

CMS Enterprise Portal and Health Insurance Oversight System (HIOS)

Non-Production User Support 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 a user registers for a CMS EIDM account and a HIOS account.

1 Register for a CMS EIDM Account

- Step 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:** Enter the required personal information and choose the desired User ID and Password. The User ID uniquely identifies the user to EIDM, and therefore cannot be changed. Based on the information provided, users will be required to answer questions for identity verification. This information is submitted to Experian and unique questions and answers are provided for identity proofing. After completing the registration process, an email acknowledging successful registration to EIDM will be sent, along with the User ID.



Figure 1: CMS Enterprise Portal Homepage

2 Register for a HIOS Account

- Step 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:** To establish access to HIOS through the CMS Enterprise portal, 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 – HIOS Application" from the System Description dropdown menu and "HIOS Issuer" for the Role. New users will need to click the hyperlink provided on the page to register for HIOS access (See Figure 2). Navigate to the HIOS registration page using the URL provided and complete the HIOS user registration process.
- 5:** Once the HIOS user registration request has been reviewed and approved, an email containing the HIOS Authorization Code will be provided. Users will need to enter the HIOS Authorization Code to obtain access to HIOS (see Step 6 below).
- 6:** 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. For CMS Enterprise Portal login issues, users can call the Exchange Operations Support Center at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov. NOTE: For access to the IMPL environment, <https://portalval.cms.gov>, users will need to email EIDMSupport@qssinc.com and request an LOA2 (level of assurance 2) in order to bypass the remote identity proofing (RIDP) process.
- 7:** Log out of the CMS Enterprise Portal and log back in. Users should see a yellow "HIOS" button on the top left of the dashboard indicating successful access established to HIOS.
- 8:** Click the yellow HIOS button, followed by the "Access HIOS" or the "Access Plan Management and Market Wide Functions" link to access HIOS functionality (See Figure 3).

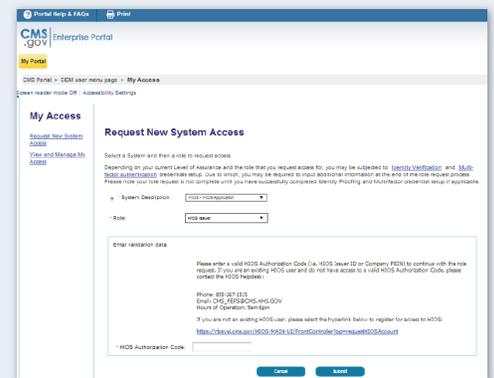


Figure 2: CMS Enterprise Portal – Request New System Access

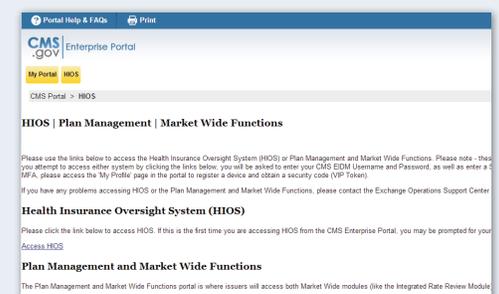


Figure 3: CMS Enterprise Portal – Access HIOS

3 HIOS Organization Registration

Upon successful login, users will arrive on the HIOS Home Page. New users will not have any organizational associations or role permissions. The “Manage an Organization” functionality allows users to create a new organization.

- Steps 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.
NOTE: There is a hyperlink to a list of organization types and their definitions to help the user 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, the user can enter the organization name and click “Search”.
- 4a:** If an organization does not exist, users will need to register the organization by clicking the “Create Organization” button and proceed to enter the organization’s information (See Figure 5).
- 4b:** If an organization exists, information will be displayed on the page. Users have the option to click “Add Issuer” 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” and a New Issuer Confirmation page will display.
- 5:** Users receive an email notification once the registration request has been reviewed and approved by the HIOS Helpdesk.



Figure 4: HIOS Home Page

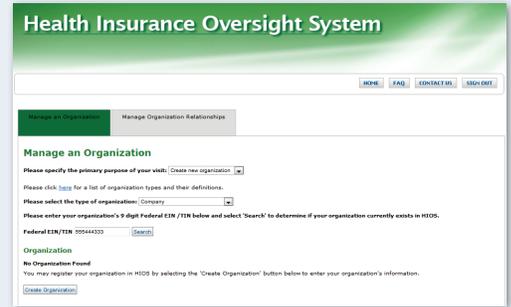


Figure 5: Manage an Organization – Create Organization

4 HIOS Role Management

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

- Steps 1:** Click the “Role Management” button on the HIOS Home Page (See Figure 4).
- 2:** Click the “Request Role” tab and select the desired module and the requested role. Click “Continue” to proceed.
- 3:** Enter the Organization Identifier such as (FEIN, Issuer ID, or State) and click “Search”. Click the “Review/Continue” button and proceed to submit the role request (See Figure 6).
- 4:** Users will receive an email notification once the role request has been reviewed and approved.

NOTE: To see user role(s) and access permissions, click the “View Existing Role” tab.

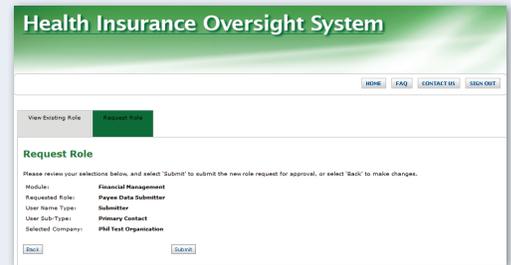


Figure 6: Request Role

Register for a CMS EIDM Account

Register for a HIOS Account and Gain Access to HIOS

Register the Organization in HIOS

Request a User Role

THIS COMPLETES THE ACCOUNT REGISTRATION PROCESS.

HIOS Frequently Asked Questions (FAQ)

Q: Who can users contact for system support?

A: For Production system support, users can call the Exchange Operations Support Center at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov. For TEST and IMPL system support, contact HIOSIntegrationSupport@cgifederal.com for HIOS related issues and the QSSI Helpdesk, EIDMSupport@qssinc.com, for user account issues.

Q: Why are users required to enter their EIDM (Enterprise Identity Management) credentials to access HIOS?

A: 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.

Q: What is the approval process for users requesting access to HIOS?

A: 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 HIOS Helpdesk needs to verify the user information and process approvals on the backend.

Q: Which roles allow users to edit Organization Information?

A: 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.

Q: How do users access the HIOS IMPL environment?

A: Users will need to complete the registration for the CMS EIDM account through the CMS Enterprise Portal prior to requesting access to HIOS. For access to the HIOS IMPL environment, <https://portalval.cms.gov>, users will need to email EIDMSupport@qssinc.com (after registering in EIDM) and request an LOA2 (level of assurance 2) in order to bypass the remote identity proofing (RIDP) process. After stepping up their account to LOA2, users can then continue with the process to register for HIOS.

Q: How do users access HIOS and Plan Management & Market Wide Functions?

A: 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.

Q: Where do users request roles and access to HIOS modules?

A: 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.

Frequently Requested HIOS Roles

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

HIOS Module Name	Role/Functionality
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 plan 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 Non-Federal Governmental plan organization). Once a user obtains 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 Users:</p> <p>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>Validator user is a representative of an organization who can validate the data submitted by the issuer. <i>Primary Validation contact:</i> The primary Validator is the primary contact for validation issues. <i>Backup Validation contact:</i> The backup Validator is the backup contact for the validation issues.</p> <p>Attestation User: An official within an organization, usually CEO or CFO, who attests the data submitted.</p>
Help Desk Roles	<p>UserAccountApprover: This role will enable the user to approve HIOS User accounts.</p> <p>UserRoleApprover: This role will enable the user to approve HIOS User role requests. This role can be cross referenced to a module, to filter only role requests related to that specific module.</p> <p>Organization Approver: This role will enable the user to approve Organization creations in HIOS (including Company, Non Insurance Company, Issuer, Non-Fed Governmental Plan, and Other Organization Type).</p>