

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 EIDM account. EIDM is the acronym for CMS' Enterprise 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.). 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. This guide provides detailed steps on how users register for a CMS EIDM account and request access to HIOS.

1 Register for a CMS EIDM Account (For New Users)

- 1: Navigate to the CMS Enterprise Portal (<https://portal.cms.gov>) and click 'New User Registration' on the right side of the page (See Figure 1).
- 2: Accept the Terms and Conditions.
- 3: On the New User Registration page, enter the required personal information and choose the desired User ID and Password. The User ID uniquely identifies you to EIDM, and therefore cannot be changed. You will need to select challenge questions and answers for identity verification and account management. After completing the registration, an email acknowledging successful registration to EIDM will be sent, along with a User ID.



Figure 1: CMS Enterprise Portal Homepage

2 Request Access to HIOS (For New Users)

- 1: Navigate to the CMS Enterprise Portal (<https://portal.cms.gov>) and click 'Login to CMS Secure Portal'.
- 2: Accept the Terms and Conditions and enter your EIDM credentials.
- 3: Click 'Request Access Now'. From the Access Catalog, click 'Request Access' for the HIOS application.
- 4: From the My Access page, click 'Request New System Access' and select 'HIOS Application' from the System Description drop-down menu and 'HIOS Issuer' for the Role. Click the hyperlink provided on the page to register for access to HIOS (See Figure 2). Navigate to the HIOS registration page using the URL provided. Complete the HIOS registration form and submit for approval. Once the HIOS user registration request has been reviewed and approved, you will receive an email containing the HIOS Authorization Code.
- 5: Repeat steps 3 and 4 in the CMS Enterprise Portal, but do not click the HIOS account request hyperlink this time. On the 'Request New System Access' page, enter the HIOS Authorization Code and then click 'Submit' (See Figure 2). This concludes the EIDM function. Log out of the CMS Enterprise Portal.

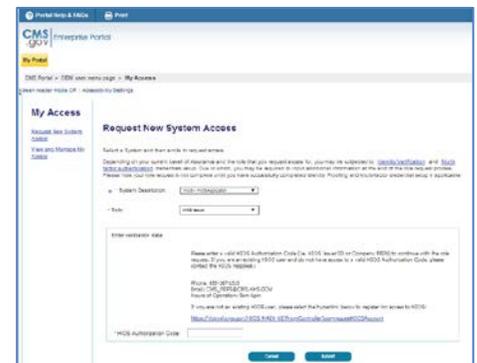


Figure 2: CMS Enterprise Portal – Request New System Access

For CMS Enterprise Portal issues, contact the Exchange Operations Support Center at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.

- 6: Log back in to the CMS Enterprise Portal. You will see a yellow 'HIOS' button on the top left of the dashboard indicating successful access established to HIOS. Click the yellow 'HIOS' button. On the landing page, click the 'Access HIOS' or the 'Access Plan Management & Market Wide Functions' link to access HIOS functionality (See Figure 3).



Figure 3: CMS Enterprise Portal - Access HIOS

3 Register an Organization (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 an Organization' functionality allows new users to create an organization before requesting a user role(s).

- 1: Click the 'Manage an Organization' button on the HIOS Home Page (See Figure 4).
- 2: From the drop-down list, select 'Create new organization'.
- 3: Select the Organization Type from the drop-down list. There is a hyperlink to a list of organization types and their definitions to help you decide which organization type to create. Provide a Federal EIN/TIN in order to conduct a search to determine if the organization currently exists in HIOS. If the organization does not have an FEIN, select 'Other Organization Type' from the drop-down list and check the box, 'My organization does not have an FEIN'. Enter the organization name to conduct a search (See Figure 5).
- 4a: If an organization does not exist, you will need to register the new organization by clicking the 'Create Organization' button and proceed to enter the organization's information and submit the request.
- 4b: You will not have to register an organization if an organization already exists in HIOS. You can add Issuer(s) to an organization by clicking the 'Add Issuer' button and proceed to the 'Register New Issuer' page. Complete the form with the Issuer(s) information and click the 'Save and Add Another Issuer' button. Click 'Submit'. This submission will generate the Issuer ID(s).
- 5: An on-screen confirmation message will display notifying you to log back in to HIOS within 1-2 business days to check the status of your request.



Figure 4: HIOS Home Page

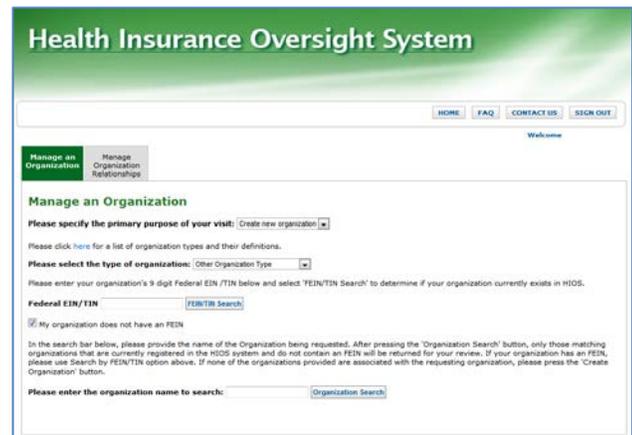


Figure 5: HIOS - Manage an Organization

4 Request Role(s)

Once the organization has been successfully registered, users can request a role(s) for the HIOS module(s).

- 1: Click the 'Role Management' button on the HIOS Page (See Figure 4).
- 2: Click the 'Request Role' tab and select the desired module from the drop-down list. Select the Requested Role, User Type, and User Sub-Type (Refer to the Frequently Requested HIOS Roles section for a description of each user role). Click 'Continue'.
- 3: Enter the Issuer ID and click 'Search'. Click the 'Review/Continue' button and proceed to submit the role request (See Figure 6).
- 4: An on-screen confirmation message will display 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, click the 'View Existing Role' tab.

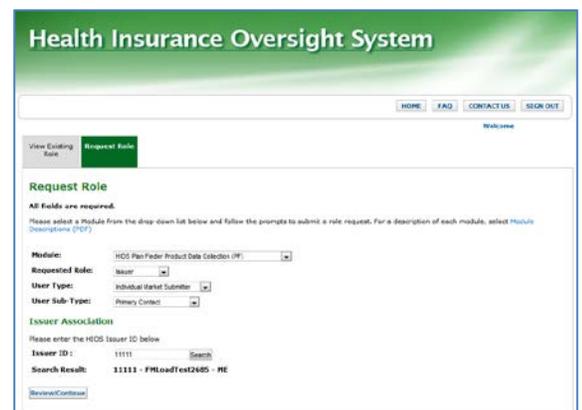


Figure 6: HIOS - Request Role

HIOS Frequently Asked Questions

Questions	Answers
Who can I contact for system support?	For Production system support, users can call the Exchange Operations Support Center at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov .
How do I access the HIOS environment?	To access the HIOS environment visit https://portal.cms.gov . Users will need to complete the registration for the CMS EIDM account through the CMS Enterprise Portal prior to requesting a HIOS account.
Why am I required to enter the EIDM (Enterprise Identity Management) credentials to access HIOS?	Users must register for an EIDM account and obtain an EIDM 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.
What is the approval process for requesting access to HIOS?	Users with EIDM credentials need to complete the HIOS account information form and provide their organizational email address. The system does not accept domains such as Gmail, Yahoo, etc. The organizational email is one of the main criteria to verify the user to the organization relationship. Users will not have immediate approval. The user information is verified and processed on the backend.
I registered for a HIOS account but did not receive an authorization code. How do I obtain a HIOS Authorization Code?	Once the HIOS user registration request has been reviewed and approved, an email containing the HIOS Authorization Code will be sent to the organizational email address provided by the user. Users should also check their Junk Email folder to ensure the message was not marked as spam.
How do I access HIOS and Plan Management & Market Wide Functions?	Users need to successfully complete the CMS Enterprise Portal registration for an EIDM account in order to access HIOS. When users log in to the CMS Enterprise Portal, there will be a yellow 'HIOS' button displayed on the top left of the dashboard. Users are not on HIOS maintained pages until they click the yellow 'HIOS' button. Users click the yellow 'HIOS' button, then the 'Access HIOS' link to navigate to the HIOS Home Page for organization registration and role requests. Users click the 'Access Plan Management & Market Wide Functions' link to access Marketplace application specific modules.
Where do I request roles and access to HIOS modules?	All module access and role requests are to be completed in the Role Management section of the HIOS Home Page. Users select the 'Role Request' button and the desired HIOS module and specific roles that apply to the module selected.
Why can't I find the role(s) I need on the Request Role page?	Some roles for HIOS modules have restricted access. These will not display on HIOS. 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 or Issuer Administrator role to edit organization and complete such tasks as updating the TPA information for that organization.
When I log in to HIOS, I do not see the green button to access a module. How do I view the green button(s) to the module(s) I requested?	To access the green button for the module requested, users need to click 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 role(s) to access specific HIOS module(s).
When I click the green button, there is no link available to access an application. How do I 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.

Frequently Requested HIOS Roles

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

HIOS Module	Role & Description
HIOS – Portal	<p>Company Administrator: Representative of Company or Non Insurance Company can request this to edit their organizations. A company can have any number of Company Administrators. A user with a Submitter or Validator roles for a Company cannot be a Company Administrator.</p> <p>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. A user with a Submitter or Validator role cannot be an Issuer Administrator.</p> <p>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.</p> <p>Role Approval Administrator: A role that can be obtained by a representative of an organization (currently applies only to Non-Federal Governmental Plans organization). Once users obtain this role for a particular organization, they will be solely responsible for approving any role requests for that particular organization.</p>
Plan Finder Product Data Collection	<p>State Users: The State representative can view all the Issuer organizations assigned to that State.</p> <p>Issuer – Submitter user is a representative of an organization who can submit and view Issuer data. <i>Primary Submitter contact:</i> The Primary Submitter is the primary contact for the submission issues. <i>Backup Submitter contact:</i> The Backup Submitter is the backup contact for the submission issues.</p> <p>Issuer – Validator user is a representative of an organization who can validate the data submitted by the Issuer. <i>Primary Validator contact:</i> The Primary Validator is the primary contact for the validation issues. <i>Backup Validator contact:</i> The Backup Validator is the backup contact for the validation issues.</p> <p>Issuer – Attester user: The CEO or CFO contact of an organization.</p> <p>NOTE: The Primary and Backup Contacts cannot be edited in Plan Finder. Users need to contact the Exchange Operations Support Center at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov to submit a change request to the user information.</p>