



Centers for Medicare & Medicaid Services

# Internet Quality Improvement Evaluation System (iQIES)

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User Roles Matrix  
Job Aid

Version 3.0

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## Table of Contents

1.	Introduction .....	2
2.	FAQs .....	2
3.	CMS Staff User Roles and Privileges .....	2
4.	CMS Support User Roles and Privileges .....	6
5.	CMS Medicare Administrative Contractor (MAC) User Roles and Privileges .	9
6.	Provider User Roles and Privileges .....	10
7.	State Agency User Roles and Privileges .....	12
8.	Office of Financial Management User Role and Privileges .....	15

## List of Tables

Table 1: CMS Staff User Roles and Privileges .....	3
Table 2: CMS Support User Roles and Privileges .....	6
Table 3: CMS MAC Contractor User Roles and Privileges .....	9
Table 4: Provider User Roles and Privileges .....	11
Table 5: State Agency User Roles and Privileges.....	12
Table 6: Office of Financial Management User Roles .....	15

# 1. Introduction

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This job aid outlines the user roles and privileges in iQIES.

All users must have a role in iQIES.

# 2. FAQs

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## How do I request a role in iQIES?

Review the [iQIES Onboarding Guide](#) for detailed instructions on requesting a specific role.

## How do I know which role I need?

Follow the user tables in this job aid to help select the correct user role. Review the privileges you need, then select the corresponding role.

## Can I have more than one role?

Yes. A State Agency General User (SAGU) may also be a State Agency Security Official. You must stay in the same category of users, though. For example, CMS Staff cannot have CMS Contractor roles.

## What is a Security Official (SO) and why is that important?

The SO is responsible for granting user roles in iQIES.

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

Review the [iQIES Security Official – Manage Job Aid](#) for more details about SOs.

### 3. CMS Staff User Roles and Privileges

The CMS staff user role has access to nationwide provider, survey, intake, and enforcement data.

The following roles are available for the CMS Staff user role under the CMS User Category:

- **CMS General User**
- **CMS Security Official**
- **CMS View Only User**

**Note:** The Security Official role is designated for specific staff at CMS Headquarters only. Do not request this role.

Table 1: CMS Staff User Roles and Privileges

Roles and Privileges Actions	CMS General User	CMS Security Official	CMS View Only User
<b>CMPTS</b>			
Edit details	yes	no	no
Edit notes	yes	no	no
View CMPTS details	yes	no	yes
View CMPTS notes	yes	no	yes
<b>Enforcements</b>			
Create and manage an enforcement	yes	no	no
Create and manage a federal monitoring survey	yes	no	no
Manage enforcement letters	yes	no	no
View enforcement details	yes	no	yes
View enforcement letters	yes	no	yes
View federal monitoring survey	yes	no	yes
<b>FSID</b>			
Manage user FSID	no	yes	no
<b>Intakes</b>			
Create and manage an intake	yes	no	no
Delete intake letters	yes	no	no
Manage intake letters	yes	no	no

Roles and Privileges Actions	CMS General User	CMS Security Official	CMS View Only User
View intake details	yes	no	yes
View intake letters	yes	no	yes
<b>Letter Template Management</b>			
Create a letter template	yes	no	no
Delete a letter template	yes	no	no
View letter template	yes	no	no
<b>Patient Assessment</b>			
Add a patient	no	no	no
Create a patient assessment	no	no	no
Delete a patient	no	no	no
Delete a patient assessment	no	no	no
Edit a patient	no	no	no
Edit a patient assessment	no	no	no
Inactivate an assessment	no	no	no
Search assessments	yes	no	yes
Submit an assessment	no	no	no
View patient	yes	no	yes
View patient assessment	yes	no	yes
<b>Provider Information</b>			
Add a Provider	yes	no	no
Approve/reject provider match data	yes	no	no
Archive provider letters	yes	no	no
Edit provider deeming approval	yes	no	no
Edit sample validation survey	yes	no	no
Manage provider letters	yes	no	no
Search providers	yes	no	yes
View provider details	yes	no	yes
View provider letters	yes	no	yes
<b>Reports</b>			
Generate and view reports	yes	no	yes
<b>Surveys</b>			
Create validation survey	yes	no	no
Create and manage a survey	yes	no	no
Delete a survey*	no	no	no

Roles and Privileges Actions	CMS General User	CMS Security Official	CMS View Only User
Delete a citation	yes	yes	no
Archive a survey letter	yes	no	no
Edit CMS-377 form	yes	no	no
Edit IDR	yes	no	no
Manage survey letters	yes	no	no
View CMS-377 form	yes	no	yes
View AO survey	yes	no	yes
View IDR	yes	yes	yes
View survey details	yes	no	yes
View survey letters	yes	no	yes
<b>Other</b>			
iQIES role approval	no	yes	no

\*Only the CMS Admin role can delete surveys, and only certain staff in the CMS locations have this role.

## 4. CMS Support User Roles and Privileges

The CMS support user role provides application assistance as it pertains to the Help Desk requests and inquiries.

The following roles are available for the iQIES Support user role under the CMS User Category:

- **iQIES Help Desk**
- **iQIES Help Desk Production Control**

Table 2: CMS Support User Roles and Privileges

Roles and Privileges Actions	iQIES Help Desk	iQIES Help Desk Production Control
<b>CMPTS</b>		
Edit details	no	no
Edit notes	no	no
View CMPTS details	yes	yes
View CMPTS notes	yes	yes
<b>FSID</b>		
Manage user FSID	no	no
<b>Enforcements</b>		
Create and manage an enforcement	no	no
Create and manage a federal monitoring survey	no	no
Manage enforcement letters	no	no
View enforcement details	yes	yes
View enforcement letters	yes	no
<b>Intakes</b>		
Create and manage an intake	no	no
Manage intake letters	no	no
View intake details	yes	yes
View intake letters	yes	no
<b>Letter Template Management</b>		

Roles and Privileges Actions	iQIES Help Desk	iQIES Help Desk Production Control
Create a letter template	no	no
Delete a letter template	no	no
View letter template	yes	no
<b>Patient Assessment</b>		
Add a patient	no	yes
Create a patient assessment	no	no
Delete a patient	no	yes
Delete a patient assessment	no	yes
Search assessments	yes	yes
View patient	yes	yes
View patient assessment	yes	yes
<b>Provider Information</b>		
Add a Provider	no	no
Approve/reject provider match data	no	no
Archive provider letters	yes	no
Edit provider deeming approval	no	no
Edit sample validation survey	no	no
Manage provider letters	no	no
Search providers	yes	yes
View provider details	no	yes
View provider letters	yes	no
<b>Reports</b>		
Generate and view reports	yes	yes
<b>Surveys</b>		
Create validation survey	no	no
Create and manage a survey	no	no
Delete a survey*	no	no
Delete a citation	no	no
Archive a survey letter	no	no



Roles and Privileges Actions	iQIES Help Desk	iQIES Help Desk Production Control
Edit IDR	no	no
Manage survey letters	no	no
View AO survey	yes	yes
View IDR	yes	no
View survey details	yes	yes
View survey letters	yes	no
<b>Other</b>		
Manage state-prohibited codes	no	yes

\*Only the CMS Admin role can delete surveys, and only certain staff in the CMS locations have this role.

## 5. CMS Medicare Administrative Contractor (MAC) User Roles and Privileges

The MAC user role is a multi-state, regional contractor responsible for administering both Medicare Part A and Medicare Part B claims.

Table 3: CMS MAC Contractor User Roles and Privileges

Roles and Privileges Action	CMS Contractor MAC User	CMS Contractor MAC Security Official
Edit user profile	yes	no
Search providers	yes	no
View administrative reports	yes	yes
View provider	yes	no
View user profile	yes	no
iQIES role approval	no	yes

## 6. Provider User Roles and Privileges

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The provider user role is comprised of organizations, agencies, and facilities that provide healthcare services.

The following roles are available for providers:

- **Assessment Submitter**
- **Provider Assessment Viewer**
- **Provider Administrator**
- **Provider Assessment Coordinator**
- **Provider Security Official**

**Note:** The **Assessment Submitter** user role cannot create, modify, or inactivate assessments in the iQIES Assessment User Tool.

The **Provider Assessment Coordinator** can create, modify, or inactivate assessments in the iQIES Assessment User Tool.

Table 4: Provider User Roles and Privileges

Roles and Privileges Actions	Assessment Submitter	Assessment Viewer	Provider Administrator	Assessment Coordinator	Provider Security Official
<b>Provider Information</b>					
Search providers	yes	yes	yes	yes	yes
View provider details	yes	yes	yes	yes	yes
View provider letters	no	no	no	no	no
<b>Patient Assessment</b>					
Add a patient	no	no	no	yes	no
Create a patient assessment	no	no	yes	yes	yes
Delete a patient	no	no	yes	no	yes
Delete a patient assessment	no	no	yes	yes	yes
Edit a patient	no	no	yes	no	yes
Edit a patient assessment	no	no	yes	yes	yes
Inactivate an assessment	no	no	yes	no	yes
Search assessments	no	no	no	no	no
Submit an assessment	no	no	yes	yes	yes
View patient	no	yes	yes	yes	yes
View patient assessment	no	yes	yes	yes	yes
<b>Users</b>					
Create a user	no	no	no	no	no
Delete a user	no	no	no	no	no
Edit a user profile	no	yes	yes	yes	yes
<b>Reports</b>					
Generate and view reports	yes	yes	yes	yes	yes
<b>Other</b>					
iQIES role approval	no	no	no	no	yes

## 7. State Agency User Roles and Privileges

The state agency user role provides state-level administration and surveying of healthcare providers, along with assessment management, and ICD-10 code management.

The following roles are available for state agencies:

- **State Agency Assessment Coordinator**
- **State Agency General User**
- **State Agency Security Official**

**Note:** The state agency general user role can add and manage role-specific information within their state and has read-only access to provider information, surveys, and enforcements outside of their state.

Table 5: State Agency User Roles and Privileges

Roles and Privileges Actions	State Agency Assessment Coordinator	State Agency General User	State Agency Security Official
<b>CMPTS</b>			
Edit details	no	no	no
Edit notes	no	yes	no
View CMPTS details	no	yes	no
View CMPTS notes	no	yes	no
<b>Enforcements</b>			
Create and manage an enforcement	no	yes	no
Create and manage a federal monitoring survey	no	no	no
Manage enforcement letters	no	yes	no
View enforcement details	no	yes	no
View enforcement letters	no	yes	no

<b>Roles and Privileges Actions</b>	<b>State Agency Assessment Coordinator</b>	<b>State Agency General User</b>	<b>State Agency Security Official</b>
<b>FSID</b>			
Manage user FSID	no	no	yes
<b>Intakes</b>			
Create and manage an intake	no	yes	no
Delete intake letters	no	yes	no
Manage intake letters	no	yes	no
View intake details	no	yes	no
View intake letters	no	yes	no
<b>Letter Template Management</b>			
Create a letter template	no	yes	no
Delete a letter template	no	yes	no
View letter template	no	yes	no
<b>Patient Assessment</b>			
Add a patient	yes	no	no
Create a patient assessment	yes	no	no
Delete a patient	yes	no	no
Delete a patient assessment	yes	no	no
Edit a patient	yes	no	no
Edit a patient assessment	no	no	no
Inactivate an assessment	no	no	no
Search assessments	yes	no	no
Submit an assessment	no	no	no
View patient	yes	no	no
View patient assessment	yes	no	no
<b>Provider Information</b>			
Add a Provider	no	yes	no
Approve/reject provider match data	no	no	no
Archive provider letters	yes	yes	no
Edit provider deeming approval	no	no	no

<b>Roles and Privileges Actions</b>	<b>State Agency Assessment Coordinator</b>	<b>State Agency General User</b>	<b>State Agency Security Official</b>
Manage provider letters	no	yes	no
Search providers	yes	yes	no
View provider details	yes	yes	no
View provider letters	no	yes	no
<b>Reports</b>			
Generate and view reports	yes	yes	no
<b>Surveys</b>			
Create validation survey	no	no	no
Create and manage a survey	no	yes	no
Delete a survey*	no	no	no
Delete a citation	no	yes	no
Archive a survey letter	no	yes	no
Edit CMS-377 form	no	yes	no
Edit IDR	no	yes	no
Manage survey letters	no	yes	no
View AO survey	no	no	no
View IDR	no	no	no
View survey details	no	yes	no
View survey letters	no	yes	no
<b>Users</b>			
Create a user	no	no	no
Delete a user	no	no	no
Edit a user profile	yes	yes	no
<b>Other</b>			
Edit a user profile	yes	yes	no
iQIES role approval	no	no	yes
Manage state-prohibited codes	yes	no	no

\*Only the CMS Admin role can delete surveys, and only certain staff in the CMS locations have this role.

## 8. Office of Financial Management User Role and Privileges

The office of financial management user role provides a limited role to view, manage, and add Civil Money Penalty (CMP) and Civil Money Penalty Tracking System (CMPTS) cases.

Refer to Table 6: Office of Financial Management User Roles for the Action this user role can perform.

Table 6: Office of Financial Management User Roles

Roles and Privileges Actions	OFM User Role
<b>CMPTS</b>	
Edit details	yes
Edit notes	yes
View CMPTS details	yes
View CMPTS notes	yes