



Centers for Medicare & Medicaid Services

Internet Quality Improvement & Evaluation System (iQIES)

User Roles Matrix Job Aid

Version 4.7

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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.

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3. CLIA User Roles and Privileges

CLIA user roles have access to CLIA Accounting on iQIES.

The following roles are available for CLIA:

- **CLIA Admin**
- **CLIA Billing Admin**
- **CLIA Billing Contractor**
- **CLIA Billing User**
- **State Agency - CLIA Billing User**

Table 1: CLIA Staff User Roles and Privileges

Roles and Privileges Actions	CLIA Admin	CLIA Billing Admin	CLIA Billing Contractor	CLIA Billing User	State Agency – CLIA Billing User
Accounting Provider Page - Billing Actions					
Provider Search	yes	yes	yes	yes	yes
Provider Specific Type (Regular, Exempt, VA)	yes	yes	yes	yes	yes
State Specific Only	N/A	N/A	N/A	N/A	See below ¹
Export CSV Search Result	yes	yes	yes	yes	yes
Certificate Inquiry	yes	yes	yes	yes	yes
Billing Inquiry	yes	yes	yes	yes	yes
Generate Fee Coupon	yes	yes	no	yes	yes
Refund Disbursement	yes	yes	no	no	no
Reverse Disbursement	yes	yes	no	no	no
Reverse Overpayment	yes	yes	no	no	no
Transfer Overpayment	yes	yes	no	no	no
Transfer Disbursement	yes	yes	no	no	no
Payment Actions					
Export CSV Search Result	yes	yes	yes	yes	yes
Create New Payment	yes	yes	no	no	no
View Payment	yes	yes	yes	yes	yes
Cancel Payment	yes	yes	no	no	no
Disburse Payment	yes	yes	no	no	no

Roles and Privileges Actions	CLIA Admin	CLIA Billing Admin	CLIA Billing Contractor	CLIA Billing User	State Agency – CLIA Billing User
PCR Actions					
View Log	yes	yes	no	no	no
Dry Run	yes	no	no	no	no
Commit (button on View Log page)	yes	no	no	no	no
View Log and Comment	yes	no	no	no	no
Cancel Request	yes	yes	no	no	no
Data Exchange					
Certificates	yes	yes	yes	yes	yes
QCOR (Demographic Working File)	yes	yes	yes	yes	yes
CWF	yes	yes	no	yes	yes
Fee Coupons	yes	yes	yes	yes	yes
LOA	yes	yes	yes	yes	yes
MSA	yes	yes	no	yes	yes
Nightly Adjustment	yes	yes	no	yes	yes
Pay.Gov	yes	yes	no	yes	yes
PECOS	yes	yes	no	yes	yes
Accounting Provider Page – Top Level Actions					
Override Adjustments	yes	yes	no	no	no
Set Certificate Enforcement Action	yes	yes	no	yes	no
Request Revised or Replacement Cert	yes	yes	no	yes	yes
Generate Fee Coupon	yes	yes	no	yes	yes

¹ User is associated with state default which allows them to see everything

4. 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 2: 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.

5. 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 3: 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.

6. 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 4: 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

7. 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 5: Provider User Roles and Privileges

Roles and Privileges Actions	Assessment Submitter	Provider Assessment Viewer	Provider Administrator	Provider Assessment Coordinator	Provider ePOC Administrator	Provider Security Official
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	no	no	no	no
Patient Assessment						
Add a patient	no	no	yes	yes	no	yes
Create a patient assessment	no	no	yes	no	no	yes
Delete a patient	no	no	yes	yes	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	no	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
Merge/Split an Assessment	no	no	no	yes	no	no
Modify a submitted assessment	no	no	yes	no	no	yes
Move (Transition) an Assessment	no	no	no	yes	no	no
Search for a patient	no	yes	yes	yes	no	yes

Roles and Privileges Actions	Assessment Submitter	Provider Assessment Viewer	Provider Administrator	Provider Assessment Coordinator	Provider ePOC Administrator	Provider Security Official
Submit an assessment within iQIES	no	no	yes	no	no	yes
Upload a patient assessment	yes	no	no	no	no	yes
View patient	no	yes	yes	yes	no	yes
View patient assessment	no	yes	yes	yes	no	yes
View submission history	yes	no	no	no	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
View survey	no	no	no	no	yes	no

8. 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 6: 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

9. 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 7: 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

10. 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:

Roles and Privileges Actions	State Agency S&C General User
Providers	
Attachments	View Only
Details	View Only
Notes	View Only
S&C Reports	View Only
Other	
My Tasks landing page shown	no
Can be added as Responsible Staff in providers, surveys, intakes, or enforcements	no
Can be a Team Member for surveys	no

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:

Roles and Privileges Actions	State Agency Security Official (SASO)
User FSIDs	Verify, Update
User Roles	Add, Remove
User Profile	View, Edit
My Tasks landing page shown	no
Can be added as Responsible Staff in providers, surveys, intakes, or enforcements	no
Can be a Team Member for surveys	no
View Help on top navigation bar	yes
View User Management on top navigation bar	yes
Can be a Team Member for surveys	no

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:

Roles and Privileges Actions	Enforcement Administrator
Providers	
Attachments	View Only
Details	View Only
Notes	View Only
S&C Reports	View Only
Surveys	
Attachments	Add
Details	View Only
Forms	View Only
Letters	View Only
Notes	View Only
S&C Reports	View Only
Enforcements	
Attachments	Add, view, edit, delete*
Details	View, create, edit
Letters	Add, view, edit, delete*
Notes	Add, view, edit, delete*
CMPTS	
Details	yes
Notes	yes
Reports	View only
Other	
My Tasks landing page shown	yes – Only providers and enforcement tabs shown
Can be added as Responsible Staff	yes - Only providers or enforcements
Can be a Team Member for surveys	no
Can be a QA Team Member for surveys	no

*Regardless of owner

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 state agency roles with privileges can only view related intakes. The CMSGU can view and edit all intakes.

Privileges:

Roles and Privileges Actions	Intake Admin
Providers	
Attachments	View Only
Details	View Only
Notes	View Only
S&C Reports	View Only
Intakes	
Allegations	Add, view, edit, delete
Attachments	Add, view, edit, delete*
Change Provider	Can reassign to a separate provider
Delete	yes
Details	View, create, edit
Forms	View, create, edit
Letters	Add, view, edit, delete*
Notes	Add, view, edit, delete*
Reports	View only
Other	
My Tasks landing page shown	yes – Only providers and intakes tabs shown
Can be added as Responsible Staff	yes - Only providers or intakes
Can be a Team Member for surveys	no
Can be a QA Team Member for surveys	no

*Regardless of owner

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:

Roles and Privileges Actions	Intake Capture
Providers	
Attachments	View Only
Details	View Only
Notes	View Only
S&C Reports	View Only
Intakes	
Allegations	Add, view, when Allegation Finds radio button is selected
Attachments	Add, view, edit, delete*
Change Provider	Can reassign to a separate provider
Details	View, create, edit
Letters	Add, view, edit
Notes	Add, view, edit, delete*
Reports	View only
Other	
My Tasks landing page shown	yes – Only providers and intakes tabs shown
Can be added as Responsible Staff	yes - Only providers or intakes
Can be a Team Member for surveys	no
Can be a QA Team Member for surveys	no
Top Navigation	Help only

*Can only delete own – not others

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:

Roles and Privileges Actions	Legal Department
Providers	
Attachments	View only
Details	View only
Letters	View only
Notes	View only
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
Reports	View only
Other	
My Tasks landing page shown	no
Can be added as Responsible Staff	no
Can be a Team Member for surveys	no
Can be a QA Team Member for surveys	no

*Regardless of owner

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:

Roles and Privileges Actions	Letters Administrator
Providers	
Attachments	View only
Details	View only
Letters	Add, view, edit, delete*
Notes	View only
S&C Reports	View only
Surveys	
Attachments	View only
Details	View only
FMS	View only when visible to the state
Letters	Add, view, edit, delete*
Notes	View only
Enforcements	
Attachments	View only
Details	View only
Letters	Add, view, edit, delete*
Notes	View only
Intakes	
Attachments	View only
Details	View only
Letters	Add, view, edit, delete*
Notes	View only
Letter Template Management	
Administration Menu	yes
Letter Templates	Add, view, edit, archive, including standardized letter templates*

Roles and Privileges Actions	Letters Administrator
Other	
My Tasks landing page shown	no
Can be added as Responsible Staff	no
Can be a Team Member for surveys	no
Can be a QA Team Member for surveys	no

*Regardless of owner

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:

Roles and Privileges Actions	Provider Administrator
Providers	
Attachments	Add, view, edit, delete*
Details	View, create, edit
Letters	View only
Notes	Add, view, edit, delete*
Reports	View only
Other	
My Tasks landing page shown	yes – Only providers tab shown
Can be added as Responsible Staff	yes - Only providers
Can be a Team Member for surveys	no
Can be a QA Team Member for surveys	no

*Regardless of owner

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:

Roles and Privileges Actions	State Agency Admin
Providers	
Attachments	Add, view, edit, delete**
Details	View, create, edit
Letters	Add, view, edit, delete*
Notes	Add, view, edit, delete**
Terminate a Medicaid Only provider	yes
Surveys	
Attachments	Add, view, edit, delete**
Delete	yes
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*
Notes	Add, view, edit, delete**
Intakes	
Attachments	Add, view, edit, delete**
Details	View, create, edit
Letters	Add, view, edit, delete*
Notes	Add, view, edit, delete**
Change Provider	Can reassign to a separate provider
Triage	View, create, edit

Roles and Privileges Actions	State Agency Admin
Enforcements	
Attachments	Add, view, edit, delete**
Details	View, create, edit
Letters	Add, view, edit, delete*
Notes	Add, view, edit, delete**
CMPTS	
Details	View only
Notes	Add, view, edit, delete**
Reports	View only
Letter Template Management	
Administration Menu	yes
Letter Templates	Add, view, edit, archive, including standardized letter templates*
Letters	Add, view, edit, delete*
Other	
My Tasks landing page shown	All tabs are shown
Can be added as Responsible Staff	Yes, for providers, surveys, intakes and enforcements
Can be a Team Member for surveys	yes
Can be a QA Team Member for surveys	yes

*Regardless of owner. There must be no citations added to delete a survey. FMS surveys cannot be deleted.

** Cannot edit or delete notes or attachments uploaded by another user

State Agency Assessment Coordinator

Description:

This role provides support for the state coordination of assessments and other supporting tasks that currently exist.

Privileges:

Roles and Privileges Actions	State Agency Assessment Coordinator
Patient Assessment	
Patient	Add, view
Assessment	View
State Selected Options	Edit
Prohibited Codes (ICD-10)	Add, view, remove
Payment Options	Add, edit, delete
State Section S Items	View, add, edit, delete/cancel
Additional Required Items	Add, remove
Providers	
Attachments	Add, view, edit, delete**
Details	View only
Letters	Archive*
Notes	Add, view, edit, delete**
Other	
Define/Manage PDPM parameters for state use	yes
Delete an assessment	no
Edit a user profile	yes
Generate and view reports	yes
Manage state-prohibited codes	yes
Merge/split OASIS or MDS records	yes
My Tasks landing page shown	no

*Regardless of owner

** Cannot edit or delete notes or attachments uploaded by another user

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:

Roles and Privileges Actions	Support Staff
Providers	
Attachments	Add, view, edit, delete**
Details	View only
Letters	Add, view, edit, delete*
Notes	Add, view, edit, delete**
Surveys	
Attachments	Add, view, edit, delete**
Details	View only
FMS	View only when visible to the state
Forms	Create, edit, and link to all forms
Letters	Add, view, edit, delete*
Notes	Add, view, edit, delete**
Intakes	
Attachments	Add, view, edit, delete**
Details	View only
Letters	Add, view, edit, delete*
Notes	Add, view, edit, delete**
Enforcements	
Attachments	Add, view, edit, delete**
Details	View only
Letters	Add, view, edit, delete*
Notes	Add, view, edit, delete**
Letter Template Management	
Administration Menu	yes
Letter Templates	Add, view, edit, archive, including standardized letter templates*
Letters	Add, view, edit, delete*

Roles and Privileges Actions	Support Staff
Other	
My Tasks landing page shown	All tabs are shown
Can be added as Responsible Staff	Yes, for providers, surveys, intakes and enforcements
Can be a Team Member for surveys	yes
Can be a QA Team Member for surveys	yes

*Regardless of owner

** Cannot edit or delete notes or attachments uploaded by another user

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:

Roles and Privileges Actions	Survey Admin
Providers	
Attachments	View Only
Details	View Only
Notes	View Only
S&C Reports	View Only
Surveys	
Attachments	Add, view, edit delete*
Citations	Add, delete*
Details	View, create, edit, delete (letters, survey, notes, attachments, forms)
Delete	yes**
FMS	View only when visible to the state
Forms	View, create, edit, and link to all forms
IDR	Edit
Letters	Add, view, edit delete*
Link to Forms	Create, edit, delete, and link to survey for all survey forms
Notes	Add, view, edit delete*
Intakes	
Allegations	Add, edit (until Substantiated/Unsubstantiated button is selected and saved)
Details	View, create, edit
Investigation Narrative	View, add, edit
Reports	View only

Roles and Privileges Actions	Survey Admin
Other	
My Tasks landing page shown	yes – Only survey and providers tabs shown
Can be added as Responsible Staff	yes - Only providers or surveys
Can be a Team Member for surveys	yes
Can be a QA Team Member for surveys	yes

*Regardless of owner

** Regardless of owner. There must be no citations added to delete a survey. FMS surveys cannot be deleted.

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:

Roles and Privileges Actions	Surveyor
Providers	
Attachments	View Only
Details	View Only
Forms	Add, edit
Notes	View Only
S&C Reports	View Only
Surveys	
Attachments	Add, view, edit, delete**
Citations	Add, view, edit, delete**
Details	View, edit***
Delete	no
FMS	View only when visible to the state
Forms	Create, edit
IDR	no
Letters	View only
Link to Forms	no
Notes	Add, view, edit delete**
Intakes	
Allegations	Add, edit (until Substantiated/Unsubstantiated button is selected and saved)
Attachments	View only
Investigation Narrative	Edit
Reports	View only

Roles and Privileges Actions	Surveyor
Other	
My Tasks landing page shown	yes – Only survey and providers tabs shown
Can be added as Responsible Staff	yes - Only surveys
Can be a Team Member for surveys	yes
Can be a QA Team Member for surveys	yes

*Regardless of owner

** Cannot edit or delete notes or attachments uploaded by another user

***Cannot edit survey dates, basic information, Responsible Staff, Teams and QA pages or edit the Plan of Correction

11. 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 following role is available for Contractor:

Contract Surveyor

Table 8: Contractor Permissions

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

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

12. 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 9: 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

13. 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 10: 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

14. iQAN User Roles and Privileges

iQAN user roles provide a limited role to view, manage, and create emails.

The following roles are available for the iQAN user role:

- **iQAN Provider User**

Note: The following users fall under the **iQAN Provider User**. All **Provider Users** have the same permissions, but can only manage information that is related to that provider type. For example, an **iQAN CLIA User** can only manage CLIA records.

- **iQAN CLIA User**
- **iQAN Nursing Home (NH) User**
- **iQAN ACC User**

- **iQAN Provider Admin**

Note: The following users fall under the **iQAN Provider Admin**. All **Provider Admins** have the same permissions, but can only manage information that is related to that provider type or any general use messages that were sent with the **General Use** template. For example, an **iQAN CLIA Admin** can only manage CLIA records, but can still also see any general user messages.

- **iQAN CLIA Admin**
- **iQAN Nursing Home (NH) Admin**
- **iQAN ACC Admin**

- **iQAN Admin**

- **State Agency iQAN User**

Note: The following users fall under the **State Agency iQAN User**. All users have the same permissions, but can only manage information that is related to that provider type. For example, a **State Agency iQAN CLIA User** can only manage CLIA records.

- **State Agency – iQAN CLIA User**
- **State Agency – iQAN NH User**
- **State Agency – iQAN ACC User**

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

Table 11: iQAN User Roles and Privileges

Roles and Privileges Actions	iQAN Provider User¹	iQAN Provider Admin²	iQAN Admin³	State Agency iQAN User⁴
Emails				
Compose an email	yes	yes	yes	no
Send an email	yes	yes	yes	no
Access email Information	no	yes	yes	no
Preview email that has been sent	no	yes	yes	no
Resend an email	no	yes	yes	no
Bulk resending of email	no	yes	yes	no
View a general recipient list	yes	yes	yes	no
View a provider-specific emails	yes	yes	yes	yes
View nonprovider-specific emails	no	no	yes	no
View system-specific emails	no	yes	yes	no
Recipient List				
Create a general recipient list	no	yes	yes	yes
Create a provider-specific recipient list	no	yes	yes	yes
Delete a general recipient list	no	yes	yes	no
Delete a provider-specific recipient list	no	yes	yes	no
Edit a general recipient list	no	no	yes	no
Edit a provider-specific recipient list	no	yes	yes	no
View a recipient list by provider type	yes	yes	yes	yes
Templates				
Activate a template	no	yes	yes	no

Roles and Privileges Actions	iQAN Provider User¹	iQAN Provider Admin²	iQAN Admin³	State Agency iQAN User⁴
Archive a template	no	yes	yes	no
Create a provider-specific template	no	yes	yes	no
Create a general template	no	no	yes	no
Delete a draft template	no	yes	yes	no
Duplicate a template	no	yes	yes	no
Edit a template	no	yes	yes	no
View an active template	yes	yes	yes	yes
View a system template	no	no	yes	yes

¹ **Provider Users** include: **iQAN CLIA User**, **iQAN Nursing Home (NH) User**, and **iQAN ACC User**. Permissions apply only for each provider area.

² **Provider Admins** include: **iQAN CLIA Admin**, **iQAN Nursing Home (NH) Admin**, and **iQAN ACC Admin**. Permissions apply only for each provider area.

³ **iQAN Admin** can view all provider types.

⁴ **State Agency iQAN Users** include: **State Agency iQAN CLIA User**, **State Agency iQAN NH User**, and **State Agency iQAN ACC User**. Permissions apply only for each provider area.

Appendix A: State Agency User Role Descriptions

State 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.