# iQIES Onboarding Process Quick Reference Guide
## State Agency Assessment Coordinator Role

## Overview

This document provides the steps involved to onboard the State Agency Assessment Coordinator Role in iQIES.

- For detailed information on onboarding, refer to **iQIES Onboarding Guide**.
- For detailed information about user roles, refer to **User Roles Matrix** on the iQIES Help page.
- A red asterisk (*) indicates a required field.

## iQIES Onboarding Process Steps

1. **Create an account in HARP**. Choose one of the following options:

   - Go to https://harp.cms.gov/register.[1]
   - Enter profile information. Click **Next**.
   - Choose **User ID**, **Password**, and **Challenge Question** and **Answer**. Click **Next**.
   - Answer Identity Proofing Questions. Click **I am not a robot** checkbox. Click **Next**. An email is automatically generated confirming account creation.
   - Click **Login to Complete Setup** to log into HARP and set up two-factor authentication.
   - Select **Device Type** from drop-down menu.
   - Enter **Phone Number**. Click **Send Code**. A code is sent to the device.
   - Type **Security Code**. Click **Submit**.

2. **Select user role in iQIES**

   - Go to https://iqies.cms.gov/. Log in with HARP credentials. The **Welcome to iQIES** page opens.
   - Click **Request User Role**. The **Select a User Category** page opens.
     **Note**: To request user roles after initial login, go to the top right corner and click the caret next to the username. Select **Request User Role**. The **Select a User Category** page opens.
   - Select **State Agency**. Click **Next**. The **Select a User Role** page opens.
   - Select **State Agency Assessment Coordinator**. Click **Next**. The **Add Organizations** window opens.
   - Select **State**. Fill out any other available information. Click **Submit Request**. The **Role Request Submitted** green banner shows on the top of the page.

3. **Await Approval**

   The designated SO approves each iQIES user role and an email is automatically generated once the role is approved. Approvals may take up to several days. Reach out to the SO for a status update, if necessary.

[1] A training video is available at https://www.youtube.com/watch?v=G1zj8JqxWg4