Internet Quality Improvement Evaluation System (iQIES)

Survey and Certification: Training Environment Access

Job Aid:

State Agency General User
CMS General User
CMS View Only User

Job Aid

Version 2.0
August 30, 2022
1. **Introduction**

This job aid outlines the steps a State Agency General User, a CMS General User, and a CMS View Only User need to access iQIES.

- For detailed information about user roles, refer to the **User Roles Matrix** on the iQIES Help page.
- Contact the iQIES Service Center at 888-477-7876 or iQIES@cms.hhs.gov for technical support.

Click here to see instructions for:
- State Agency General User Role
- CMS General Users Role
- CMS View Only Users Role

2. **State Agency General User (SAGU)**

2.1 Log in to iQIES at [https://iqies.cms.gov/](https://iqies.cms.gov/) with HARP login credentials. Refer to the **iQIES Onboarding Guide** for further information, if necessary.

2.2 Log in to the iQIES training environment at [https://training-iqies.cms.gov/](https://training-iqies.cms.gov/). The **Welcome to iQIES** page opens. See *Figure 1, Request a SAGU User Role*.

*Figure 1: Request a SAGU User Role*
2.3 Click **Request User Role**. The **Select a User Category** page opens. See **Figure 2, Select a SAGU User Category**.

![Figure 2: Select a SAGU User Category](image)

2.4 Select **State Agency**. Click **Next**. The **Select a User Role** page opens. See **Figure 3, Select a SAGU User Role**.

![Figure 3: Select a SAGU User Role](image)

2.5 Select **State Agency S&C General User**.
2.6 Click **Next**. The **Add Organizations** window opens. See *Figure 4, Add Organizations*.

**Note:** Do not respond to the question: **Are you a Surveyor?**

*Figure 4: Add Organizations*

2.7 Select state from the drop-down menu under **State**.

2.8 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green banner shows on the top of the page. See *Figure 5, SAGU Role Request Submitted Notification*.

*Figure 5: SAGU Role Request Submitted Notification*

**Notes:**

- No further action is required. The role is immediately available in the test environment.
- View the user roles requested under **Pending Requests** on the **My Profile** page.
3. CMS General User (CMSGU)

3.1 Log in to iQIES at https://iqies.cms.gov/ with HARP login credentials. Refer to the iQIES Onboarding Guide for further information, if necessary.

3.2 Log in to the iQIES training environment at https://training-iqies.cms.gov/. The Welcome to iQIES page opens. See Figure 6, Request a CMS User Role.

![Figure 6: Request a CMS User Role](image)

3.3 Click Request User Role. The Select a User Category page opens. See Figure 7, Select a CMS User Category.

![Figure 7: Select a CMS User Category](image)
3.4 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See Figure 8, **Select a CMS User Role**.

**Figure 8: Select a CMS User Role**

3.5 Select **CMS General User**.

3.6 Click **Next**. The **Add Organizations** window opens. See Figure 9, **Add Organizations**.

**Note:** Do not respond to the question: **Are you a Surveyor?**

**Figure 9: Add Organizations**
3.7 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green banner shows on the top of the page. See **Figure 10, CMS Role Request Submitted Notification**.

![Role Request Submitted]

*Your approval status will be emailed to you after your request is reviewed.*

**Figure 10: CMS Role Request Submitted Notification**

**Notes:**

- No further action is required. The role is immediately available in the test environment.
- View the user roles requested under **Pending Requests** on the **My Profile** page.
4. **CMS View Only User**


4.2 Log in to the iQIES training environment at [https://training-iqies.cms.gov/](https://training-iqies.cms.gov/). The **Welcome to iQIES** page opens. See *Figure 11, Request a CMS View Only User Role*.

![Welcome to iQIES](image)

*Figure 11: Request a CMS View Only User Role*

4.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 12, Select a CMS View Only User Category*.

![Select a User Category](image)

*Figure 12: Select a CMS View Only User Category*
4.4 Select CMS. Click Next. The Select a User Role page opens. See Figure 13, Select a CMS View Only User Role.

Figure 13: Select a CMS View Only User Role

4.5 Select CMS General User.

4.6 Click Next. The Add Organizations window opens. See Figure 14, Add Organizations.

Figure 14: Add Organizations

4.7 Click Submit Request. The My Profile page opens. The Role Request Submitted green banner shows on the top of the page. See Figure 15, CMS View Only Role Request Submitted Notification.
Role Request Submitted
Your approval status will be emailed to you after your request is reviewed.

Figure 15: CMS View Only Role Request Submitted Notification

Notes:

- No further action is required. The role is immediately available in the test environment.
- View the user roles requested under Pending Requests on the My Profile page.