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.

As of June 19, 2016, 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 Exchange Operations Support Center at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov. Additionally, for step-by-step instructions on how to register an MFA device, you may also visit https://www.youtube.com/watch?v=y4HaapQPy2g&list=PLaV7m2-zFKpgYq_8AHW-FYM61J295xwLC&index=2.

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

1. Navigate to the CMS Enterprise Portal (https://portal.cms.gov) and click the 'New User Registration' link on the right side of the page (See Figure 1).

2. Agree to the Terms and Conditions and click the 'Next' button.

3. On the New User Registration page, enter the required personal information and your User ID and Password. The User ID uniquely identifies you to EIDM, and therefore cannot be changed. You'll 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 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) and click the 'Login to CMS Secure Portal' button (See Figure 1).

2. Accept the Terms and Conditions.

3. Enter your EIDM User ID and Password and click the 'Log In' button.

4. On the My Portal page, click the 'Request Access Now' button (See Figure 2).

Figure 2: CMS Enterprise Portal – Request Access

5. From the Access Catalog, click the 'Request Access' button for the HIOS application.

6. On the My Access page, click the 'Request New System Access' link. Select 'HIOS Application' from the System Description drop-down menu and 'HIOS User' for the Role (See Figure 3).

7. On the Request New System Access page, click the hyperlink provided to register for access to HIOS. On the Request HIOS Account page, complete the HIOS registration form and submit for approval. Once the HIOS user registration request has been reviewed and approved, you'll receive an email containing the HIOS Authorization Code.

8. Repeat steps 1-6 above. On the Request New System Access page, enter the HIOS Authorization Code and then click the 'Submit' button (See Figure 3).

9. 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. Once you complete the questions and answers on the Verify Identity screen, click the 'Next' button.

10. Users will see an on-screen message confirming successful remote identity proofing (See Figure 4). Click the 'Next' button and proceed to Multi-Factor Authentication (MFA). Please refer to the next section in this guide for step-by-step instructions on how to register an MFA device.
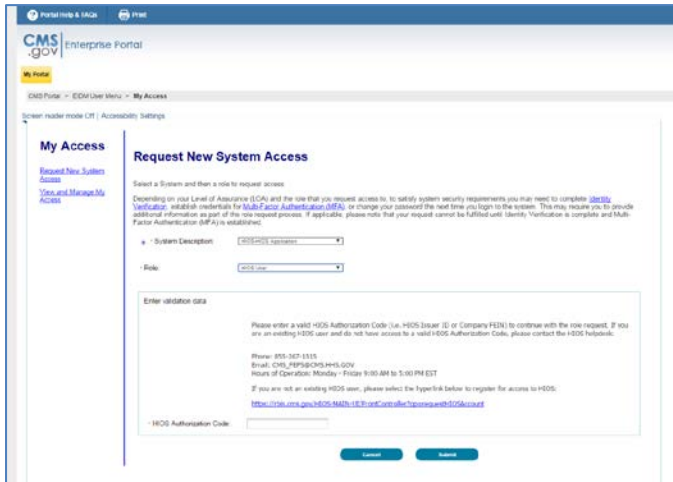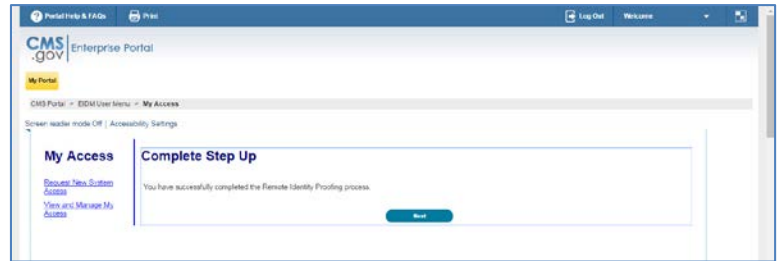

Figure 3: Request New System Access

Figure 4: Successful Completion of Remote Identity Proofing

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. On the Multi-Factor Authentication Information page, click the 'Next' button to proceed with MFA device registration (See Figure 5).

2. Select an MFA device from the 'MFA Device Type' drop-down (See Figure 6). Follow the on-screen instructions for your selected device type to complete the registration.
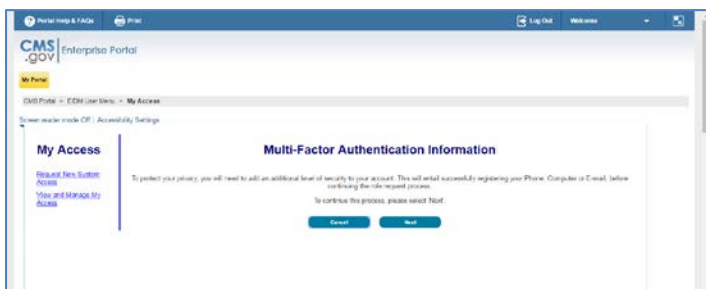

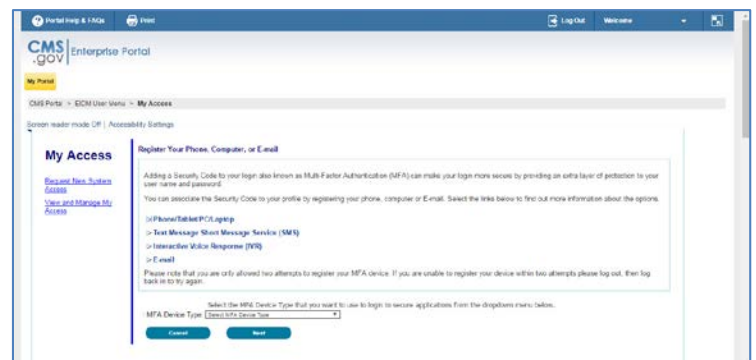Figure 5: CMS Enterprise Portal – Multi-Factor Authentication

Figure 6: CMS Enterprise Portal – Register an MFA Device

3. You'll see an on-screen message confirming successful registration of the device to your user profile. Click the 'OK' button. This completes the MFA device registration process. Click '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 click the 'Login to CMS Secure Portal' button (See Figure 1).

2. Accept the Terms and Conditions.

3. Enter your User ID and click the 'Next' button.

4. Enter your Password and select the MFA Device Type. Enter the Security Code from your MFA device and click the 'Log In' button (See Figure 7).

5. You will see a yellow 'HIOS' button on the top left of the dashboard. Click the yellow 'HIOS' button (See Figure 8).

6. On the landing page, click the 'Access HIOS' or the 'Access Plan Management & Market Wide Functions' link to access HIOS functionality (See Figure 9).

Figure 7: CMS Enterprise Portal – Enter Password and MFA Security Code

Figure 8: CMS Enterprise Portal –HIOS Access

Figure 9: CMS Enterprise Portal – Access HIOS, 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 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 10).

Figure 10: HIOS Home Page

2. On the Manage an Organization page, select 'Create new organization' from the drop-down menu (See Figure 11).

3. Select the Organization Type. 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 and click the 'Organization Search' button (See Figure 11).

4. If an organization does not exist, you'll need to register the new organization by clicking the 'Create Organization' button (See Figure 12). On the Register New Organization page, enter your organization's information and click the 'Continue' button.

Figure 11: HIOS - Manage an Organization

Figure 12: HIOS – Create Organization

5. On the Register Attributes for New Organization page, enter your organization's attribute information and click the 'Review/Continue' button (See Figure 13). Review your organization information and then click the 'Submit' button.

6. You'll see a confirmation message notifying you to log back in to HIOS within 1-2 business days to check the status of your request. Click the 'Continue' button to navigate back to the Manage an Organization page.

Figure 13: HIOS – Register Attributes for New Organization

6   Add Issuer(s) to an Organization

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

1. Click the 'Manage an Organization' button on the HIOS Home Page (See Figure 10).

2. On the Manage an Organization page, select 'Edit existing organization' from the drop-down menu (See Figure 14).

3. Select the Organization Type.

4. Enter the Federal EIN/TIN and click the 'FEIN/TIN Search' button.

5. Click the 'Add Issuer' button (See Figure 14).

6. On the Register New Issuer page, enter the Issuer information and click the 'Save and Add Another Issuer' button (See Figure 15).

7. The Issuer(s) that you have requested to create will display on the page. Click the 'Submit' button.

8. You'll see a confirmation message notifying you to log back in to HIOS within 1-2 business days to check the status of your request. Click the 'Continue' button to navigate back to the Manage an Organization page.
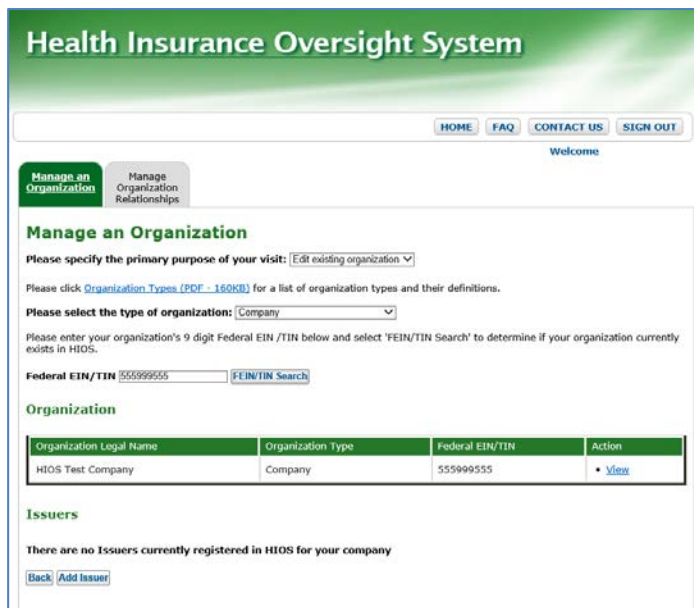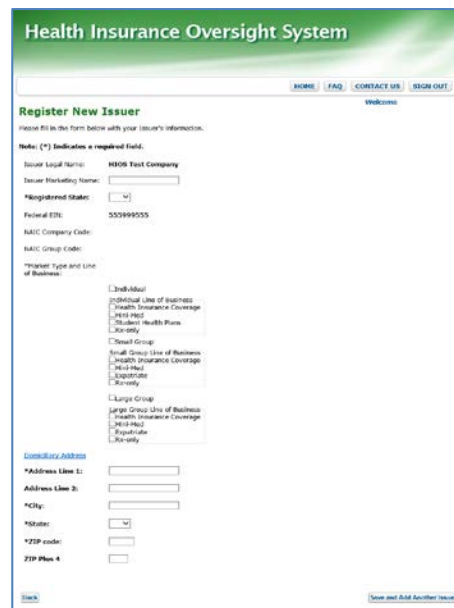

Figure 14: HIOS – Add Issuer

Figure 15: HIOS – Register New Issuer

7 Request HIOS Module Role(s)

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

1. Click the 'Role Management' button on the HIOS Home Page (See Figure 10).

2. Click the 'Request Role' tab. On the Request Role page, there's a hyperlink to a description of each module and the role functionality (See Figure 16).

3. Select from the Module drop-down menu.

4. Select the Requested Role, User Type, User Sub-Type (if applicable to the module). You will be prompted to select an Association.

5. Enter the HIOS Issuer ID and click the 'Search' button.

6. Click the 'Add Issuer' button to associate the role to multiple Issuers per request. The system allows up to 10 Issuers per submission.

7. Proceed to submit the role request. You'll 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, click the 'View Existing Role' tab.
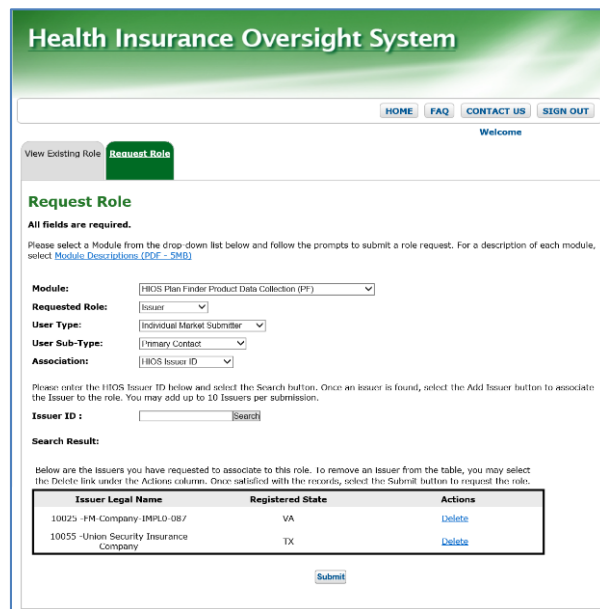

Figure 16: HIOS - Request Role

Frequently Requested HIOS Roles

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

HIOS Module	Role & Description
HIOS – Portal	**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. A user with a Submitter or Validator roles for a Company cannot be a Company Administrator. **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. **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. **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.
Plan Finder Product Data Collection	**Submitter User** is a representative of an organization who can submit and view Issuer data. *Primary Submitter contact:* The Primary Submitter is the primary contact for the submission issues. *Backup Submitter contact:* The Backup Submitter is the backup contact for the submission issues. **Validator User** is a representative of an organization who can validate the data submitted by the Issuer. *Primary Validator contact:* The Primary Validator is the primary contact for the validation issues. *Backup Validator contact:* The Backup Validator is the backup contact for the validation issues. **Attestation User:** An official within an organization, usually CEO or CFO, who attests the data submitted. 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.

HIOS Frequently Asked Questions

Questions	Answers
Who can users contact for system support?	For Production system support, users can contact the Exchange Operations Support Center 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 EIDM account through the CMS Enterprise Portal prior to requesting access to HIOS.
Why are users required to enter their EIDM (Enterprise Identity Management) credentials to access HIOS?	Users must have 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 users requesting access to HIOS?	Users with EIDM credentials need to complete the HIOS account information form and provide their organizational email address. The organizational email is one of the main criteria to verify the user to the organization relationship for account approval.
How do users 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.

Questions	Answers
How do users 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 users request roles and access to HIOS modules?	Module access and role requests are done via the Role Management function on the HIOS Home Page. To submit a request, users select the 'Request Role' tab, 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.
Which roles allow users to edit organization information?	Users should have the Company Administrator or Issuer Administrator role to edit organization information and complete such tasks as updating the TPA information for that organization.
How do users view the green button(s) to the module(s) 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 user role(s) to access specific HIOS module(s).
When users click the green button, 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.