



**Restricted Distribution
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Centers for Medicare & Medicaid Services

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/> 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/>. The **Welcome to iQIES** page opens. See *Figure 1, Request a SAGU User Role*.

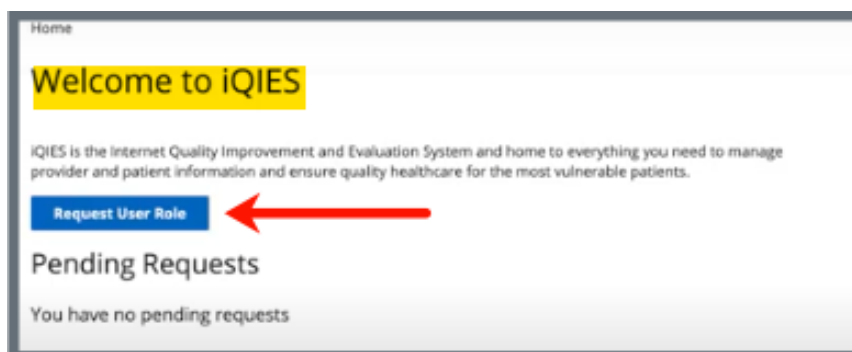


Figure 1: Request a SAGU User Role

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

STEP 1

Select a User Category

Select the category of your organization to begin the role request process.

- Accrediting Organization
Administration and survey of deemed healthcare providers.
- ADO
Application Development Organization
- CMS
IQIES Administration for User Security Support for Patient Assessments and or Survey and Certification.
- Contractor
CMS Contractors, Contract Surveyors, Medicare Administrative Contractors, Medicare Administrative Contractor Security Official
- Provider
Healthcare organizations, agencies, and services.
- State Agency
State-level administration for Survey and Certification activities and Patient Assessments Management activities.
- Vendor
Data and assessment submitters on behalf of providers.

[Next](#) [Cancel](#)

Figure 2: Select a SAGU User Category

- 2.4 Select **State Agency**. Click **Next**. The **Select a User Role** page opens. See *Figure 3, 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
Access and manage provider information, events, and reports within your state. Read-only access to all provider profiles and details in all other states.

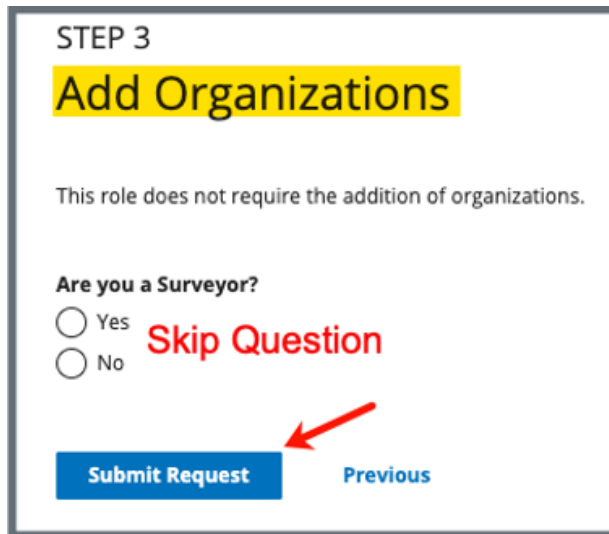
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Figure 3: Select a SAGU User Role

- 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?**



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 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*.

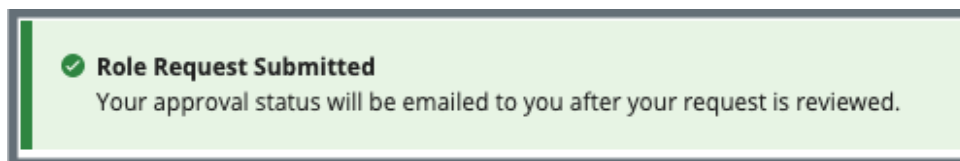


Figure 5: SAGU Role Request Submitted Notification

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*.

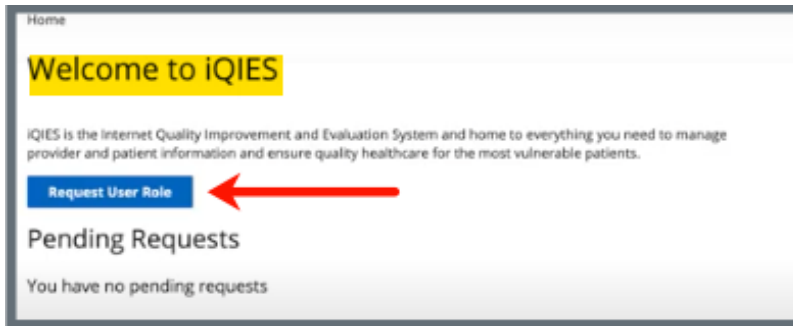


Figure 6: Request a CMS User Role

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

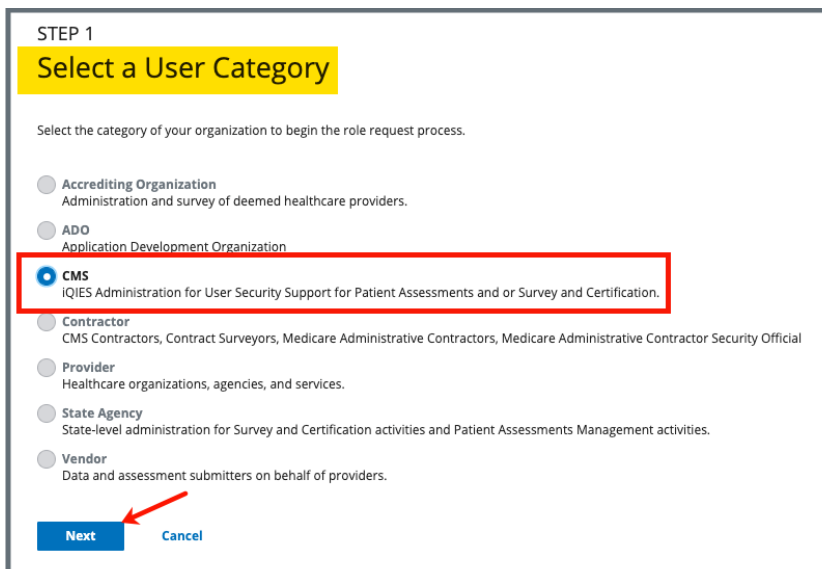


Figure 7: Select a CMS User Category

3.4 Select **CMS**. Click **Next**. The **Select a User Role** page opens. See *Figure 8, 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 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?**

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 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*.

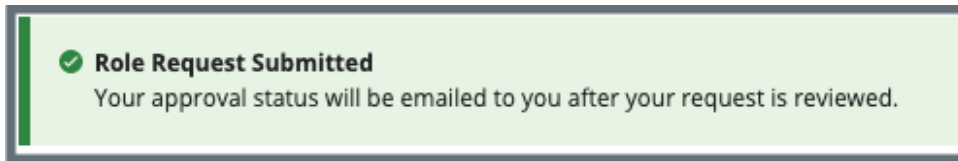


Figure 10: CMS Role Request Submitted Notification

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

- 4.1 Log in to iQIES at <https://iqies.cms.gov/> with HARP login credentials. Refer to the [iQIES Onboarding Guide](#) for further information, if necessary.
- 4.2 Log in to the iQIES training environment at <https://training-iqies.cms.gov/>. The **Welcome to iQIES** page opens. See *Figure 11, Request a CMS View Only User Role*.

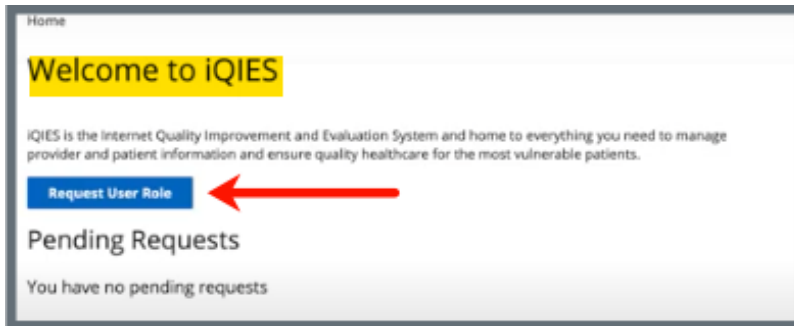


Figure 11: Request a CMS View Only User Role

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

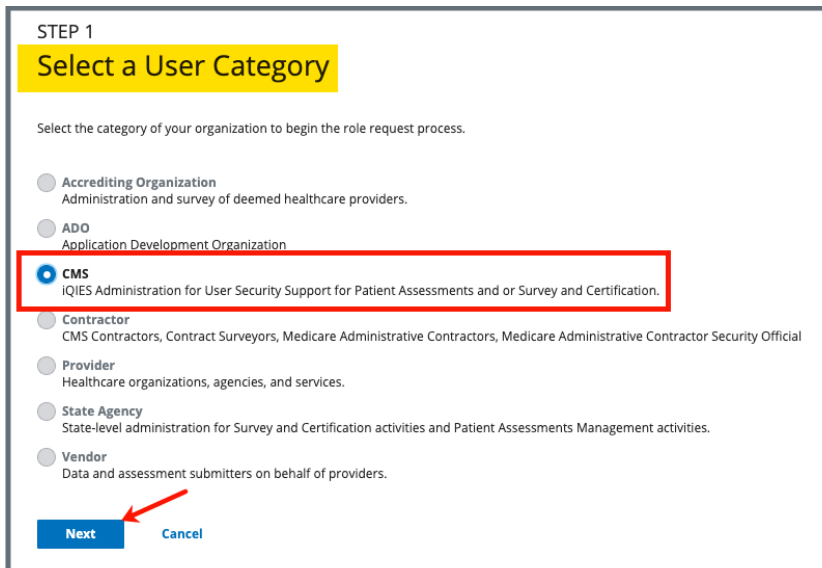


Figure 12: Select a CMS View Only User Category

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

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 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*.

STEP 3

Add Organizations

This role does not require the addition of organizations.

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

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*.

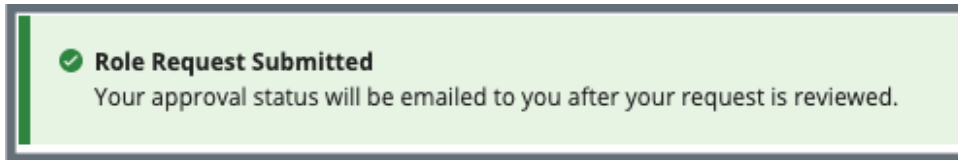


Figure 15: CMS View Only Role Request Submitted Notification

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.