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Centers for Medicare & Services

Internet Quality Improvement Evaluation System (iQIES)

Roles Matrix

Version 2.0

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Table of Contents

Table of Contents	ii
List of Tables.....	ii
1. Overview	1
2. CMS	2
2.1 CMS Staff.....	2
2.2 CMS Support.....	4
3. CMS Contractors.....	6
4. Providers	7
5. State Agencies	8
6. Corporate and Third-Party Vendors	10
7. Appendix A: Record of Changes	11

List of Tables

Table 1: CMS Staff User Roles & Privileges	3
Table 2: CMS Support User Roles and Privileges	5
Table 3: CMS Contractor User Roles	6
Table 4: Provider User Roles	7
Table 5: State Agency User Roles	9
Table 6: Vendor User Roles	10
Table 7: Record of Changes	11

1. Overview

Welcome to iQIES! Once you've created your HCQIS Access Roles and Profile (HARP) account, the first thing you will need to do when you log into iQIES is to request a role. However, all organizations must have a Security Official role established to approve all other role requests, and it is recommended that your organization designate at least two security official roles.

The user role tables in the section below will help you determine which role best fits your needs and requirements. Each role's actions and permissions are highlighted to help you make your selection, and each table is organized with the role names in the columns and the permissions in the rows. If necessary, it is possible to request multiple user roles provided each role is in the same user category (ex. CMS, CMS Contractors, Providers, State Agencies, & Vendors). For example, a Security Official may also need to hold an additional General User role.

All users will have access to view their user profile, request roles, and access help content.

2. CMS

2.1 CMS Staff

CMS is responsible for ensuring that all providers/suppliers are in compliance with Federal regulations, which is met through survey, certification, enforcement, and emergency preparedness actions. CMS users have access to nationwide provider, survey, intake and enforcement data.

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

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

Table 1: CMS Staff User Roles & Privileges

Action	CMS View Only User	CMS General User	CMS Security Official
View Provider Information	Yes	Yes	No
View Patient Profiles	Yes	Yes	No
View Assessments	Yes	Yes	No
Add Patient/Resident	No	No	No
Merge/Split Assessments	No	No	No
Delete Assessments	No	No	No
Manage ICD-10 Code Exclusion	No	No	No
View Intakes	Yes	Yes	No
View Surveys	Yes	Yes	No
View Enforcements	Yes	Yes	No
Deemed Provider Approval	No	Yes	No
Add & Manage Provider Information	No	Yes	No
Add & Manage Intakes	No	Yes	No
Add & Manage Surveys	No	Yes	No
Add & Manage Enforcements	No	Yes	No
Generate & View Reports	Yes	Yes	No
iQIES Role Approval (in HARP)	No	No	Yes

2.2 CMS Support

CMS support will provide application assistance as it pertains to the Help Desk requests and inquiries.

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

- iQIES Help Desk
- IQIES Help Desk Production Control

Table 2: CMS Support User Roles and Privileges

Action	iQIES Help Desk	IQIES Help Desk Production Control
View Provider Information	Yes	Yes
View Patient Profiles	Yes	Yes
View Assessments	Yes	Yes
Add Patient/Resident	No	Yes
Merge/Split Assessments	No	Yes
Delete Assessments	No	Yes
Manage ICD-10 Code Exclusion	No	Yes
View Intakes	Yes	Yes
View Surveys	Yes	Yes
View Enforcements	Yes	Yes
Deemed Provider Approval	No	No
Add & Manage Provider Information	No	No
Add & Manage Intakes	No	No
Add & Manage Surveys	No	No
Add & Manage Enforcements	No	No
Generate & View Reports	Yes	Yes
iQIES Role Approval (in HARP)	No	No

3. CMS Contractors

CMS Contractors are a Medicare Administrative Contractor (MAC) for a private health care insurer that has been awarded a geographic jurisdiction to process Medicare Part A and Part B (A/B) medical claims or Durable Medical Equipment (DME) claims for Medicare Fee-For-Service (FFS) beneficiaries. CMS relies on a network of MACs to serve as the primary operational contact between the Medicare FFS program and the health care providers enrolled in the program. MACs are multi-state, regional contractors responsible for administering both Medicare Part A and Medicare Part B claims.

Table 3: CMS Contractor User Roles

Action	CMS Contractor MAC User	CMS Contractor MAC Security Official
Generate & View IRF Administrative Reports	Yes	No
MAC User Approvals (in HARP)	No	Yes

4. Providers

Providers are organizations, agencies, and facilities that provide healthcare services.

The following roles are available for Providers:

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

Refer to the Table 3: Provider User Roles for the Action each user role can perform.

Note: Assessment Submitter user role can NOT Create, Modify/Inactivate Assessments within the iQIES Assessment User Tool. Provider Assessment Coordinator CAN Create, Modify/Inactivate Assessments within the iQIES Assessment User Tool.

Table 4: Provider User Roles

Action	Assessment Submitter	Provider Administrator	Provider Assessment Coordinator	Provider Assessment Viewer	Provider Security Official
View Assessments	No	Yes	Yes	Yes	Yes
View Patient Profiles	No	Yes	Yes	Yes	Yes
Create & Manage Patient Profiles	No	Yes	Yes	No	Yes
Upload Assessments	Yes	No	No	No	Yes
Create Assessments	No	Yes	Yes	No	Yes
Modify/Inactivate Assessments	No	Yes	No	No	Yes
Generate & View Reports	Yes	Yes	Yes	Yes	Yes
iQIES Role Approval (in HARP)	No	No	No	No	Yes

5. State Agencies

State agencies provide 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 Security Official
- State Agency General User

Refer to the Table 4: State Agency User Roles for the Action each user role can perform.

Note: State Agency General User role CAN add/manage role-specific information within their state(s) and READ-ONLY ACCESS to provider information, surveys, and enforcements outside of their state(s).

Table 5: State Agency User Roles

Action	State Agency Assessment Coordinator	State Agency General User	State Agency Security Official
View Assessments	Yes	No	No
View Patient Profiles	Yes	No	No
Manage ICD-10 Code Exclusions	Yes	No	No
Add Patient/Resident	Yes	No	No
Merge/Split Assessments	Yes	No	No
Delete Assessments	No	No	No
Add & Manage Providers	No	Yes	No
Add & Manage Intakes	No	Yes	No
Add & Manage Surveys	No	Yes	No
Add & Manage Enforcements	No	Yes	No
Find a Provider	No	Yes	No
Generate & View Reports	Yes	Yes	No
iQIES Role Approval (in HARP)	No	No	Yes

6. Corporate and Third-Party Vendors

Vendors are third party data and assessment submitters on behalf of providers and their roles are approved by the provider's Security Official.

The following role is available for Vendors:

- Assessment Submitter

Note: Assessment Submitter role can ONLY upload assessments.

Table 6: Vendor User Roles

Action	Assessment Submitter
View Assessments	No
View Patient Profiles	No
Create & Manage Patient Profiles	No
Upload Assessments	Yes
Create Assessments	No
Modify/Inactivate Assessments	No
Generate & View Reports	Yes

7. Appendix A: Record of Changes

Table 7: Record of Changes

Version Number	Date	Author/Owner	Description of Change
1.0	04/17/2020	CMS	Baseline document
2.0	06/01/2021	CMS	Role Modification

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