Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

User Roles Matrix
Job Aid

Version 4.4
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1.   Introduction

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

All users must have a role in iQIES.

2.   FAQs

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 for other users in their state or provider 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, enforcement, and Federal patient assessment 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**

- **CMS Active Provider File**

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	CMS Active Provider File
CMPTS (Complaints)				
Edit details	yes	no	no	no
Edit notes	yes	no	no	no
View CMPTS details	yes	no	yes	no
View CMPTS notes	yes	no	yes	no
Enforcements				
Create and manage an enforcement	yes	no	no	no
Create and manage a federal monitoring survey	yes	no	no	no
Manage enforcement letters	yes	no	no	no
View enforcement details	yes	no	yes	no
View enforcement letters	yes	no	yes	no
View federal monitoring survey	yes	no	yes	no

Roles and Privileges Actions	CMS General User	CMS Security Official	CMS View Only User	CMS Active Provider File
FSID (Federal Surveyor ID)				
Manage user FSID	no	yes	no	no
Intakes				
Create and manage an intake	yes	no	no	no
Delete intake letters	yes	no	no	no
Manage intake letters	yes	no	no	no
View intake details	yes	no	yes	no
View intake letters	yes	no	yes	no
Letter Template Management				
Create a letter template	yes	no	no	no
Delete a letter template	yes	no	no	no
View letter template	yes	no	no	no
Patient Assessment				
Add a patient	no	no	no	no
Create a patient assessment	no	no	no	no
Delete a patient	no	no	no	no
Delete a patient assessment	no	no	no	no
Edit a patient	no	no	no	no
Edit a patient assessment	no	no	no	no
Inactivate an assessment	no	no	no	no
Search assessments	yes	no	yes	no
Submit an assessment	no	no	no	no
View patient	yes	no	yes	no
View patient assessment	yes	no	yes	no
Provider Information				
Add a Provider	yes	no	no	no
Archive provider letters	yes	no	no	no
Edit provider deeming approval	yes	no	no	no
Edit sample validation survey	yes	no	no	no
Manage provider letters	yes	no	no	no

Roles and Privileges Actions	CMS General User	CMS Security Official	CMS View Only User	CMS Active Provider File
Search providers	yes	no	yes	no
Terminate a Medicaid-Only Provider	yes	no	no	no
View provider details	yes	no	yes	no
View provider letters	yes	no	yes	no
Reports				
Generate and view reports	yes	no	yes	no
Active Provider File report	no	no	no	yes
Surveys				
Create validation survey	yes	no	no	no
Create and manage a survey	yes	no	no	no
Delete a survey*	no	no	no	no
Delete a citation	yes	yes	no	no
Archive a survey letter	yes	no	no	no
Edit CMS-377 form	yes	no	no	no
Edit IDR	yes	no	no	no
Manage survey letters	yes	no	no	no
View CMS-377 form	yes	no	yes	no
View AO survey	yes	no	yes	no
View IDR	yes	yes	yes	no
View survey details	yes	no	yes	no
View survey letters	yes	no	yes	no
Other				
iQIES role approval	no	yes	no	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
CMPTS		
Edit details	no	no
Edit notes	no	no
View CMPTS details	yes	yes
View CMPTS notes	yes	yes
FSID		
Manage user FSID	no	no
Enforcements		
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
Intakes		
Create and manage an intake	no	no
Manage intake letters	no	no
View intake details	yes	yes
View intake letters	yes	no
Letter Template Management		
Create a letter template	no	no

Roles and Privileges Actions	iQIES Help Desk	iQIES Help Desk Production Control
Delete a letter template	no	no
View letter template	yes	no
Patient Assessment		
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
Provider Information		
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
Reports		
Generate and view reports	yes	yes
Surveys		
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
Edit IDR	no	no
Manage survey letters	no	no

Roles and Privileges Actions	iQIES Help Desk	iQIES Help Desk Production Control
View AO survey	yes	yes
View IDR	yes	no
View survey details	yes	yes
View survey letters	yes	no
Other		
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

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 ePOC Administrator**
- **Provider Security Official**

Notes:

- 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	Administrator	Assessment Coordinator	ePOC Administrator	SO
Provider Information						
Search providers	no	no	yes	yes	yes	yes
View provider details	no	no	yes	yes	yes	yes
Terminate a Medicaid Only provider	no	no	yes	no	no	no
Patient Assessment						
Add a patient	no	no	yes	yes	no	yes
Create a patient assessment	no	no	yes	yes	no	yes
Delete a patient	no	no	yes	no	no	yes
Delete a patient assessment	no	no	yes	yes	no	yes
Delete an upload	no	no	no	no	no	no
Edit a patient	no	no	yes	no	no	yes
Edit a patient assessment	no	no	yes	yes	no	yes
Edit an uploaded assessment (re-upload a modified file)	yes	no	no	no	no	yes
Inactivate an assessment	no	no	yes	no	no	yes
Modify a submitted assessment	no	no	yes	no	no	yes
Search for a patient	no	yes	yes	yes	no	yes
Submit an assessment within iQIES	no	no	yes	yes	no	yes
Upload a patient assessment	yes	no	no	no	no	yes
View patient	no	yes	yes	yes	no	yes

Roles and Privileges Actions	Assessment Submitter	Assessment Viewer	Administrator	Assessment Coordinator	ePOC Administrator	SO
Provider Information						
Search providers	no	no	yes	yes	yes	yes
View provider details	no	no	yes	yes	yes	yes
Terminate a Medicaid Only provider	no	no	yes	no	no	no
Patient Assessment						
Add a patient	no	no	yes	yes	no	yes
Create a patient assessment	no	no	yes	yes	no	yes
Delete a patient	no	no	yes	no	no	yes
Delete a patient assessment	no	no	yes	yes	no	yes
View patient assessment	no	yes	yes	yes	no	yes
View your uploaded assessment	yes	no	no	no	no	yes
Users						
Create a user	no	no	no	no	no	no
Delete a user	no	no	no	no	no	no
Edit a user profile	no	yes	yes	yes	yes	yes
Reports						
Generate and view reports	yes	yes	yes	yes	no	yes
Other						
iQIES role approval	no	no	no	no	no	yes
Generate an SOD	no	no	no	no	yes	no
View Citations	no	no	no	no	yes	no
View Letters	no	no	no	no	yes	no
Generate a POC	no	no	no	no	yes	no
View Attachments	no	no	no	no	yes	no
Upload Attachments	no	no	no	no	yes	no

Roles and Privileges Actions	Assessment Submitter	Assessment Viewer	Administrator	Assessment Coordinator	ePOC Administrator	SO
Provider Information						
Search providers	no	no	yes	yes	yes	yes
View provider details	no	no	yes	yes	yes	yes
Terminate a Medicaid Only provider	no	no	yes	no	no	no
Patient Assessment						
Add a patient	no	no	yes	yes	no	yes
Create a patient assessment	no	no	yes	yes	no	yes
Delete a patient	no	no	yes	no	no	yes
Delete a patient assessment	no	no	yes	yes	no	yes
View survey	no	no	no	no	yes	no

7.   AO User Roles and Privileges

Accrediting Organizations (AOs) perform Survey and Certification activities for Deemed providers or expectant Deemed providers on behalf of CMS. These organizations review and determine a provider's status in terms of adherence to CMS's Conditions of Participation in order to allow the provider's participation in the program.

The following roles are available for AO:

- **AO User**

- **AO Security Official**

Table 5: AO User Roles and Privileges

Roles and Privileges Action	AO User	AO Security Official
Generate and view HHA QM reports	yes	no
iQIES role approval	no	yes

8.   QIO/QIN User Roles and Privileges

QIO/QIN users are a group of health quality experts, clinicians, and consumers organized to improve the quality of care delivered to improve the quality of care delivered by the provider. There are 12 QIO/QINs across the United States.

Note: QIO/QIN users can access selected MDS reports for the providers in the states where each QIO has access.

The following roles are available for QIO/QIN:

- **QIO/QIN User**

- **QIO/QIN Security Official**

Table 6: QIO/QIN User Roles and Privileges

Roles and Privileges Action	QIO/QIN User	QIO/QIN Security Official
Generate and view MDS reports	yes	yes
iQIES role approval	no	yes

9.   State Agency User Roles and Privileges

The state agency user roles provide state-level administration and surveying of healthcare providers, along with assessment management, and state-specific prohibited ICD-10 code management.

The following roles are available for state agencies:

- **State Agency S&C General User**   Basic Role (must be requested)
- **State Agency Security Official (SASO)**   Grants additional roles

All users initially start with the **State Agency S&C General User** role, which has read-only access. Additional roles are added by the SASO.

See Appendix A for quick definitions of each of the following roles:

- **Enforcement Administrator**
- **Intake Admin**
- **Intake Capture**
- **Legal Department**
- **Letters Administrator**
- **S&C Provider Administrator**
- **State Agency Admin**
- **Support Staff**
- **Survey Admin**
- **Surveyor**

Click any of the above roles to go directly to the role details.

State Agency S&C General User

Description:

This role has the most basic access to iQIES and has:

- Read Only access to provider information
- Is assigned to all users that are approved to access iQIES

Privileges:

Area	Details
S&C Privileges	**Providers** **Attachments** View only **Details** View only **Notes** View only **S&C Reports** View only
User Profile	View and edit
Is the My Tasks Landing Page shown?	The My Tasks landing page is not shown.
Top Navigation	Help only
General	• Cannot be added as Responsible Staff in providers, surveys, intakes, or enforcements. • Cannot be a Team Member for surveys.

State Agency Security Official (SASO)

Description:

This role grants and removes additional roles. The SASO has limited access to iQIES as shown below, unless the role is combined with other Admin level roles.

Privileges:

Area	Details	
S&C Privileges	**User FSIDs**	Verify/Update
	User Roles	Add, remove
S&C Privileges when Combined with other Admin-level Roles	**IDR**	View only
	Provider Details	View only
	Survey Citations	Delete (all citations, regardless of owner)
	Surveys	Delete (all surveys, regardless of owner)
User Profile	View and edit	
Is the My Tasks Landing Page shown?	The My Tasks landing page is not shown.	
Top Navigation	• Help • User Management	
General	• Cannot be added as Responsible Staff in providers, surveys, intakes, or enforcements. • Cannot be a Team Member for surveys.	

Enforcement Administrator

Description:

This role manages all data related to creating and updating enforcements. This role has all the State Agency S&C General User Role privileges in addition to the following:

Privileges:

Area	Details
S&C Privileges	**Surveys**
	Attachments Add
	Details View only
	Forms View only
	Letters View only
	Notes Add, edit (own notes only)
	Enforcements
	Attachments Add, view, edit, delete (all attachments, regardless of owner)
	Details View, create, edit
	Letters Add, view, edit, delete (all letters, regardless of owner)
	Notes Add, view, edit, delete (all notes, regardless of owner)
	CMPTS
	Details View only
	Notes View, edit
	Report Access • HHA Provider Reports • HHA Quality Measure Reports • MDS Provider Reports • MDS Reports

Area	Details
Is the My Tasks Landing Page shown?	Yes. Only Providers and Enforcement tabs are shown.
General	• Can be added as Responsible Staff in providers and enforcements. • Cannot be a Team Member or QA Team Member for surveys.

Intake Admin

Description:

This role manages all the data captured within an Intake. This role has all the State Agency S&C General User Role privileges, plus all the privileges of the Intake Capture role, in addition to the following:

Note: This role includes triage of the intake. All other roles, with the exception of the CMSGU, can only view an intake.

Privileges:

Area	Details
S&C Privileges	**Intakes**
	Allegations Add, view, edit, delete
	Attachments Add, view, edit, delete (all attachments, regardless of owner)
	Details View, create, edit
	Intake View, create, edit
	Letters Add, view, edit, delete (all letters, regardless of owner)
	Notes Add, view, edit, delete (all notes, regardless of owner)
	Change Provider Can reassign to a separate provider
	Report Access
	• HHA Provider Reports
	• HHA Quality Measure Reports
	• MDS Provider Reports
	• MDS Reports
Is the My Tasks Landing Page shown?	Yes. Only providers and intakes tabs are shown.

Area	Details
General	• Can be added as Responsible Staff in providers and intakes. • Cannot be a Team Member or a QA Team Member for surveys.

Intake Capture

Description:

This role captures all data related to the intake, but it does not triage. This role has all the State Agency S&C General User Role privileges in addition to the following:

Privileges:

Area	Details
S&C Privileges	**Intakes**
	Allegations View, add, when the **Allegation Findings** radio button is selected.
	Attachments Add, view, edit, delete (cannot delete attachments uploaded by another user)
	Details View, create, edit
	Letters Add, view, edit
	Notes Add, view, edit, delete (cannot delete notes entered by another user)
	Change Provider Can reassign to a separate provider
Is the My Tasks Landing Page shown?	Yes. Only providers and intakes tabs are shown.
Top Navigation	Help only
General	• Can be added as Responsible Staff in providers and intakes. • Cannot be a Team Member or a QA Team Member for surveys.

Legal Department

Description:

This role can view enforcement-related data to monitor any possible legal ramifications and has all the State Agency S&C General User Role privileges in addition to the following:

Privileges:

Area	Details
S&C Privileges	**Enforcements** **Attachments** — View only **Details** — View only **Letters** — View only **Notes** — View only **Intakes** **Attachments** — View only **Details** — View only **Letters** — View only **Notes** — View only **CMPTS** **Details** — View only **Notes** — View only
Is the My Tasks Landing Page shown?	The My Tasks landing page is not shown.
General	• Cannot be added as Responsible Staff in providers, surveys, intakes, or enforcements. • Cannot be a Team Member or a QA Team Member for surveys.

Letters Administrator

Description:

This role manages letters, including creating letters from templates and creating templates, and has all the State Agency S&C General User Role privileges in addition to the following:

Privileges:

Area	Details	
S&C Privileges	**Providers**	
	Attachments	View only
	Letters	Add, view, edit, delete (all letters, regardless of owner)
	Notes	View only
	Surveys	
	Attachments	View only
	Details	View only
	FMS	View only when visible to the state
	Forms	View only
	Letters	Add, view, edit, delete (all letters, regardless of owner)
	Notes	View only
	Intakes	
	Attachments	View only
	Details	View only
	Forms	View only
	Letters	Add, view, edit, delete (all letters, regardless of owner)
	Notes	View only
	Enforcements	
	Attachments	View only
	Details	View only
	Letters	Add, view, edit, delete (all letters, regardless of owner)
	Notes	View only

Area	Details
	Letter Template Management • View Administration on top menu • Add, view, edit, and archive letter templates, including standardized letter templates
Is the My Tasks Landing Page shown?	The My Tasks landing page is not shown.
General	• Can be added as Responsible Staff in providers, surveys, intakes, and enforcements. • Cannot be a Team Member for surveys.

S&C Provider Administrator

Description:

This role controls all provider information. This role can also modify for state appropriate information. For example, it can update the state region of a provider, but cannot update the CMS location.

This role has all the [State Agency S&C General User Role privileges](#) in addition to the following:

Privileges:

Area	Details
S&C Privileges	**Providers** **Attachments** Add, view, edit, delete (all attachments, regardless of owner) **Details** Create, edit **Letters** View only **Notes** Add, view, edit, delete (all notes, regardless of owner) **Report Access** • HHA Provider Reports • HHA Quality Measure Reports • MDS Provider Reports • MDS Reports
Is the My Tasks Landing Page shown?	Yes. Only Providers tab is shown.
General	• Can be added as Responsible Staff only for providers. • Cannot be a Team Member for surveys.

State Agency Admin

Description:

This role performs all functions within the application. This role is the highest level State Agency role and is restricted to a select few individuals at the State Agency with direct oversight responsibilities supporting S&C Staff within a state agency. The role has all the State Agency S&C General User Role privileges in addition to the following:

Privileges:

Area	Details	
S&C Privileges	**Providers**	
	Attachments	Add, view, edit, delete (cannot delete attachments uploaded by another user)
	Details	Create, edit
	Letters	Add, view, edit, delete (all letters, regardless of owner)
	Notes	Add, view, edit, delete (cannot edit or delete notes entered by another user)
	Other	Terminate a Medicaid Only provider
	Surveys	
	Attachments	Add, view, edit, delete (cannot delete attachments uploaded by another user)
	Details	View, create, edit
	FMS	View only when visible to the state
	Forms	Create, edit, delete, and link to all forms
	Letters	View, edit, delete (all letters, regardless of owner)
	Notes	Add, view, edit, delete (cannot edit or delete notes entered by another user)

Area	Details
	Intakes
	Attachments Add, view, edit, delete (cannot delete attachments uploaded by another user)
	Details View, create, edit
	Letters Add, view, edit, delete (all letters, regardless of owner)
	Notes Add, view, edit, delete (cannot edit or delete notes entered by another user)
	Change Provider Can reassign to a separate provider
	Triage View, create, edit
	Enforcements
	Attachments Add, view, edit, delete (cannot delete attachments entered by another user)
	Details View, create, edit
	Letters Add, view, edit, delete (all letters, regardless of owner)
	Notes Add, view, edit, delete (cannot edit or delete notes entered by another user)
	CMPTS
	Details View only
	Notes Add, view, edit, delete (cannot delete notes entered by another user)
	Report Access • HHA Provider Reports • HHA Quality Measure Reports • MDS Provider Reports • MDS Reports
Is the My Tasks Landing Page shown?	Yes. All tabs are shown.

Area	Details
General	• Can be added as Responsible Staff for providers, surveys, intakes, and enforcements. • Can be a QA Team Member for surveys.

State Agency Assessment Coordinator

Description:

This role provides support for the state coordination of assessments related to the Outcome and Assessment Information Set (OASIS) and other supporting tasks that currently exist.

Privileges:

Area	Details
S&C Privileges	**Patient Assessment** **Patient** — Add, view **Assessment** — Create, edit, view **Providers** **Attachments** — Add, view, edit, delete (cannot delete attachments uploaded by another user) **Details** — View **Letters** — Archive letters, regardless of owner **Notes** — Add, view, edit, delete (cannot edit or delete notes entered by another user) **Other** • Edit a user profile • Manage state-prohibited codes • Generate and view reports
Is the My Tasks Landing Page shown?	No.
General	N/A

Support Staff

Description:

This role manages notes, attachments, and letters in each module. It has all the State Agency S&C General User Role privileges in addition to the following:

Privileges:

Area	Details	
S&C Privileges	**Providers**	
	Attachments	Add, view, edit, delete (cannot delete attachments uploaded by another user)
	Letters	Add, view, edit, delete (all letters, regardless of owner)
	Notes	Add, view, edit, delete (cannot edit or delete notes entered by another user)
	Surveys	
	Attachments	Add, view, edit, delete (cannot delete attachments uploaded by another user)
	Details	View only
	FMS	View only when visible to the state
	Forms	Create, edit, and link to all forms
	Letters	Add, view, edit, delete (all letters, regardless of owner)
	Notes	Add, view, edit, delete (cannot edit or delete notes entered by another user)

Area	Details
	Intakes **Attachments** Add, view, edit, delete (cannot delete attachments uploaded by another user) **Details** View only **Letters** Add, view, edit, delete (all letters, regardless of owner) **Notes** Add, view, edit, delete (cannot edit or delete notes entered by another user) **Enforcements** **Attachments** Add, view, edit, delete (cannot delete notes entered by another user) **Details** View only **Letters** Add, view, edit, delete (all letters, regardless of owner) **Notes** Add, view, edit, delete (cannot edit or delete notes entered by another user)
Is the My Tasks Landing Page shown?	Yes. All tabs are shown.
General	• Can be added as Responsible Staff for providers, surveys, intakes, and enforcements. • Can be a QA Team Member for surveys.

Survey Admin

Description:

This role is responsible for overseeing all aspects of a survey and has all the State Agency S&C General User Role privileges, plus all the privileges of the Surveyor role, in addition to the following:

Privileges:

Area	Details	
S&C Privileges	**Surveys**	
	Attachments	Add, view, edit, delete (all attachments, regardless of owner)
	Citations	Add, delete (all citations, regardless of owner)
	Details	Create, edit, delete (letters, survey, notes, attachments, forms)
	FMS	View when FMS is set to be visible to the state
	Forms	Create, edit, and link to all forms
	IDR	Edit
	Letters	Add, view, edit, delete (all letters, regardless of owner)
	Link to Forms	Create, edit, delete, and link to survey for all survey forms.
	Merge Findings	Yes
	Notes	Add, view, edit, delete (all notes, regardless of owner)
	Validation Survey	**No**
	Intakes	
	Allegations	Add, edit (until **Substantiated/Unsubstantiated** button is selected and saved)
	Details	Create, edit
	Investigation Narrative	Add, edit

Area	Details
	Report Access • HHA Provider Reports • HHA Quality Measure Reports • MDS Provider Reports • MDS Reports
Is the My Tasks Landing Page shown?	Yes. Only Survey and Providers tabs are shown.
General	• Can be added as Responsible Staff for providers and surveys. • Can be a QA Team Member for surveys.

Surveyor

Description:

This role has limited access to surveys to which they have been added and has all the [State Agency S&C General User Role privileges](#) in addition to the following:

Privileges:

Area	Details
S&C Privileges	**Providers**
	Attachments — View only
	Forms — Add, edit
	Notes — View only
	Surveys
	Attachments — Add, view, edit, delete (cannot delete notes entered by another user)
	Citations — Add, view, edit, delete(cannot delete citations entered by another user)
	Details — View and edit[1]
	FMS — View only when visible to the state
	Forms — Edit all forms
	Letters — Add, view, edit, delete (all letters, regardless of owner)
	Notes — Add, view, edit, delete (cannot delete notes entered by another user)
	[1] Cannot edit survey dates, basic information, Responsible Staff, Teams and QA pages or edit the Plan of Correction.
	Intakes
	Allegations — Add, edit (until **Substantiated/Unsubstantiated** button is selected and saved)
	Attachments — View only
	Investigation Narrative — Edit

Area	Details
	Report Access • HHA Provider Reports • HHA Quality Measure Reports • MDS Provider Reports • MDS Reports
Is the My Tasks Landing Page shown?	Yes. Only Survey and Providers tabs are shown.
General	• Can be added as Responsible Staff for providers and surveys. • Can be a survey Team Member • Cannot be added as a QA Team Member for surveys.

10. Contractor User Roles and Privileges

The contractor user role provides limited access to iQIES for various roles.

Notes:

- The Contract Surveyor role only has the survey/intake permissions below when added to the survey as a Team member by an authorized user.

- The Contract Surveyor role can view and edit their user profile without being added to a Team.

- The Contract Surveyor role can be state or CMS.

- The Contract Survey Admin role can be a QA Team Member for surveys.

The following roles are available for Contractor:

- **Contract Surveyor**

- **Contract Survey Admin**

Table 7: Contractor Permissions

Roles and Privileges Actions	Contract Surveyor	Contract Survey Admin
Edit Survey	Limited	yes
Edit User Profile	yes	yes
View Survey	Limited	yes
View User Profile	yes	yes
View Survey Notes	yes	yes
Create Survey Notes	yes	yes
View Survey Attachments	yes	yes
Create Survey Attachments	yes	yes
View My Surveys	yes	yes
View Intake Notes	yes	yes
View Intake Attachments	yes	yes
View Associated Intakes	yes	yes

Roles and Privileges Actions	Contract Surveyor	Contract Survey Admin
Manage Providers		
View Providers	yes	yes
View Provider History Report	no	yes
Create Surveys for Designated Providers	no	yes
Manage Surveys		
Update Basic Information	no	yes
Update Responsible Staff	no	yes
Manage Tasks	no	yes
Update Teams (both Survey and QA)	no	yes
Add Citations	yes	yes
Lock Citations	yes	yes
Generate the Statement of Deficiencies	yes	yes
Update the Plan of Correction	no	yes
Update Provider-Specific Forms* *Cannot update CMS-1539	no	yes
View Letters	no	yes
Add/Update Survey Note	yes	yes
Add/Update Survey Attachments	yes	yes
Create Revisits	no	yes
Manage Intakes		
Update Allegation details for linked intakes	no	yes
Update Basic Information	no	yes

11. Third Party User Roles and Privileges

The third party user role provides limited access to iQIES for the assessment submitter role.

Note: Assessment Submitter role can ONLY upload assessments.

The following role is available for contractors: **Vendor Assessment Submitter**.

Table 8: Third Party Permissions

Roles and Privileges Actions	Vendor Assessment Submitter
Provider Information	
Search providers	no
View provider details	no
View provider letters	no
Patient Assessment	
Add a patient	no
Create a patient assessment	no
Delete a patient	no
Delete a patient assessment	no
Delete an upload	no
Edit a patient	no
Edit a patient assessment	no
Inactivate an assessment	no
Modify a submitted assessment	no
Search for a patient	no
Submit an assessment	no
Upload a patient assessment	yes
View patient	no
View patient assessment	no
View your uploaded assessment	yes
Generate and view reports	yes

12. 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 10, Office of Financial Management User Roles for the actions this user role can perform.

Table 9: Office of Financial Management Permissions

Roles and Privileges Actions	OFM User Role
CMPTS	
Edit details	yes
Edit notes	yes
View CMPTS details	yes
View CMPTS notes	yes

13. iQAN User Roles and Privileges

iQAN user roles provide a limited role to view, manage, and create emails. The iQAN user role is limited to CMS General User roles.

The following roles are available for the iQAN user role:

- **iQAN [Provider] User**

- **iQAN [Provider] Admin**

- **iQAN Admin**

Refer to Table 11, iQAN User Roles and Privileges, for the actions these user roles can perform.

Table 10: iQAN User Roles and Privileges

Roles and Privileges Actions	iQAN [Provider] User	iQAN [Provider] Admin	iQAN Admin
Emails			
Compose an email	yes	yes	yes
Send an email	yes	yes	yes
Access email Information	no	yes	yes
Preview email that has been sent	no	yes	yes
Resend an email	no	yes	yes
Bulk resending of email	no	yes	yes
View a general recipient list	yes	yes	yes
View a provider-specific recipient list	yes	yes	yes
Recipient List			
Create a general recipient list	no	no	yes
Create a provider-specific recipient list	no	yes	yes
Delete a general recipient list	no	no	yes
Delete a provider-specific recipient list	no	yes	yes
Edit a general recipient list	no	no	yes
Edit a provider-specific recipient list	no	yes	yes

Roles and Privileges Actions	iQAN [Provider] User	iQAN [Provider] Admin	iQAN Admin
Templates			
Activate a template	no	yes	yes
Archive a template	no	yes	yes
Create a provider-specific template	no	yes	yes
Create a general template	no	no	yes
Delete a draft template	no	yes	yes
Duplicate a template	no	yes	yes
Edit a template	no	yes	yes
View an active template	no	yes	yes
View a system template	no	yes	yes

Appendix A: State Agency User Role Descriptions

Stage Agency User Role	Role Description
Enforcement Administrator	Manage all data related to an enforcement.
Intake Admin	Manager for all the data captured within an Intake. Includes triage of the Intake.
Intake Capture	Capture, but not triage, intakes. Capture all data related to the intake.
Legal Department	View enforcement-related data to monitor any possible legal ramifications. View Enforcement and CMP data.
Letters Administrator	Manage letters, including creating letters from templates and creating templates.
S&C Provider Administrator	Control all provider information. Modify the state appropriate information.
State Agency Administrator	Perform all functions within the application. Restricted to a select few within a state agency.
State Agency S&C General User	Basic access only. Read Only access to provider information. Assigned to all users that are approved to access iQIES.
State Agency Security Official	Grants and removes additional roles.
Support Staff	Manage notes, attachments, and letters in each module.
Survey Admin	Responsible for overseeing all aspects of a survey.
Surveyor	Limited access to surveys to which they have been added to the survey team.