



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

Survey and Certification: Training Environment Access

Job Aid:

State Agency General User

Accrediting Organizations

Contract Surveyor (State, Federal, Admin)

CMS General User

CMS View Only User

Job Aid

Version 3.2

September 25, 2026

1. Introduction

This job aid outlines the steps the State Agency General Users, Accrediting Organization users, Contract Surveyors for State and CMS, a Contract Survey Admins, CMS General Users, and CMS View Only User roles must complete to access iQIES.

- For detailed information about user roles, refer to the **User Roles Matrix** on the [iQIES Help page](#) or on the [QIES Technical Support Website \(QTSO\)](#).
- 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](#)
- [Accrediting Organization \(AO\)](#)
- [Contract Surveyor - State](#)
- [Contract Surveyor - CMS](#)
- [CMS General Users Role](#)
- [CMS View Only Users Role](#)

Note: For the **Contract Survey Admin** role follow the steps for [Contract Surveyor - CMS](#).

2. Create an Account in HARP

Notes:

- Users who already have a HARP ID can skip this step and go directly to <https://training-iqies.cms.gov> to request the desired user role.
- HARP is the Health Care Quality Information Systems (HCQIS) Access Roles and Profile.
- There is also a video available: [HARP Registration](#).
- Go to <https://harp.cms.gov/help> for additional questions about HARP.

2.1 Go to the [HARP Registration Page](#). See *Figure 1, Create an Account*.

Create an Account
HCQIS Access Roles and Profile

1 Profile Information 2 Account Information 3 Confirmation

Profile Information

Enter your profile information for identity proofing. HARP uses Experian to help verify your identity. Already called Experian? [Enter a Reference Number](#).

Want to retry a previously failed registration attempt? [Retry Remote Identity Proofing](#).

All fields marked with an asterisk (*) are required.

Legal First Name * Legal Last Name *

Middle Name Date of Birth *
mm/dd/yyyy

Personal Email Address * Confirm Personal Email Address *

Business Email Address * Confirm Business Email Address *

Personal Phone Number * Business Phone Number
() - -

Is your address in the United States? *
☒ Yes ☐ No

Home Address Line 1 * Home Address Line 2

City * State *

Zip Code * Zip Code Extension

Social Security Number *

Don't want to enter your SSN? [Initiate Manual Proofing](#)

By registering for HARP, you agree to the [Terms & Conditions](#).

Next >

Figure 1: Create an Account

2.2 Fill out the form.

Note: A red asterisk (*) indicates a required field.

2.3 Click **Next**. The **Account Information** page opens. See *Figure 2, Account Information*.

Note: Next is disabled until all the information is completed.

Profile Information **2** Account Information 3 Confirmation

Account Information

Create your user ID, password, and challenge question.
All fields marked with an asterisk (*) are required.

User ID *

User ID must be between 6-74 characters.

Password * Confirm Password *

× At least 15 characters
× Include a lowercase letter
× Include an uppercase letter
× Include a number (0-9)
Cannot contain first name, last name, or part of user ID

Challenge Question * ⓘ Challenge Answer *

Challenge Answer must be at least 4 characters and cannot contain the challenge question, user ID, or password.

← Back Next →

Figure 2: Account Information

2.4 Fill out account information.

- 2.5 Click **Next**. The **Remote Proofing** page opens. See *Figure 3, Remote Proofing*.

Note: Remote proofing is a list of questions to verify the user's identity.

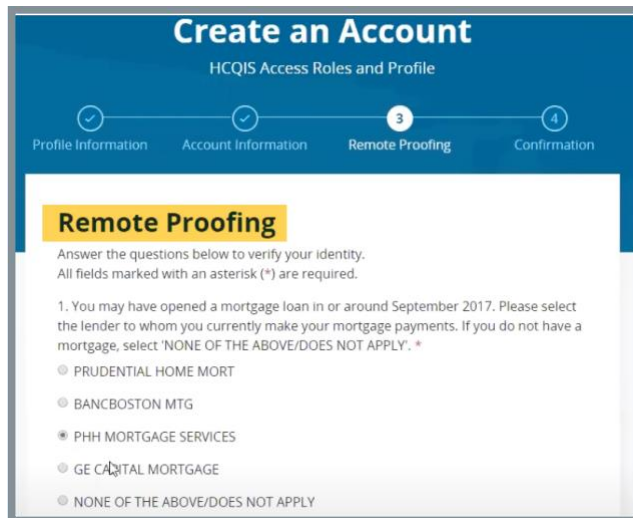


Figure 3: Remote Proofing

- 2.6 Respond to all the questions.
- 2.7 Check **I am not a Robot** checkbox.
- 2.8 Click **Next**. The **Confirmation** page opens and says the account has been successfully created. See *Figure 4, Confirmation*.

Note: An automated email is sent confirming user ID and account creation.

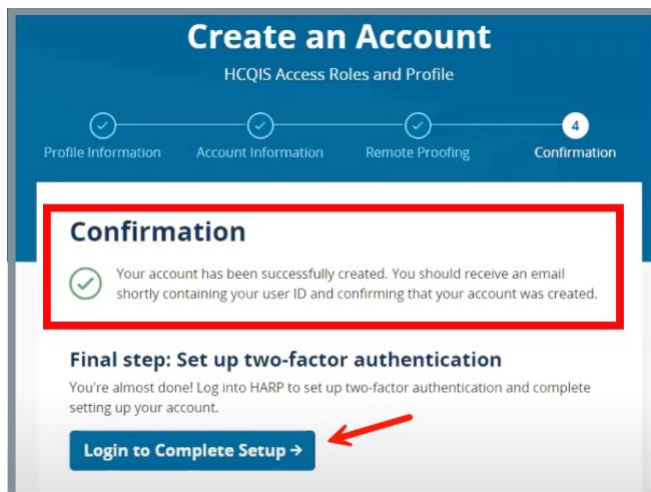


Figure 4: Confirmation

- 2.9 Enter your HARP login information and click **Login to Complete Setup**. The HARP **Login** page opens. See *Figure 5, HARP Login Page*.

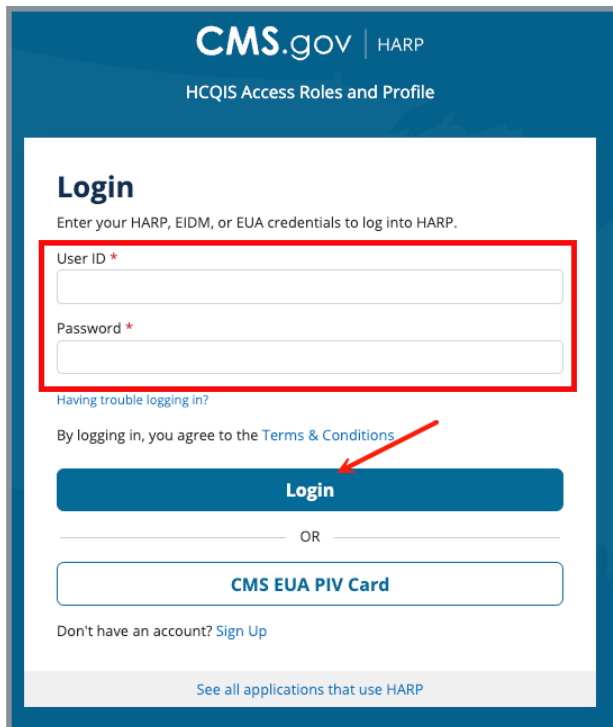


Figure 5: HARP Login Page

- 2.10 Set up two-factor authentication. See *Figure 6, Set Up Two-Factor Authentication*.



Figure 6: Set Up Two-Factor Authentication

- a. **Select Device Type:** Choose preferred device type from the drop-down menu – **Text Message, Email, Voice, Google Authenticator, Okta Verify, or Okta Verify Push.**

- b. **Enter Phone Number or Email:** Type phone number or email address.
- c. Click **Send Code** to receive a security code.
- d. Type the security code. See *Figure 7, Security Code*.

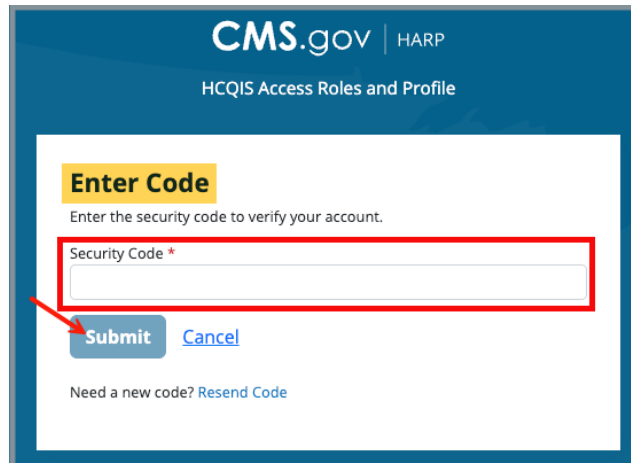


Figure 7: Security Code

- e. Click **Submit**.
- f. Click **Add Device** and select a device from the drop-down menu to add an additional device, if desired. See *Figure 8, Additional Devices*.

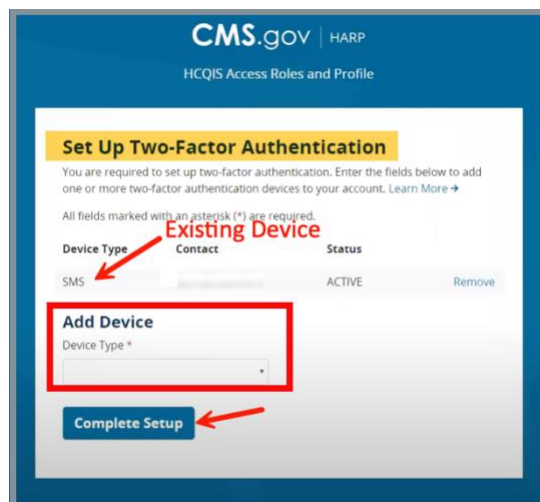


Figure 8: Additional Devices

- g. Click **Complete Setup** to finish setting up two-factor authentication. The **Account Setup Complete** window opens. See *Figure 9, Account Setup Complete*.

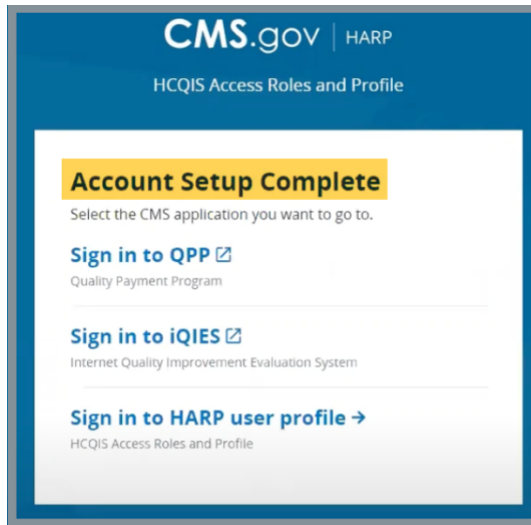


Figure 9: Account Setup Complete

Note: Do not click **Sign in to iQIES** to sign into iQIES. That link goes to production iQIES, not the test environment. Follow the steps below for details on the test environment.

- h. Click the user role below to review steps to create that user role in iQIES.

[State Agency General User Role](#)

[Contract Surveyor - State](#)

[Contract Surveyor - CMS](#)

[CMS General Users Role](#)

[CMS View Only Users Role](#)

3. State Agency General User (SAGU)

- 3.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) 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 10, Request a SAGU User Role*.

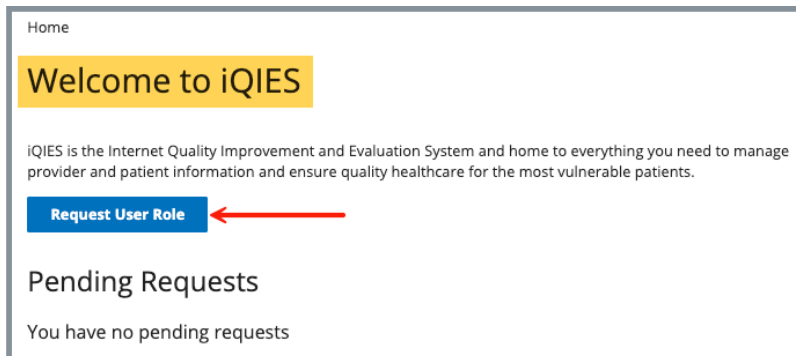


Figure 10: Request a SAGU User Role

- 3.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 11, Select a SAGU User Category*.

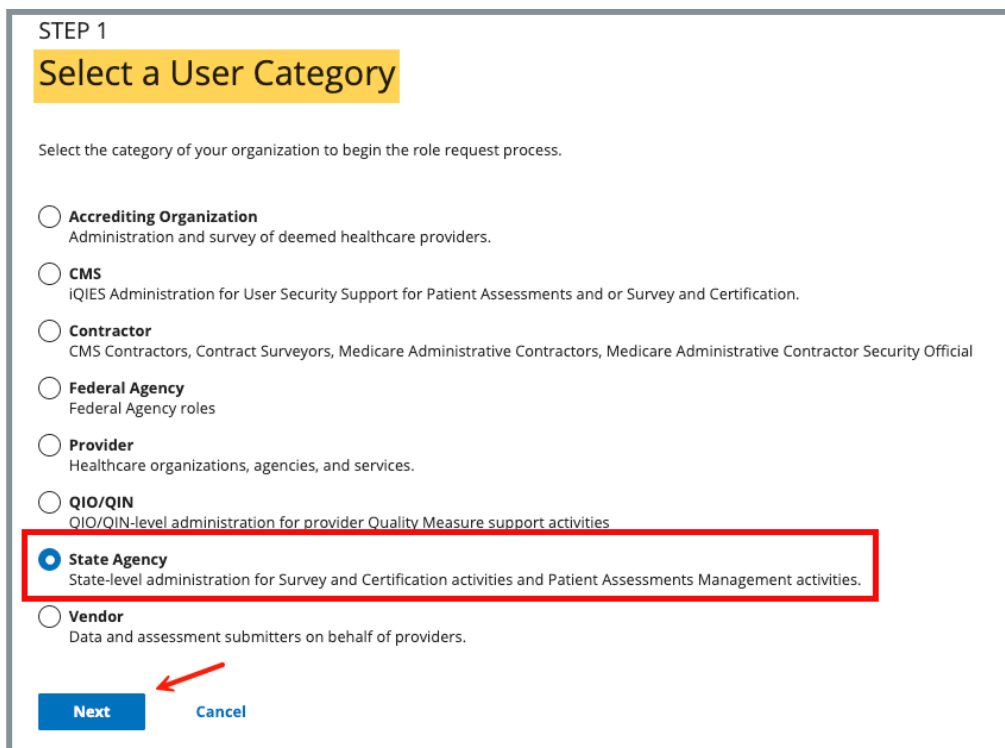


Figure 11: Select a SAGU User Category

- 3.4 Select **State Agency**. Click **Next**. The **Select a User Role** page opens. See *Figure 12, Select a SAGU User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- ☐ **State Agency Assessment Coordinator**
Manage ICD-10 exclusions and patient assessment information, view and manage patient profiles and assessments, run provider reports.
- ☐ **State Agency Security Official for S&C**
iQIES user access approvals and user profiles
- ☒ **State Agency S&C General User**
This role will have the most basic access to iQIES, which would be Read Only access to the provider information. This role will be granted extra authority based on your job requirements by the State Agency Security Official.
- ☐ **MDS Extract Data API Access**
Access MDS Extract Data API

[Next](#) [Previous](#)

Figure 12: Select a SAGU User Role

- 3.5 Select State Agency S&C General User.
- 3.6 Click Next. The Add Organizations window opens. See Figure 13, Add Organizations.
- 3.7 Select state from the drop-down menu under **State**.

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

STEP 3

Add Organizations

Enter the state for your organization.

State *

Alabama

State Agency Employee ID

Forgot your ID? [?](#)

Are you a Surveyor? [Skip Question](#)

☐ Yes

☐ No

Submit Request [Previous](#)

Figure 13: Add Organizations

- 3.1 Click **Submit Request**. The **User Information/Pending Requests** page opens. The **Role Request Submitted** green notification banner shows on the top of the page and the pending request is shown under **Pending Requests**. See *Figure 14, SAGU Role Request Submitted Notification*.

Role Request Submitted
Your approval status will be emailed to you after your request is reviewed.

User Information [Edit in HARP](#)

User ID Email Phone Number

Pending Requests [Request User Role](#)

Contractor			
User Role State Agency S&C General User	State Agency 	Management Unit No information	Security Official Name
Security Official Contact 	Request Date 02/25/2025		

Figure 14: Role Request Submitted Notification

- Green successful submission notification banner.
- User Information** section. This section can be edited in HARP. Click **Edit in HARP** and a new tab opens in HARP.
- Pending Requests** section, which notes the user role requested, the State Agency state, the Security Official (SO) name and contact information, along with the user role request date.

Notes:

- The role must be approved by the designated SO. Approval can take up to several days.
- Additional permissions must be granted by the SO. Refer to the **User Roles Matrix** on the [iQIES Help page](#) or on the [QIES Technical Support Website \(QTSO\)](#) for additional information on user role permissions.
- An email will arrive from <http://donotreply.HARP@hcgis.org> noting whether the role was approved or rejected. Contact [the iQIES Service Center](#) if no email is received within several days.

4. Accrediting Organization (AO)

- 4.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 4.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 15, Request an AO User Role*.

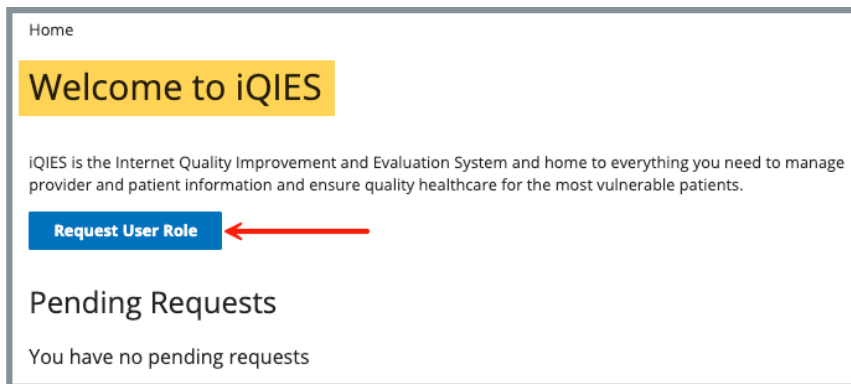


Figure 15: Request an AO User Role

- 4.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 16, Select an Accrediting Organization User Category*.

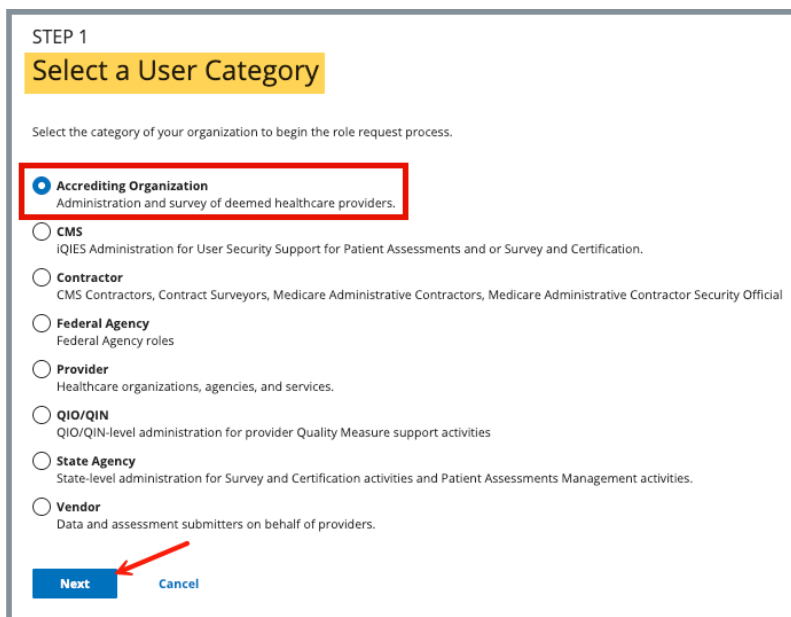


Figure 16: Select an Accrediting Organization User Category

- 4.4 Select **Accrediting Organization**. Click **Next**. The **Select a User Role** page opens. See *Figure 17, Select an Accrediting Organization User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- ☒ **Accrediting Organization User**
Enter and upload deemed provider information and generate reports.
- ☐ **Accrediting Organization Security Official**
IQIES user access approvals and user profiles.
- ☐ **Accrediting Organization Admin**
Accrediting Organization Admins have edit, create, and manage privileges for providers, surveys, and intakes, plus broad view privileges across iQIES.

[Next](#) [Previous](#)

Figure 17: Select an Accrediting Organization User Role

- 4.5 Select the appropriate AO user role.
- 4.6 Click **Next**. The **Add Organizations** window opens. See *Figure 18, Add Organizations*.

STEP 3

Add Organizations

Select your accrediting organization for the Accrediting Organization User role.

Accrediting Organization

Select one

[Submit Request](#) [Previous](#)

Figure 18: Add Organizations

- 4.7 Select an **Accrediting Organization** from the drop-down menu.
Note: Only one organization can be selected. Repeat the process to add additional organizations.
- 4.8 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 19, AO User Role Request Submitted Notification*.

a Role Request Submitted
Your approval status will be emailed to you after your request is reviewed.

b User Information [Edit in HARP](#)

User ID: [Redacted] Email: [Redacted] Phone Number: [Redacted] Federal Surveyor ID: [Redacted]

c Pending Requests

Accrediting Organization: [Redacted] [Request User Role](#)

User Role	Accrediting Organization	Security Official Name	Security Official Contact
Accrediting Organization User	Community Health Accreditation Partner (CHAP)	[Redacted]	[Redacted]
Request Date	09/22/2026		

Figure 19: AO User Role Request Submitted Notification

- a. Green successful submission notification banner.
- b. **User Information** section. This section can be edited in HARP. Click **Edit in HARP** and a new tab opens in HARP.
- c. **Pending Requests** section, which notes the user role requested, the accrediting organization, the Security Official (SO) name and contact information, along with the user role request date.

Notes:

- The role must be approved by the designated SO. Approval can take up to several days.
- An email will arrive from [http://donotreply.HARP@hcqis.org](mailto:donotreply.HARP@hcqis.org) noting whether the role was approved or rejected. Contact [the iQIES Service Center](#) if no email is received within several days.

5. Contract Surveyor - State

- 5.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 5.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 20, Request a Contract Surveyor State User Role*.

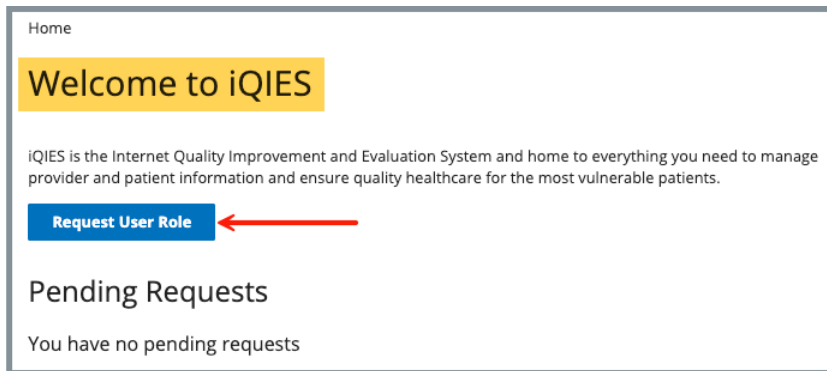


Figure 20: Request a Contract Surveyor User Role

- 5.3 Click Request User Role. The Select a User Category page opens. See *Figure 21, Select a User Category*.

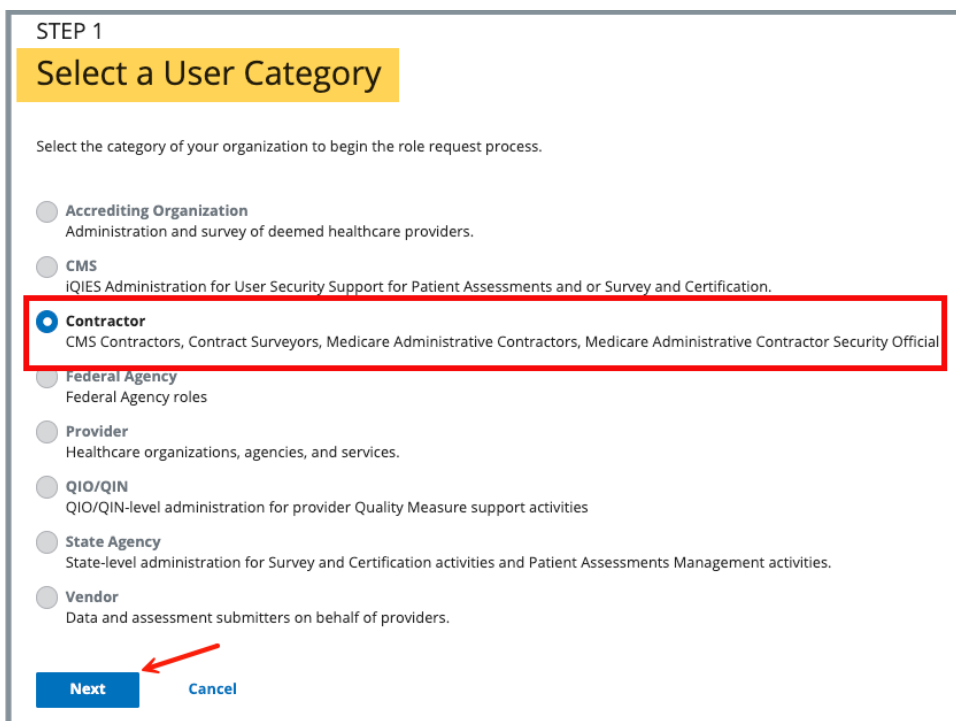


Figure 21: Select a User Category

- 5.4 Select **Contractor**. Click **Next**. The **Select a User Role** page opens. See *Figure 22, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- ☐ **Medicare Administrative Contractor Security Official**
MAC Account Approval
- ☐ **MAC Reports**
Allows Medicare Administrative Contractor (MAC) Agents to select, run and create reports as needed
- ☒ **Contract Surveyor**
Surveyor that is contracted with either CMS or a specific state
- ☐ **MAC OASIS API Access**
Access OASIS Assessments via API
- ☐ **MAC MDS API Access**
Access MDS Assessments via API
- ☐ **ADO MDS API Access**
MDS Assessments Retrieval API
- ☐ **ADO Contractor Security Official**
ADO Contractor User Account Approvals
- ☐ **ADO OASIS API Access**
OASIS Assessment Retrieval API
- ☐ **CLIA Billing Contractor**
Provides access to CLIA functionality for CLIA Billing Contractors
- ☐ **Contract Survey Admin**
Contractor Role with additional privileges to coordinate and manage CMS-directed surveys

Next Previous

Figure 22: Select a User Role

- 5.5 Select Contract Surveyor.
- 5.6 Click Next. The Add Organizations window opens. See *Figure 23, Add Organizations*.

STEP 3

Add Organizations

Organization *

☐ CMS

☒ State

State *

Alabama

Contract Organization *

University of Colorado Select...

Select one or more

Are you a New or Existing Surveyor? *

☐ New

☒ Existing

Federal Surveyor ID

Forgot your ID? [?](#)

Confirm Federal Surveyor ID

Submit Request [Previous](#)

Figure 23: Add Organizations

- 5.7 Select State under Organization.
- 5.8 Select a state from the drop-down menu.
- 5.9 Select a Contract Organization from the drop-down menu.
Note: More than one Contract Organization can be selected.
- 5.10 Select **New** or **Existing** to the question, **Are you a New or Existing Surveyor?**
- 5.11 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 24, Contract Surveyor-State Role Request Submitted Notification Banner*.

Role Request Submitted
Your approval status will be emailed to you after your request is reviewed.

User Information [Edit in HARP](#)

User ID Email Phone Number

Pending Requests [Request User Role](#)

Contractor	User Role	Surveyor	Surveyor Disciplines	Security Official Name
	Contract Surveyor		No Information	
	Security Official Contact	Request Date		
		02/25/2025		

Figure 24: Contract Surveyor-State Role Request Submitted Notification

- a. Green successful submission notification banner.
- b. **User Information** section. This section can be edited in HARP. Click **Edit in HARP** and a new tab opens in HARP.
- c. **Pending Requests** section, which notes the user role requested, the Surveyor and Surveyor Disciplines (selected when the role is approved), the Security Official (SO) name and contact information, along with the user role request date.

Notes:

- The role must be approved by the designated SO. Approval can take up to several days.
- An email will arrive from [http://donotreply.HARP@hcqis.org](mailto:donotreply.HARP@hcqis.org) noting whether the role was approved or rejected. Contact [the iQIES Service Center](#) if no email is received within several days.

- 5.12 Log back into iQIES once the role has been approved. The **Profile** page opens and a red notification banner shows at the top of the page. See *Figure 25, Missing Discipline Red Banner Notification*.

Note: The notification banner may be specific about which discipline is missing. Be sure to take note.

The screenshot displays a web interface with a red notification banner at the top. The banner contains a red circle with a white 'x' icon, the text 'Missing Discipline', and a message: 'Please select at least 1 primary discipline for the following role(s): Contract Surveyor'. Below the banner is a section titled 'User Information' with a link 'Edit in HARP' and an external link icon. This section contains three columns: 'User ID' with the value 'testtest', 'Email' with 'testtest@fake.org', and 'Phone Number' with '123'. Below this is a 'Pending Requests' section with the text 'You have no pending role requests.' and a 'Request User Role' button. The 'User Roles' section is titled 'Contractor' and contains a table with three columns: 'User Role', 'Surveyor', and 'Surveyor Disciplines'. The table has one row with the values 'Contract Surveyor - Alabama', 'Yes', and 'No information'. An 'Edit' button is located below the table, highlighted with a red box and a red arrow pointing to it.

User Role	Surveyor	Surveyor Disciplines
Contract Surveyor - Alabama	Yes	No information

Figure 25: Missing Discipline Red Banner Notification

- 5.13 Click **Edit** under **User Roles**. The **Surveyor Discipline** fields open. See *Figure 26, Surveyor Disciplines*.

User Roles

Contractor

User Role
Contract Surveyor - Alabama

Surveyor
Yes

Surveyor Disciplines *

Select all applicable disciplines.

☐ Registered Nurse	☐ Physician	☐ Other
☐ Licensed Practical (Vocational) Nurse	☐ Architect	☐ Nutritionist/Dietitian; Qualified Intellectual Disability Professional (QIDP)
☐ Physical Therapist	☐ Cytotechnologist	☐ Pathologist
☐ Occupational Therapist	☐ Engineer	☐ Registered Nurse; Qualified Intellectual Disability Professional (QIDP)
☐ Speech Pathologist/Audiologist/Therapist	☐ Physician; Qualified Intellectual Disability Professional (QIDP)	☐ Social Worker; Qualified Intellectual Disability Professional (QIDP)
☐ Social Worker	☐ Health Care Administrator	☐ Speech Pathologist/Audiologist/Therapist; Qualified Intellectual Disability Professional (QIDP)
☐ Home Health Aide	☐ Human Services Professional	☐ Firefighter
☐ Pharmacist	☐ Life Safety Code Inspector	☐ Fire Protection Specialist
☐ Nutritionist/Dietitian	☐ Psychologist	☐ Facility Manager
☐ Sanitarian	☐ Recreational Therapist; Qualified Intellectual Disability Professional (QIDP)	☐ Chaplain/Pastoral Counselor
☐ Generalist	☐ Medical Records Administrator	☐ Bereavement Counselor
☐ Laboratorian	☐ Speech Therapist	☐ Spiritual Counselor
☐ Medical Technologist	☐ X-Ray Specialist	

Save **Cancel**

Figure 26: Surveyor Disciplines

5.14 Select at least one discipline.

Notes:

- More than one discipline can be selected.
- Review notification banner to see if specific disciplines are requested.

5.15 Click **Save**.

6. Contract Surveyor – CMS

- 6.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 6.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 27, Request a Contract Surveyor State User Role*.

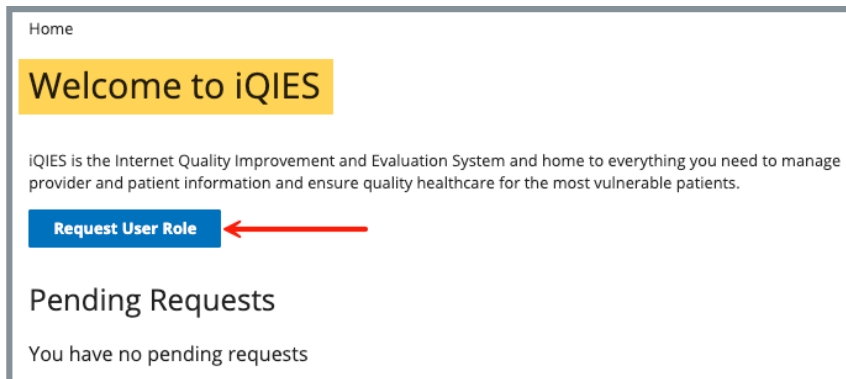


Figure 27: Request a Contract Surveyor User Role

- 6.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 28, Select a User Category*.

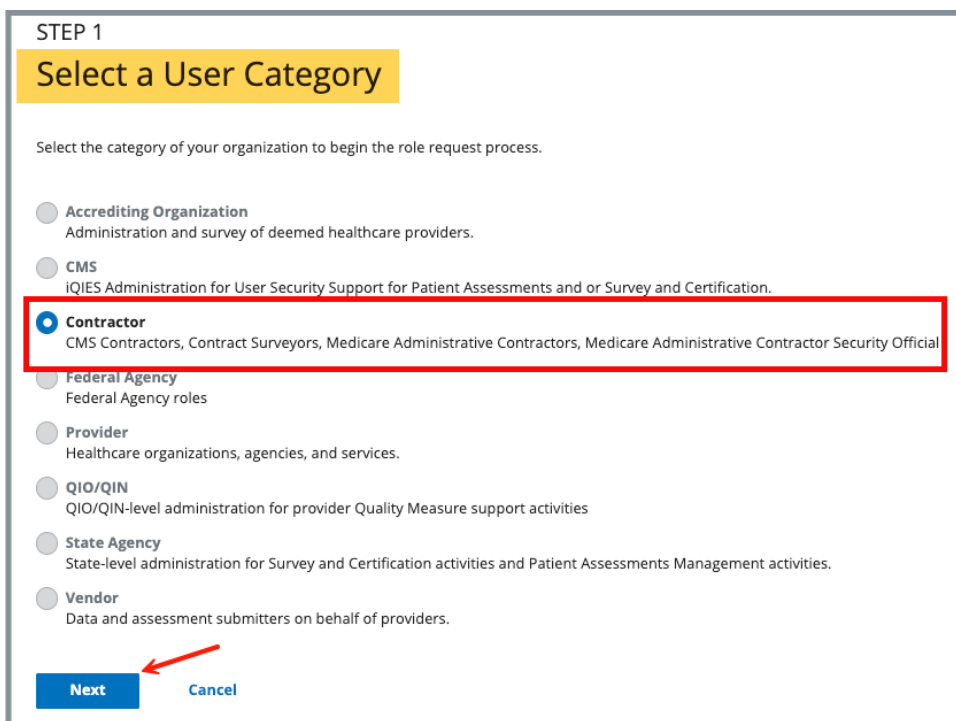


Figure 28: Select a User Category

- 6.4 Select **Contractor**. Click **Next**. The **Select a User Role** page opens. See *Figure 29, Select a User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- ☐ **Medicare Administrative Contractor Security Official**
MAC Account Approval
- ☐ **MAC Reports**
Allows Medicare Administrative Contractor (MAC) Agents to select, run and create reports as needed
- ☒ **Contract Surveyor**
Surveyor that is contracted with either CMS or a specific state
- ☐ **MAC OASIS API Access**
Access OASIS Assessments via API
- ☐ **MAC MDS API Access**
Access MDS Assessments via API
- ☐ **ADO MDS API Access**
MDS Assessments Retrieval API
- ☐ **ADO Contractor Security Official**
ADO Contractor User Account Approvals
- ☐ **ADO OASIS API Access**
OASIS Assessment Retrieval API
- ☐ **CLIA Billing Contractor**
Provides access to CLIA functionality for CLIA Billing Contractors
- ☐ **Contract Survey Admin**
Contractor Role with additional privileges to coordinate and manage CMS-directed surveys

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Figure 29: Select a User Role

- 6.5 Select Contract Surveyor.

Note: Select **Contract Survey Admin** for the Admin role. Follow the rest of the steps.

- 6.6 Click **Next**. The **Add Organizations** window opens. See *Figure 30, Add Organizations*.

STEP 3

Add Organizations

Organization *

☒ CMS
☐ State

Contract Organization *

University of Colorado × Select... →

Select one or more

Are you a New or Existing Surveyor? *

☒ New
☐ Existing

Select...

- Ascillon Corporation
- ASCT Services
- CertiSurv
- Copeland and Conner Healthcare Staffing
- Healthcare Management Solutions
- University of Colorado

Submit Request Previous

Figure 30: Add Organizations

- 6.7 Select **CMS** under **Organization**.
- 6.8 Select a **Contract Organization** from the drop-down menu.
Note: More than one **Contract Organization** can be selected.
- 6.9 Select **New** or **Existing** to the question, **Are you a New or Existing Surveyor?**
- 6.10 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 31, Contract Surveyor-CMS Role Request Submitted Notification*.

Role Request Submitted
Your approval status will be emailed to you after your request is reviewed.

User Information [Edit in HARP](#)

User ID Email Phone Number

Pending Requests [Request User Role](#)

Contractor			
User Role Contract Surveyor - CMS	Surveyor	Surveyor Disciplines No information	Security Official Name
Security Official Contact	Request Date 02/25/2025		

Figure 31: Contract Surveyor-CMS Role Request Submitted Notification

- a. Green successful submission notification banner.
- b. **User Information** section. This section can be edited in HARP. Click **Edit in HARP** and a new tab opens in HARP.
- c. **Pending Requests** section, which notes the user role requested, the Surveyor and Surveyor Disciplines (selected when the role is approved), the Security Official (SO) name and contact information, along with the user role request date.

Notes:

- The role must be approved by the designated SO. Approval can take up to several days.
- An email will arrive from <http://donotreply.HARP@hcqis.org> noting whether the role was approved or rejected. Contact [the iQIES Service Center](#) if no email is received within several days.

6.11 Log back into iQIES once the role has been approved. The **Profile** page opens and a red notification banner shows at the top of the page. See *Figure 32, Missing Discipline Red Banner Notification*.

Note: The notification banner may be specific about which discipline is missing. Be sure to take note.

Missing Discipline
Please select at least 1 primary discipline for the following role(s): Contract Surveyor

User Information [Edit in HARP](#)

User ID	Email	Phone Number
trest	trest@fake.org	123

Pending Requests [Request User Role](#)

You have no pending role requests.

User Roles

Contractor

User Role	Surveyor	Surveyor Disciplines
Contract Surveyor - CMS	Yes	No information

[Edit](#)

Figure 32: Missing Discipline Red Banner Notification

6.12 Click **Edit** under User Roles. The **Surveyor Discipline** fields open. See *Figure 33, Surveyor Disciplines*.

User Roles

Contractor

User Role	Surveyor
Contract Surveyor - CMS	Yes

Surveyor Disciplines *
Select all applicable disciplines.

☐ Registered Nurse	☐ Physician	☐ Other
☐ Licensed Practical (Vocational) Nurse	☐ Architect	☐ Nutritionist/Dietitian; Qualified Intellectual Disability Professional (QIDP)
☐ Physical Therapist	☐ Cytotechnologist	☐ Pathologist
☐ Occupational Therapist	☐ Engineer	☐ Registered Nurse; Qualified Intellectual Disability Professional (QIDP)
☐ Speech Pathologist/Audiologist/Therapist	☐ Physician; Qualified Intellectual Disability Professional (QIDP)	☐ Social Worker; Qualified Intellectual Disability Professional (QIDP)
☐ Social Worker	☐ Health Care Administrator	☐ Speech Pathologist/Audiologist/Therapist; Qualified Intellectual Disability Professional (QIDP)
☐ Home Health Aide	☐ Human Services Professional	☐ Firefighter
☐ Pharmacist	☐ Life Safety Code Inspector	☐ Fire Protection Specialist
☐ Nutritionist/Dietitian	☐ Psychologist	☐ Facility Manager
☐ Sanitarian	☐ Recreational Therapist; Qualified Intellectual Disability Professional (QIDP)	☐ Chaplain/Pastoral Counselor
☐ Generalist	☐ Medical Records Administrator	☐ Bereavement Counselor
☐ Laboratorian	☐ Speech Therapist	☐ Spiritual Counselor
☐ Medical Technologist	☐ X-Ray Specialist	

[Save](#) [Cancel](#)

Figure 33: Surveyor Disciplines

6.13 Select at least one discipline.

Notes:

- More than one discipline can be selected.
- Review notification banner to see if specific disciplines are requested.

6.14 Click **Save**.

7. CMS General User (CMSGU)

- 7.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 7.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 34, Request a CMS User Role*.

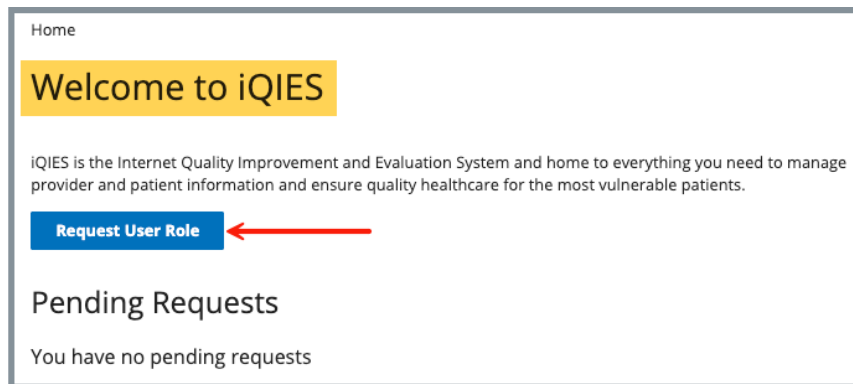


Figure 34: Request a CMS User Role

- 7.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 35, Select a CMS User Category*.

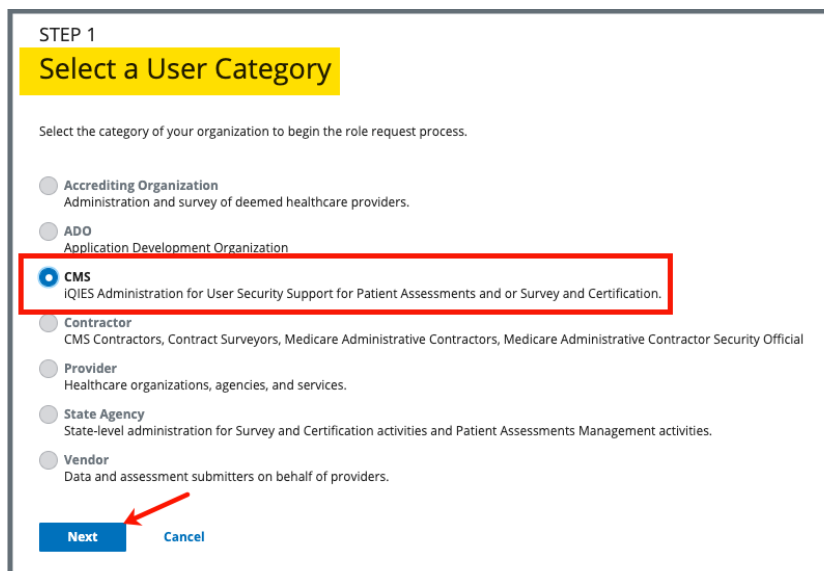


Figure 35: Select a CMS User Category

- 7.4 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 36, Select a CMS User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- ☐ CMS View Only User
View patient profiles, view assessments, generate and view reports.
- ☒ CMS General User
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- ☐ iQIES Help Desk
iQIES system support.
- ☐ iQIES Help Desk Production Control
Approve, Reject, and Remove User Requests; Manage ICD-10 exclusions and patient assessment information, view patient profile and assessments, manage patient assessments, run provider reports.
- ☐ CMS Security Official
iQIES user account approvals.
- ☐ Office of Financial Management User
Track CMPTS cases; record CMPTS payments

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Figure 36: Select a CMS User Role

7.5 Select CMS General User.

7.6 Click **Next**. The **Add Organizations** window opens. See *Figure 37, Add Organizations*.

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

STEP 3

Add Organizations

This role does not require the addition of organizations.

Are you a Surveyor?

- ☐ Yes
- ☐ No

Skip Question

[Submit Request](#) [Previous](#)

Figure 37: Add Organizations

7.7 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 38, CMS General User Role Request Submitted Notification*.

Role Request Submitted
Your approval status will be emailed to you after your request is reviewed.

User Information [Edit in HARP](#)

User ID Email Phone Number

Pending Requests [Request User Role](#)

Contractor	User Role	Surveyor	Surveyor Disciplines	Security Official Name
	CMS General User	No information	No information	
	Security Official Contact	Request Date		
		02/25/2025		

Figure 38: CMS General User Role Request Submitted Notification

- d. Green successful submission notification banner.
- e. **User Information** section. This section can be edited in HARP. Click **Edit in HARP** and a new tab opens in HARP.
- f. **Pending Requests** section, which notes the user role requested, the Surveyor and Surveyor Disciplines (selected when the role is approved), the Security Official (SO) name and contact information, along with the user role request date.

Notes:

- The role must be approved by the designated SO. Approval can take up to several days.
- An email will arrive from <http://donotreply.HARP@hcqis.org> noting whether the role was approved or rejected. Contact [the iQIES Service Center](#) if no email is received within several days.

8. CMS View Only User

- 8.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to [Create an Account in HARP](#) for further information, if necessary.
- 8.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 39, Request a CMS View Only User Role*.

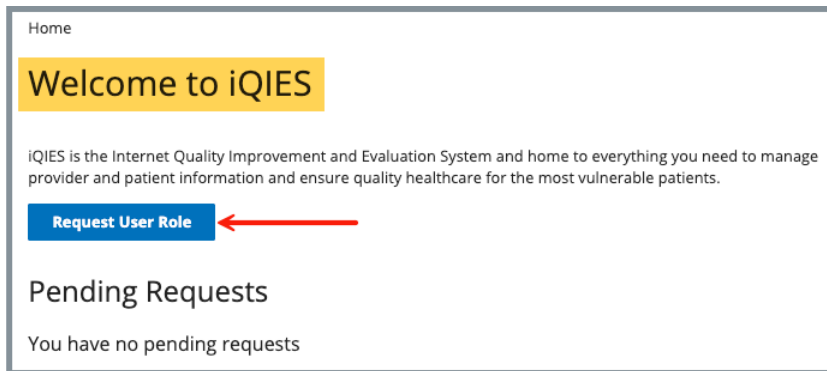


Figure 39: Request a CMS View Only User Role

- 8.3 Click **Request User Role**. The **Select a User Category** page opens. See *Figure 40, Select a CMS View Only User Category*.

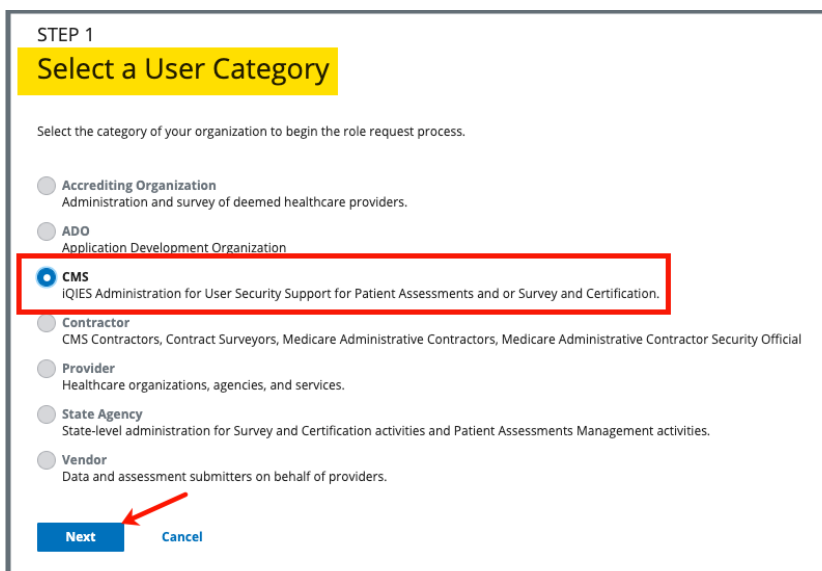


Figure 40: Select a CMS View Only User Category

- 8.4 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 41, Select a CMS View Only User Role*.

STEP 2

Select a User Role

Select the user role that best fits your needs.

- ☒ **CMS View Only User**
View patient profiles, view assessments, generate and view reports.
- ☐ **CMS General User**
Manage all providers; manage and approve deemed providers; read-only access to patient profiles and assessments; run provider reports.
- ☐ **iQIES Help Desk**
iQIES system support.
- ☐ **iQIES Help Desk Production Control**
Approve, Reject, and Remove User Requests; Manage ICD-10 exclusions and patient assessment information, view patient profile and assessments, manage patient assessments, run provider reports.
- ☐ **CMS Security Official**
iQIES user account approvals.
- ☐ **Office of Financial Management User**
Track CMPTS cases; record CMPTS payments

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Figure 41: Select a CMS View Only User Role

- 8.5 Select CMS View Only User.
- 8.6 Click **Next**. The **Add Organizations** window opens. See *Figure 42, Add Organizations*.

STEP 3

Add Organizations

This role does not require the addition of organizations.

[Submit Request](#) [Previous](#)

Figure 42: Add Organizations

- 8.7 Click **Submit Request**. The **My Profile** page opens. The **Role Request Submitted** green notification banner shows on the top of the page. See *Figure 43, CMS View Only Role Request Submitted Notification*.

Role Request Submitted
Your approval status will be emailed to you after your request is reviewed.

User Information [Edit in HARP](#)

User ID Email Phone Number

Pending Requests [Request User Role](#)

Contractor	User Role	Surveyor	Surveyor Disciplines	Security Official Name
	CMS View Only	No information	No information	
	Security Official Contact	Request Date		
		02/25/2025		

Figure 43: CMS View Only Role Request Submitted Notification

- Green successful submission notification banner.
- User Information** section. This section can be edited in HARP. Click **Edit in HARP** and a new tab opens in HARP.
- Pending Requests** section, which notes the user role requested, the Surveyor and Surveyor Disciplines (selected when the role is approved), the Security Official (SO) name and contact information, along with the user role request date.

Notes:

- The role must be approved by the designated SO. Approval can take up to several days.
- An email will arrive from <http://donotreply.HARP@hcqis.org> noting whether the role was approved or rejected. Contact [the iQIES Service Center](#) if no email is received within several days.