

Health Insurance Oversight System

Health Insurance Oversight User

Quick Reference Guide

To access the Health Insurance Oversight System (HIOS), users will need to go through the CMS Enterprise Portal and register for a CMS IDM account. IDM is the acronym for CMS' Identity Management system which includes Identity Management, Access Management, Authorization Assistance Workflow Tools, and Identity Lifecycle Management functions (i.e., Password Reset, Forgot User ID, etc.). IDM handles the identity verification of users trying to request access to CMS systems. A CMS IDM account ensures that only authorized/registered users can access protected information and systems through the CMS Enterprise Portal. This guide provides detailed steps on how users register for a CMS IDM account and request access to HIOS.

New users are required to complete the Remote Identity Proofing (RIDP) process as well as Multi-Factor Authentication (MFA). As part of the RIDP process, users will be required to answer questions related to their personal information. Users will also be prompted to complete the MFA registration process, which requires users to provide more than one form of verification in order to access the CMS Enterprise Portal. Once an MFA device is registered for their account, users must use this device to log into the CMS Enterprise Portal.

NOTE: If you encounter any issues with your account or MFA device registration, please contact the Marketplace Service Desk at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.

1 Create a CMS Enterprise Portal Account (For New Users)

Important Information

- If you are an existing HIOS user with a CMS Enterprise Portal Account skip to section 6.
- Users that are not registered in HIOS will need to create an Enterprise Portal account by completing sections 1-5.

To create a CMS Enterprise Portal Account:

1. Navigate to CMS Enterprise Portal at <https://portal.cms.gov>.
2. Select the **New User Registration** button located at the bottom of the screen (Figure 1).

Figure 1: CMS Enterprise Portal New User Registration

CMS.gov | Enterprise Portal

Applications Help About

Login Login with PIV Card

CMS.gov | Enterprise Portal

User ID is a required field

Password is a required field

☒ I agree to the Terms & Conditions

Login

Forgot your User ID or your Password?
Need to [unlock](#) your account?

New User Registration

How can I help you?

3. Step #1: Select Your Application - Select **HIOS** from the drop-down menu on (Figure 2).

Figure 2: Select HIOS Application

CMS.gov | Enterprise Portal

Applications Help About

Step #1: Select Your Application

Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.

Select Your Application

HETS Collaboration Tools (JIRA/Confluence)

HICS

HIOS

Host Access Transformation Services (HATS)

IC-Innovation Center

IDM Reports

4. Select **I agree to the Terms and Conditions** check box, then select Next (Figure 3).

Figure 3: Agree to Terms & Conditions

CMS.gov | Enterprise Portal

Applications Help About

Step #1: Select Your Application

Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.

HIOS

Application Description: Health Insurance Oversight System. The Health Insurance Oversight System is the federal government's primary data collection vehicle for regulated health insurance companies. It is used to register companies and their products, obtain identification numbers and report medical loss ratio and other company data. Additionally, HIOS is used for reporting by States and assister organizations for PPACA grant activities.

Terms & Conditions

OMB No.0938-1236 | Expiration Date: 08/31/2025 | Paperwork Reduction Act

Consent to Monitoring

By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We encourage you to read the [HHS Rules of Behavior](#).

[Protecting Your Privacy](#)

☒ I agree to the Terms and Conditions

Next Cancel

How can I help you?

5. Step #2: Register Your Information – **Complete the form** with your personal information and select **Next** (Figure 4).

Figure 4: Register Your Information

CMS.gov | Enterprise Portal

Applications Help About

Step #2: Register Your Information

Step 2 of 3 - Please enter your personal and contact information.

All fields are required unless marked (optional).

Enter First Name Enter Middle Name (optional) Enter Last Name Suffix (optional)

Select Birth Month Select Birth Date Select Birth Year

Is Your Home Address U.S. Based?

☒ Yes ☐ No

Enter Home Address Line 1 Enter Home Address 2 (optional)

Enter City Select State Enter ZIP Code Enter ZIP+4 Code (optional)

Enter Email Address Confirm Email Address

Enter Phone Number

Back Next Cancel

How can I help you?

6. Step #3: Create User ID, Password & Security Question/Answer- **Complete the user information** and select **Next** (Figure 5).

Figure 5: Create User ID & Password

Step #3: Create User ID, Password & Security Question/Answer

Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer.

Enter User ID

Enter Password

Confirm Password

Security answer to be used in case you forget your password or you need to unlock your account.

Select Your Security Question

Enter Security Answer

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

7. Review the Registration Summary Page and **ensure all the information is correct**. Select **Submit User** (Figure 6).
 - An email will be sent from donotreply@cms.gov acknowledging successful registration. This email will contain your Identity Management System (IDM) **User ID** necessary for Multi-Factor Authentication (Figure 7).

Figure 6: Registration Summary

CMS.gov Enterprise Portal Applications Help About E-Mail Alerts

Registration Summary

Please review your information and make any necessary changes before submitting.

HHS/TFE: Health Insurance Oversight System

All fields are required unless marked 'Optional'.

First Name: test

Enter Middle Name (optional)

Last Name: test

Suffix(optional): IV

Enter Social Security Number (optional)

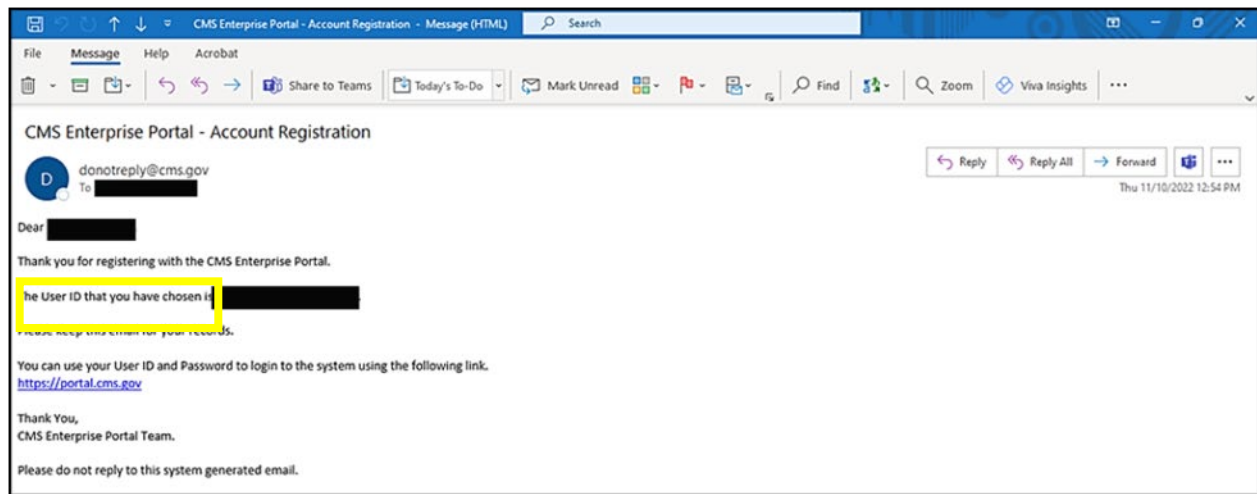
Birth Month: May

Birth Date: 31

Birth Year: 1990

Home Address #1

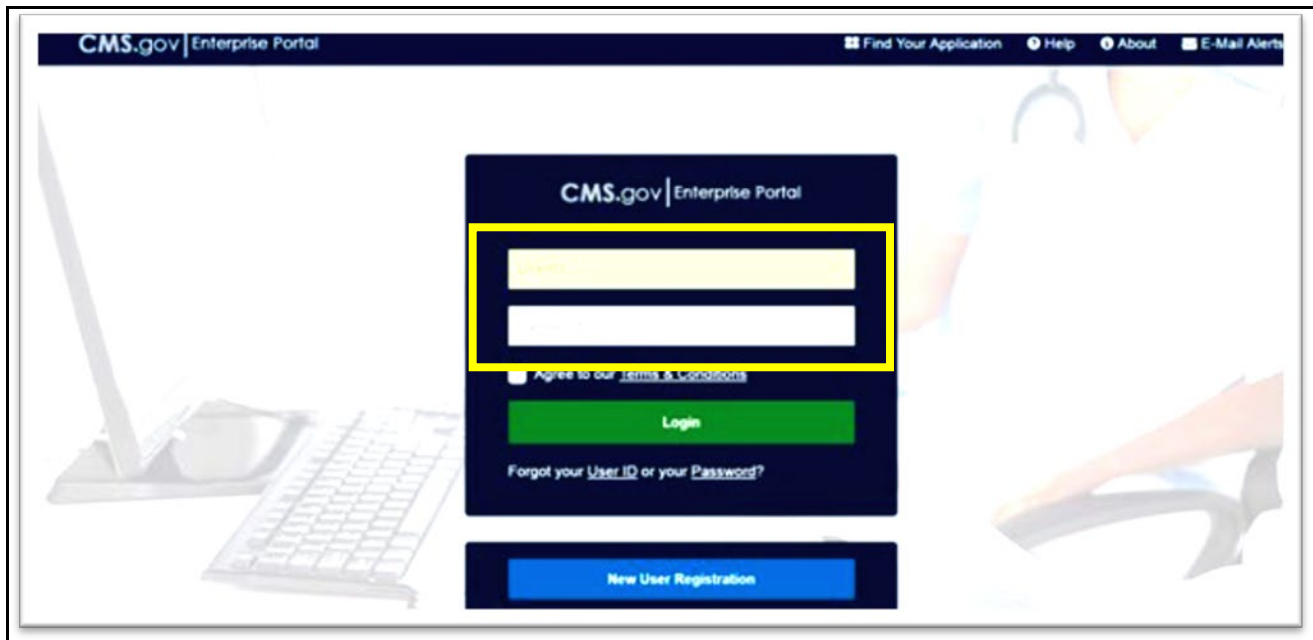
Figure 7: Account Registration Email



2 Register a Multi-Factor Authentication Device (For New Users)

1. After you receive the email with your User ID, return to the CMS Enterprise Portal at <https://portal.cms.gov/> and login with your User ID and password (Figure 8).

Figure 8: CMS Enterprise Portal Login Page



2. First-time users will be prompted to register a multi-factor authentication (MFA) device. Select an option from the drop-down menu. **Enter your preferred option and select Send MFA Code** (Figure 9).
 - The preferred option would be text or email. You may revisit this step in the future to register multiple devices.
 - The code should be sent to your device within a couple of minutes.
 - For further details about setting up your MFA device, consult the **Enterprise Portal User Guide**.

Figure 9: Register a Multi-Factor Device


Register Multi-Factor Authentication (MFA) Device

Adding a MFA Code to your login, also known as Multi-Factor Authentication (MFA), can make your login more secure by providing an extra layer of protection to your User ID and Password.

Select the MFA device type that you want to use to login

Please note that you are only allowed two attempts to register your MFA device. If you are unable to register your MFA device within two attempts please log out, then log back in to try again.

Text Message (SMS) ▼

 **Text Message (SMS)**

The SMS option will send your MFA Code directly to your mobile device via a text message. This option requires you to provide a ten (10) digits U.S. phone number for a mobile device that is capable of receiving text messages. Carrier service charges may apply for this option.

Enter Phone Number

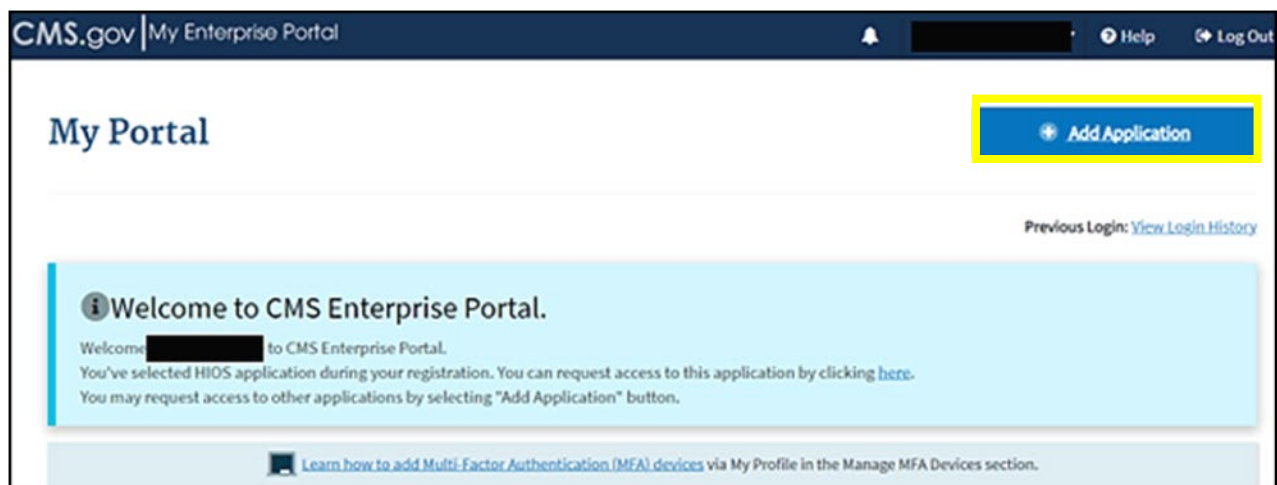
Send MFA Code Cancel

For more details about setting up your MFA device, consult the **Enterprise Portal User Guide**.

3 HIOS Access

1. After you create your CMS Enterprise Portal Account and set-up your MFA device, return to <https://portal.cms.gov/>. Upon login, you will see your My Portal homepage. Select **Add Application** in the upper right corner (Figure 10).

Figure 10: My Portal Home Page – Add Application



2. On the Request Application Access screen, select **HIOS** from the **Select an Application** drop-down, then select **Next** (Figure 11).

Figure 11: HIOS Application Access

CMS.gov | My Enterprise Portal

My Apps

Help Log Out

Request Application Access

The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access.

You can review your current roles and pending role requests in [My Access](#).

1 Select an Application

Application

HIOS

Application Description: Health Insurance Oversight System. The Health Insurance Oversight System is the federal government's primary data collection vehicle for regulated health insurance companies. It is used to register companies and their products, obtain Identification numbers and report medical loss ratio and other company data. Additionally, HIOS is used for reporting by States and assister organizations for PPACA grant activities.

Help Desk Information

Next

3. Select **HIOS User** in the **Select a Role** drop-down, then select **Next** (Figure 12).

Figure 12: Select the HIOS User Role

CMS.gov | My Enterprise Portal

My Apps

Help Log Out

Request Application Access

The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access.

You can review your current roles and pending role requests in [My Access](#).

1 Select an Application ✓ Completed Edit

✓ HIOS

2 Select a Role

Role

HIOS User

Role Description: HIOS User

Next

4. Select **Launch** to begin the process of completing identity verification (Figure 13).

Figure 13: Begin Identity Verification

The screenshot shows the CMS.gov My Enterprise Portal interface. At the top, there's a navigation bar with 'CMS.gov | My Enterprise Portal', 'My Apps', a user profile for 'Anna Coppedge', and links for 'Help' and 'Log Out'. The main content area displays a progress bar with five steps: 1. HIOS (completed with a green checkmark), 2. Select a Role (completed with a green checkmark), 3. Complete Identity Verification (active step), 4. Enter Role Details, and 5. Enter Reason for Request. Under step 3, there's a sub-step '1 Identity Verification' with a light blue background and text explaining that additional verification is required. A blue 'Launch' button is highlighted with a yellow border. A 'Top' button is visible in the bottom right corner.

4 Identity Verification

1. Step #1: Identity Verification Overview - After you select Launch, select **Next** (Figure 14).

Figure 14: Step # 1 - Identity Verification Overview

The screenshot shows the 'Step #1: Identity Verification Overview' page. The title is in a large, bold, dark blue font. Below the title, there's a paragraph explaining that to protect privacy, identity verification must be completed before requesting access. It lists three items to keep in mind: 1. Ensure correct entry of personal information (name, address, phone, birth date, email). 2. Identity verification involves Experian using credit report information, which may result in a 'soft inquiry' on the credit report. 3. Access to personal and credit report information may be required for the Experian application. A link to the Experian Consumer Assistance website is provided. At the bottom, there's a paragraph stating that if proceeding now, a Terms and Conditions statement will be prompted, and selecting 'Next' will continue the process. Two buttons are at the bottom: a green 'Next' button highlighted with a yellow border, and a blue 'Cancel' button.

2. Step #2: Accept Terms and Conditions - Check **I agree to Terms & Conditions** box and select **Next** (Figure 15).

Figure 15: Step #2 - Accept Terms & Conditions

Step #2: Accept Terms & Conditions

OMB No. 0938-1236 | Expiration Date: 08/31/2025 | [Paperwork Reduction Act](#)

Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#), which describes how we use the information you provide.

Personal information is described as data that is unique to an individual, such as a name, address, telephone number, Social Security Number, and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal information to verify your identity. Your information will be disclosed to Experian, an external authentication service provider, to help us verify your identity. If collected, we will validate your Social Security Number with Experian only for the purposes of verifying your identity. Experian verifies the information you give us against their records. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

HHS Rules of Behavior

We encourage you to read the [HHS Rules of Behavior](#), which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.

☒ I agree to the Terms & Conditions

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

3. **Complete the form** to verify your identity and then select **Next** (Figure 16).
 - The Social Security Number (SSN) is the primary piece of information that is required.

Figure 16: Step #3 - Enter Your Information

Step #3: Enter Your Information

Enter your legal first name and last name, as it may be required for Identity Verification.
All fields are required unless marked [optional].

First Name [Redacted] Middle Name [optional] [Redacted] Last Name [Redacted] Suffix [optional] [Redacted]

Enter Social Security Number [Redacted] Birth Month [Redacted] Birth Date [Redacted] Birth Year [Redacted]

Required field:

Is Your Address US Based?
☒ Yes ☐ No

Home Address Line 1 [Redacted] Home Address Line 2 [optional] [Redacted]

City [Redacted] State [Redacted] ZIP Code [Redacted] ZIP+4 Code [optional] [Redacted]

Phone Number [Redacted]

4. Step #4: Verify Your Identity - Complete **the identity verification questions** and select **Next**. Select **Next** on the Confirmation screen (Figure 17).
 - Examples of the identity verification questions include the dates you lived at an address, worked at a job, or opened a credit card.
 - **Entering this information will not impact your credit score.**

Figure 17: Identity Verification Confirmation



5 Enter Role Details

1. Upon completion of the identity verification, you will be returned to the Request Application Access screen. In the Enter Role Details section, **select Address location type** from the drop-down menu (Figure 18).

Figure 18: Enter Role Details

The screenshot shows the 'Enter Role Details' section of the CMS.gov My Enterprise Portal. The page has a dark blue header with 'CMS.gov My Enterprise Portal', 'My Apps', a notification bell, a user profile icon, 'Help', and 'Log Out'. The main content area shows a progress bar with three steps: '2 Select a Role' (Completed), '3 Complete Identity Verification' (Completed), and '4 Enter Role Details' (Current step). Under '4 Enter Role Details', there's a note 'All fields are required unless marked (optional)'. Below this, there's a dropdown menu labeled 'Select Address location type' which is highlighted with a yellow border. To the right of the dropdown is a text box with the prompt 'Select Address type of US or Non-US based on your current address'. At the bottom right, a blue 'Next' button is highlighted with a yellow border.

2. **Complete the form** and select **Next** (Figure 19).

Figure 19: Role Details Address Information

The screenshot shows the CMS.gov My Enterprise Portal interface. At the top, there is a navigation bar with the CMS.gov logo, 'My Enterprise Portal', and links for 'My Apps', 'Help', and 'Log Out'. Below the navigation bar, the form is titled 'Role Details Address Information'. The form contains several input fields: 'Enter Email Address', 'Enter Address 1', 'Address 2 (optional)', 'Enter City', 'Enter State/Territory', 'Enter Zip Code', 'Zip Code Extension (optional)', 'Select Title (optional)', 'Select Suffix (optional)', 'Enter Phone Number', and 'Phone Ext (optional)'. A blue 'Next' button is located at the bottom right of the form, and a 'Top' button is also visible.

3. Fill-in the reason you need access within the **Enter Reason for Request** box and select **Submit** (Figure 20).
 - For example, "I need to submit my data in the RxDC HIOS module."

Figure 20: Enter Reason for Request

The screenshot shows the 'Enter Reason for Request' form. The form has a title 'Enter Reason for Request' and a large text area for entering the reason. Below the text area, there is a red error message that says 'Required field.' At the bottom right of the form, there is a green 'Submit' button and a 'Cancel' button. A 'Top' button is also visible.

4. When the pop-up confirmation message appears, select **OK**.
5. When the Request New Application Access Acknowledgement message appears, select **OK** again.

6 HIOS Home Page

Important Information

- Both new and existing HIOS users will follow the steps in this section to access HIOS once they have a CMS Enterprise Portal account.

To Access the HIOS Home Page:

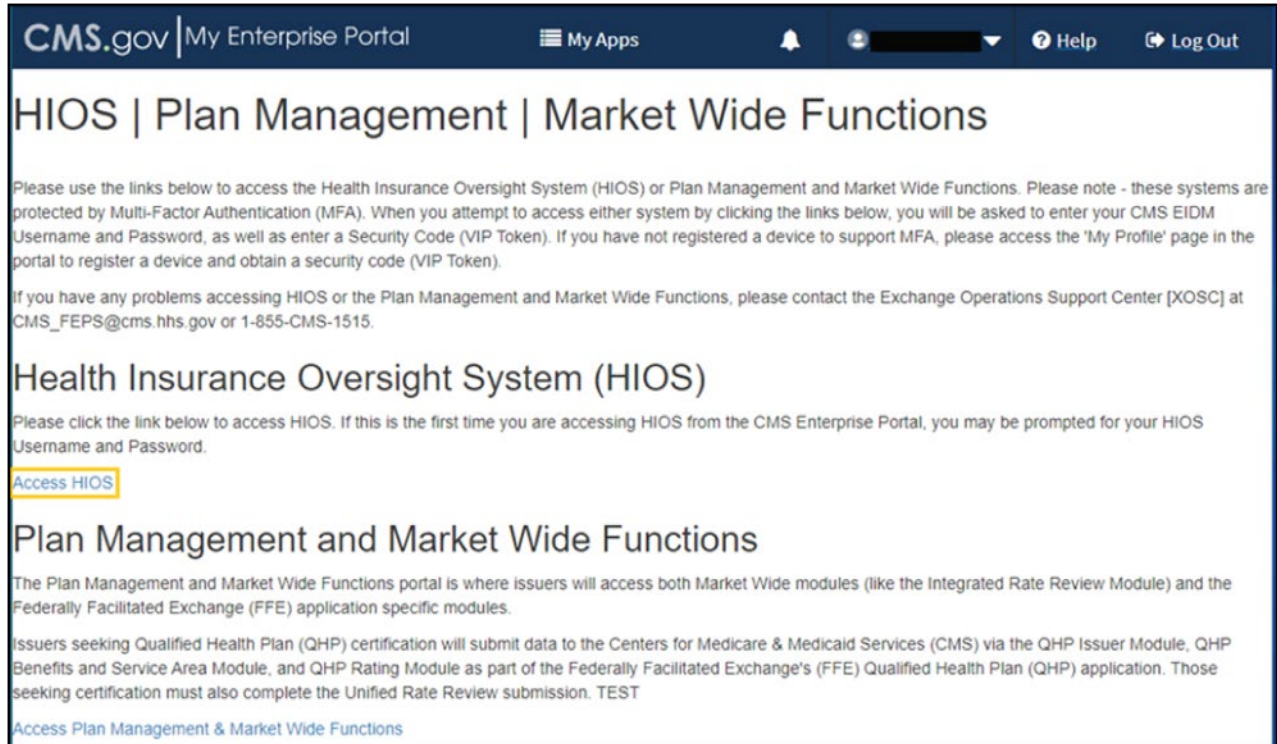
1. After requesting the HIOS application, **log-out of CMS Enterprise Portal and then login again**. On the My Portal homepage, the HIOS application will display. Select **HIOS**, then select **Overview** (Figure 21).

Figure 21: My Portal Page with HIOS Application



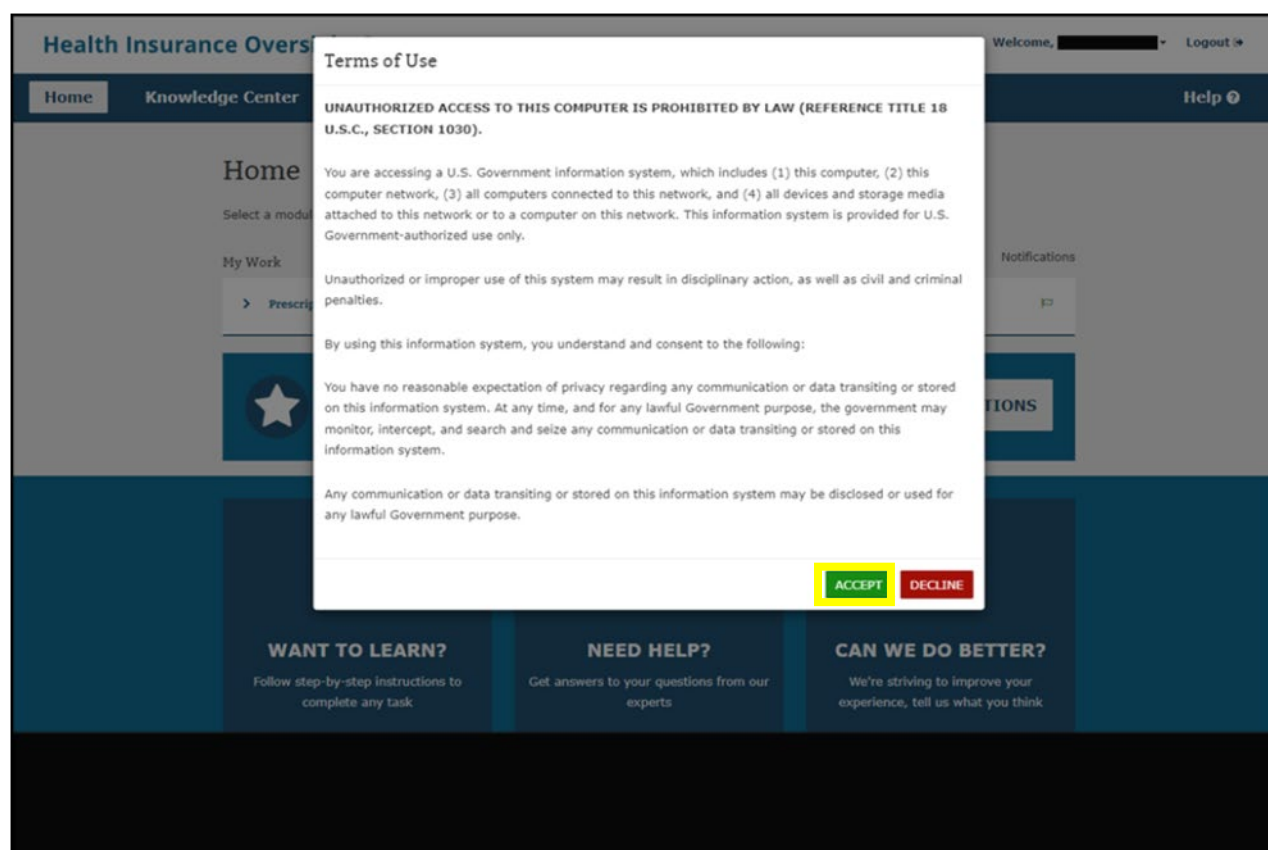
2. Select **Access HIOS** (Figure 22).

Figure 22: Access HIOS Page



3. Read the Terms of Use and select **Accept** (Figure 23).

Figure 23: HIOS Terms of Use



7 Request HIOS Module Roles

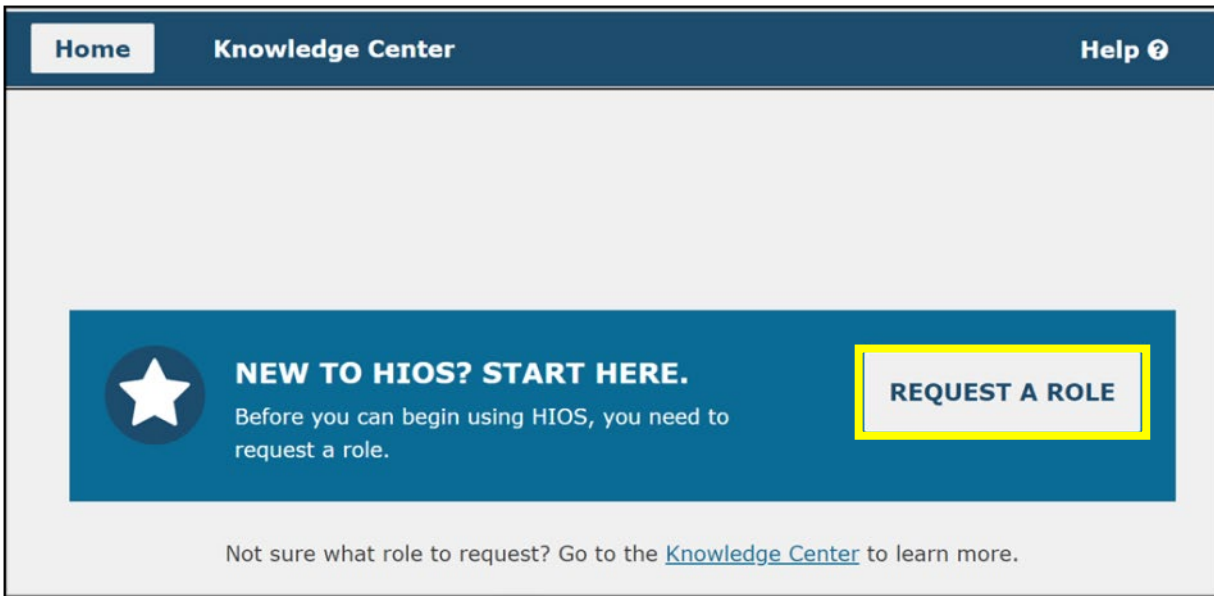
Important Information

- If your organization does not exist in HIOS, skip to section 8 to create the organization. Once the organization has been created and approved in HIOS, you will need to revisit this section to request the role. The organization must exist in HIOS before a role can be requested.
- If you require an issuer role and your issuer does not exist in HIOS, skip to section 9 to create the organization. Once the issuer has been created and approved in HIOS, you will need to revisit this section to request the role. The organization must exist in HIOS before a role can be requested.

To request the HIOS roles:

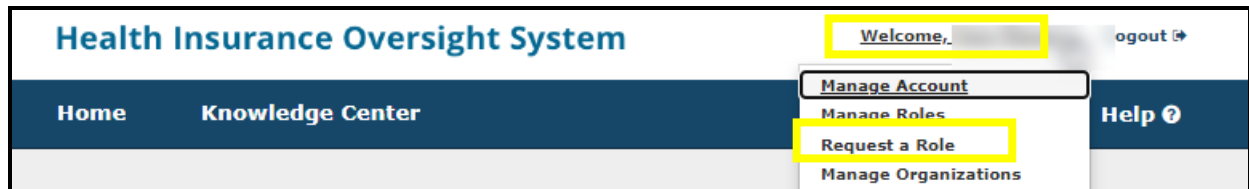
1. New users can select the **Request A Role** button on the page (Figure 24).

Figure 24: HIOS Homepage for New Users



- Existing HIOS users will need to select the **Welcome** drop-down and then select **Request A Role** (Figure 25).

Figure 25: Request a Role Drop-Down



3. Select a **Module** and select **Next** (Figure 26).

Figure 26: Request a Role - Select a Module

1

Select a module

* Please select a module below:

HIOS Modules

<input type="radio"/> Agent Broker Compensation Data Collection	<input type="radio"/> Assister	<input type="radio"/> Enforcement and Consumer Protections	<input type="radio"/> External Review Election
<input type="radio"/> Form Filing	<input type="radio"/> HIOS Portal	<input type="radio"/> Market Conduct	<input type="radio"/> Marketplace Quality Module
<input type="radio"/> Medical Loss Ratio	<input type="radio"/> Minimum Essential Coverage	<input type="radio"/> Navigator Resources	<input type="radio"/> Non-Federal Governmental Plans
<input type="radio"/> Pharmacy Benefit Manager	<input type="radio"/> Plan Finder Product Data Collection	<input checked="" type="radio"/> Prescription Drug Data Collection (RxDC)	<input type="radio"/> Rate Review Grants
<input type="radio"/> Rate Review Justification	<input type="radio"/> Rates & Benefits Information System	<input type="radio"/> State Document Collection	<input type="radio"/> State Flexibility Grant

Plan Management & Market Wide Functions

<input type="radio"/> EDGE Server Management	<input type="radio"/> Financial Management	<input type="radio"/> Plan Management and Market Wide Functions	<input type="radio"/> Plan Validation
<input type="radio"/> QHP Benefits and Service Area Module	<input type="radio"/> QHP Issuer Module	<input type="radio"/> QHP Rating Module	<input type="radio"/> State Evaluation
<input type="radio"/> Unified Rate Review System			

NEXT

4. Select a **Role**, **Role Type** and **Contact Type** (if applicable to the module) from step 2 and select **Next** (Figure 27).

Figure 27: Select a Role

Home Knowledge Center Help ?

Request a Role

Please note, a field with an asterisk (*) before it is a required field. For a detailed description of each module and available roles, please visit the [Browse by Module](#) page in the Knowledge Center.

Please note, you must first have an organization registered in HIOS in order to request access to a module.

1 Select a module Prescription Drug Data Collection (RxDC) [Revisit this step](#)

2 Select a role
* Please select the role below:
☒ RxDC Submitter
[NEXT](#)

5. Select your **Association Type** and then select the **Search** button (Figure 28).

Figure 28: Add Association

Request a Role

Please note, a field with an asterisk (*) before it is a required field. For a detailed description of each module and available roles, please visit the [Browse by Module](#) page in the Knowledge Center.

Please note, you must first have an organization registered in HIOS in order to request access to a module.

1 Select a module Prescription Drug Data Collection (RxDC) [Revisit this step](#)

2 Select a role RxDC Submitter [Revisit this step](#)

3 Add association
To add an Association to this role request, you must search for it in the system.
* Association Type
☐ HIOS Issuer ID
☒ Organization with FEIN
☐ Organization without FEIN (Other Organization)
[NEXT](#)

6. Within the Search for Association box, enter **YOUR company's EIN** and select **Search** (Figure 29).
 - NOTE: If your company is not already registered in HIOS, you will receive the message "The organization does not exist..." select **Create an Organization** and then skip to the instructions in Section 8 below. After the organization has been approved, you will need to revisit section 7 to request the role.

Figure 29: Search for Association

The screenshot shows a three-step process for adding an association. Step 1 is 'Select a module' with 'Prescription Drug Data Collection (RxDC)' selected. Step 2 is 'Select a role' with 'RxDC Submitter' selected. Step 3 is 'Add association'. Below the step indicator, it says 'To add an Association to this role request, you must search for it in the system.' There are three radio button options for 'Association Type': 'HIOS Issuer ID', 'Organization with FEIN' (which is selected), and 'Organization without FEIN (Other Organization)'. Below these is a section titled '* Search for association' with instructions: 'Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.' A text input field and a 'SEARCH' button are highlighted with a yellow box. At the bottom of the form is a green 'NEXT' button.

7. Select your company from the results and select **Next** (Figure 30).

Figure 30: Association Search Results

The screenshot shows the 'Add association' step with search results. It includes the same 'Association Type' radio buttons as Figure 29. Below the search instructions, there is a text input field and a 'SEARCH' button. Below these, a yellow box highlights the search results section. It says 'Showing results for' followed by a blurred input field. Underneath, there is a section titled '* ASSOCIATION' with a single result listed, which is also blurred. A green 'NEXT' button is at the bottom.

8. Review the information in the Confirm your request section and select **Submit** (Figure 31).
 - If the information is not correct, return to the step where the incorrect information was entered and make the necessary correction.

Figure 31: Confirm Your Request

4 Confirm your request

Please select "Submit" to complete your request.

MODULE
Prescription Drug Data Collection (RxDC)

ROLE
RxDC Submitter

ASSOCIATIONS

SUBMIT RESET

9. After you select Submit, a confirmation box will show noting that your role request has been submitted for approval (Figure 32).
 - You will see a confirmation message notifying you to log back into HIOS within 1-2 business days to check the status of your request. To see your user role(s) and access permissions, select the Manage Roles link from the username drop down menu.

Figure 32: Role Request Confirmation

Home Knowledge Center Help

✓ Confirmation: Your role request has been submitted for approval. Please log back in within 1-2 business days to check the status.

Request a Role

Please note, a field with an asterisk (*) before it is a required field. For a detailed description of each module and available roles, please visit the [Browse by Module](#) page in the Knowledge Center.

Please note, you must first have an organization registered in HIOS in order to request access to a module.

1 Select a module

* Please select a module below:

HIOS Modules

Agent Broker Compensation Data Collection Assister Enforcement and Consumer Protections External Review Election

8 Create an Organization

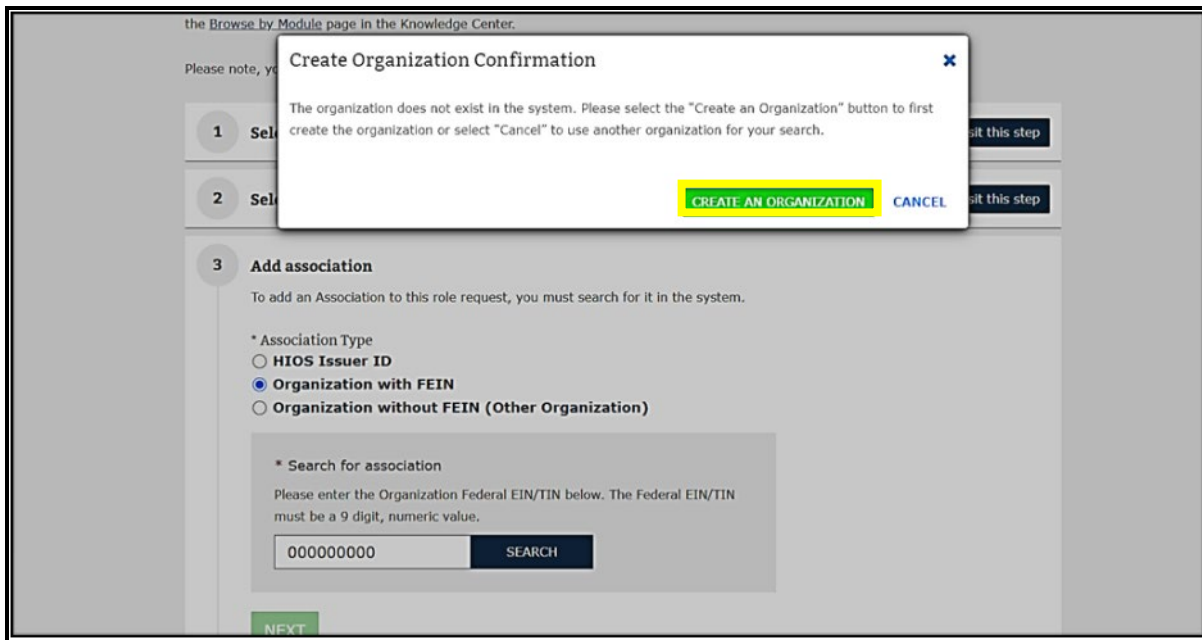
Important Information

- You may skip this section if your organization already exists in HIOS. (Please Note - If you have previously submitted data within HIOS, then your organization is already registered within HIOS.)
- If your organization does not currently exist in HIOS, please complete this section to register your organization in HIOS.

To create a new organization in HIOS:

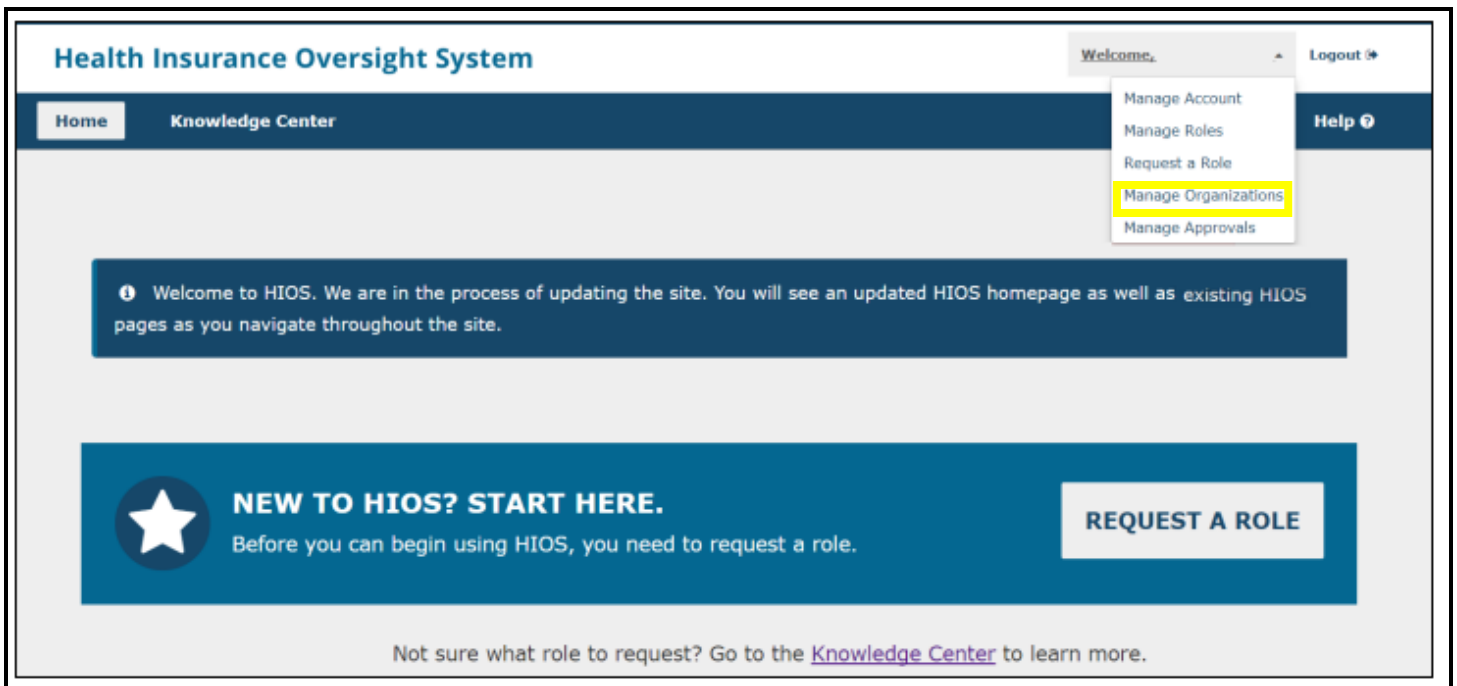
1. If your organization does not currently exist in HIOS, you will receive a message "The organization does not exist..." when attempting to Add association during the role request process. Select **Create an Organization** (Figure 33).

Figure 33: Create Organization Button



Alternatively, you can create an organization directly from the HIOS home page by selecting **Manage Organizations** from the Welcome drop-down (Figure 34). Either action will take you to the 'Create an Organization' page when you can then complete the steps to register your organization in HIOS.

Figure 34: Manage Organizations



2. On the Create an Organization page, **Select the Organization's Primary Function** according to the instructions below. After selecting your organization's primary function, select **NEXT** (Figure 35).

Organization Primary Function Notes:

- Organizations that are considered an Insurance Company and are coming into HIOS to submit Plan/Product information should select **Company**.
- TPAs, PBMs, third-party vendors, and other group health plans, should select **Non-Insurance Company**.
- Non-federal governmental health plans (such as school districts and state and local governments) should select **Non-Federal Governmental Health Plans**.
- Foreign entities that are coming into HIOS to report information for Minimum Essential Coverage should select **Other Organization**.

Figure 35: Select the Organization's Primary Function

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

1 Select the Organization's Primary Function

* What is the organization's primary business?

☐ An insurance company that is a legal entity licensed to sell health insurance products and plans.

This organization may manage plan data including reporting graded level data or Medical Loss Ratio information, create an issue for the organization, provide or receive TIN services, or work with other company specific data.

In HIOS, this type of organization is referred to as a **Company**.

☐ A company whose primary business does not include selling licensed health insurance products or plans.

This organization may come to HIOS to obtain a Health Plan Scorefile or provide TIN services.

In HIOS, this type of organization is referred to as a **Non-Insurance Company**.

☐ A Group Health Plan offered by a Non-Federal Governmental organization to its non-federal governmental employees.

This organization may report plan information for purposes of HIPAA, premium-splitting or external notice election.

In HIOS, this type of organization is referred to as a **Non-Federal Governmental Health Plan**.

☐ Other - the above categories do not fit the organization's primary business.

This organization may be a Foreign entity that reports information for Minimum Essential Coverage.

In HIOS, this type of organization is referred to as an **Other Organization**.

NEXT

2 Enter Federal EIN/TIN

3 Organization Details

4 Confirm Your Request

3. After selecting your organization's primary function, select **NEXT** (Figure 36).

Figure 36: Finalize Selection

☐ **A Group Health Plan offered by a Non-Federal Governmental Organization to its non-federal governmental employees.**

This organization may report plan information for purposes of HIPAA provision opt-out or external review election.

In HIOS, this type of organization is referred to as a **Non-Federal Governmental Health Plan**.

☐ **Other - the above categories do not fit the organization's primary business.**

This organization may be a Foreign entity that reports information for Minimum Essential Coverage.

In HIOS, this type of organization is referred to as an **Other Organization**.

NEXT

4. Enter **your company's EIN** in the search box and select **Search**. If the number is not in the system, a confirmation message will appear, stating that the number does not already exist in the system. Select **NEXT** (Figure 37).

Figure 37: Create an Organization: Enter Federal EIN/TIN

[Add a Relationship](#)
[Organization Search](#)

2 Enter Federal EIN/TIN

First, let's see if your organization already exists in the system.

* Enter the organization's FEIN and select "Search"

Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.

444666444 **SEARCH**

Confirmation: The FEIN/TIN you entered does not already exist in the system. Please select next below to enter your organization's details.

NEXT

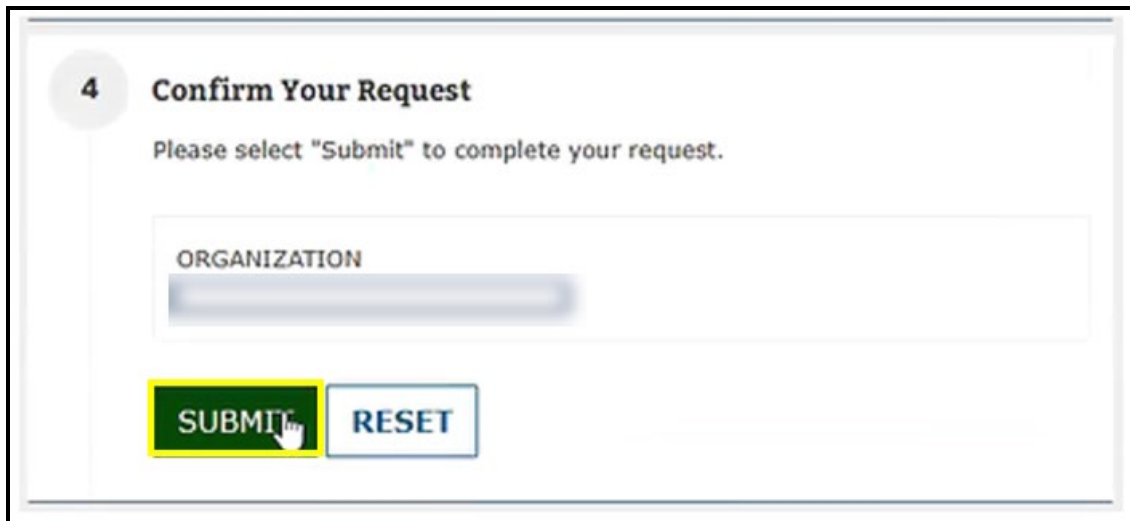
5. **Scroll down** to Organization Details and complete the form for your organization (Figure 38).

Figure 38: Create an Organization: Organization Details

The screenshot shows a web form titled '3 Organization Details'. Below the title is a sub-header 'Please enter your organization details below.' The form contains several input fields: a text box for 'Organization Legal Name', a dropdown menu for 'Incorporated State', a section for 'Domiciliary Address' with a help icon, and two text boxes for 'Address Line 1' and 'Address Line 2'. Below these are fields for 'City' and 'State' (a dropdown), and two text boxes for 'ZIP Code (5 digits)' and 'ZIP Plus 4 (4 digits)'. All required fields are marked with a red asterisk.

6. Review the organization's information and scroll down to the Confirm Your Request section and select **SUBMIT** (Figure 39).
- You may revisit any previous steps to make changes prior to confirming your request.
 - It takes 1-2 business days for an organization to be approved. After the organization has been approved, it will then be available for users to submit role requests.

Figure 39: Confirm Your Request



9 Create an Issuer

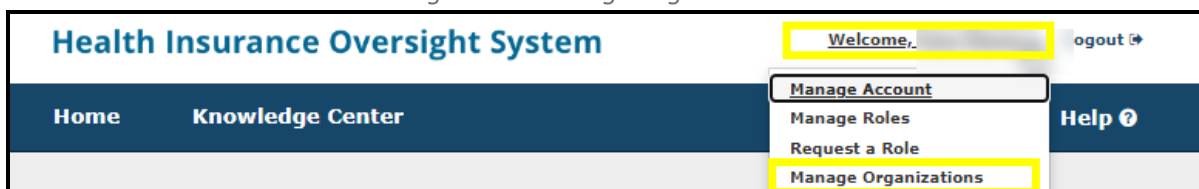
Important Information

- You may skip this section if your issuer already exists in HIOS. (Please Note - If you have previously submitted data within HIOS, then your organization is already registered within HIOS.)
- If your issuer does not currently exist in HIOS, please complete this section to register your organization in HIOS.
- **Please Note** – The parent organization must be registered in HIOS as a **Company** before an issuer can be added. If the parent organization is not registered in HIOS, refer to section 8.
- **Please note**- An Issuer will only be required for certain modules. (Example: Plan Finder, RBIS)

If an organization exists in HIOS, users can add an Issuer(s) to that organization by following the below steps:

1. Select the **Manage Organizations** link on the HIOS Home Page (Figure 40).

Figure 40: Manage Organizations



2. On the Manage Organizations page, select **Add an Issuer** (Figure 41).

Figure 41: Add an Issuer

Manage Organizations

What would you like to work on today?

[My Organizations](#)

My Organizations is where users with an administrative role can view or edit an organization's information.

[Create an Organization](#)

Users can register their organizations within HIOS. Organizations must exist in HIOS before users can request a user role for the organization.

[Add an Issuer](#)

Users can add an issuer for an insurance company within HIOS. Organizations must have been registered as a Company in order to add issuers.

[Data Change Request](#)

Users can submit a data change request for organization information that cannot be edited through the My Organizations functionality. Data change requests will be submitted for approval, and users can review the status of their data change request.

[Add a Relationship](#)

Users can submit a request to establish a relationship between an organization and an issuer within HIOS.

[Organization Search](#)

Users can search and view details for organizations registered in HIOS.

Administrator Roles

Certain functionality such as My Organizations or Data Change Requests require users to have at least one of the following administrator roles:

Company Administrator
Representative who is solely responsible for editing Company and associated issuer level data, including relationship information.

Issuer Administrator
Representative who can edit Issuer level data only, including relationship information.

Organization Administrator
Representative of a Non-Federal Governmental Plan or Other Organization who is responsible for editing their organization data.

3. Search for the organization you would like to add an issuer to by entering the **Federal EIN/TIN** and select **Search**.
4. Select the **Issuer Registered State** and proceed forward to enter the Issuer Details.
5. In Step 3, enter the **Issuer Details** and select **NEXT** (Figure 42).

Figure 42: Issuer Details

← Manage Organizations

My Organizations

Create an Organization

Add an Issuer

Data Change Request

Add a Relationship

Add an Issuer

Please note, a field with an asterisk (*) before it is a required field.

- 1 Search for an Organization** [Revisit this step](#)
817203871 - JN Test Company Edit 2 on 11-21-14
- 2 Issuer Registered State** [Revisit this step](#)
Texas (TX)
- 3 Issuer Details**
Issuer Marketing Name:

Please note, users must select "Yes" for at least one of the following market type coverage:
* Does this issuer offer coverage in the Individual Market?
☐ Yes
☐ No
* Does this issuer offer coverage in the Small Group Market?
☐ Yes
☐ No
* Does this issuer offer coverage in the Large Group Market?
☐ Yes
☐ No
Domesticity Address
The domesticity address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.
* Address Line 1

Address Line 2

* City * State
* ZIP Code (5 digits) ZIP Plus 4
[NEXT](#)
- 4 Confirm Your Request**

- Review the organization's information and scroll down to the Confirm Your Request section and select **SUBMIT**.
 - You may revisit any previous steps to make changes prior to confirming your request.
 - It takes 1-2 business days for an issuer to be approved. After the issuer has been approved, it will then be available for users to submit role requests.

10 Help Desk Information

Contact the CMS help desk at CMS_FEPS@cms.hhs.gov or 1-855-267-1515 if you have questions about setting up your account. You can typically expect a confirmation email on the same day and a full resolution within 1-2 weeks.

11 Frequently Asked Questions

Table 1: Frequently Asked Questions

Questions	Answers
Who can users contact for system support?	For Production system support, users can call the Marketplace Service Desk at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov .
How do users access HIOS?	To access HIOS, visit https://portal.cms.gov . Users will need to complete the registration for the CMS IDM account through the CMS Enterprise Portal prior to requesting access to HIOS.
Why are users required to enter their IDM (Identity Management) credentials to access HIOS?	Users must have an IDM User ID and password to access the CMS Enterprise Portal. HIOS has been integrated with the CMS Enterprise Portal and is only accessible through the Portal.
Why is my SSN needed and why is my identity being verified?	<p>Establishing confidence in a person's identity is a critical starting point for conducting online business with the Centers for Medicare & Medicaid Services (CMS). Identity proofing is an important part of preventing identity crime or mistaken identity. The identification and authentication of users must adhere to the guidelines as issued by the National Institutes of Standards and Technology Special Publication 800-63-3.</p> <p>For the identification of remote users over an open network, ARS stipulates that for assurance level two or above (LOA2/3), verification of identifying materials and information is required.</p> <p>To comply with this standard, IDM stakeholders have contracted the services of a remote identity proofing (RIDP) vendor. During registration/role request, users are referred to the vendor for RIDP. The result of RIDP is an aggregate risk score which summarizes the RIDP vendor's confidence in the user's identity.</p> <p>It is during this RIDP process that users are asked to provide their SSN.</p>
How do users access HIOS and Plan Management & Market Wide Functions?	To access HIOS, users need to successfully complete the CMS Enterprise Portal registration for an IDM account. When users log in to the CMS Enterprise Portal, there will be a HIOS button displayed on the My Portal page. Users are not on HIOS maintained pages until they select the HIOS button. Once users select the HIOS button, they will be navigated to the landing page and can select either the Access HIOS link or the Access Plan Management & Market Wide Functions link to navigate to the HIOS Home Page. All HIOS and Plan Management functions will display on the same page.
Where do users request roles and access to HIOS modules?	Module access and role requests are done via the Request a Role function on the HIOS Home Page. To submit a request, users select the Request a Role link from the Welcome drop down menu, the HIOS module(s), and role(s) applicable to the module(s).
Why can users not find the role(s) needed on the Request Role page?	Some roles for HIOS modules have restricted access. These will not display on the user interface. Users will need CMS approval before certain roles can be granted.
Which roles allow users to edit organization information?	Users should have the Company Administrator, Issuer Administrator, or Organization Administrator role to edit organization information and complete such tasks as updating the TPA information for that organization.
How do users view or access the module(s)?	To access the requested module, users need to select the correct link on the CMS Enterprise Portal page, either the Access HIOS link or the Access Plan Management & Market Wide Functions link. Users will also need to have the correct user role(s) to access specific HIOS module(s).

Questions	Answers
When users launch the module, there is no link available to access an application. How do users view the link to access an application?	Some HIOS modules (i.e., EDGE Server Management, Financial Management, QHP Modules, or RBIS) have a submission window when a link to an application can be accessible. When the submission window is closed, the link will not display, and users may see a message stating the application is not available or the submission window is closed.