HPID and OEID System Overview

March 2013
Agenda

- Policy Overview
- Accessing Health Plan and Other Entity Enumeration System (HPOES)
- High Level Application Overview
- Wrap Up and Next Steps
- Q&A
Policy Overview
What is the Purpose of the HPID?

- Required to be used in the standard transactions to identify a health plan that has an HPID.
- Allowed to be used for any other lawful purpose.
Who is Required to Get the HPID?

- Health plans as defined by 45 CFR 160.103.
- Controlling Health Plan (CHP) vs. Subhealth Plan (SHP).

<table>
<thead>
<tr>
<th>Entity</th>
<th>Enumeration Requirements</th>
<th>Enumerations Options</th>
</tr>
</thead>
</table>
| CHPs     | Must get an HPID for itself | • May get HPID(s) for its SHP(s)  
|          |                          | • May direct its SHP(s) to get HPID(s) |
| SHPs     | Not required to get an HPID | • May get an HPID at the direction of its CHP  
|          |                          | • May get an HPID of its own initiative |
What is the Timeline for Compliance with the Regulation?

<table>
<thead>
<tr>
<th>Entity Type</th>
<th>Compliance Date for Obtaining HPID</th>
<th>Full Implementation Date for Using HPID in Standard Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Plans, excluding Small Health Plans</td>
<td>Nov 5, 2014</td>
<td>Nov 7, 2016</td>
</tr>
<tr>
<td>Small Health Plans*</td>
<td>Nov 5, 2015</td>
<td>Nov 7, 2016</td>
</tr>
<tr>
<td>Covered Healthcare Providers</td>
<td>N/A</td>
<td>Nov 7, 2016</td>
</tr>
<tr>
<td>Healthcare Clearinghouses</td>
<td>N/A</td>
<td>Nov 7, 2016</td>
</tr>
</tbody>
</table>

* Small Health Plan means a health plan with annual receipts of $5 million or less. (45 CFR 160.103)
What is the Other Entity Identifier?

- Voluntary Identifier
- Must meet following requirements:
  - Needs to be identified in the standard transactions.
  - Is NOT eligible to obtain an NPI.
  - Is NOT eligible to obtain an HPID.
  - Is NOT an individual.
Accessing Health Plan and Other Entity Enumeration System (HPOES)
Accessing HPOES through the CMS Enterprise Portal

- HPID and OEID applications will be available through HPOES on March 29th 2013.
- HPOES is housed within CMS’s Health Insurance Oversight System (HIOS).
- Starting on 3/28, HIOS will be integrated with the CMS Enterprise Portal and users will no longer be able to access HIOS via https://insuranceoversight.hhs.gov/.
- Users will need to go to the CMS Enterprise Portal at https://portal.cms.gov/ to access HIOS.
Accessing HIOS through the CMS Enterprise Portal

• All existing HIOS users will automatically receive an account to login into the Enterprise Portal.
• On 3/28, all existing HIOS users will receive an email with their Enterprise Portal login credentials.
• In order to complete the registration process, existing HIOS users will be required to provide additional information that is not currently in HIOS.
• All new HIOS users will need to register in the Enterprise Portal to obtain a user ID and password.
Accessing HPOES through the CMS Enterprise Portal

- All users will be required to complete the Enterprise Portal registration process, which includes Identity Verification (ID Proofing).
- ID Proofing verifies that the individual referenced in the account is the same person creating the account.
- Additional information collected includes the following Personally Identifiable Information (PII) for purposes of the ID Proofing Process:
  - Social Security Number, Date of Birth, Home Address and Primary Phone Number.
Accessing HPOES through the CMS Enterprise Portal
Accessing HPOES through the CMS Enterprise Portal

Health Insurance Oversight System (HIOS)

Plan Management and Market Wide Functions
High Level Application Overview
High Level Application Overview

Step 1: Register the Organization in HIOS

Step 2: Access HIOS User Role Management

Step 3: Access HPOES and Select an Application Type

Step 4: Complete and Submit an Application

Step 5: Application Review by the Authorizing Official

Step 6: HPID or OEID Number Assigned
High Level Application Overview

Step 1: Register the Organization in HIOS

Step 2: Access HIOS User Role Management

Step 3: Access HPOES and Select an Application Type

Step 4: Complete and Submit an Application

Step 5: Application Review by the Authorizing Official

Step 6: HPID or OEID Number Assigned
Overview of Application Process

• **Step 1: Register the Organization in HIOS**
  - To determine if the organization already exists in HIOS, search by the organization’s Federal Employer Identification Number (EIN).
  - If the organization does not already exist in HIOS, users will need to register their organization.
  - All registration requests are reviewed prior to approval.
  - If the organization already exists in HIOS, users may proceed directly to step 2.
HIOS Main Page – Register an Organization

Health Insurance Oversight System

Organizations Management & Administrative Functions:
- Manage Account
- Register an Organization
- Role Management

HIOS Functions:
- Health Plan and Other Entity Enumeration System

HIOS Home Page
Announcements
Search by FEIN

Health Insurance Oversight System

Organization Registration

Please enter your company's 9 digit Federal EIN below and select 'Search' to determine if your company currently exists in HIOS.

Federal EIN:  
Search
Company Search Results – None

Health Insurance Oversight System

Organization Registration

Please enter your company's 9 digit Federal EIN below and select 'Search' to determine if your company currently exists in HIOS.

Federal EIN: 321321321 [Search]

Company

No Company Found

You may register your company in HIOS by selecting the 'Create Company' button below to enter your company's information.

[Create Company]
# Register New HIOS Company

- **Health Insurance Oversight System**

## Register New Company

Please fill in the form below with your Company's information.

**Note:** (*) Indicates a required field.

- **Company Legal Name:** 
- **Incorporated State:** 
- **Federal EIN:** 321321321
- **NAIC Company Code:** 
- **NAIC Group Code:** 
- **Group Name:** 
- **AM Best Number:** 
- **Not For Profit:** 
- **Co-Op:** 

### Domiciliary Address

- **Address Line 1:** 
- **Address Line 2:** 
- **City:** 
- **State:** 
- **ZIP code:** 
- **ZIP Plus 4:**

[Review/Continue]
New HIOS Company Creation Confirmation

Your request to register the Company below has been submitted for approval. Once approved, you shall receive a notification email.

### Company

<table>
<thead>
<tr>
<th>Company Legal Name</th>
<th>Registered State</th>
<th>Federal EIN</th>
<th>NAIC Company Code</th>
<th>AM Best Number</th>
<th>Not For Profit</th>
<th>Co-Op</th>
<th>Address Line 1</th>
<th>Address Line 2</th>
<th>City</th>
<th>State</th>
<th>ZIP Code</th>
<th>ZIP Plus 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company 3213-21</td>
<td>MD</td>
<td>3213213-21</td>
<td>32111</td>
<td>Yes</td>
<td>Yes</td>
<td>321 Main Street</td>
<td>Fairfax, MD</td>
<td>22124</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Company Group

<table>
<thead>
<tr>
<th>NAIC Group Code</th>
<th>Group Name</th>
</tr>
</thead>
</table>

Continue
Summary of New HIOS Company Information

Required information to register a new company:

• Company Legal Name
• Federal Employer Identification Number
• Incorporated State
• Domiciliary Address
High Level Application Overview

Step 1: Register the Organization in HIOS
Step 2: Access HIOS User Role Management
Step 3: Access HPOES and Select an Application Type
Step 4: Complete and Submit an Application
Step 5: Application Review by the Authorizing Official
Step 6: HPID or OEID Number Assigned
Overview of Application Process

• **Step 2: Determine HPOES user role and request HIOS access to the company.**
  - Users will need to determine their user role and identify the company to which they need access. There are three different HPOES user roles:
    - **Guest User:** A user that is able to view general HPOES information (no company association needed).
    - **Submitter User:** A representative of a health plan or other entity that submits an application.
    - **Authorizing Official User:** A company executive that has the authority to approve applications, including CEOs and CFOs.
Overview of Application Process

• Step 2 (Continued)
  • If requesting the Submitter or Authorizing Official role, users will need to identify the company to which they wish to be granted access.
  • Users can only have one HPOES role at a time.
HIOS Main Page – Role Management

Health Insurance Oversight System

Organization Management & Administrative Functions:
- Manage Account
- Register an Organization
- Role Management

HIOS Functions:
- Health Plan and Other Entity Enumeration System

HIOS Home Page
Announcements
Request Role

Health Insurance Oversight System

View Existing Roles  Request Role

Request Role

Please select a Module from the drop-down list below and follow the prompts to submit a role request. For a description of each module, select Module Descriptions

Module:

Health Plan and Other Entity Enumeration System (HPOES)

Note: For this module, you can have only one user role at a time. Requesting a different user role will deactivate your current user role and any company associations. For instance, you cannot be both an authorizing official and a submitter for a company.

Requested Role:

-- Select Role --
Select Role
Guest
Submitter
Authorizing Official
Select Role

Health Insurance Oversight System

Request Role

Please select a Module from the drop-down list below and follow the prompts to submit a role request. For a description of each module, select Module Descriptions.

Module: Health Plan and Other Entity Enumeration System (HPOES)

Note: For this module, you can have only one user role at a time. Requesting a different user role will deactivate your current user role and any company associations. For instance, you cannot be both an authorizing official and a submitter for a company.

Requested Role: Submitter

Continue
Search for Federal EIN

Health Insurance Oversight System

Request Role

Please select a Module from the drop-down list below and follow the prompts to submit a role request. For a description of each module, select Module Descriptions.

Module: Health Plan and Other Entity Enumeration System (HPOES)

Note: For this module, you can have only one user role at a time. Requesting a different user role will deactivate your current user role and any company associations. For instance, you cannot be both an authorizing official and a submitter for a company.

Requested Role: Submitter

Company Association

Please enter the Company Federal EIN below

Federal EIN: Search
Health Insurance Oversight System

Request Role

Please select a Module from the drop-down list below and follow the prompts to submit a role request. For a description of each module, select Module Descriptions.

Module: Health Plan and Other Entity Enumeration System (HPOES)

Note: For this module, you can have only one user role at a time. Requesting a different user role will deactivate your current user role and any company associations. For instance, you cannot be both an authorizing official and a submitter for a company.

Requested Role: Submitter

Company Association

Please enter the Company Federal EIN below

Federal EIN: 321321321
Search

Search Result: Company 321321

Review/Continue
Health Insurance Oversight System

Request Role

Please review your selections below, and select 'Submit' to submit the new role request for approval, or select 'Back' to make changes.

Module: Health Plan and Other Entity Enumeration System (HPOES)
Requested Role: Submitter
Selected Company: Company 321321

[Submit]
Request Role Confirmation

Health Insurance Oversight System

Request Role

Confirmation:

- Your role request has been submitted for approval. Once approved, you shall receive a notification email.

Please select a Module from the drop-down list below and follow the prompts to submit a role request. For a description of each module, select Module Descriptions.

Module:  

-- Select Module --
High Level Application Overview

Step 1: Register the Organization in HIOS
Step 2: Access HIOS User Role Management
Step 3: Access HPOES and Select an Application Type
Step 4: Complete and Submit an Application
Step 5: Application Review by the Authorizing Official
Step 6: HPID or OEID Number Assigned
Overview of Application Process

• Step 3: Access HPOES and select an application type
  • HPIID Application
    • There are two different HPIID application types:
      • CHP
      • SHP
    • If completing a SHP HPIID application, users will be required to select a CHP company.
  • OEID Application
Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

Announcements
Insert Submitter user announcements here. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam nisl turpis, luctus id congue id, tincidunt...

Read More

Health Plan and Other Entity Enumeration System Application instructions

Welcome to the Health Plan and Other Entity Enumeration System!
HPID and OEID applications are now available!

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of 10-15 minutes to complete an application.

How do I obtain an HPID or OEID?
First, an entity must determine if it is going to obtain an HPID or OEID, and therefore must determine whether it meets the definition of health plan. If the entity is going to obtain an HPID it should follow these instructions (pdf, 59.8KB). If the entity is going to obtain an OEID it will follow these instructions (pdf, 34.3KB).

What is the purpose of the health plan identifier?
The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.
High Level Application Overview

Step 1: Register the Organization in HIOS
Step 2: Access HIOS User Role Management
Step 3: Access HPOES and Select an Application Type
Step 4: Complete and Submit an Application
Step 5: Application Review by the Authorizing Official
Step 6: HPID or OEID Number Assigned
Overview of Application Process

• **Step 4: Complete and Submit an Application**
  • Users will need to complete their application and provide the necessary information.
  • The company’s Authorizing Official needs to be identified if one has not already been designated.
    • SHP applications will display the CHP’s Authorizing Official information.
    • All Authorizing Official information provided in the application is reviewed prior to the user being assigned the Authorizing Official role.
  • Users will be able to review their application information prior to submission.
Controlling Health Plan
HPID Application
Information
Submitter User Homepage

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

All Users:
- User Management
- Register an Organization
- Search Applications
- Controlling Health Plan Functions:
  - Create Profile and Apply for HPID
  - View Profile
  - Apply for SHP HPID(s)
- Subhealth Plan Functions:
  - Apply for SHP HPID(s)
- Other Entity Functions:
  - Create Profile and Apply for OEID
  - View Profile

Health Plan and Other Entity Enumeration System
Announcements
Insert Submitter user announcements here. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam nisl turpis, luctus id congue id, tincidunt...
Read More

Health Plan and Other Entity Enumeration System
Application instructions
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Welcome Jolene Nguyen

Events and Webinars
Please visit the HPID website for information on upcoming trainings and webinars.

Help
If at any point you experience any problems with the application or have questions, please contact the HIOS Helpdesk in one of the following ways:
Phone: 1-877-343-6507
Email: insuranceoversight@hhs.gov

Resources
- HPID Final Rule (PDF)
- HPID Fact Sheet
- HPID Administrative Simplification Page
- Affordable Care Act and Administrative Simplification Provisions Page
- Training Presentations
Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please click on the 'HIOS Main Page' button above. Once on the HIOS Main Page, click on the 'Register an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

*Company Name:
Select Company

*Please enter either an NAIC Number or a Payer Identification Number to proceed.

<table>
<thead>
<tr>
<th>NAIC Number</th>
<th>Payer Identification Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Below are the Payer IDs that have been added. You may click the 'Delete' button to remove a Payer ID from the table.

<table>
<thead>
<tr>
<th>Payer ID</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No records to display.

Save And Add Another Payer ID

< <<< BACK

CONTINUE >>>

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Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'HIOS Main Page' button above. Once on the HIOS Main Page, select the 'Register an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

*Company Name - State - Federal EIN:
Company 123 - VA - 123123123

Federal EIN: 123123123

Domiciliary Address
Address Line 1: 123 Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

*Please enter either an NAIC Number or a Payer Identification Number to proceed.

NAIC Number: Payer Identification Number:
12345

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

Payer ID | Action
---------|--------
No records to display

CONTINUE >>>>
CHP Application – Authorizing Official

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System


Welcome Jolene Nguyen

Authorizing Official Contact Information

Please enter the following information:

Note: (*) Indicates a required field.

*Title of Authorizing Official:
CEO

Prefix: *First Name: Middle Initial: *Last Name: Suffix:
Jolene

*Email Address: *Phone Number: Phone Ext:
jpn4p@virginia.edu 703-938-0732

Please note that the contact listed above will receive notification that they have been designated as the company’s Authorizing Official in the Health Plan and Other Entity Enumeration System.

<<< BACK  CONTINUE >>>
Profile and Application Review

Please review the information listed below.
If changes to the information are required prior to submitting the application, please click the 'Back' link.

Controlling Health Plan Information:

Company Information
Company Name: Company 123
Federal EIN: 123123123
NAIC: 12345

Domiciliary Address
Address Line 1: 123 Street
Address Line 2:
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4:

Authorizing Official
Title: CEO
Contact Name: Jolene Nguyen
Email Address: Jpn4p@virginia.edu
Phone Number: 7039380752
Phone Ext: N/A

If the information above is correct, please check the certification box, and click the 'Apply for HPID' button to request an HPID.

Once an application has been submitted, an email will be sent to the Authorizing Official for approval. After the Authorizing Official approves the application, the entity will receive an HPID.

I certify that all data submitted for this application are complete and accurate.

Apply for HPID

<<< BACK
Profile Summary

Thank you for submitting your application.
The HPID application is pending system validation and approval by your Authorizing Official. Once the health plan has been assigned an HPID, you will receive an email notification.

To view a different profile please select a Company Name below:

| *Company Name: | Company 123 |
| Application Type: | Health Plan |

**Company Information**

| Application Number: | 0000296 |
| HPID: | Pending |
| Company Name: | Company 123 |
| Federal EIN: | 12123123 |
| NAIC: | 12345 |

**Authorizing Official**

| Title: | CEO |
| Contact Name: | Jolene Nguyen |
| Email Address: | jnp4p@virginia.edu |
| Phone Number: | 703-938-0732 |
| Phone Ext: | |

To obtain additional HPIDs, please click the 'Apply for SHP HPID(s)' button below. Please note that the 'Apply for SHP HPID(s)' button will only become enabled once the CHP HPID application has been approved and the CHP HPID has been assigned. The system will not accept SHP HPID applications until a CHP has been assigned an HPID.

Apply for SHP HPID(s)
Summary of CHP HPID Application Information

• Company Information:
  • Company Name, Federal Employer Identification Number and Domiciliary Address

• Authorizing Official Information:
  • First and Last Name, Title, Phone Number and Email Address

• The Health Plan’s NAIC Number or Payer ID used in standard transactions
Subhealth Plan HPID Application Information
Subhealth Plan HPID Application

• All SHP applications require a user to identify the company’s Controlling Health Plan that already has been assigned an HPID.

• Two different ways to apply for a SHP HPID:
  • Select the ‘Apply for SHP HPID(s)’ button on the HPOES Submitter Homepage.
  • Select the ‘Apply for SHP HPID(s)’ button on the CHP Profile Page.
Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are now available!

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of 10-15 minutes to complete an application.

**How do I obtain an HPID or OEID?**

First, an entity must determine if it is going to obtain an HPID or OEID, and therefore must determine whether it meets the definition of health plan. If the entity is going to obtain an HPID it should follow these instructions (pdf, 59.8KB). If the entity is going to obtain an OEID it will follow these instructions (pdf, 34.3KB).

**What is the purpose of the health plan identifier?**

The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.
Controlling Health Plan (CHP) Identification

Note: (*) Indicates a required field.

*Please indicate your Controlling Health Plan (CHP) to proceed. You may either select your CHP Name or search by the CHP HPID Number.

NOTE: If your CHP has not yet received its HPID, you will not be able to move forward until they have received their HPID. Please call the Helpdesk at 1-877-343-6507 if you have any questions.

- CHP Name:
  - Select

- CHP HPID Number:
Profile Summary

Thank you for submitting your application.
The HPID application is pending system validation and approval by your Authorizing Official. Once the health plan has been assigned an HPID, you will receive an email notification.

To view a different profile please select a Company Name below:

*Company Name: Company 123
*Application Type: Health Plan

Company Information

Application Number: 0000206
HPID: Pending
Company Name: Company 123
Federal EIN: 123123123
NAIC: 12345

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jnn4p@virginia.edu
Phone Number: 703-938-0732
Phone Ext:

To obtain additional HPIDs, please click the ‘Apply for SHP HPID(s)’ button below. Please note that the ‘Apply for SHP HPID(s)’ button will only become enabled once the CHP HPID application has been approved and the CHP HPID has been assigned. The system will not accept SHP HPID applications until a CHP has been assigned an HPID.

Apply for SHP HPID(s)
CHP Profile Summary – SHP Button Enabled
<table>
<thead>
<tr>
<th>Subhealth Plan Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>(*) Indicates a required field.</td>
</tr>
<tr>
<td>*Please select one of the following:</td>
</tr>
<tr>
<td>To view the definitions of the terms listed below, please click on the link.</td>
</tr>
<tr>
<td>- Company</td>
</tr>
<tr>
<td>- Issuer</td>
</tr>
<tr>
<td>- Product</td>
</tr>
<tr>
<td>- Line of Business</td>
</tr>
<tr>
<td>- Other Category</td>
</tr>
</tbody>
</table>

<< BACK  CONTINUE >>>
Subhealth Plan HPID - Company
Subhealth Plan HPID – Company Type

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Your Progress: Entity Information Authorizing Official Application Review

Welcome Jolene Nguyen

Subhealth Plan Type

(*) Indicates a required field.

*Please select one of the following:

To view the definitions of the terms listed below, please click on the link.

- Company
- Issuer
- Product
- Line of Business
- Other Category

< <<< BACK

CONTINUE >>>

Accessibility | Rules of Behavior | Web Policies | File Formats and Plug-Ins

U.S. Department of Health & Human Services · 200 Independence Avenue, S.W. · Washington, D.C. 20201
Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Tuesday, February 26, 2013

Welcome Sai Paleti

Your Progress:

Entity Information
Authorizing Official
Application Review

SHP Application Review

You've selected the following options for this application:

- Health Plan
- Subhealth Plan (SHP)
- Controlling Health Plan Name: Company 123
- Company

To continue with the application process, please select the 'Continue' link. If changes are required, select the 'Back' link.

<<< BACK

CONTINUE >>>

Accessibility | Rules of Behavior | Web Policies | File Formats and Plug-Ins

U.S. Department of Health & Human Services · 200 Independence Avenue, S.W. · Washington, D.C. 20201
Subhealth Plan HPID – Select a Company

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Apply for SHP HPID(s)

1. Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please click on the 'HIOS Main Page' button above. Once on the HIOS Main Page, click on the 'Register an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

*Company Name:
  Select Company

2. NAIC/Payer ID Information

*Please enter either an NAIC Number or a Payer Identification Number to proceed.

NAIC Number:  Payer Identification Number:

Below are the Payer IDs that have been added. You may click the 'Delete' button to remove a Payer ID from the table.

Payer ID  Action
No records to display.

<<< BACK  CONTINUE >>>
Apply for SHP HPID(s)

1. Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'HIOS Main Page' button above. Once on the HIOS Main Page, select the 'Register an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

*Company Name - State - Federal EIN:
[Company 1234 - CA - 123456789]

Federal EIN: 123456789

Domiciliary Address

Address Line 1: 100 Test Drive
Address Line 2: N/A
City: San Francisco
State: CA
Zip: 94108
Zip Plus 4: N/A

2. NAIC/Payer ID Information

*Please enter either an NAIC Number or a Payer Identification Number to proceed.

NAIC Number: Payer Identification Number:
14357

Save And Add Another Payer ID

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

<table>
<thead>
<tr>
<th>Payer ID</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<<< BACK

CONTINUE >>>
Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Welcome Jolene Nguyen

Your Progress: Entity Information Authorizing Official Application Review

Authorizing Official Contact Information

Your application information will be sent to the following Authorizing Official for review and approval:

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 7039380732
Phone Ext: N/A

If you have any questions, please contact the HelpDesk.

<<<< BACK CONTINUE >>>>
Subhealth Plan HPID – Application Review

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System


Welcome Jolene Nguyen

Application Review

Note: (*) Indicates a required field. Please review the information listed below.
If changes to the information are required prior to submitting the application, please select the 'Back' link.

Controlling Health Plan Name: Company 123

Subhealth Plan Information:

Company Information
Company Name: Company 1234
Federal EIN: 1234567890
NAIC: 14357

Domiciliary Address
Address Line 1: 100 Test Drive
Address Line 2: N/A
City: San Francisco
State: CA
Zip: 94108
Zip Plus 4: N/A

Authorizing Official
Title: CEO
Contact Name: Jolene Nguyen
Email Address: jxn4p@virginia.edu
Phone Number: 7039380792
Phone Ext: N/A

If the information above is correct, please check the certification box, and select the 'Apply for HPID' button to request an HPID.

Once an application has been submitted, an email will be sent to the Authorizing Official for approval. After the Authorizing Official approves the application, the entity will receive an HPID.

* I certify that all data submitted for this application are complete and accurate.

Apply for HPID

<<< BACK
Application Summary

Thank you for submitting your application.
The HPID application is pending system validation and approval by your Authorizing Official. Once the entity has been assigned an HPID, you will receive an email notification.

Application Number: 0000149
Controlling Health Plan Name: Company 123

Company Information
Company Name: Company 1234
Federal EIN: 123456880
NATC: 14357

Authorizing Official
Title: CEO
Contact Name: Jolene Nguyen
Email Address: jnp4p@virginia.edu
Phone Number: 7039380732
Phone Ext: N/A

You may choose one of the following options:
A. If you would like to request HPID(s) for another company that are under the same Controlling Health Plan, please select the ‘Get Additional SHP HPID(s)’ button below.
B. If you would like to request HPID(s) for another company that is under a different Controlling Health Plan or do not require additional HPID(s) at this time, please select the ‘Done’ button below.
Subhealth Plan Type: Company

• SHP Company Information
  • Company Name, Federal Employer Identification Number and Domiciliary Address

• The Health Plan’s NAIC Number or Payer ID used in standard transactions.
Subhealth Plan HPID - Issuer
Subhealth Plan HPID - Issuer

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Apply for SHP HPID(s)

1. Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'HIOS Main Page' button above. Once on the HIOS Main Page, select the 'Register an Organization' button to begin the registration process.

Note: (*) indicates a required field.

*Company Name - State - Federal EIN:
Company 123 - VA - 123123123

Federal EIN: 123123123

Domiciliary Address

Address Line 1: 123 Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

2. Issuer Information

Please enter Issuer information.

*Issuer Name - State - ID:
Company 123 - VA - 727241

3. NAIC/Payer ID Information

*Please enter either an NAIC Number or a Payer Identification Number to proceed.

NAIC Number: Payer Identification Number:
12345

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

Player ID | Action
---------|-------

<<<<< BACK

CONTINUE >>>>
Summary of SHP HPID Application Information – Issuer

Subhealth Plan Type: Issuer

• Company Information
  • Company Name, Federal Employer Identification Number and Domiciliary Address

• Issuer’s HIOS ID, Issuer Legal Name and State of Business
  • If the Issuer does not already exist in HIOS, users will first need to register the Issuer in HIOS.

• The Health Plan’s NAIC Number or Payer ID used in standard transactions.
Registering a New Issuer in HIOS
Submitter User Homepage

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Announcements
Insert Submitter user announcements here. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam nisl turpis, luctus id congue id, tincidunt...

Health Plan and Other Entity Enumeration System Application instructions

Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are now available!

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of 10-15 minutes to complete an application.

How do I obtain an HPID or OEID?

First, an entity must determine if it is going to obtain an HPID or OEID, and therefore must determine whether it meets the definition of health plan. If the entity is going to obtain an HPID it should follow these instructions (pdf, 59.8KB). If the entity is going to obtain an OEID it will follow these instructions (pdf, 34.3KB).

What is the purpose of the health plan identifier?

The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.
Search by Federal EIN

Health Insurance Oversight System

Organization Registration

Please enter your company's 9 digit Federal EIN below and select 'Search' to determine if your company currently exists in HIOS.

Federal EIN:  

Search
## Organization Registration

Please enter your company’s 9 digit Federal EIN below and select ‘Search’ to determine if your company currently exists in HIOS.

**Federal EIN:** 321321321

**Company**

<table>
<thead>
<tr>
<th>Company Legal Name</th>
<th>Incorporated State</th>
<th>Federal EIN</th>
<th>NAIC Code</th>
<th>Address Line 1</th>
<th>Address Line 2</th>
<th>City</th>
<th>State</th>
<th>ZIP Code</th>
<th>ZIP Plus 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company 321321</td>
<td>MD</td>
<td>321321321</td>
<td>32111</td>
<td>321 Main Street</td>
<td>22124</td>
<td>Fairfax</td>
<td>MD</td>
<td>22124</td>
<td></td>
</tr>
</tbody>
</table>

**Issuers**

There are no Issuers currently registered in HIOS for your company.
Register New Issuer

Please fill in the form below with your Issuer's information.

Note: (*) Indicates a required field.

Issuer Legal Name: Company 321321
*Registered State: 
Federal EIN: 321321321
NAIC Company Code: 32111
NAIC Group Code: 
*Market Coverage: 

Domiciliary Address
*Address Line 1: 
Address Line 2: 
*City: 
*State: 
*ZIP code: 
ZIP Plus 4: 

Save and Add Another Issuer
Submit Issuer Request

Health Insurance Oversight System

Register New Issuer

Please fill in the form below with your Issuer's information.

Note: (*) Indicates a required field.

Issuer Legal Name: Company 321321
*Registered State: 
Federal EIN: 321321321
NAIC Company Code: 32211
NAIC Group Code: 
*Market Coverage: [

Domiciliary Address
*Address Line 1: 
Address Line 2: 
*City: 
*State: 
*ZIP code: 
ZIP Plus 4: 

Save and Add Another Issuer

Below are the Issuers that you have requested to create. To remove an Issuer from the table, you may select the Delete link on that row.

Company 321321 321321321 32211 Individual 335 Main St 41567
321321321 321321321 32211 Individual 335 Main St 41567
321321321 321321321 32211 Individual 335 Main St 41567

Submit
New Issuer Confirmation

Your request to register the issuers below has been submitted for approval. Once approved, you shall receive a notification email.

<table>
<thead>
<tr>
<th>Issuer Legal Name</th>
<th>Registered State</th>
<th>Federal EIN</th>
<th>NAIC Company Code</th>
<th>NAIC Group Code</th>
<th>Market Coverage</th>
<th>Address Line 1</th>
<th>Address Line 2</th>
<th>City</th>
<th>State</th>
<th>ZIP Code</th>
<th>ZIP Plus 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company 3213</td>
<td>VA</td>
<td>321321321</td>
<td>32111</td>
<td></td>
<td>Individual</td>
<td>333 Main Street</td>
<td></td>
<td>Fairfax</td>
<td>VA</td>
<td>2212</td>
<td>4</td>
</tr>
</tbody>
</table>

Continue
Summary of New HIOS Issuer Information

Required information to register a new issuer:

• Issuer Legal Name
• Company’s Federal Employer Identification Number
• Registered State
• Market Coverage
• Domiciliary Address
Subhealth Plan HPID - Product
**Subhealth Plan HPID - Product**

### Health Insurance Oversight System

#### Health Plan and Other Entity Enumeration System

**Apply for SHP HPID(s)**

1. **Company Information**
   - If your company is already registered with HEDIS, please select the appropriate company below. If your company is not registered with HEDIS, please select the 'Register an Organization' button above. Once on the HEDIS Main Page, select the 'Register an Organization' button to begin the registration process.
   - *Note:* (*) indicates a required field.
   - **Company Name:**
     - State: VA, **Company ID:** 123123123
   - **Federal CIN:** 123123123
   - **Domiciliary Address:**
     - Address Line 1: 123 Street
     - City: Fairfax
     - State: VA
     - Zip: 22124
     - Zip Plus 4: N/A

2. **Issuer Information**
   - Please enter Issuer information.
   - **Issuer Name:**
     - State: VA, **Issuer ID:** 123123123

3. **Product Information**
   - Please enter Product Information.
   - **Product Name:**
     - Market Type: Individual, **Product Type:** HMO - 722/456001

4. **NAIC/Payer ID Information**
   - Please enter either an NAIC Number or a Payer Identification Number to proceed.
   - **NAIC Number:**
     - **Payer Identification Number:**
     - 12345

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.
Summary of SHP HPID Application Information – Product

Subhealth Plan Type: Product

- SHP Company Information
  - Company Name, Federal Employer Identification Number and Domiciliary Address
- HIOS Issuer ID, Issuer Legal Name and State of Business
- HIOS Product ID, Product Name, Product Type and Market Type
- The Health Plan’s NAIC Number or Payer ID used in standard transactions.
Subhealth Plan HPID – Line of Business
Subhealth Plan HPID - Line of Business

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Apply for SHP HPID(s)

1. Company Information
   If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'Register an Organization' button above. Once on the HIOS Main Page, select the 'Register an Organization' button to begin the registration process.
   Notes: (*) Indicates a required field.
   *Company Name - State - Federal EIN:
     Company 123 - VA - 123123123
     Federal EIN:
     123123123

   Dominciliary Address
   Address Line 1:
   123 Street
   Address Line 2:
   N/A
   City:
   Fairfax
   State:
   VA
   Zip:
   22124
   Zip Plus 4:
   N/A

2. Line of Business Information
   Please enter Line of Business Information.
   *Type:
   [Select]
   *Product Name/Brand Name:

3. NAIC/Payer ID Information
   *Please enter either an NAIC Number or a Payer Identification Number to proceed.
   NAIC Number:
   Payer Identification Number:
   12345
   [Save And Add Another Payer ID]

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

[Delete Button]
Subhealth Plan Type: Line of Business

- SHP Company Information
  - Company Name, Federal Employer Identification Number and Domiciliary Address
- Line of Business Type
- Product Name/Brand Name
- The Health Plan’s NAIC Number or Payer ID used in standard transactions.
Subhealth Plan HPID – Other Category
Subhealth Plan HPID - Other Category
Subhealth Plan Type: Other Category

- SHP Company Information
  - Company Name, Federal Employer Identification Number and Domiciliary Address
- Other Category Name
- Other Category Type/Description
- The Health Plan’s NAIC Number or Payer ID used in standard transactions.
OEID Application Information
Submitter User Homepage

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Announcements
Insert Submitter user announcements here. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam nisl turpis, luctus id congue id, tincidunt...
Read More

Health Plan and Other Entity Enumeration System Application instructions
Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are now available!
See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of 10-15 minutes to complete an application.

How do I obtain an HPID or OEID?
First, an entity must determine if it is going to obtain an HPID or OEID, and therefore must determine whether it meets the definition of health plan. If the entity is going to obtain an HPID it should follow these Instructions (pdf, 59.8KB). If the entity is going to obtain an OEID it will follow these Instructions (pdf, 34.3KB).

What is the purpose of the health plan identifier?
The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.

Welcome Jolene Nguyen
Events and Webinars
Please visit the HPID website for information on upcoming trainings and webinars.

Help
If at any point you experience any problems with the application or have questions, please contact the HIOS Helpdesk in one of the following ways:
Phone: 1-877-343-6507
Email: insuranceoversight@hhs.gov

Resources
- HPID Final Rule (PDF)
- HPID Fact Sheet
- HPID Administrative Simplification Page
- Affordable Care Act and Administrative Simplification Provisions Page
- Training Presentations
OEID Application – Company Selected

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Monday, February 25, 2013

Welcome Sai Paleti

Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the ‘HIOS Main Page’ button above. Once on the HIOS Main Page, select the ‘Register an Organization’ button to begin the registration process.

Note: (*) Indicates a required field.

*Company Name - State - Federal EIN:
Company 1234 - CA - 123456880

Federal EIN: 123456880

Domiciliary Address

Address Line 1: 100 Test Drive
Address Line 2: N/A
City: San Francisco
State: CA
Zip: 94108
Zip Plus 4: N/A

*Business Classification:
Third Party Administrator

*Please enter a Payer Identification Number to proceed

Payer Identification Number:

Below are the Payer IDs that have been added. You may select the ‘Delete’ button to remove a Payer ID from the table.

<table>
<thead>
<tr>
<th>Payer ID</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14327</td>
<td>Delete</td>
</tr>
</tbody>
</table>

CONTINUE >>>
OEID Application – Authorizing Official Information

Welcome Sai Paleti

Authorizing Official Contact Information

Your application information will be sent to the following Authorizing Official for review and approval:

- **Title:** CEO
- **Contact Name:** Dominic Alphonse
- **Email Address:** dominic.alphonse@cgi.com
- **Phone Number:** 4349583045
- **Phone Ext:** N/A

If you have any questions, please contact the HelpDesk.

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CONTINUE >>>

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Profile and Application Review

Note: (*) Indicates a required field. Please review the information listed below.

If changes to the information are required prior to submitting the application, please select the 'Back' link.

Other Entity Information:

Company Information
Company Name: Company 1234
Business Classification: Third Party Administrator
Federal EIN: 123456880
Payer Identification Number: 14357

Domiciliary Address
Address Line 1: 100 Test Drive
Address Line 2: N/A
City: San Francisco
State: CA
Zip: 94108
Zip Plus 4: N/A

Authorizing Official
Title: CEO
Contact Name: Dominic Alphonse
Email Address: dominic.alphonse@cgl.com
Phone Number: 434-958-3045
Phone Ext: N/A

If the information above is correct, please check the certification box, and select the 'Apply for OEID' button to request an OEID.

Once an application has been submitted, an email will be sent to the Authorizing Official for approval. After the Authorizing Official approves the application, the entity will receive an OEID.

I certify that all data submitted for this application are complete and accurate.

Apply for OEID

<<< BACK
# OEID Application – Confirmation and Profile Summary

## Profile Summary

Thank you for submitting your application.

The OEID application is pending system validation and approval by your Authorizing Official. Once the other entity has been assigned an OEID, you will receive an email notification.

To view a profile, please select a Company Name and Application Type below:

<table>
<thead>
<tr>
<th>Company Name - State - FEIN</th>
<th>Company 1234 - CA - 123456880</th>
<th>Application Type: Other Entity</th>
</tr>
</thead>
</table>

## Company Information

- **Application Number:** 0000150
- **OEID:** Pending
- **Company Name:** Company 1234
- **Business Classification:** Third Party Administrator
- **Federal EIN:** 123456880
- **Payer Identification Number:** 14357

### Authorizing Official

- **Title:** CEO
- **Contact Name:** Dominic Alphonse
- **Email Address:** dominic.alphonse@cgi.com
- **Phone Number:** 434-958-3045
- **Phone Ext:** N/A
Summary of OEID Application Information

• Company Information
  • Company Name, Federal Employer Identification Number and Domiciliary Address

• Authorizing Official Information:
  • First and Last Name, Title, Phone Number and Email Address

• Business Classification

• The Other Entity’s Payer ID or Atypical Provider ID used in standard transactions.
High Level Application Overview

Step 1: Register the Organization in HIOS
Step 2: Access HIOS User Role Management
Step 3: Access HPOES and Select an Application Type
Step 4: Complete and Submit an Application
Step 5: Application Review by the Authorizing Official
Step 6: HPID or OEID Number Assigned
Overview of Application Process

• **Step 5: Application Review**
  
  • Once the application has been submitted, the company’s Authorizing Official will be notified that an application is pending their approval.
  
  • The Authorizing Official will need to review each application and will have the option to approve or reject it.
Welcome to the Health Plan and Other Entity Enumeration System!

A representative from your organization has submitted an application for a Health Plan Identifier (HPID) or Other Entity Identifier (OEID). Each application has a designated Authorizing Official. In order for an organization to receive an HPID or OEID, the Authorizing Official must review and approve the application. Once the applications have been approved by you as the Authorizing Official, the HPID or OEID will be assigned and displayed on the page. The representative that submitted the application will receive an email notification of the application approval which will also list the relevant HPID or OEID numbers. To learn more about how to approve an application, download the detailed instruction document (pdf, 32.7KB).

To check your pending tasks, navigate to the Pending Tasks page.

To search for an application please select the "Search Applications" button on the left menu.
Authorizing Official Search

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Search Applications

Please select the desired criteria to filter the applications and select the 'View Application' button to view the application results. If no filters are utilized, all records for which you are the Authorizing Official will be displayed.

Company Name: [Field]
Application Type: [Dropdown]
Application Status: [Dropdown]

View Application

NOTE: To view or update an application or record, select an action under the "Actions" column.

<table>
<thead>
<tr>
<th>Application Number</th>
<th>Submitted Date</th>
<th>Application Type</th>
<th>Health Plan Category</th>
<th>Company Name</th>
<th>Status</th>
<th>HPID/OEID Number</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>00000007</td>
<td>2/20/2013</td>
<td>OEID</td>
<td>N/A</td>
<td>Company 123</td>
<td>Approval Pending</td>
<td>Pending</td>
<td>Select</td>
</tr>
</tbody>
</table>
Authorizing Official Pending Tasks

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Pending Tasks

Below are the applications that are awaiting your approval as the designated Authorizing Official.

<table>
<thead>
<tr>
<th>Application Number</th>
<th>Submitted Date</th>
<th>Application Type</th>
<th>Health Plan Category</th>
<th>Company Name</th>
<th>Status</th>
<th>HPID/OEID Number</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>00000007</td>
<td>2/20/2013</td>
<td>OEID</td>
<td>N/A</td>
<td>Company 123</td>
<td>Approval Pending</td>
<td>Pending</td>
<td>Select</td>
</tr>
</tbody>
</table>

Accessibility | Rules of Behavior | Web Policies | File Formats and Plug-Ins

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Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

Application Confirmation

Please review the information listed below. Please select the "Submit" button to approve an application. Once an application has been approved, the entity will receive an OEID and an email notification is sent to the submitter.

Note: (*) Indicates a required field.
OEID: Pending
Status: Approval Pending
Application Number: 0000007

Company Information
Company Name: Company 123
Business Classification: Clearinghouse
Federal EIN: 123123123
State: VA
Payer Identification Number: 123123123

Authorizing Official:
Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 7039380732
Phone Ext: N/A

Confirm or Return Application
* I wish to:
  ☐ Confirm the record accuracy: I certify that this application is complete and accurate.
  ☐ Reject: This application is incomplete and/or inaccurate.

Submit

<<< BACK
Approval Confirmation

You have approved the application for the following Other Entity:

- **Company Name:** Company 123
- **Business Classification:** Clearinghouse
- **OEID Number:** Pending

[Done]
High Level Application Overview

Step 1: Register the Organization in HIOS

Step 2: Access HIOS User Role Management

Step 3: Access HPOES and Select an Application Type

Step 4: Complete and Submit an Application

Step 5: Application Review by the Authorizing Official

Step 6: HPID or OEID Number Assigned
Overview of Application Process

• Step 6: HPID or OEID Number Assigned
  • Once the application is approved by the Authorizing Official, the system will generate an HPID or OEID.
  • An email notification will be sent to the submitter user with the HPID or OEID generated.
WRAP UP

Wrap Up and Next Steps
Wrap Up and Next Steps

Next Steps


• Please send questions to the HIOS Helpdesk at insuranceoversight@hhs.gov.

Wrap Up

• Thank you for attending.
• Please let us know if you have any questions.
Wrap Up and Next Steps

Next CMS Access and Registration Training and Q&A session:

- March 19th - 2:00 p.m. to 3:30 p.m. EST
  - Call in: (866) 503-0859
  - Conference ID: 24848094
  - URL: https://www.livemeeting.com/cc/cgi-ams/join?id=8NKQ6P&role=attend&pw=MN%3BQ8cP
- March 27th - 11:00 a.m. to 12:30 p.m. EST
  - Call in: (877) 267-1577
  - Meeting ID: 5283
  - URL: https://webinar.cms.hhs.gov/hiosneweidm/
Questions & Answers