1. **Introduction**

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).


The SO is responsible for granting user roles in iQIES.

2. FAQs

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 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. 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.
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 2: Security Official Welcome Page*

*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*.

![Approve Request Pop-up Window](image1.png)

*Figure 4: Approve Request Pop-up Window*

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

![Approval Notification](image2.png)

*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.

![Figure 6: User Lookup](image)

*Figure 6: User Lookup*
4.3 Click **Search**. The user appears below. See *Figure 7, User Lookup Results*.

![User Lookup Result](image)

*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*.
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**.

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.

![Security Official]

*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.
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*.

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 applicable to State SOs.
- An email is sent to the SO from donotreply.HARP@hcqis.org requesting the addition.

6.1 Click **FSID Management** 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**.

![Figure 13: Search for Users Advanced Search](image)

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**.
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**.

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

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