Chapter 1: Instructions for the Administrative Application Section

Contents

1. Overview

This section of the Qualified Health Plan (QHP) application collects administrative information about the insurance company and any holding company associated with an issuer submitting an application, such as the issuer marketing name, National Association of Insurance Commissioners (NAIC) affiliation, proposed market coverage, and company contacts such as chief executive officer (CEO), chief financial officer (CFO), and customer service representative. The collected administrative information is used to support the operations of the Federally-facilitated Marketplace (FFM), including the tracking of issues, communications, and data submission. When possible, much of the information in this and other sections of the QHP application is prepopulated with data previously collected by the Health Insurance Oversight System (HIOS).

Both QHP and stand-alone dental plan (SADP) issuers are required to submit the Administrative template as part of their QHP application. All of the instructions in this document apply to both QHP and SADP issuers.

2. Purpose

The purpose of the Administrative section of the QHP application is to provide company specific information such as: issuer marketing name, NAIC affiliation, proposed market coverage, and company contacts such as: CEO, CFO, and customer service representative. The Administrative template facilitates the collection and submission of company information for each issuer-State application. This chapter guides you through the steps to complete the Administrative section of your QHP application.

3. Data Requirements

To complete the Administrative section of the QHP application , you will need the following information:

1. HIOS Issuer ID
2. Issuer state
3. HIOS Product ID for proposed QHPs
4. NAIC company and group codes
5. Taxpayer Identification Number (TIN) or Employer Identification Number (EIN), also known as Federal Employer Identification Number (FEIN)
6. Proposed exchange market coverage: Individual, Small Business Health Options Program (SHOP), or both
7. Current sales market: Individual, SHOP, or both
8. Names, phone numbers, e-mail addresses, and website addresses (i.e., URLs) for company contacts, such as CEO, CFO, and customer service.

4. Application Instructions

The QHP Application system uses Excel templates to collect most of the required issuer information. To complete the QHP application, all issuers must submit a completed Administrative Template.

In addition to the Administrative Template, issuers must enter their Administrative information into HIOS. The HIOS Administrative data, ***not*** the Admistrative Template data, will be used to populate the www.healthcare.gov website for the individual market. It is essential to ensure that you also enter your Administrative information into HIOS, and that the information is correct (see Section 5 for specific fields displayed on www.healthcare.gov). This applies to all issuers, including those who file through the System for Electronic Rate and Form Filing (SERFF).

For **Plan Year 2016**, there are some additional required data fields in HIOS that were not available in previous plan years. These new fields will only appear in HIOS and will ***not*** be on the Administrative Template.

For issuers offering Federally-facilitated Small Business Health Options Programs (FF-SHOP) plans, the *Issuer Marketing Name* displayed on HIOS is drawn from the Administrative Template. Issuers offering plans in the FF-SHOP market should ensure that their *Issuer Marketing Name* is correct in both HIOS and on the Administrative Template. If an issuer does not provide an *Issuer Marketing Name*, the *Issuer Legal Name* entered on the Administrative Template will be displayed on the HIOS website.

Figure 1-1 provides some helpful hints to assist in completing the Administrative section.

Figure 1-1. Administrative Section Highlights

- Instructions for this chapter apply to both QHP and SADP issuers.
- The Administrative Template contains 12 sections.
- All state values must be selected from the drop-down menu.
- The data displayed on www.healthcare.gov are drawn from the data contained in HIOS, and ***not*** the Administrative Template. It is essential that you ensure that your HIOS Administrative information is populated, and that the information is correct. (See Section 5 for specific fields displayed on www.healthcare.gov.)
- For issuers offering FF-SHOP plans, the *Issuer Marketing Name* displayed on HIOS is drawn from the Administrative Template. Issuers offering plans in the FF-SHOP market should ensure that their *Issuer Marketing Name* is correct in both HIOS and on the Administrative Template. If an issuer does not provide an *Issuer Marketing Name*, the *Issuer Legal Name* entered on the Administrative Template will be displayed on the HIOS website.
- The template requires you to select a *Current Sales Market*. If you are not currently selling products in either the Individual or SHOP markets, select **Both** in the *Current Sales Market* field.
- Dual-product issuers should use the same Administrative Template for their QHPs and SADPs. Only one template is allowed per issuer.
- Dual-product issuers should submit the primary dental contact where indicated in the Administrative Template, and indicate their main customer service line in Section 9 (individual market) or Section 10 (small group). Only a single customer service line can be entered.
- Dual-product issuers can only enter a single customer service number in HIOS. Issuers should communicate directly with members and/or route calls regarding dental questions to the appropriate support number. Issuers should work with their account managers, when assigned, to indicate additional contact information, as appropriate.
- Using the correct template version is critical to completing the Administrative section of the QHP application. The current and correct version of the template includes 2016 in the banner. The latest version of the Administrative Template is available from http://cciio.cms.gov/programs/exchanges/qhp.html.
- To initiate the template and allow data entry, enable template macros using the **Options** button on the Security Warning toolbar, and select **Enable this content**. Please see Appendix C for information regarding enabling macros.
- All header fields in the template marked with an asterisk (*) are required.
- If you are a registered HIOS user, your template may have prepopulated fields that are highlighted in yellow and cannot be changed.

All issuers must complete the Administrative Template. When the template is completed, issuers must upload it to the Administrative Data section of the Issuer Module in the QHP Application system.

4.1 HIOS User Interface Instructions

There are no user interface components for the Administrative Data section.

4.2 Template Instructions

Using the 2016 version[1] of the template downloaded from the Administrative Data section of the Issuer Module in the QHP Application system, follow the instructions below to complete the Administrative Template. Figures 1-2 through 1-5 show samples of completed Administrative Template sections.

Figure 1-2. Administrative Template (Sections 1 through 4)

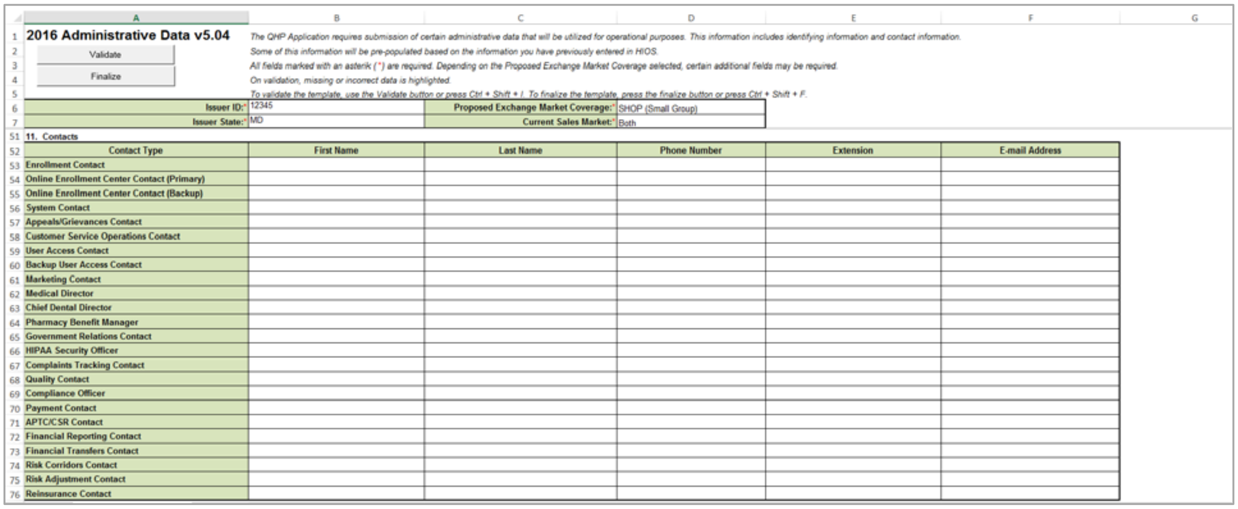
	A	B	C	D	E	F	G
1	2016 Administrative Data v5.04	The QHP Application requires submission of certain administrative data that will be utilized for operational purposes. This information includes identifying information and contact information.					
2	Validate	Some of this information will be pre-populated based on the information you have previously entered in HIOS.					
3		All fields marked with an asterik (*) are required. Depending on the Proposed Exchange Market Coverage selected, certain additional fields may be required.					
4	Finalize	On validation, missing or incorrect data is highlighted.					
5		To validate the template, use the Validate button or press Ctrl + Shift + I. To finalize the template, press the finalize button or press Ctrl + Shift + F.					
6	Issuer ID:*	12345	Proposed Exchange Market Coverage:*	SHOP (Small Group)			
7	Issuer State:*	MD	Current Sales Market:*	Both			
8							
9	1. Administrative Data						
10	Company Legal Name:*	Issuer Legal Name:*	Issuer Marketing Name:*				
11	Maryland Insurance Company, DKS	MIC	Md Ins Co				
12							
13	Associated Health Plan ID:	TIN:*	NAIC Company Code:	NAIC Group Code:			
14	1234567890	52-2113333	54771	0812			
15							
16	2. Company Address						
17	Address:*	Address 2 (optional):	City:*	State:*	Zip Code:*		
18	2222 Md Insurance Way	Suite 2	Hyattsville	MD			
19							
20	3. Issuer Address						
21	Address:*	Address 2 (optional):	City:*	State:*	Zip Code:*		
22	2222 Md Insurance Way	Suite 2A	Hyattsville	MD			
23							
24	4. Select Your Primary Contact:*						
25	SHOP (Small Group)						

Figure 1-3. Administrative Template (Sections 5 through 10)

	A	B	C	D	E	F	G
1	2016 Administrative Data v5.04	The QHP Application requires submission of certain administrative data that will be utilized for operational purposes. This information includes identifying information and contact information.					
2	Validate	Some of this information will be pre-populated based on the information you have previously entered in HIOS.					
3		All fields marked with an asterik (*) are required. Depending on the Proposed Exchange Market Coverage selected, certain additional fields may be required.					
4	Finalize	On validation, missing or incorrect data is highlighted.					
5		To validate the template, use the Validate button or press Ctrl + Shift + I. To finalize the template, press the finalize button or press Ctrl + Shift + F.					
6	Issuer ID:*	12345	Proposed Exchange Market Coverage:*	SHOP (Small Group)			
7	Issuer State:*	MD	Current Sales Market:*	Both			
27	5. Issuer Individual Market Contact						
28	First Name:	Last Name:	E-mail Address:	Phone Number:	Phone Extension:		
29	Ralph	Thompson	rathompson@mdins.org	301-123-4567			
30							
31	6. Issuer SHOP (Small Group) Contact						
32	First Name:	Last Name:	E-mail Address:	Phone Number:	Phone Extension:		
33	Susan	Smith	ssmith@mdins.org	301-123-4568			
34							
35	7. CEO						
36	First Name:*	Last Name:*	E-mail Address:*	Phone Number:*	Phone Extension:		
37	Betsy	Randolph	barandolph@mdins.org	301-123-4569			
38							
39	8. CFO						
40	First Name:*	Last Name:*	E-mail Address:*	Phone Number:*	Phone Extension:		
41	Henry	Jones	hajones@mdins.org	301-111-1111			
42							
43	9. Customer Service - Individual Market						
44	Customer Service Phone:	Customer Service Phone Extension:	Customer Service Toll Free:	Customer Service TTY:	Customer Service URL:		
45	800-123-4569		800-123-4569	866-111-1112	MDINS.com		
46							
47	10. Customer Service - SHOP (Small Group)						
48	Customer Service Phone:	Customer Service Phone Extension:	Customer Service Toll Free:	Customer Service TTY:	Customer Service URL:		
49	800-123-4570		800-123-4570	866-111-1113	MDINS-SHOP.com		

[1] The 2016 version of the Administrative template must be used. The banner in the upper left corner of each template will indicate that the template is for 2016.

Figure 1-4. Administrative Template (Section 11)



2016 Administrative Data v5.04

Validate

Finalize

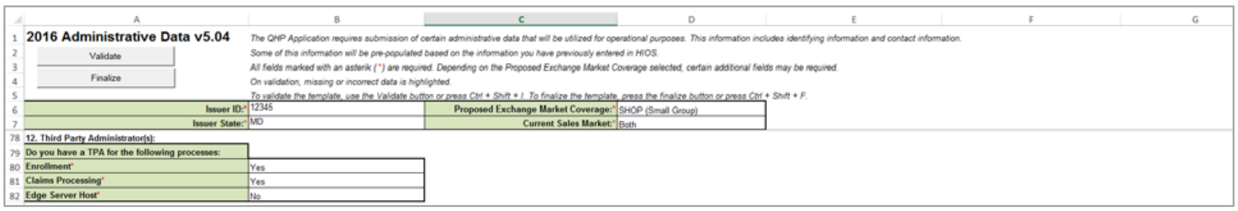
The QHP Application requires submission of certain administrative data that will be utilized for operational purposes. This information includes identifying information and contact information.
Some of this information will be pre-populated based on the information you have previously entered in HIOS.
All fields marked with an asterik (*) are required. Depending on the Proposed Exchange Market Coverage selected, certain additional fields may be required.
On validation, missing or incorrect data is highlighted.
To validate the template, use the Validate button or press Ctrl + Shift + I. To finalize the template, press the finalize button or press Ctrl + Shift + F.

Issuer ID:*	12345	Proposed Exchange Market Coverage:*	SHOP (Small Group)
Issuer State:*	MD	Current Sales Market:*	Both

11. Contacts

Contact Type	First Name	Last Name	Phone Number	Extension	E-mail Address
Enrollment Contact					
Online Enrollment Center Contact (Primary)					
Online Enrollment Center Contact (Backup)					
System Contact					
Appeals/Grievances Contact					
Customer Service Operations Contact					
User Access Contact					
Backup User Access Contact					
Marketing Contact					
Medical Director					
Chief Dental Director					
Pharmacy Benefit Manager					
Government Relations Contact					
HIPAA Security Officer					
Complaints Tracking Contact					
Quality Contact					
Compliance Officer					
Payment Contact					
APTC/CSR Contact					
Financial Reporting Contact					
Financial Transfers Contact					
Risk Corridors Contact					
Risk Adjustment Contact					
Reinsurance Contact					

Figure 1-5. Administrative Template (Section 12)



2016 Administrative Data v5.04

Validate

Finalize

The QHP Application requires submission of certain administrative data that will be utilized for operational purposes. This information includes identifying information and contact information.
Some of this information will be pre-populated based on the information you have previously entered in HIOS.
All fields marked with an asterik (*) are required. Depending on the Proposed Exchange Market Coverage selected, certain additional fields may be required.
On validation, missing or incorrect data is highlighted.
To validate the template, use the Validate button or press Ctrl + Shift + I. To finalize the template, press the finalize button or press Ctrl + Shift + F.

Issuer ID:*	12345	Proposed Exchange Market Coverage:*	SHOP (Small Group)
Issuer State:*	MD	Current Sales Market:*	Both

12. Third Party Administrator(s):

Do you have a TPA for the following processes:	
Enrollment*	Yes
Claims Processing*	Yes
Edge Server Host*	No

4.2.1 Entering Data

Complete the following fields in the Administrative Template:

1. Enable template macros using the **Options** button on the Security Warning toolbar, and select **Enable this conten**t. If macros are not enabled before entering data, the template will not recognize the data and they will have to be reenter.

2. *HIOS Issuer ID* (required). Enter your five-digit HIOS issuer ID, if not prepopulated.

3. *Proposed Exchange Market* (required). Use the drop-down menu to select the correct proposed exchange market (**Individual**, **SHOP**, or **Both**). An application can be associated with both an Individual market plan and SHOP. If you intend to offer both Individual and SHOP plans in the FFM, select **Both**. An issuer should <u>not</u> fill out two separate applications; submitting a second Administrative Template overwrites the first submission in HIOS.

4. *Issuer State* (required). Select the state in which you propose to offer coverage using the drop-down menu.

5. *Current Sales Market* (required). Select the markets in which you currently sell products using the drop-down menu:

    a. If you are not currently selling products in either the Individual or SHOP markets, select **Both**.

6. *Administrative Data* (Section 1). Enter administrative data:

    a. *Company Legal Name* (required). Enter the company's legal name. (This may be your parent or holding company. If you do not have a parent or holding company, your company legal name and issuer legal name are the same.)

    b. *Issuer Legal Name* (required). Enter the issuer's legal name. If *Issuer Legal Name* on the template does not match exactly the name associated with your Issuer ID in HIOS, the template returns an invalid issuer legal name system error when you upload it.

    c. *Issuer Marketing Name* (required). Enter any marketing name you use for the plans you offer.

    d. *Associated Health Plan ID* (HPID). Enter your HPID (the controlling HPID for the company licensed to operate within the state), if applicable.

    e. *TIN* (required). Enter your nine-digit Tax Identification Number. The TIN field accepts nine numbers (no hyphen) or 10 characters (including the hyphen). If users enter 10 numbers, it will not pass validation.

    f. *NAIC Company Code*. Enter your NAIC company code, if applicable.

    g. *NAIC Group Code*. Enter your NAIC group code, if applicable.

7. *Company Address* (Section 2). Enter company address information:

    a. Enter the address, city, state, and ZIP code information, as required.

    b. Enter any additional address information in the Address 2 field, if applicable.

8. *Issuer Address* (Section 3). Enter issuer address information:

    a. Enter the address, city, state, and ZIP code information, as required.

    b. Enter any additional address information in the Address 2 field, if applicable.

9. *Primary Contact* (required) (Section 4). Using the drop-down menu, select the market **(Individual or SHOP)** associated with the person designated as the primary Marketplace contact for your organization.

10. *Issuer Individual Market Contact* (Section 5). If you chose **Individual** as your primary contact, enter the contact information for the Individual market contact:

    a. Enter the first name, last name, e-mail address, and phone number of your Individual market contact.

    b. Enter a phone extension for your Individual market contact, if applicable. If the phone extension begins with a zero, copy and paste the number from another Excel document (format the cell in the other Excel document as text) into the cell (it will be accepted and pass validation). Do not type a phone extension beginning with a zero directly into the template because Excel reformats the entry.

11. *Issuer Small Group Contact* (Section 6). If you chose **SHOP** as your primary contact, enter the contact information for the SHOP (Small Group) market contact:

    a. Enter the first name, last name, e-mail address, and phone number of your SHOP contact.

    b. Enter a phone extension for your SHOP contact, if applicable. If the phone extension begins with a zero, copy and paste the number from another Excel document (format the cell in the other Excel document as text) into the cell (it will be accepted and pass validation). Do not type a phone extension beginning with a zero directly into the template because Excel reformats the entry.

12. *CEO* (Section 7). Enter the contact information for your CEO contact:

    a. Enter the first name, last name, e-mail address, and phone number of your CEO contact.

    b. Enter a phone extension for your CEO contact, if applicable. If the phone extension begins with a zero, copy and paste the number from another Excel document (format the cell in the other Excel document as text) into the cell (it will be accepted and pass validation). Do not type a phone extension beginning with a zero directly into the template because Excel reformats the entry.

13. *CFO* (Section 8). Enter the contact information for your CFO contact:

    a. Enter the first name, last name, e-mail address, and phone number of your CFO contact.

    b. Enter a phone extension for your CFO contact, if applicable. If the phone extension begins with a zero, copy and paste the number from another Excel document (format the cell in the other Excel document as text) into the cell (it will be accepted and pass validation). Do not type a phone extension beginning with a zero directly into the template because Excel reformats the entry.

14. *Customer Service Individual Market* (Section 9). If you chose **Individual** as your proposed exchange market, enter your customer service contact:

    a. Enter the proposed Individual market coverage customer service phone number, toll-free number, TTY, and customer service URL.

        i. Use your *Customer service phone number* if there is no 10-digit TTY number.

        ii. The customer service phone number, toll-free number, and TTY need to be final as entered into the QHP application, but the numbers themselves do not need to be live until open enrollment.

    b. Enter a phone extension for your Individual market customer service contact, if applicable. If the phone extension begins with a zero, copy and paste the number from another Excel document (format the cell in the other Excel document as text) into the cell (it will be accepted and pass validation). Do not type a phone extension beginning with a zero directly into the template because Excel reformats the entry.

15. *Customer Service SHOP* (Small Group) (Section 10). If you chose **SHOP** as your proposed exchange market, enter your customer service contact:

    a. Enter the proposed SHOP market coverage customer service phone number, toll-free number, TTY, and customer service URL.

        i. Use your *Customer service phone number* if there is no 10-digit TTY number.

        ii. The customer service phone number, toll-free number, and TTY need to be final as entered into the QHP application, but the numbers themselves do not need to be live until open enrollment.

    b. Enter a phone extension for your SHOP customer service contact, if applicable. If the phone extension begins with a zero, copy and paste the number from another Excel document (format the cell in the other Excel document as text) into the cell (it will be accepted and pass validation). Do not type a phone extension beginning with a zero directly into the template because Excel reformats the entry.

16. *Contacts* (Section 11). Enter other contacts, as applicable:

    a. Contact information is optional, but very useful. The contacts you provide should reflect the person at the issuer who can answer Department of Health and Human Services (HHS) questions on the specific topic. The contacts are not made public.

        i. The User Access Contact is used to identify the single point of contact for addressing issues related to HIOS access.

        ii. The Quality Contact is the person who should be contacted for issues related to QHP quality reporting requirements such as accreditation, the Quality Rating

System and the QHP Enrollee Experience Survey (also known as the Enrollee Satisfaction Survey).

b. Enter the first name, last name, phone number, and e-mail address of each applicable contact.

c. Enter a phone extension for each contact, if applicable. If the phone extension begins with a zero, copy and paste the number from another Excel document (format the cell in the other Excel document as text) into the cell (it will be accepted and pass validation). Do not type a phone extension beginning with a zero directly into the template because Excel reformats the entry.

d. The pharmacy benefit manager and reinsurance contacts do not apply to dental plans.

17. *Third Party Administrator* (required) (Section 12). Identify whether you have third-party administrators (TPAs) by selecting **Yes** or **No,** as applicable. Use the drop-down menu to select the correct response. This information identifies whether the issuer works with a TPA (any vendor that provides services in the functional areas listed); indicating "Yes" does not require that a TPA perform *all* functions.

    a. Enrollment

    b. Claims Processing

    c. Edge Server Host.

4.2.2 Finalizing Template

Once you have completed the Administrative Template, follow these steps to finalize the template:

1. Click the **Validate** button in the top left of the template (Figure 1-6). The validation process will identify any data issues that need to be resolved. If no errors are identified proceed directly to the 3rd step.

2. If the template has any errors, a Validation Report will appear within a pop-up box (Figure 1-7) indicating the data element and cell location of each error. Correct any identified errors and click **Validate** again. Continue this process until all errors are resolved. Once the template is valid, proceed to the next step.

3. Click the **Finalize** button in the template. The **Finalize** function creates the XML file of the template that you need to upload in the applicable QHP Application System.

4. **Save** the XML template. It is recommended you save the validated template to your computer as both a standard Excel.XLSM file, and the finalized.XML file on your local computer in the same folder that contains the template.

5. Upload the saved file in the Adminstrative Data section of the Issuer Module of the QHP Application System.

Figure 1-6. Validate and Finalize Buttons

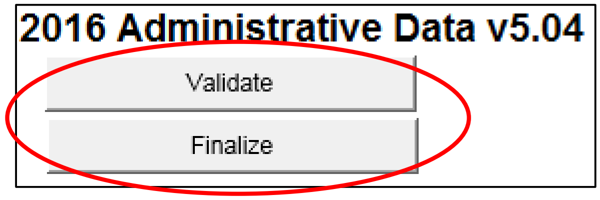
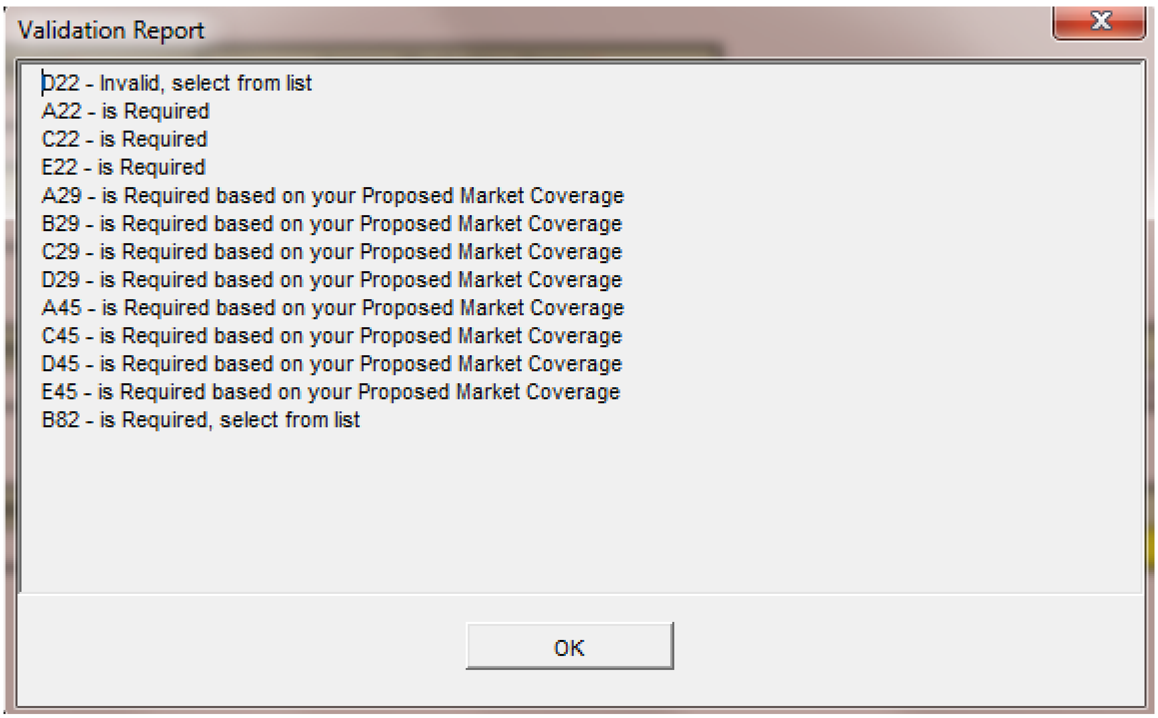


Figure 1-7. Validation Report



4.3 Supporting Documentation Instructions

There are no supporting documents for the Administrative Data section.

5. Data Display and Updates

The data displayed on www.healthcare.gov for the individual market are drawn from HIOS Administrative data, ***not*** from the Administrative Template. It is essential that you ensure that your HIOS Administrative information is populated, and that the information is correct (see Figure 1-8 for specific fields displayed on www.healthcare.gov).

For issuers offering FF-SHOP plans, the *Issuer Marketing Name* displayed on HIOS is drawn from the Administrative Template. Issuers offering plans in the FF-SHOP market should ensure that their *Issuer Marketing Name* is correct in both HIOS and on the Administrative Template. If an issuer does not provide an *Issuer Marketing Name*, the *Issuer Legal Name* entered on the Administrative Template will be displayed on the HIOS website.

Figure1-8 shows the fields displayed on www.healthcare.gov.

Figure 1-8. Plan Compare—QHP Landscape

Data element	Displayed on Plan Compare?		Displayed on QHP Landscape?		Displayed on My Account?		SHOP Display	
	2015	2016	2015	2016	2015	2016	2015	2016
Issuer ID	No	No	Yes	Yes	No	No	No	No
Issuer State	No	No	Yes	Yes	Yes	Yes	No	No
Issuer Address	No	No	No	No	Yes	No	No	No
Issuer Legal Name	Displayed if Issuer marketing name/Issuer Marketplace Marketing name is blank		Displayed if Issuer marketing name/Issuer Marketplace Marketing name is blank		Displayed if Issuer marketing name/Issuer Marketplace Marketing name is blank		Displayed if Issuer marketing name is blank	
Issuer Marketing Name	Yes	No	Yes	No	Yes	No	**Yes***	**Yes***
Customer Service-Individual Market–Customer Service Phone	Yes	No	Yes	No	Yes	No	No	No
Customer Service-Individual Market–Customer Service Phone Extension	Yes, if extension exists	No	Yes, if extension exits	No	Yes, if extension exits	No	No	No
Customer Service-Individual Market–Customer Service Phone Toll Free	Yes	No	Yes	No	Yes	No	No	No
Customer Service-Individual Market–Customer Service TTY	Yes, if different from toll free	No	Yes, if different from toll free	No	Yes, if different from toll free	No	No	No
Customer Service-Individual Market–Customer Service URL	Yes	No	Yes	No	Yes	No	No	No
Customer Service-SHOP (Small Group) Customer Service Phone	No	No	Yes	No	Yes	No	No	No
Customer Service-SHOP (Small Group) Customer Service Phone Extension	No	No	Yes, if extension exits	No	Yes, if extension exits	No	No	No
Customer Service-SHOP (Small Group) Customer Service Toll Free	No	No	Yes	No	Yes	No	No	No
Customer Service-SHOP (Small Group) Customer Service TTY	No	No	Yes, if different from toll free	No	Yes, if different from toll free	No	No	No
Customer Service-SHOP (Small Group) Customer Service URL	No	No	Yes	No	Yes	No	No	No
Marketplace Administrative Data–Issuer Marketplace Marketing Name	No	Yes	No	Yes	No	Yes	No	No
Customer Service–Marketplace Issuer Billing Address-Marketplace Issuer Billing Address	No	No	No	No	No	Yes	No	No
Marketplace Customer Service–Phone, Phone Extension, URL-IFP Customer Service Phone	No	Yes	No	Yes	No	Yes	No	No
Marketplace Customer Service–Phone, Phone Extension, URL-IFP Customer Service Phone Extension	No	Yes, if extension exits	No	Yes, if extension exits	No	Yes, if extension exits	No	No
Marketplace Customer Service–Phone, Phone Extension, URL-IFP Customer Service Toll Free	No	Yes	No	Yes	No	Yes	No	No
Marketplace Customer Service–Phone, Phone Extension, URL-IFP Customer Service TTY	No	Yes, if different from toll free	No	Yes, if different from toll free	No	Yes, if different from toll free	No	No
Marketplace Customer Service–Phone, Phone Extension, URL-IFP Customer Service URL	No	Yes	No	Yes	No	Displayed for 2016	No	No
Marketplace Customer Service–Phone, Phone Extension, URL-SHOP Customer Service Phone	No	No	No	Yes	No	Yes	No	Yes
Marketplace Customer Service–Phone, Phone Extension, URL-SHOP Customer Service Phone Extension	No	No	No	Yes, if extension exits	No	Yes, if extension exits	No	Yes, if extension exits
Marketplace Customer Service–Phone, Phone Extension, URL-SHOP Customer Service Toll Free	No	No	No	Yes	No	Yes	No	Yes
Marketplace Customer Service–Phone, Phone Extension, URL-SHOP Customer Service TTY	No	No	No	Yes, if different from toll free	No	Yes, if different from toll free	No	Yes, if different from toll free
Marketplace Customer Service–Phone, Phone Extension, URL-SHOP Customer Service URL	No	No	No	Yes	No	Yes	No	Yes

**Issuer Marketing Name for SHOP Display is pulled from Administrative template*

Updates to the data displayed for plan compare, QHP Landscape, and My Account must be completed in HIOS Plan Finder. It takes approximately 24 hours for updated information to be displayed. Updates to the *Issuer Marketing Name* for display in FF-SHOP must be completed in the Administrative Template.

1. If you need to change your customer service information (phone numbers or URL), please note the following:

    a. You must have a submitter role in HIOS to make changes.

    b. Instructions on how to make these changes in the HIOS Plan Finder Module are contained in Section 5.1 of the *Health Insurance Oversight System Plan Finder—Issuer User Manual* at http://www.cms.gov/CCIIO/Resources/Forms-Reports-and-Other-Resources/Downloads/HIOS-Plan-Finder-User-Manual-08-2014.pdf.

2. If you need to change your *Issuer Marketing Name* or *Issuer Marketplace Marketing Name*, take the following steps (you must have an Issuer Administrator role in order to make issuer-level changes):

    a. Log in to HIOS.

b. Select “Manage an Organization” on the left-hand side of the bar.

c. Enter the FEIN, and click “Search.” The issuers associated with the company will display.

d. Select “Edit” next to the issuer where the change is needed.

e. *Issuer Marketing Name* is the third data element. *Issuer Marketplace Marketing Name* is the fourth data element.

f. After making the desired change, scroll to the bottom of the page and select the “Submit” button.

g. The change is then committed to the database and seen on the screen.

The *Issuer Marketing Name* does not need to be changed in the Administrative Template unless you want to change other data elements in the Administrative Template or you want to update the FF-SHOP display. If you want to change other data in the Administrative Template, first change *Issuer Marketing Name* in the HIOS web-edit feature (instructions above) and then download a new version of the Administrative Template with the revised *Issuer Marketing Name* prepopulated in the template. The template then can be resubmitted into the QHP Issuer module.

3. Other:

   a. Instructions on how to update data contained in HIOS (but not displayed on www.healthcare.gov) are found at http://www.cms.gov/CCIIO/Resources/Forms-Reports-and-Other-Resources/Downloads/HIOS-Portal-UserManual-082014-150200.pdf.

   b. If you determine that information in HIOS for the following fields is incorrect, you need to submit a change request to the CMS Help Desk, Exchange Operations Support Center, (XOSC) at 1-855-CMS-1515 or via e-mail at CMS_FEPS@CMS.HHS.gov. Specify your issuer ID, the updates that need to be made, and that the update needs to be made to the data in the HIOS Plan Finder Module.

      i. *NAIC Company Code*

      ii. *NAIC Group Code*

      iii. *Issuer Legal Name*[2]

[2] Issuers who change their legal name in HIOS also should update their Administrative Template and the Unified Rate Review Template (URRT). Please note that *the Issuer Legal Name* in HIOS is verified with the Internal Revenue Service (IRS) based on their FEIN, so the issuers also will need to make the necessary updates with the IRS.

iv. *Issuer Address*.

c. Updates to contacts should be provided to your account manager, when assigned.