

WEBINAR | SEP 15, 2022

**simple.**  
a Netsmart solution

# Unlocking iQIES

What you need to know  
about the new iQIES  
system from CMS



 **Netsmart**

# Your Speakers



**Jason Jones**  
*VP and General Manager,  
Simple Solutions*



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*Client Alignment Executive,  
Simple Solutions*



**Corey Pauley**  
*Sr. Director, Engineering,  
Simple Solutions*

# Poll #1



How familiar are you with the new iQIES system?



How prepared is your organization for the transition to iQIES?

# What is iQIES?

iQIES is an internet-based system that will be used for **all submissions and communications to and from CMS**

- This includes MDS submissions, surveys, and certifications

The official iQIES manuals from CMS can be found by visiting:

<https://qtso.cms.gov/software/iqies/reference-manuals>

# Timeline

- CMS is transitioning to iQIES in **early 2023**
- Impacts **MDS Transmission, Patient Assessments, and CASPER reports**

- Registration is now open for all regions
- No official start date yet but CMS confirmed that it will be sometime in early 2023

# Why the change?

- Increased Federal Security Mandates
  - Remote Identify Proofing
  - Secure identity management provided by CMS through HARP
- CMS wants to know who is accessing PHI information
- CMS wants to know what PHI they are accessing
- CMS wants to know who the Provider Security Official (PSO) will be in your organization

# Creating your PSO Account (HARP)

Follow these steps to register your Provider Security Official (PSO):

1. Identify at least one individual who will be the Provider Security Official (PSO).

2. Each individual will need to register for iQIES login credentials by creating an account in the HARP system at: <https://harp.cms.gov/register>

3. Set up MFA (Multi-Factor Authentication) for your account and complete the Identify Proofing process.

# Creating your PSO Account (HARP)

CMS.gov | HARP

© Help Login

CMS.gov | HARP  
HCQIS Access Roles and Profile

### Login

Enter your HARP, EIDM, or EUA credentials to log into HARP.

User ID \*

Password \*

Having trouble logging in?

By logging in, you agree to the [Terms & Conditions](#)

Login

OR

CMS EUA PIV Card

Don't have an account? [Sign Up](#)

See all applications that use HARP

Training Videos

Help



# Creating your PSO Account (HARP)

CMS.gov | HARP Help Login

## Create an Account

HCQIS Access Roles and Profile

1 Profile Information    2 Account Information    3 Remote Proofing    4 Confirmation

### Profile Information

Enter your profile information for identity proofing. HARP uses Experian to help verify your identity. Already called Experian? Enter Reference Number

Want to retry a previously failed registration attempt? [Retry Remote Proofing](#)

All fields marked with an asterisk (\*) are required.

Legal First Name *	Legal Last Name *
<input type="text"/>	<input type="text"/>
Middle Name	Date of Birth *
<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>
Email Address *	Confirm Email Address *
<input type="text"/>	<input type="text"/>
Personal Phone Number	Is your address in the United States? *
<input type="text" value="( ) - -"/>	<input type="button" value="Yes"/> <input type="button" value="No"/>
Home Address Line 1 *	Home Address Line 2
<input type="text"/>	<input type="text"/>
City *	State *
<input type="text"/>	<input type="text"/>
Zip Code *	Zip Code Extension
<input type="text"/>	<input type="text"/>
Social Security Number *	
<input type="text"/>	

Don't want to enter your SSN? [Initiate Manual Proofing](#)

By registering for HARP, you agree to the [Terms & Conditions](#)

[Next →](#)

# Creating your PSO Account (HARP)

## New Security Measures

- Requires Multi-Factor Authentication (MFA)
- Identity Proofing through Experian
- Series of credit background checks
- Once a HARP account is created you can proceed to iQIES to request a role

# Creating your PSO Account (iQIES)

1. Access iQIES using your HARP ID and password: <https://iqies.cms.gov/>

2. Initiate your Provider Security Official (PSO) role request using your provider CCN.

3. Once your request has been submitted AND approved, you will receive an email notification. At this point, you will have authority to approve/deny requests for iQIES access and role types.

# Creating your PSO Account (iQIES)

**iQIES**

Welcome to iQIES

Essential accessibility and connectivity for health care professionals.

### Two-Factor Authentication

Select a device to verify your account.  
All required fields are marked with an asterisk (\*)

**Device \***

Select one

[Send Code](#) [Cancel](#)

Don't have your device handy? [Add New Device](#)

HCQIS Access Roles and Profile (HARP) is a secure identity management portal provided by the Centers for Medicare & Medicaid Services (CMS).  
For security, account registration and credential management are processed through HARP.

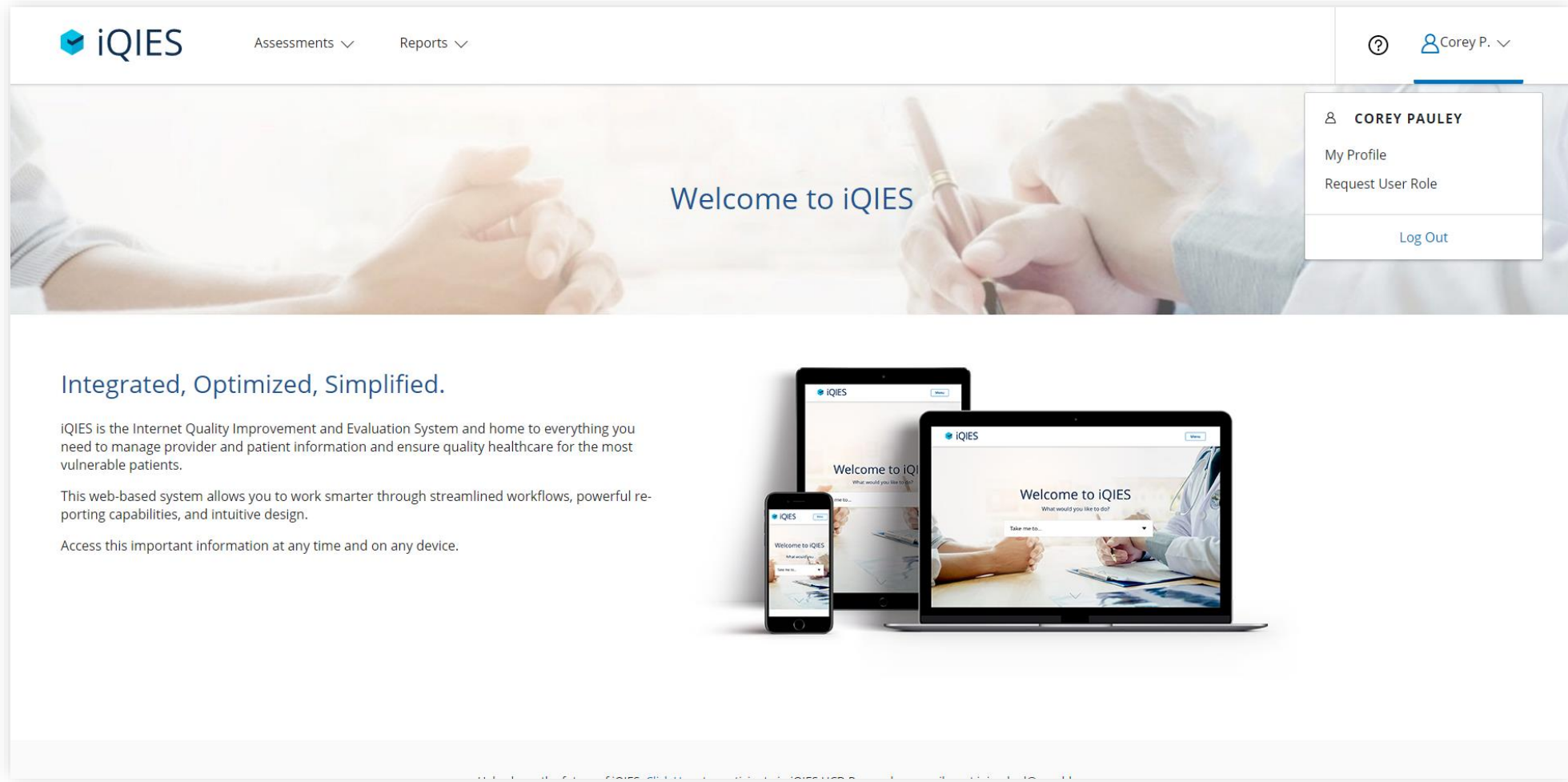
Help shape the future of iQIES. [Click Here](#) to participate in iQIES HCD Research or email us at [iqies\\_hcd@cms.hhs.gov](mailto:iqies_hcd@cms.hhs.gov).

**View Resources**  
iQIES Technical Support Office  
Known Issues

**Get Help**  
CCSQ Support Central  
Help


**Stay Connected**  
Twitter icon  
YouTube icon

# Creating your PSO Account (iQIES)



The screenshot displays the iQIES web application interface. At the top left, the iQIES logo is visible, followed by navigation links for "Assessments" and "Reports". On the top right, a user profile dropdown menu is open, showing the user's name "COREY PAULEY" and options for "My Profile", "Request User Role", and "Log Out". The main content area features a large banner image of hands shaking over a document, with the text "Welcome to iQIES" overlaid. Below the banner, the text "Integrated, Optimized, Simplified." is followed by a description of the system: "iQIES is the Internet Quality Improvement and Evaluation System and home to everything you need to manage provider and patient information and ensure quality healthcare for the most vulnerable patients. This web-based system allows you to work smarter through streamlined workflows, powerful reporting capabilities, and intuitive design. Access this important information at any time and on any device." To the right of the text, three devices (a smartphone, a tablet, and a laptop) are shown displaying the iQIES interface, demonstrating its responsive design.

# Creating your PSO Account (iQIES)

 Assessments ▾ Reports ▾ ? Corey P. ▾

[Home](#) / [My Profile](#) / [Access Request Form](#)

## STEP 1


### Select a User Category

Select the category of your organization to begin the role request process.

- Accrediting Organization**  
Administration and survey of deemed healthcare providers.
- CMS**  
iQIES Administration for User Security Support for Patient Assessments and or Survey and Certification.
- CMS Contractor**  
CMS Contractors, Medicare Administrative Contractors, Medicare Administrative Contractor Security Official
- Provider**  
Healthcare organizations, agencies, and services.
- State Agency**  
State-level administration for Survey and Certification activities and Patient Assessments Management activities.
- Vendor**  
Data and assessment submitters on behalf of providers.

[Next](#) [Cancel](#)

# Creating your PSO Account (iQIES)

 Assessments ▾ Reports ▾ ? Corey P. ▾

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## STEP 2


### Select a User Role

Select the user role that best fits your needs.

- Assessment Submitter**  
Upload and submit patient assessments; generate and view reports
- Provider Administrator**  
Create and manage patient profiles; create, manage, submit, modify, and inactivate patient assessments; generate and view reports
- Provider Assessment Coordinator**  
Create and manage patient profiles and assessments within iQIES; create, manage, and submit patient assessments; generate and view reports
- Provider Assessment Viewer**  
View patient profiles and their assessments; generate and view reports. (Warning: Cannot upload patient assessments)
- Provider Security Official**  
Approve iQIES user accounts; upload, create, manage, and submit patient assessments; create and manage patient profiles; generate and view reports

[Next](#) [Previous](#)

# Creating your PSO Account (iQIES)

 Assessments ▾ Reports ▾ ? Corey P. ▾

Home / My Profile / Access Request Form

## STEP 3 Add Organizations

Add providers for the Provider Security Official role by entering their CCN or Facility ID.

**Search By** Search for

Select whether to search by CCN or Facility ID

Provider	Provider Type	CCN	Facility ID
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[Previous](#)

For multi facility organizations, the PSO can request access to multiple nursing facilities by adding all CCN#'s in Step 3



# Deadlines by Region

Region	States per Region	Registration Deadline
1 and 2	Region 1: CT, ME, MA, NH, RI, VT Region 2: NJ, NY, PR, VI	Aug 26 - 2022
3, 9, and 10	Region 3: DE, DC, MD, PA, VA, WV Region 9: AZ, CA, HI, NV, Pacific Territories Region 10: AK, ID, OR, WA	Sep 9 - 2022
4	Region 4: AL, FL, GA, KY, MS, NC, SC, TN	Sep 23 - 2022
6	Region 6: AR, LA, NM, OK, TX	Oct 7 - 2022
5	Region 5: IL, IN, MI, MN, OH, WI	Oct 28-2022
7 and 8	Region 7: IA, KS, MO, NE Region 8: CO, MT, ND, SD, UT, WY	Nov 11 - 2022

**Your facility must establish a PSO by the listed deadlines**

# Poll #2



Is your data vendor ready for the switch to iQIES?

# SimpleLTC Authorization

Simple will also need to be established as a PSO under your provider CCNs.

- The day of the deadline, you will receive a request for a PSO role coming from Jason Jones, our Chief Privacy Officer.
- The PSO role is required for Simple to retain the same level of access that we have today with CMS (Transmission, Final Validations, & Reporting).
- If you haven't established a PSO by that time, our request will make Simple the first PSO for your organization. In that case, we will work together to ensure you have another PSO established. You can still register your PSOs using the standard process at any time following the deadline.

# Unknowns

- What will happen to the old CASPER access?
- We don't know exactly what MDS submissions will look like.
- Simple has been submitting Oasis for Home Health under iQIES for a while, and the transition was a little bumpy.
- We are waiting for updates on PBJ and when the transition will occur for PBJ transmissions.

# Removing Users & Additional Security Considerations

- How will your organization manage PSO access in the case of turnover?
- We recommend more than 1 PSO during the initial setup
- No account sharing
- Remote access verification prevents this
- PSO should manage additional Third-Party Access

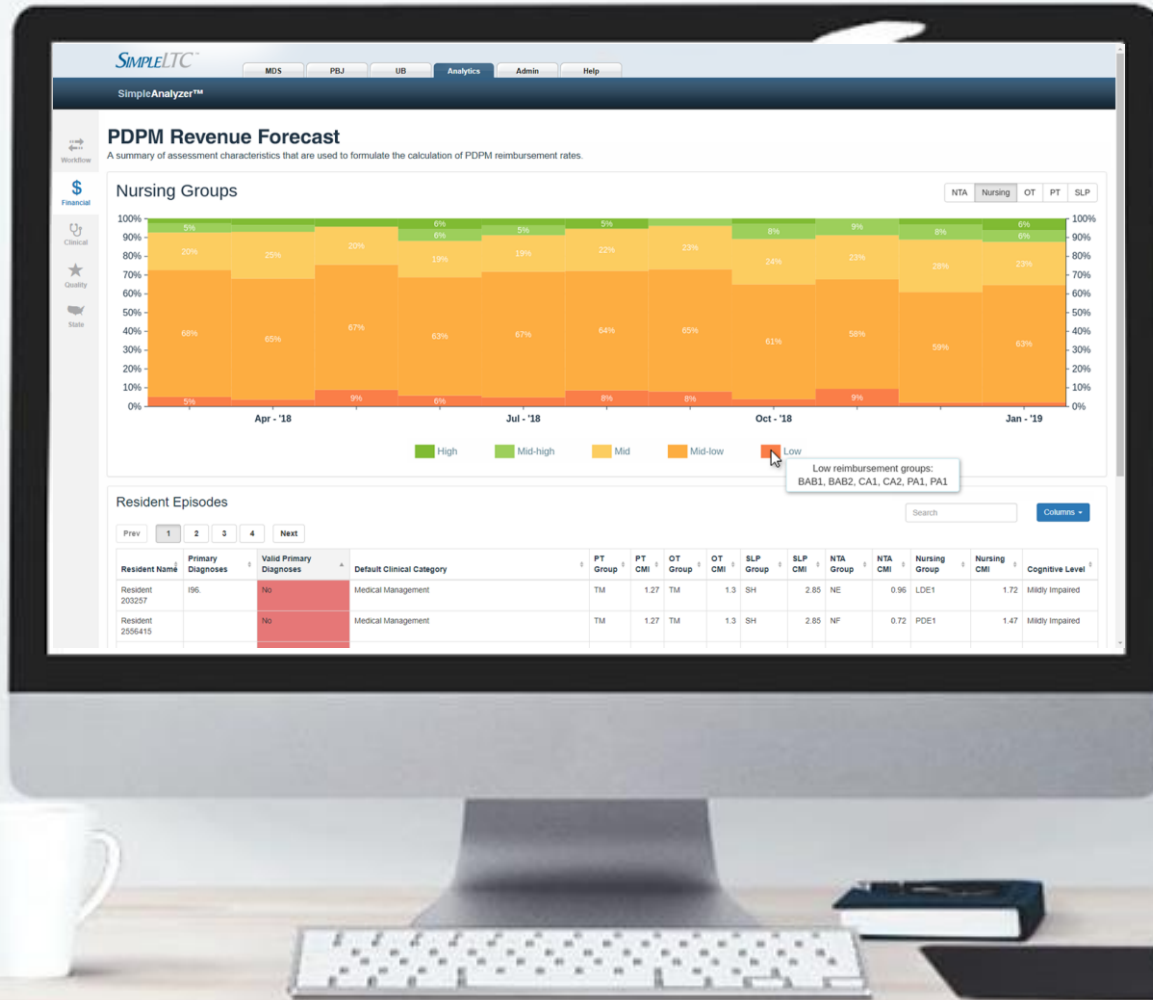
# Additional CMS iQIES Resources & Training

[Creating a HARP Account Training Videos](#)

[iQIES Reference and Manuals Page](#)

[iQIES Training Videos Page](#)

[iQIES News & Updates Page](#)



# Compliance, automation, and iQIES connectivity



SimpleAnalyzer™



SimpleConnect™

- Automated CMS transmission
- Pre-transmission scrubbing
- Real-time Quality Metrics
- PDPM performance tools
- Five-Star insights

# Questions?

Thank you for attending!

[Recording and slides available here](#)

