Manage Data Changes for the Health Insurance Oversight System Quick Reference Guide

The Manage Data Changes functionality is available to users with the Company Administrator, Issuer Administrator, and Organization Administrator roles. This guide provides instructions for administrators to create and submit data change requests in HIOS. Once a data change request is submitted, it will be reviewed, and the status updated accordingly. To access the Manage Data Changes functionality in the Health Insurance Oversight System (HIOS), users will need to go through the CMS Enterprise Portal and register for a CMS IDM account. For instructions on how to register for an IDM and HIOS account, refer to the "CMS Enterprise Portal and Health Insurance Oversight System User Quick Reference Guide".

1 Request HIOS User Role

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

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

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

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

2 Access the Manage Data Changes Function

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

1. On the HIOS Home Page, select the "Manage Organizations" link (See Figure 1).
2. Select the "Data Change Request" card on "Manage Organizations" page and navigate to the page.
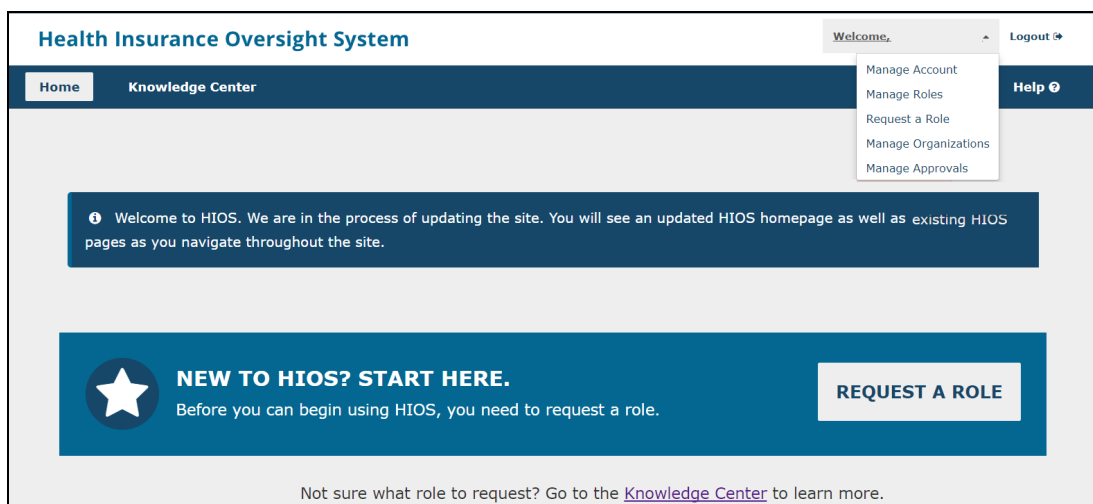

Figure 1 : HIOS – Manage Organizations

3 Create Data Change Requests

Updates to certain data elements that are not editable on the HIOS user interface can be requested on the Manage Data Changes page. Company, Issuer, and Organization Administrators can create a data change request by clicking the "Create Request for Data Change" button on the Manage Data Changes page (See Figure 2).
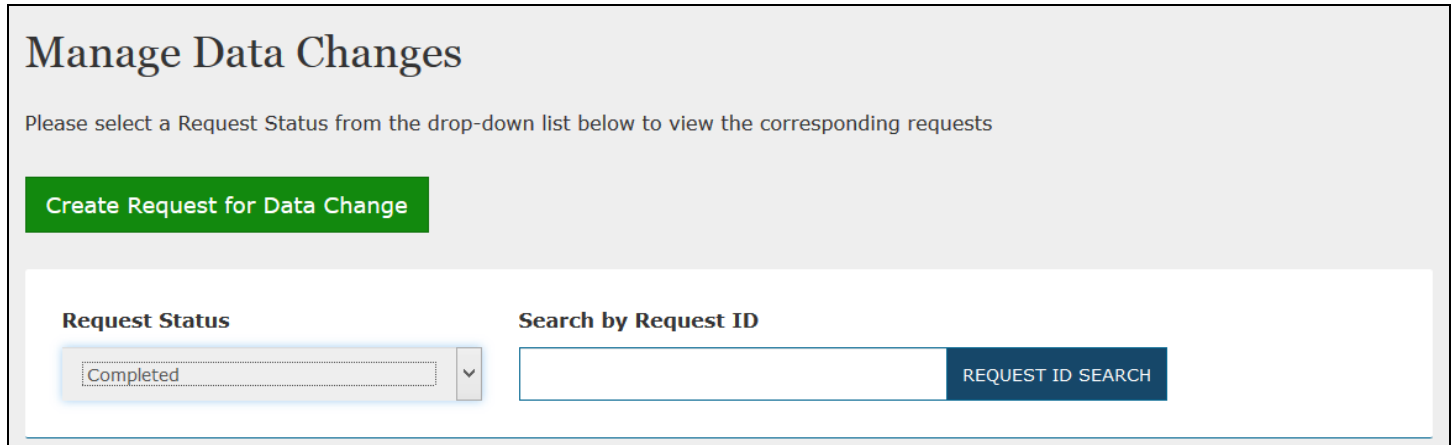

Figure 2: Manage Data Changes – Create Request for Data Change

Company Administrators

1. Select the value to change from the "What values would you like to change?" drop-down menu (See Figure 3). Company Administrators are able to select the values for the Organization, Issuer, and Product.

2. Company Administrators of multiple organizations will see a list of companies displayed in the drop-down menu. Select the company for which you are making the data change.
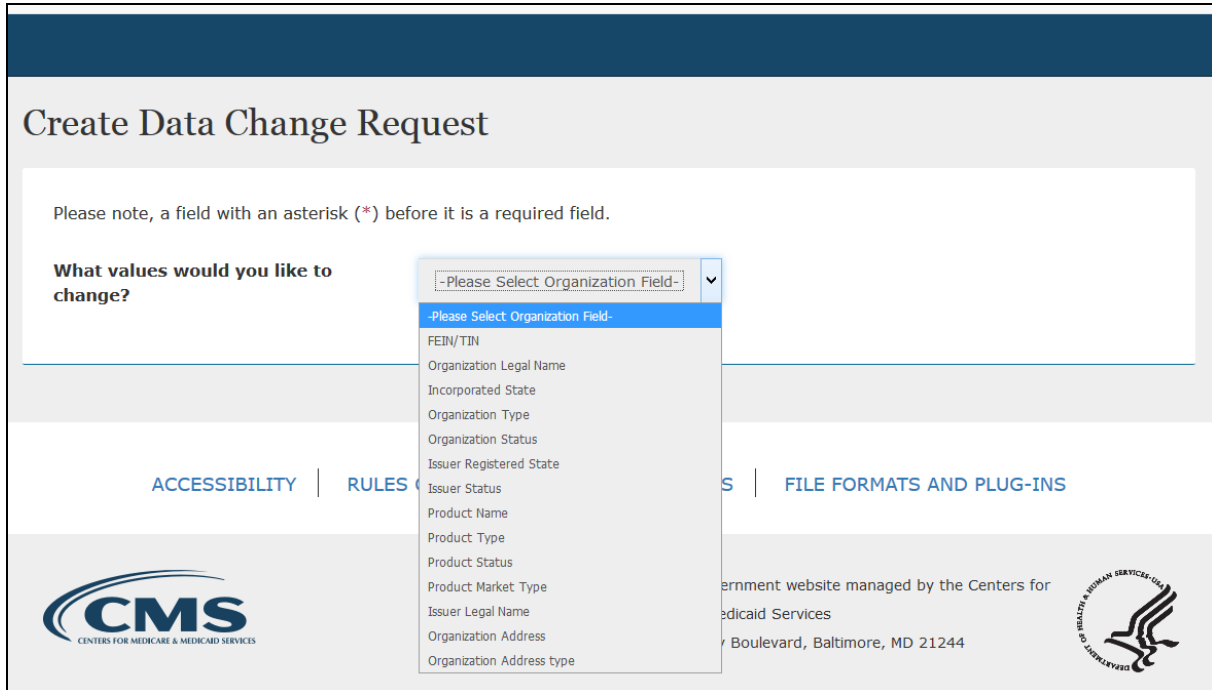

Figure 3: Create Data Change Request – Select Values

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

4. If a change to the organization type from Company or Non-Insurance to a Non-Federal Governmental Plans is needed, you will need to select the 'Self-Funded' or 'Fully Insured' radio button before clicking the 'Submit' button.

5. You will see a confirmation message displayed on the screen. A Request ID will be assigned, along with a "Pending Approval" status. Click the "Continue" button to return to the Manage Data Changes page.

Figure 4: Create Data Change Request – New Value and Reason for Change

Issuer Administrators

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

2. If the value you would like to change is for an Issuer, you will need to choose the Issuer from the drop-down menu. Select the Issuer Registered State and proceed forward to enter the Issuer Details.

3. If the value you would like to change is for a Product, you will need to select the Issuer and the Product associated to that Issuer (See Figure 5).

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

5. You will see a confirmation message displayed on the screen. A Request ID will be assigned, along with a "Pending Approval" status. Click the "Continue" button to return to the Manage Data Changes page.

Figure 5: Create Data Change Request for a Product

Organization Administrators

1. Select the value to change from the "What values would you like to change?" drop-down menu. Organization Administrators are able to select the values for the Organization only.

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

   a. To change an Organization Type from Non-Federal Governmental Plans to a Company or Non Insurance Company, you will need to select an incorporated state.

   b. To change Other Organization Type to a Company, you will need to enter a FEIN and select an incorporated state.

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

4. You will see a confirmation message displayed on the screen. A Request ID will be assigned, along with a "Pending Approval" status. Click the "Continue" button to return to the Manage Data Changes page.

4   View Data Change Request

1. Company, Issuer, and Organization Administrators can view data change requests on the Manage Data Changes page (See Figure 6).

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

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

4. Click the "View" link to review the change request details (See Figure 7).

Manage Data Changes

Please select a Request Status from the drop-down list below to view the corresponding requests

[Create Request for Data Change]

Request Status

| Completed | ⌄ |

Search by Request ID

| | REQUEST ID SEARCH |

« First « Prev **1** Next » Last »   **Show Entries** [10 ⌄]   Showing 1 to 1 of 1 entries

Request ID ⇕	Request Created Date ⇕	Status ⇕	Status Updated Date ⇕	NOTE ⇕	Action
DCR31	02/23/2016 8:39 PM	Completed	02/26/2016 3:16 PM	testing complete by HIOS admin dcr31	View

Figure 6: View Data Change Requests

Data Change Details View

Change Request ID
DCR31

Request Created Date
02/23/2016 8:39 PM

User Name
Stumkur

Federal EIN/TIN
541984140

Organization Legal Name
Ashburn Insurance org - Name Change

Organization Type
Other Organization Type

Current Value
Other Organization Type

New Value
Company

Supplement Attributes
Incorporated State: LA

Attribute
Organization Type

Note
testing complete by HIOS admin dcr31

[Back]

Figure 7: Data Change Details View

Email Notifications for Data Change Requests

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

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