

CMS Enterprise Portal and Health Insurance Oversight System

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 Register for a CMS IDM Account (For New Users)

1. Navigate to the CMS Enterprise Portal (<https://portal.cms.gov>) and select **New User Registration** at the bottom of the page. (Refer to Figure 1).
2. Choose Your Application page, select your application from the drop-down list. Review and accept the Terms & Conditions before selecting **Next** to continue with the registration process.
3. It will require you to enter personal information (SSN is not collected here) and it will require you to create your User ID and Password. You must select security question and answer for identity verification and account management. Review the information on the Registration Summary page, make any necessary changes, and select **Submit User**. After completing the registration, an email acknowledging successful registration to IDM will be sent, along with your User ID.

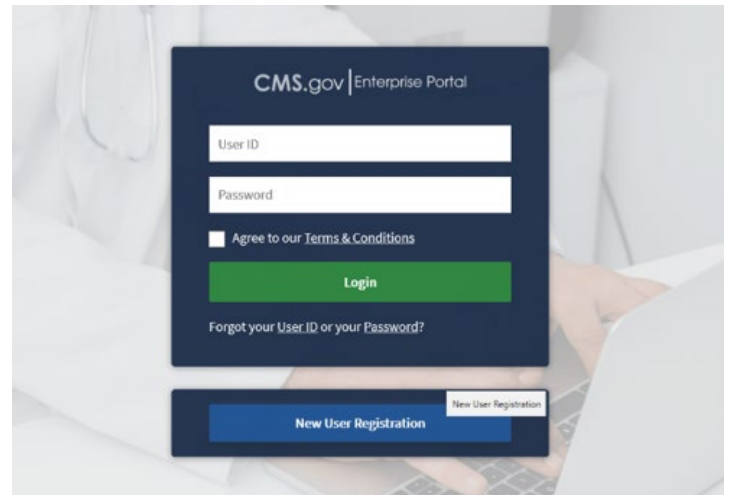


Figure 1: CMS Enterprise Portal Homepage

2 Request a HIOS Role and Complete Remote Identity Proofing (For New Users)

1. Navigate to the CMS Enterprise Portal (<https://portal.cms.gov>).
2. Enter your User ID and your Password and select the Terms and conditions checkbox before selecting the **Login** button (Refer to Figure 2).

Figure 2: CMS Enterprise Portal Login

3. On the My Portal page, select **Add Application** or select **Here** (Refer to Figure 3).

Figure 3: My Portal – Add Application

4. Select an Application **HIOS**.
5. In the drop-down under Select a Role, select **HIOS User** and then select **Launch**. (Refer to Figure 4).

Figure 4: Launch Identity Verification

6. The system will take you through the identity verification process. Accept the Terms and Conditions and proceed with the on-screen instructions to verify your identity (Refer to Figure 5).

Figure 5: Request New System Access

7. Once you complete the questions and answers on the Verify Identity screen, select the **Next** button. You will see an on-screen message confirming successful remove identity proofing.
8. Click on **Next** button, it will direct you back to Application page, you will need to enter your information for Role Request Detail
9. Once you entered the data for the Role Request Detail, clicked on **Next**. It will direct to the next section “Enter Reason for Request”. You will need to provide your reason get your HIOS Account to be approved.
10. Log out of HIOS and resign back into HIOS. Enter your User ID and your Password. Select your MFA Device, enter your security code, and select **Login**. You will see the HIOS Application under My Portal webpage.

3 Register an MFA Device (For New Users)

After successful completion of the identity verification process, new users will be prompted to complete the registration of a device for Multi-Factor Authentication.

1. Navigate to the CMS Enterprise Portal (<https://portal.cms.gov>) home page (Refer to Figure 2).
2. Enter your User ID and your Password. Select your MFA Device, enter your security code, and select **Login**.
3. Please go to your name dropdown and select My Profile.
4. Select an MFA device from the **MFA Device Type** drop-down (Refer to Figure 6). Follow the on-screen instructions for your selected device type to complete the registration.
5. You will see an on-screen message confirming successful registration of the device to your user profile. Select the **OK** button. This completes the MFA device registration process. Select **Log Out** to exit the CMS Portal.

4 Login Using MFA

After registering an MFA device, follow the steps below to log in to the CMS Portal and HIOS.

1. Navigate to the CMS Enterprise Portal (<https://portal.cms.gov>) and enter your User ID and Password and select the MFA Device Type. A one-time security code will be sent to your registered device. Enter the Security Code and select the Terms and Conditions checkbox before selecting the **Login** button (Refer to Figure 7).
2. You will now see the HIOS button card on the My Portal page. Select the HIOS card and then the **Overview** link (Refer to Figure 8).

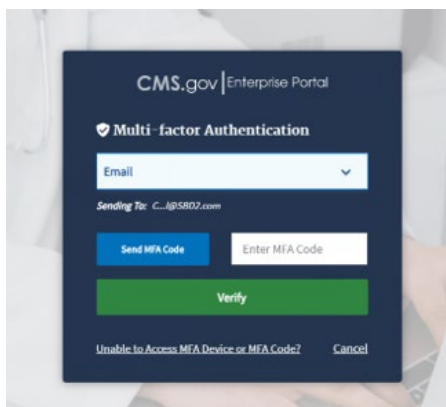


Figure 7: Enter User ID, Password and MFA Device Security Code

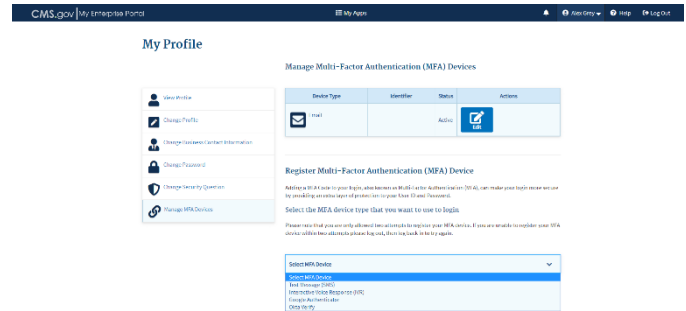


Figure 5: CMS Enterprise Portal – Register a Multi-Factor Authentication Device

3. On the landing page, select the **Access HIOS** or the **Access Plan Management & Market Wide Functions** link to access HIOS functionality (Refer to Figure 9).



Figure 8: My Portal – HIOS Access

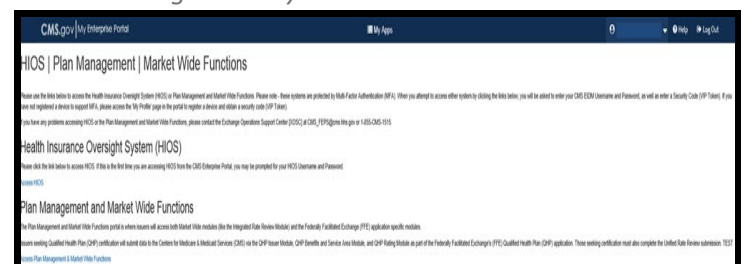


Figure 9: CMS Enterprise Portal – Access HIOS or Access Plan Management and Market Wide Functions

5 Register an Organization in HIOS (For New Users)

Not all users will need to register an organization in HIOS, but new users will not have any organizational associations or role permissions. The **Manage Organizations** functionality allows new users to create an organization before requesting a user role(s).

1. Select the **Manage Organizations** link on the HIOS Home Page (Refer to Figure 10).

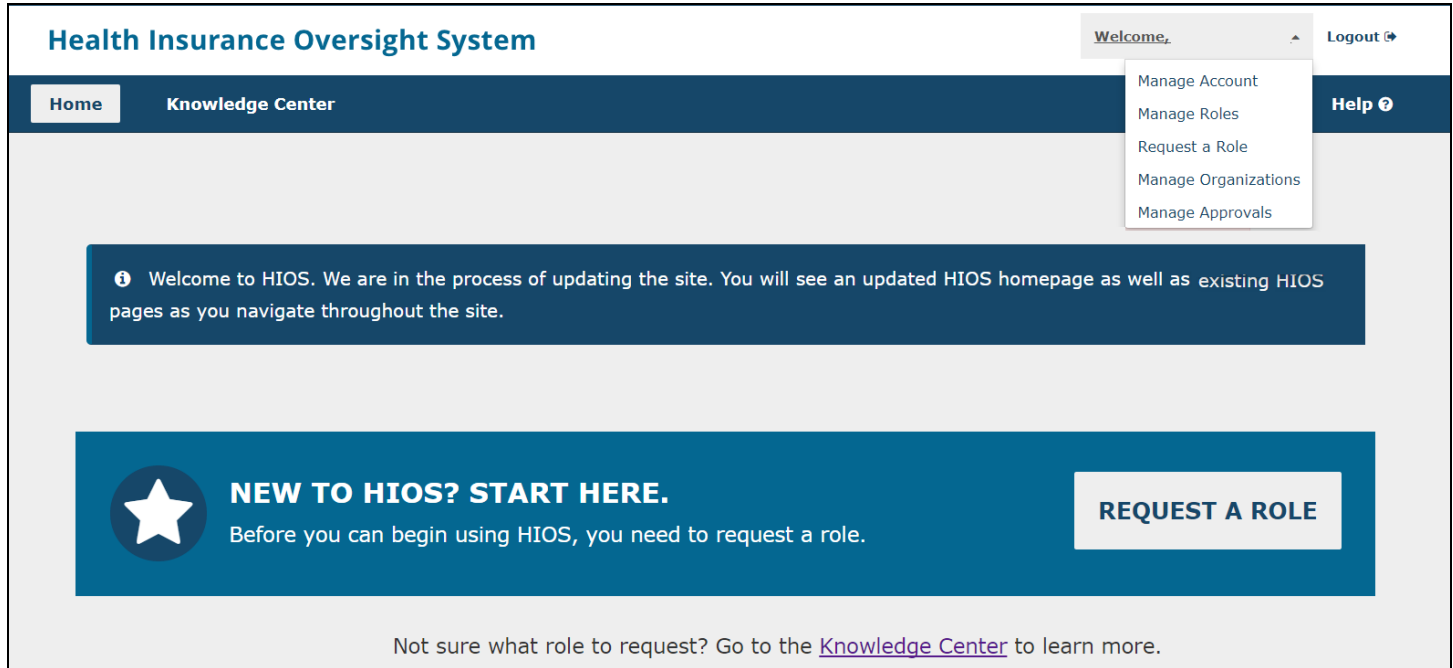


Figure 10: HIOS Home Page

2. On the Manage Organizations page, select **Create an Organization** (Refer to Figure 11).
3. Select the Organization's Primary Function. There are descriptions of each HIOS organization's primary business to help you decide which organization type to create.
4. Provide a Federal EIN/TIN to conduct a search to determine if the organization currently exists in HIOS (Refer to Figure 12). If the organization is an **Other Organization Type** and does not have an FEIN, enter the organization name and select **Search**.

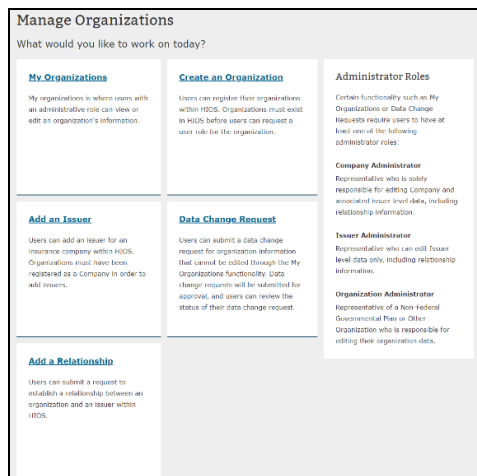


Figure 11: HIOS – Manage Organizations

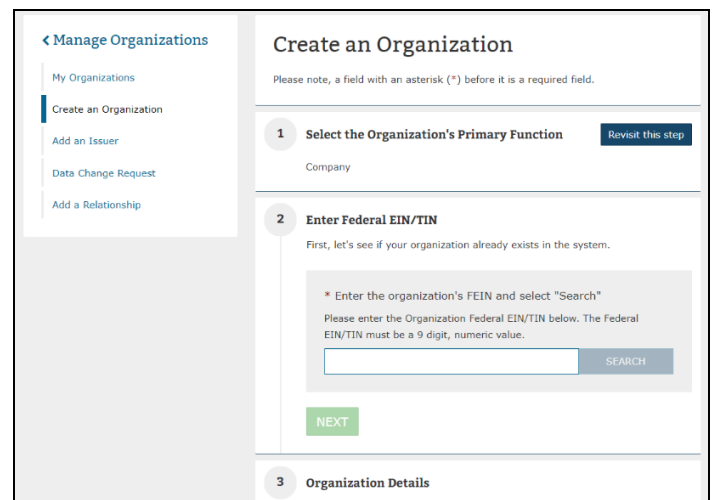


Figure 12: HIOS – Enter Federal EIN/TIN

- If an organization does not exist, proceed forward to Step 3 where you will enter your organization's details (Refer to Figure 13).
- In Step 4, you will review the organization information. You may revisit any previous steps to update the information. Once the information has been reviewed, select the **Submit** button.
- You will see a confirmation message at the top of the page notifying you to log back in to HIOS within 1-2 business days to check the status of your request. Select **Manage Organizations** from the left-hand navigation menu to navigate back to the Manage Organizations page.

Figure 13: HIOS – Enter Organization Details

6 Add Issuer(s) to an Organization

If an organization exists in HIOS, users can add an Issuer(s) to that organization.

- Select the **Manage Organizations** link on the HIOS Home Page (Refer to Figure 10).
- On the Manage Organizations page, select **Add an Issuer** (Refer to Figure 14).
- Search for the organization you would like to add an issuer to by entering the Federal EIN/TIN and select **Search**. Note: A company is the only organization type that can have issuers associated to it.
- Select the Issuer Registered State and proceed forward to enter the Issuer Details.
- In Step 3, enter the Issuer Details and select **Next** (Refer to Figure 15).
- In Step 4, you will review the issuer information. You may revisit any previous steps to update the information. Once the information has been reviewed, select the **Submit** button.
- You will see a confirmation message at the top of the page notifying you to log back in to HIOS within 1-2 business days to check the status of your request. Select **Manage Organizations** from the left-hand navigation menu to navigate back to the Manage Organizations page.

Figure 14: HIOS – Add Issuer

Figure 15: HIOS – Register New Issuer

7 Request HIOS Module Roles

Users with an organizational association can request a role(s) for the HIOS module(s).

1. Select the **Request a Role** link on the HIOS Home Page (Refer to Figure 10).
2. On the Request a Role page, there is a link for the Browse by Module page where a description of each module and the role functionality is provided.
3. Select a module from Step 1 and select **Next**.
4. Select a role, role type, and contact type (if applicable to the module) from Step 2 and select **Next**.
5. Enter the Organization ID for the association in Step 3 and then select the **Search** button. If an Organization ID does not exist, you will see a popup message instructing you to select the Manage an Organization button to first create the organization or select the Cancel button to use another Organization ID (Refer to Figure 16).
6. Select the **Add** button to associate the role to multiple Issuers per request. The system allows up to 10 Issuers per submission (Refer to Figure 17).
7. Proceed to submit the role request in Step 4. You will see a confirmation message notifying you to log back in to 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.

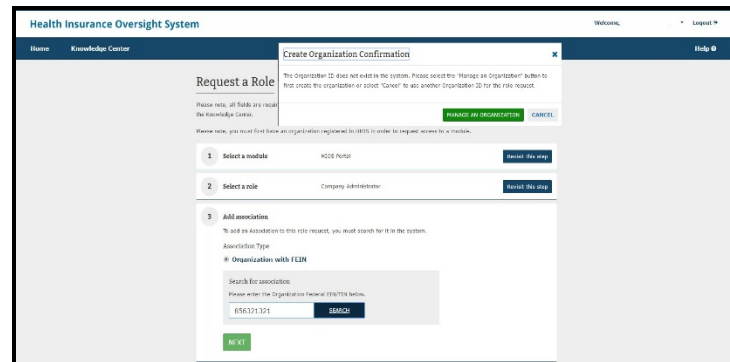


Figure 16: HIOS – Organization ID Does Not Exist

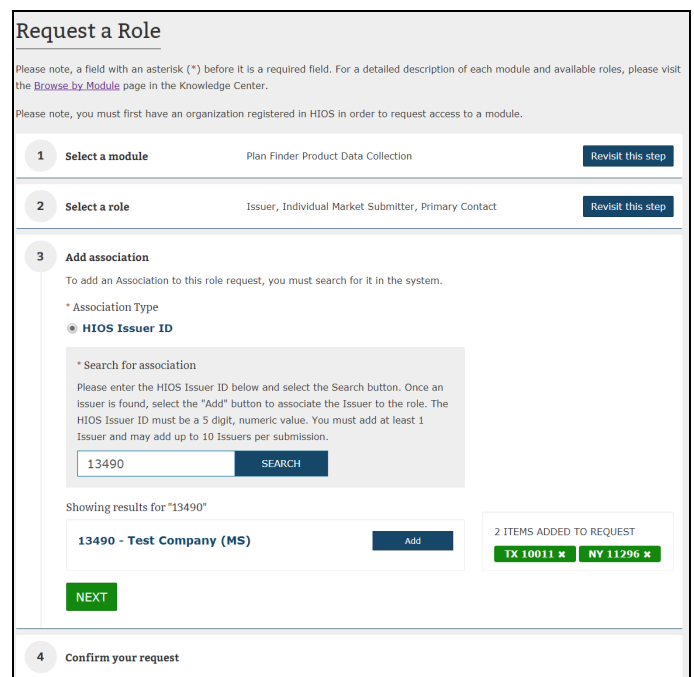


Figure 17: HIOS – Request Role

Frequently Requested Roles

The table below provides a description of the frequently requested roles:

HIOS Module	Role and Description
HIOS Portal	<p>Company Administrator is a representative of a Company or Non Insurance Company that can edit their organization information, including relationship information. The Company Administrator can also edit the information for the associated Issuers. A company can have any number of Company Administrators. A user with a Submitter or Validator role for a Company cannot be a Company Administrator.</p> <p>Issuer Administrator is a representative of the Issuer who will be solely responsible for editing of the Issuer level information, including relationship information. Each Issuer can have multiple administrators. A user with a Submitter or Validator role cannot be an Issuer Administrator.</p> <p>Organization Administrator is 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.</p> <p>Role Approval Administrator is a representative of a Non-Federal Governmental Plans organization who is responsible for approving role requests for their organization.</p>

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.
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.

Questions	Answers
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).
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.