Manage Data Changes for the Health Insurance Oversight System

Quick Reference Guide

The Manage Data Changes functionality is available to users with the Company Administrator, Issuer Administrator, and Organization Administrator roles. This guide provides instructions for administrators to create and submit data change requests in HIOS. To access the Manage Data Changes functionality in the Health Insurance Oversight System (HIOS), users will need to go through the CMS Enterprise Portal and register for a CMS EIDM account. EIDM handles the identity verification of users trying to request access to CMS systems. A CMS EIDM account ensures that only authorized/registered users can access protected information and systems through the CMS Enterprise Portal. For instructions on how to register for an EIDM and HIOS account, refer to the “CMS Enterprise Portal and Health Insurance Oversight System User Quick Reference Guide”.

1 Request HIOS User Role

Users must have one of the following roles in HIOS to create and submit a request for data change. For instructions on how to request user roles, refer to the “CMS Enterprise Portal and Health Insurance Oversight System User Quick Reference Guide”.

Company Administrator: A representative of a Company or Non Insurance Company can request this role to edit their organization information. The Company Administrator can also edit the information for the associated Issuers. A company can have any number of Company Administrators.

Issuer Administrator: A representative of the Issuer who will be solely responsible for editing of the Issuer level information. Each Issuer can have multiple administrators.

Organization Administrator: A representative of a Non-Federal Governmental Plans organization or Other Organization Type that will be responsible for editing the organization information. Each organization can have multiple administrators.

2 Access the Manage Data Changes Function

Once users have the Company, Issuer, or Organization Administrator role, follow the steps below to access the Manage Data Changes function.

1. On the HIOS Home Page, select the “Manage an Organization” button to navigate to the Manage Data Changes page.
2. Select the “Manage Data Changes” tab to view and create requests (See Figure 1).

Figure 1: HIOS - Manage Data Changes

3 Create Data Change Requests

Updates to certain data elements that are not editable on the HIOS user interface can be requested on the Manage Data Changes page and through the Company and Issuer “Edit” page.

1. Company, Issuer, and Organization Administrators can create a data change request by clicking the “Create Request for Data Change” button on the Manage Data Changes page (See Figure 2).
2. Company and Issuer Administrators can also access this functionality via the “Create Request for Data Change” link found on the “Edit Company” and the “Edit Issuer” page (See Figure 3).

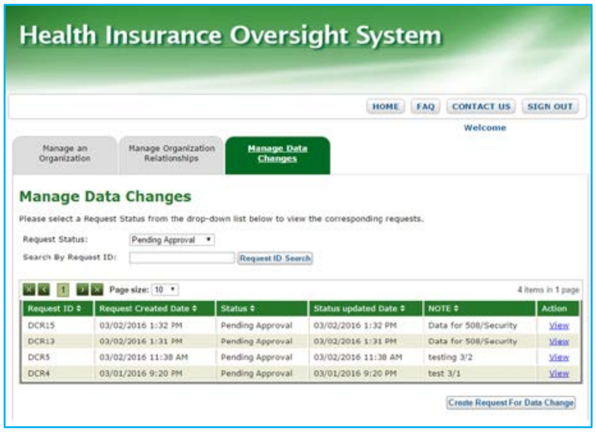

Figure 2: Manage Data Changes – Create Request for Data Change

Figure 3: Edit Company/Edit Issuer – Create Request for Data Change

Company Administrators

1. Select the value to change from the “What values would you like to change?” drop-down menu (See Figure 4). Company Administrators are able to select the values for the Organization, Issuer, and Product.
2. Company Administrators of multiple organizations will see a list of companies displayed in the drop-down menu. Select the company for which you are making the data change (See Figure 5).

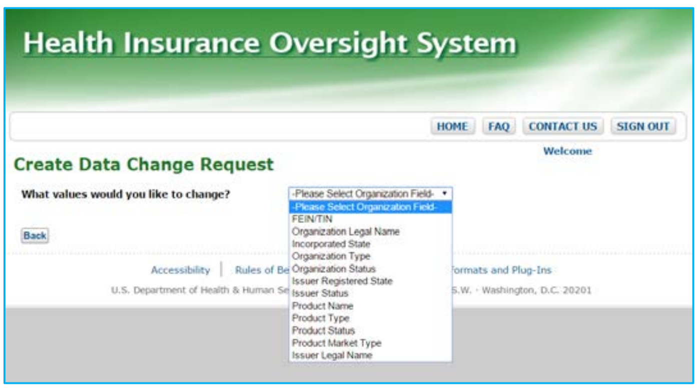

Figure 4: Create Data Change Request – Select Values

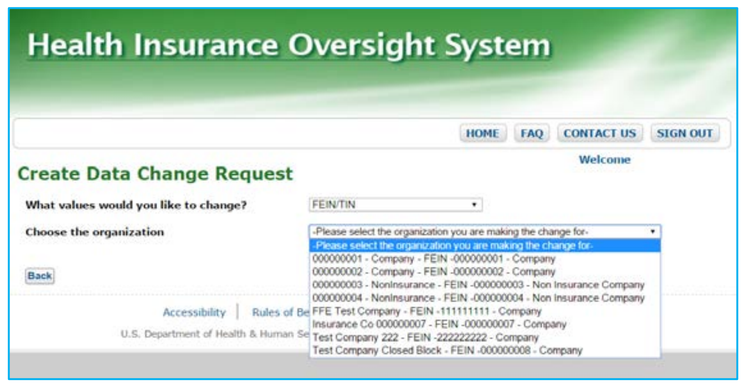

Figure 5: Create Data Change Request – Select Company

3. The current value of the selected field is displayed. You’ll need to enter the new value, or select from a predefined list of values, and a reason for change (maximum of 250 characters) and then click the ‘Submit’ button (See Figure 6).
4. If a change to the organization type from Company or Non Insurance to a Non-Federal Governmental Plans is needed, you’ll need to select the ‘Self-Funded’ or ‘Fully Insured’ radio button before clicking the ‘Submit’ button (See Figure 7).
5. You’ll see a confirmation message displayed on the screen. A Request ID will be assigned, along with a “Pending Approval” status (See Figure 15). Click the “Continue” button to return to the Manage Data Changes page.

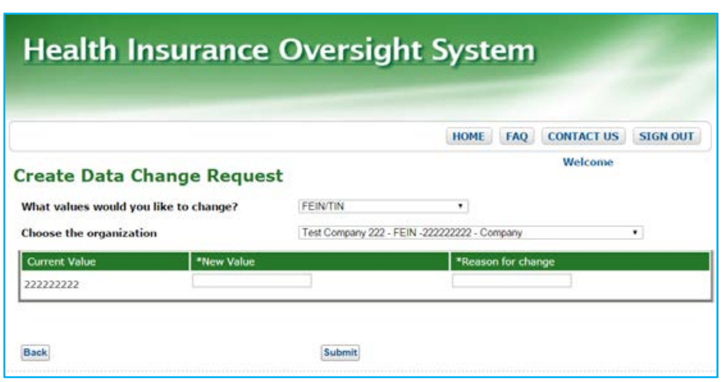

Figure 6: Create Data Change Request – New Value and Reason for Change

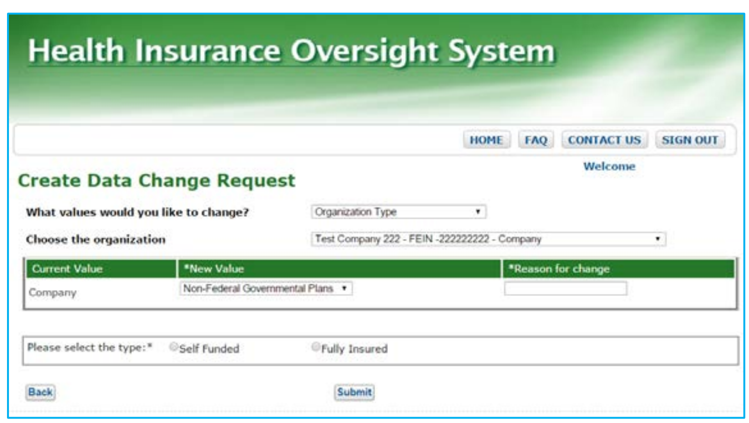

Figure 7: Create Data Change Request – Organization Type change from Company to Non-Federal Governmental Plans

Issuer Administrators

1. Select the value to change from the “What values would you like to change?” drop-down menu (See Figure 8). Issuer Administrators are able to select the values for Issuer and Product only.

2. If the value you would like to change is for an Issuer, you’ll need to choose the Issuer from the drop-down menu (See Figure 9).

3. If the value you would like to change is for a Product, you’ll need to select the Issuer and the Product associated to that Issuer (See Figure 10).

4. The current value of the selected field is displayed. You’ll need to enter the new value, or select from a predefined list of values, and a reason for change (maximum of 250 characters) and then click the ‘Submit’ button (See Figure 11).

5. You’ll see a confirmation message displayed on the screen. A Request ID will be assigned, along with a “Pending Approval” status (See Figure 15). Click the “Continue” button to return to the Manage Data Changes page.

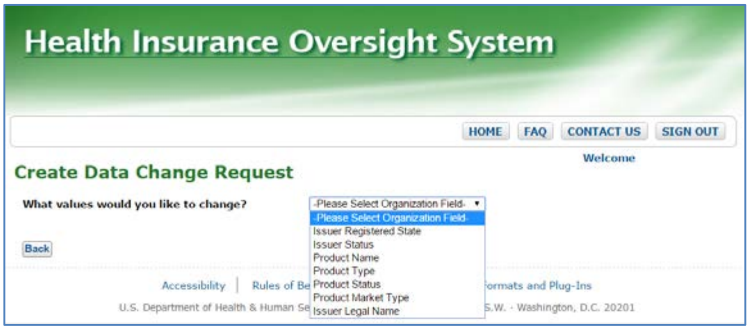

Figure 8: Select Values for Issuer or Product

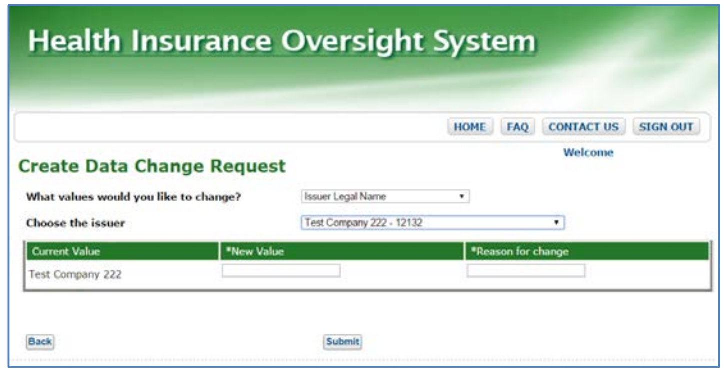

Figure 9: Create Data Change Request for an Issuer

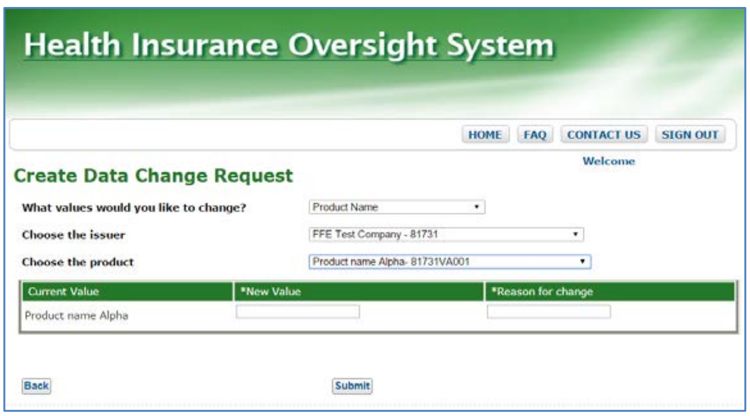

Figure 10: Create Data Change Request for a Product

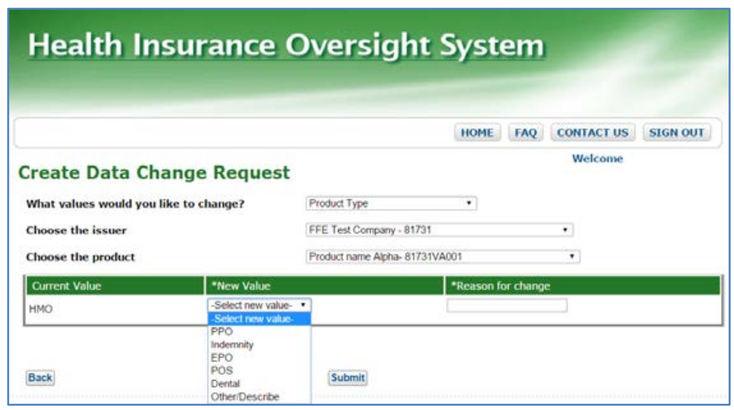

Figure 11: Current Value, New Value, and Reason for Change

Organization Administrators

1. Select the value to change from the “What values would you like to change?” drop-down menu. Organization Administrators are able to select the values for the Organization only (See Figure 12).

2. Organization Administrators of multiple organizations will see a list of organizations displayed in the drop-down menu. Select the organization for which you are making the data change. The current value of the selected field is displayed. You’ll need to enter the new value, or select from a predefined list of values.

   - To change an Organization Type from Non-Federal Governmental Plans to a Company or Non Insurance Company, you’ll need to select an incorporated state (See Figure 13).

   - To change Other Organization Type to a Company, you’ll need to enter a FEIN and select an incorporated state (See Figure 14).

3. Enter a reason for change (maximum of 250 characters) and then click the ‘Submit’ button.

4. You’ll see a confirmation message displayed on the screen. A Request ID will be assigned, along with a “Pending Approval” status (See Figure 15). Click the “Continue” button to return to the Manage Data Changes page.

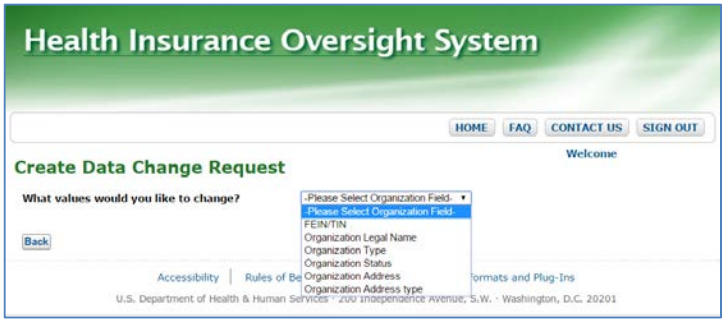

Figure 12: Select Values for the Organization

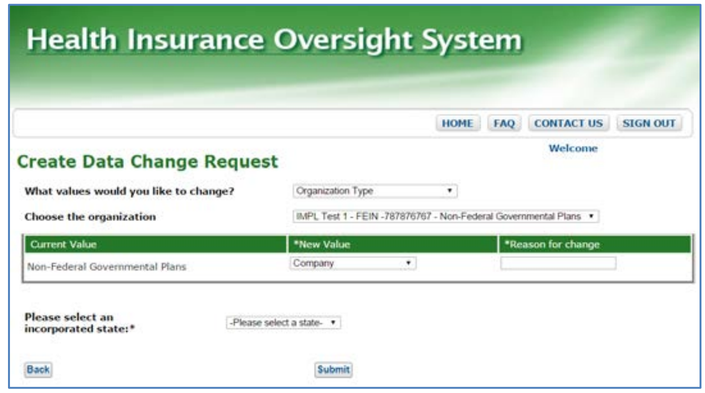

Figure 13: Organization Type Change from Non-Federal Governmental Plans to a Company

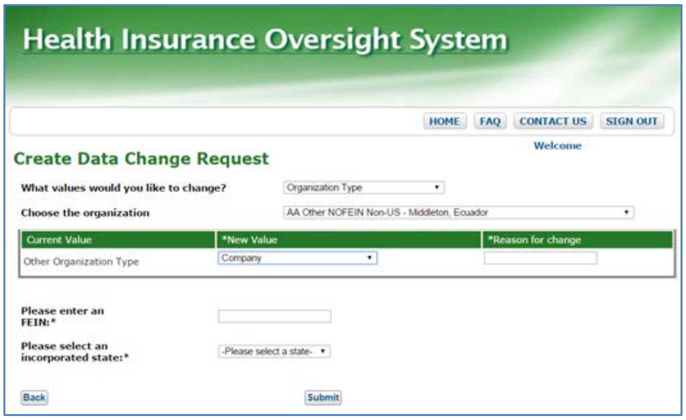

Figure 14: Organization Type Change for Other Organization Type to a Company

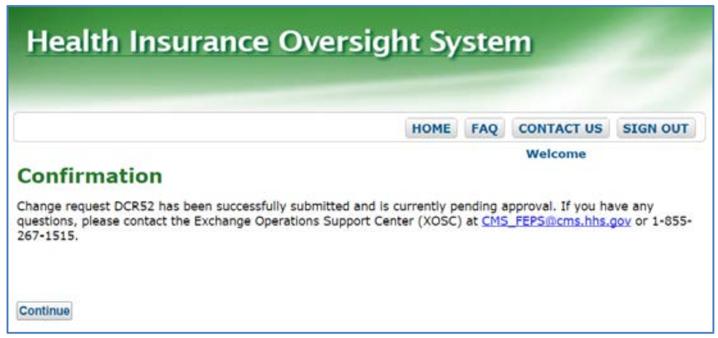

Figure 15: Confirmation of Change Request Submission

4 View Data Change Requests

1. Company, Issuer, and Organization Administrators can view data change requests on the Manage Data Changes page (See Figure 16).

2. Select one of the following the statuses from the “Request Status” drop-down menu.
   - Pending Approval
   - Approved
   - Denied
   - Unable to Process
   - Completed

3. You can sort the change requests by clicking the arrows in the column headers or enter a “Request ID” to search for a particular request.

4. Click the “View” link to review the change request details (See Figure 17).

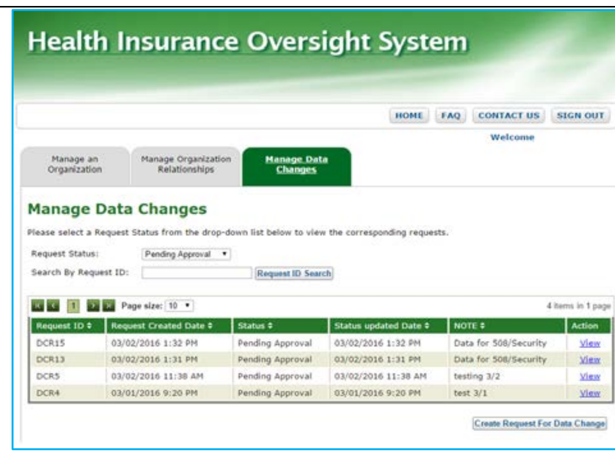

Figure 16: Manage Data Changes

Figure 17: Data Change Details View

Email Notifications for Data Change Requests

Email notifications are sent to administrators based on the Request Status. The table below illustrates the HIOS users who receive emails for each Request Status.

Request Status	Company, Issuer, or Organization Administrator
Pending Approval	No
Approved	No
Denied	Yes
Completed	Yes
Unable to Process	Yes