



**Centers for Medicare & Medicaid Services**

# **Internet Quality Improvement & Evaluation System (iQIES)**

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**Security Official: Manage Access and FAQs**  
**Job Aid**

**Version 2.1**  
**January 18, 2024**

# 1. Introduction

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This job aid outlines the steps a Security Official (SO) needs to approve or reject requests for access to iQIES as well as update Federal Survey IDs (FSID).

For this job aid, **Security Official** covers all Security Official roles, including Provider Security Official, State Security Official, and CMS Security Official.

The SO is responsible for granting user roles in iQIES.

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

## 2. FAQs

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How many SOs should each provider or state have?

CMS recommends that every provider and state has at least two designated SOs:

- The first SO can only be approved by CMS
- Subsequent SOs are approved by an existing SO

Is there a limit to how many SOs a provider or state can have?

No.

How does the SO know when a user has submitted a role request?

An email is sent directly to the SO requesting a user role.

What if the only SO has left the provider?

- No new user roles can be approved until a new SO is approved.
- Contact the iQIES Service Center at 800-339-9313 or [iQIES@cms.hhs.gov](mailto:iQIES@cms.hhs.gov) and request the removal of the previous SO prior to requesting the new SO role.

What can the SO do?

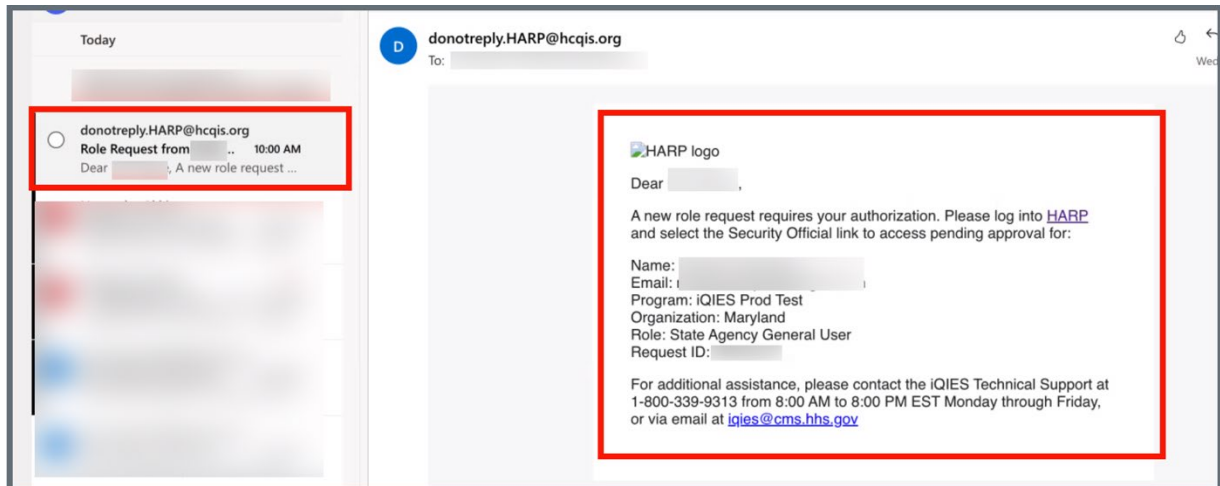
Click any of the following links to find the process:

- [Approve or Deny a Role Request](#)
- [Remove a User](#)
- [Request History](#)
- [Add an FSID](#) (SASOs only)

### 3. Approve or Deny a Role Request

#### Notes:

- This process is completed in HARP.
- An email is sent to the SO from [donotreply.HARP@hcqis.org](mailto:donotreply.HARP@hcqis.org). The subject is: **Role Request from [name]**. See *Figure 1, Role Request Email*.



*Figure 1: Role Request Email*

- 3.1 Click either **View Pending Role Requests** or **Security Official** on the top menu on the **HARP** home page. See *Figure 2, Security Official Welcome Page*. The **User Lookup** page opens.

**Note:** The pending role requests can also be seen on the **HARP** home page. The **Security Official** widget shows how many pending requests there are in red highlight.

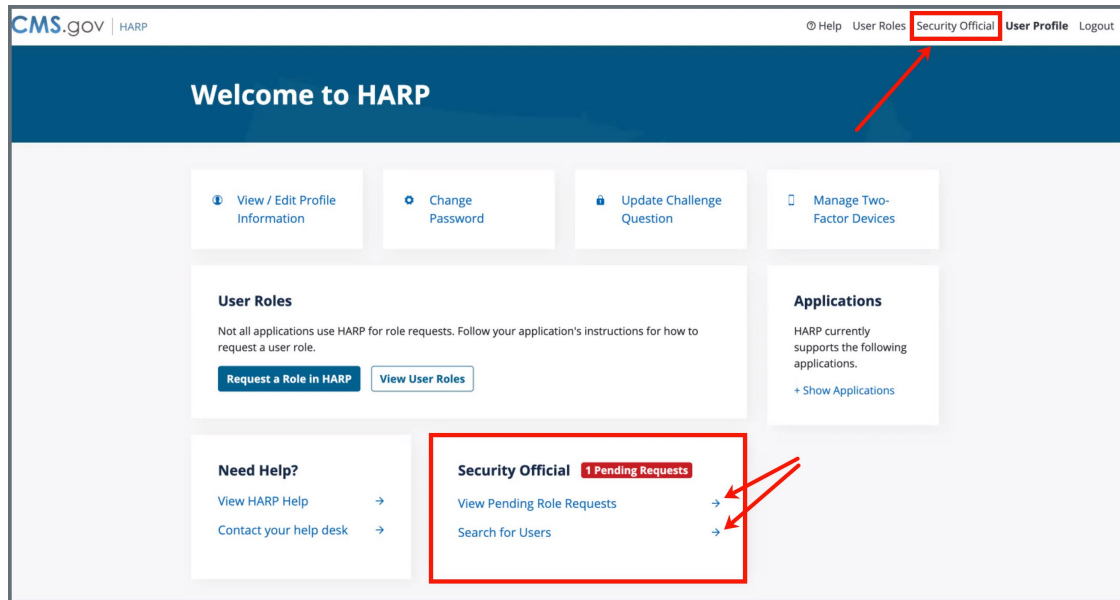


Figure 2: Security Official Welcome Page

3.2 Click **Role Requests** on the left menu. See Figure 3, *Role Requests*.

**Note:** The **Role Request** page shows pending requests from users.

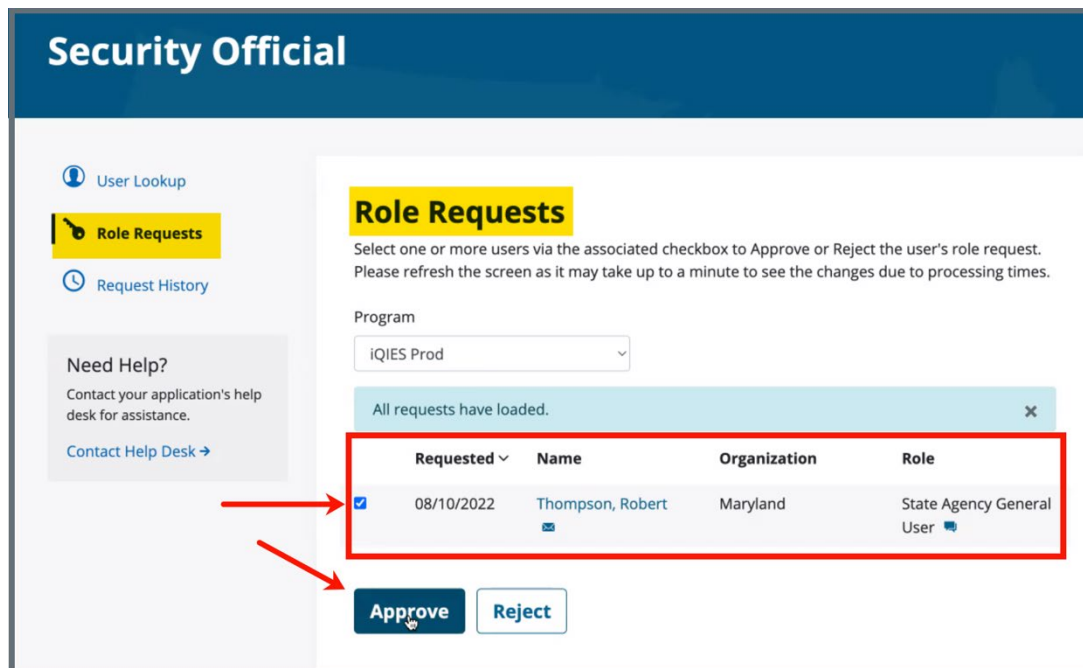
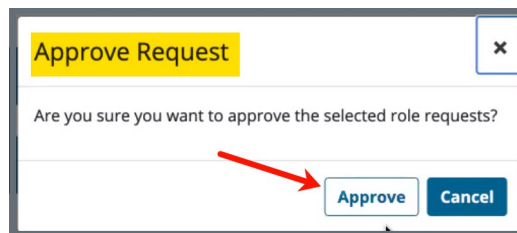


Figure 3: Role Requests

### 3.3 Review the role request.

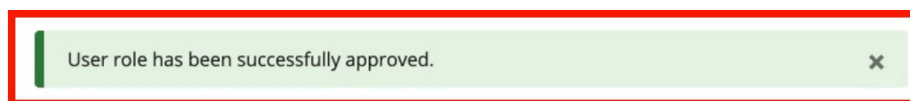
#### To Approve the Role Request:

- a. Click **Approve** to approve the request. An **Approve Request** pop-up window opens. See *Figure 4, Approve Request Pop-up Window*.



*Figure 4: Approve Request Pop-up Window*

- b. Click **Approve**. The green approval notification is shown. See *Figure 5, Approval Notification*.



*Figure 5: Approval Notification*

#### To Reject the Role Request:

- a. Click **Reject** to reject the request. A **Reject Request** pop-up window opens.
- b. Type a rejection reason.
- c. Click **Reject**. The green rejection notification is shown.

## 4. Remove a User

4.1 Go to the **User Lookup** page.

- From the **HARP** home page: Click **Search for Users** or **Security Official**.
- From the **Security Official** page: click **User Lookup** on the left menu.

4.2 Select the name of the organization or state from the drop-down **Organization** menu or type the name, email, or user ID of the user in the **Search** field. See *Figure 6, User Lookup*.

**Security Official**

**User Lookup**

Search by first name, last name, user ID or email to find a user.  
All fields marked with an asterisk (\*) are required.

Program \*  
iQIES Prod

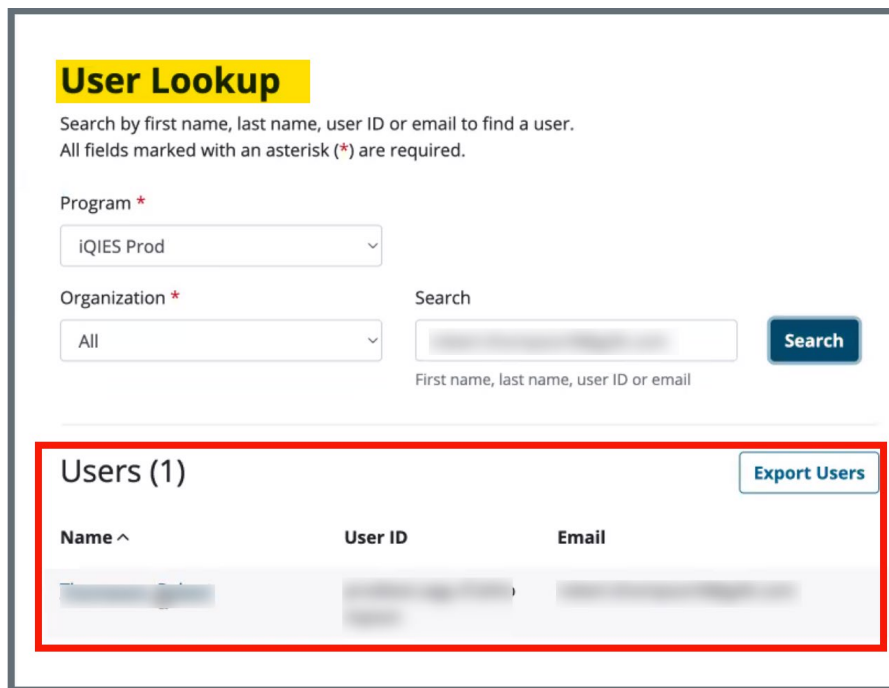
Organization \*  
All

Search  
First name, last name, user ID or email

**Search**

*Figure 6: User Lookup*

4.3 Click **Search**. The user appears below. See *Figure 7, User Lookup Results*.



The screenshot displays the 'User Lookup' interface. At the top, a yellow header reads 'User Lookup'. Below it, instructions state: 'Search by first name, last name, user ID or email to find a user. All fields marked with an asterisk (\*) are required.' The search filters include 'Program' (set to 'iQIES Prod') and 'Organization' (set to 'All'), both marked with an asterisk. A 'Search' button is located to the right of a search input field. Below the search section, a table titled 'Users (1)' is shown, with an 'Export Users' button in the top right corner. The table has three columns: 'Name ^', 'User ID', and 'Email'. A single user entry is visible in the table, highlighted with a red border.

Name ^	User ID	Email
[Redacted]	[Redacted]	[Redacted]

*Figure 7: User Lookup Results*

4.4 Click the name of the user to be removed. The user's profile information, including roles, opens. See *Figure 8, User Profile Information*.



[← Back to Previous Page](#)

( [blurred] )

### Profile Information

First Name	Last Name
[blurred]	[blurred]
Middle Initial	Date of Birth
[blurred]	[blurred]
Email Address	Phone Number
[blurred]	N/A
Home Address Line 1	City
[blurred]	[blurred]
State	Zip Code
[blurred]	[blurred]
Country	
US	

### User Roles

View and remove user roles below. It may take up to a minute to see your changes due to processing times.

Program	Organization	Role	
iQIES Prod Test	Florida	State Agency General User	<a href="#">Remove</a>
iQIES Preview	Florida	State Agency General User	

**Figure 8: User Profile Information**

- 4.5 Verify this is the correct user to remove.
- 4.6 Click **Remove**. The **Remove Role** pop-up window opens. See *Figure 9, Remove Role Pop-up Window*.

**Remove Role** [X]

Are you sure you want to remove this role (It may take up to a minute to see your changes due to processing times)?

[Remove](#) [Cancel](#)

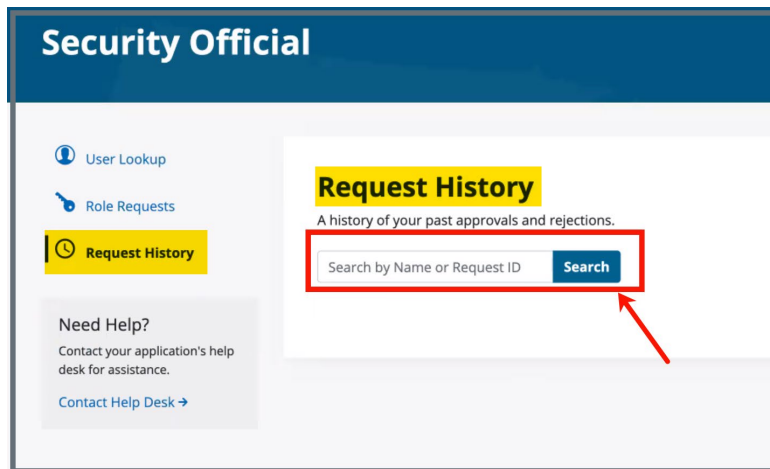
**Figure 9: Remove Role Pop-up Window**

- 4.7 Click **Remove**. The user role is removed.

## 5. Request History

5.1 Go to the **Request History** page. See *Figure 10, Request History*.

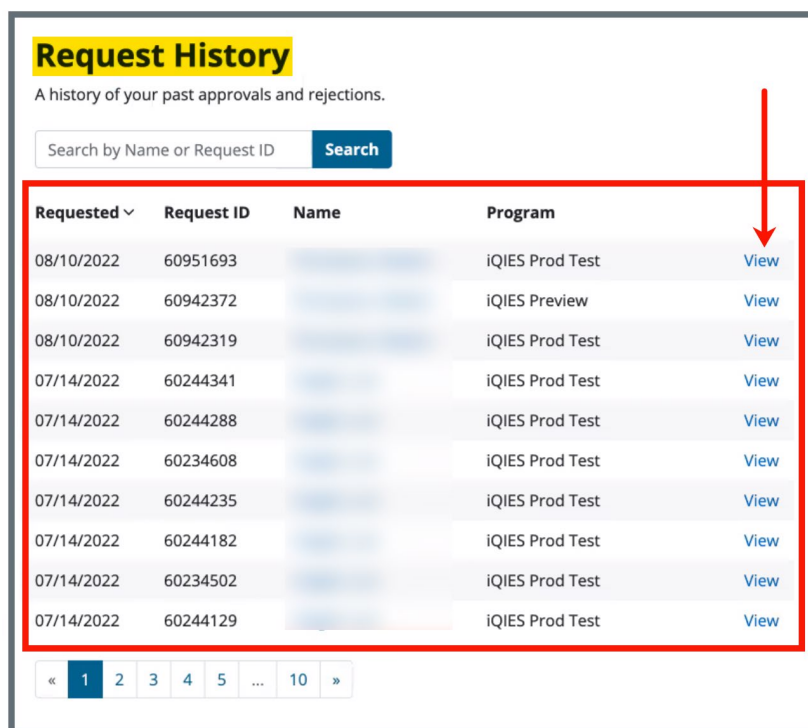
- From the **HARP** home page: Click **Security Official**, then click **Request History** on the left menu.
- From the **Security Official** page: click **Request History** on the left menu.



*Figure 10: Request History*

5.2 Type the **Name** or **Request ID** in the field next to **Search**. The **Request History** page opens. See *Figure 11, Request History Window*.

**Note:** It is not necessary to put any information in the **Search** field. The search will bring back all approvals and rejections the SO has made. This search may take a few minutes to load.



**Request History**

A history of your past approvals and rejections.

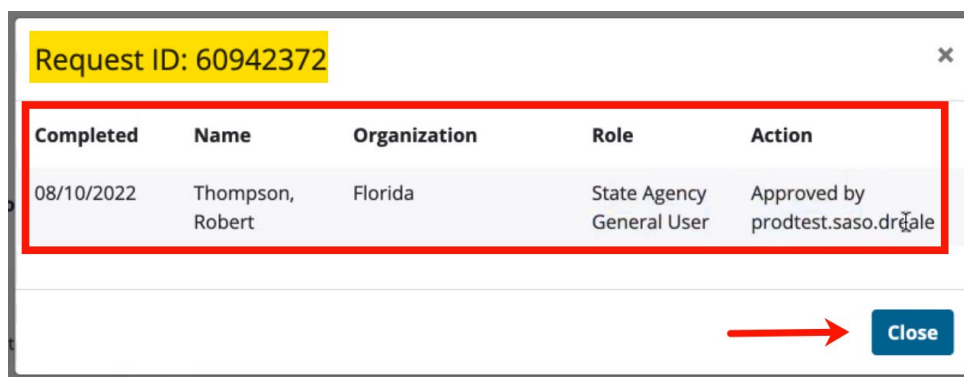
Search by Name or Request ID

Requested	Request ID	Name	Program	
08/10/2022	60951693		iQIES Prod Test	<a href="#">View</a>
08/10/2022	60942372		iQIES Preview	<a href="#">View</a>
08/10/2022	60942319		iQIES Prod Test	<a href="#">View</a>
07/14/2022	60244341		iQIES Prod Test	<a href="#">View</a>
07/14/2022	60244288		iQIES Prod Test	<a href="#">View</a>
07/14/2022	60234608		iQIES Prod Test	<a href="#">View</a>
07/14/2022	60244235		iQIES Prod Test	<a href="#">View</a>
07/14/2022	60244182		iQIES Prod Test	<a href="#">View</a>
07/14/2022	60234502		iQIES Prod Test	<a href="#">View</a>
07/14/2022	60244129		iQIES Prod Test	<a href="#">View</a>

« 1 2 3 4 5 ... 10 »

**Figure 11: Request History Window**

- 5.3 Click **View** next to any person to review the history. The **Request ID** pop-up window opens with information about the actions taken by the SO. See *Figure 12, Request ID Pop-up Window*.



**Request ID: 60942372**

Completed	Name	Organization	Role	Action
08/10/2022	Thompson, Robert	Florida	State Agency General User	Approved by prodtest.saso.dr@ale

**Figure 12: Request ID Pop-up Window**

- 5.4 Click **Close** to close out of the window and get back to the **Request History** page.

## 6. Add a Federal Survey ID (FSID)

### Notes:

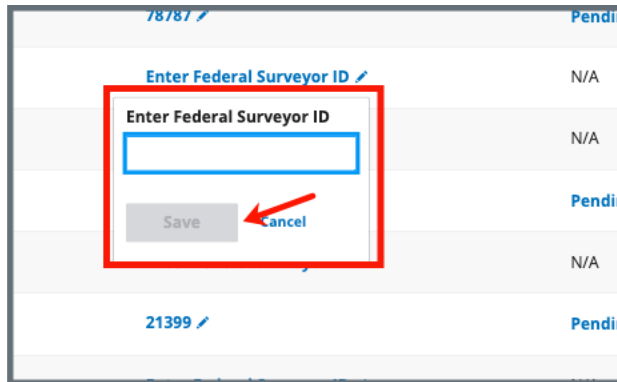
- This process is completed in iQIES and is only applicated to State SOs.
- An email is sent to the SO from [donotreply.HARP@hcqis.org](mailto:donotreply.HARP@hcqis.org) requesting the addition.

- 6.1 Click **Search** from the **User Management** drop-down menu on the top of the screen.
- 6.2 Click **Show Advanced Search**. See *Figure 13, Search for Users Advanced Search*.

The screenshot shows the 'Search for Users' interface. At the top is a search bar with the placeholder text 'Enter first and/or last name, employee ID, or federal surveyor ID'. Below the search bar is a button labeled 'Hide Advanced Search'. To the left of the main content area is a 'User Roles' section with a dropdown menu labeled 'Select...' and the text 'Select one or more'. To the right is a section titled 'FEDERAL SURVEYOR ID' which contains a checkbox labeled 'Show only users pending Federal Surveyor ID verification'. A red box highlights this checkbox, and a red arrow points to it. At the bottom left are two buttons: 'Search' and 'Reset'.

*Figure 13: Search for Users Advanced Search*

- 6.3 Click the checkbox next to **Show only users pending Federal Surveyor ID verification** under **FEDERAL SURVEYOR ID**.
- 6.4 Click **Search**. A list of all users with a missing or pending FSID are listed.
- To enter or update an FSID:
- a. Click the pencil icon next to the existing FSID or **Enter Federal Survey ID**. A pop-up window opens.
  - b. Type the FSID. See *Figure 14, FSID Number*.

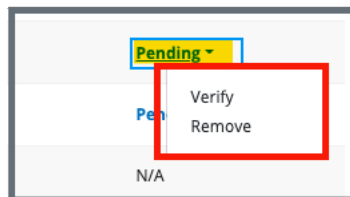
A screenshot of a web application showing a table with columns for a surveyor ID and a status. A red-bordered pop-up window titled 'Enter Federal Surveyor ID' is overlaid on the table. The pop-up contains a text input field, a 'Save' button, and a 'Cancel' button. A red arrow points to the 'Cancel' button. The table in the background has rows with IDs like '78787' and '21399' and a 'Pending' status.

*Figure 14: FSID Number*

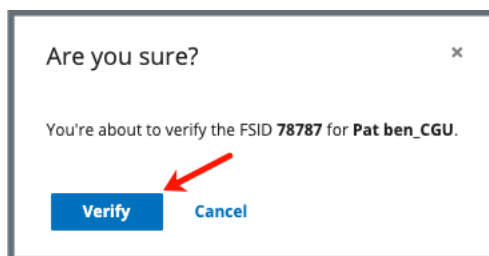
- c. Click **Save**.

To remove or verify an existing FSID:

- a. Click the drop-down menu under **Pending**.
- b. Select **Verify** or **Remove**. See *Figure 15, Verify/Remove Drop-Down Menu*. The **Are you sure?** pop-up opens. See *Figure 16, Are you sure? Pop-up window*.



*Figure 15: Verify/Remove Drop-Down Menu*



*Figure 16: Are you sure? Pop-up window*

- c. Click **Verify** or **Remove**.

**Note:** No further notification appears after clicking **Verify** or **Remove** the second time.