



Centers for Medicare & Medicaid Services

Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey) Website

Issuer User Guide

Version 1.0

11/01/2023

Table of Contents

1. Introduction 1

2. Register a New User Account in CMS’ Identity Management (IDM) System 2

3. Request a QHP Issuer Role..... 6

4. Sign In to QHP Enrollee Survey Website 13

1. Introduction

Section 1311(c)(4) of the Patient Protection and Affordable Care Act (PPACA) requires the United States Department of Health and Human Services Secretary (HHS) to develop an enrollee satisfaction survey system that assesses consumer experience with Qualified Health Plans (QHPs) offered through the Health Insurance Exchanges. The goals of the survey are to provide comparable and useful information to consumers about the quality of health care services and enrollee experiences delivered by QHPs offered through the Exchanges, facilitate oversight of QHP issuer compliance with quality reporting standards, and provide actionable information to QHP issuers so they can improve quality and performance.

The Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey) website is a secure online website developed by the Centers for Medicare and Medicaid Services (CMS) to support QHP Enrollee Survey operations.

The QHP Enrollee Survey website has three objectives:

- Enable QHP issuers to attest to the survey eligibility criteria or report ineligibility status.
- Enable QHP issuers to select an authorized survey vendor.
- Enable QHP survey vendors to securely submit survey data.

All QHP issuers with eligible reporting units are required to:

1. Attest to the QHP Enrollee Survey eligibility criteria for each eligible reporting unit.
2. Select an HHS-approved vendor via the [QHP Enrollee Survey website](#).

All QHP issuers with ineligible reporting units are required to:

1. Report ineligibility status for each ineligible reporting unit via the QHP Enrollee Survey website.

One authorized point of contact identified by each issuer will receive an email to register an account in the CMS Identity Management (IDM) system, request the QHP Enrollee Survey Issuer role, and sign in to the QHP Enrollee Survey website to complete the above steps. **When registering an account, issuers must use the same email address where they received the QHP Enrollee Survey attestation process email.**

Note: Issuers must register an account in the IDM system and request the QHP Survey Issuer role in IDM before attempting to sign in to the QHP Enrollee Survey website. After receiving a confirmation email that the role request is approved, issuers will be able to sign in to the QHP Enrollee Survey website. For detailed instructions on how to register an account, see [section 2](#) in this document. For detailed steps on how to request the Issuer role, see [section 3](#).

If you are a certified issuer designated as the authorized point of contact and did not receive an email notification or you are unable to sign in to the QHP EES website, please contact the QHP Enrollee Survey Project Team at QHP_Survey@air.org.

Issuers can contact QHP_Survey@air.org with any questions related to account setup, QHP Enrollee Survey website access, or the attestation process.

2. Register a New User Account in CMS' Identity Management (IDM) System

This section provides step-by-step instructions on how to register and create a user ID and password through the CMS' IDM system.

1. Navigate to <https://home.idm.cms.gov/>.

The Sign In page appears.

CMS.gov | IDM

Sign In

User ID

Password

☐ Agree to our [Terms & Conditions](#)

Sign In

OR

CMS PIV Card Only

Attention CMS PIV card users: If this is your first time signing in you must first sign in using your EUA ID and password before having the option to log in with your PIV card.

OR

New User Registration

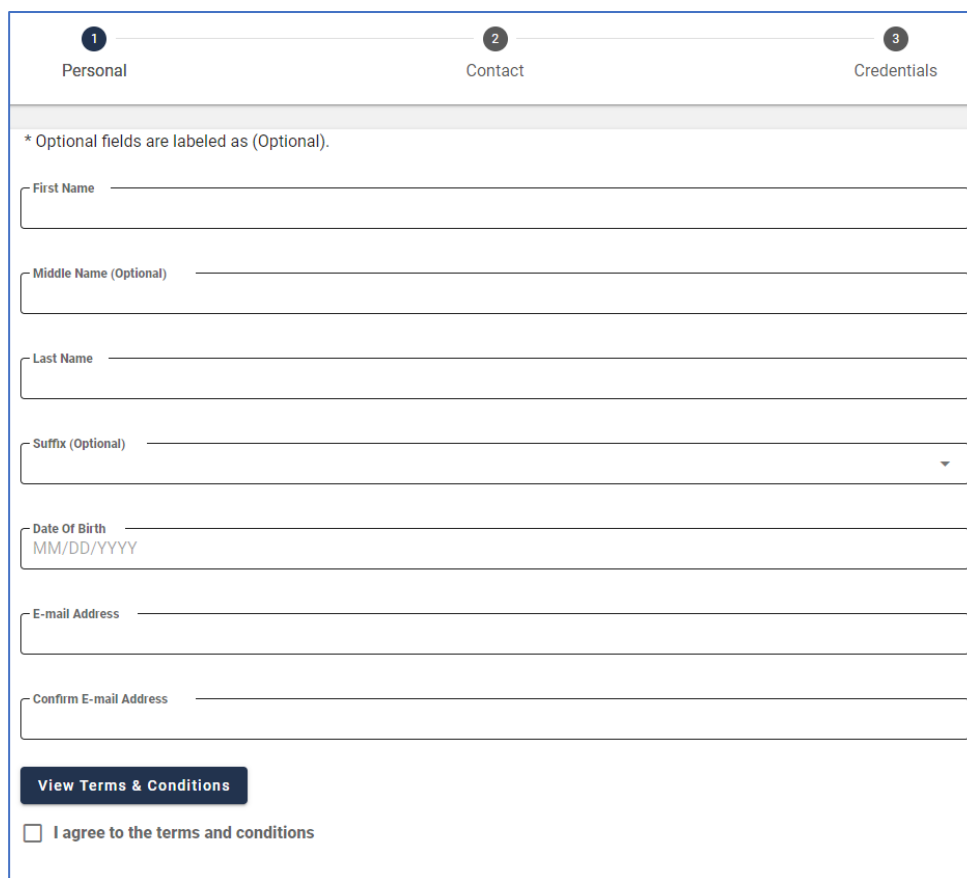
Forgot your [Password](#), [User ID](#) or [Unlock your account](#)?

[Need Help?](#)

Figure 1: CMS IDM Sign In Page

2. Click the **New User Registration** button.

The Personal tab of the IDM Self Service registration page appears.



The form is titled "IDM System User Registration Form – Personal Tab" and is part of a three-step process. Step 1, "Personal", is the active tab, while Step 2, "Contact", and Step 3, "Credentials", are inactive. The form includes a note: "* Optional fields are labeled as (Optional)". The fields are: First Name, Middle Name (Optional), Last Name, Suffix (Optional) (a dropdown menu), Date Of Birth (MM/DD/YYYY), E-mail Address, and Confirm E-mail Address. Below the fields is a "View Terms & Conditions" button and a checkbox labeled "I agree to the terms and conditions".

1 Personal 2 Contact 3 Credentials

* Optional fields are labeled as (Optional).

First Name

Middle Name (Optional)

Last Name

Suffix (Optional)

Date Of Birth
MM/DD/YYYY

E-mail Address

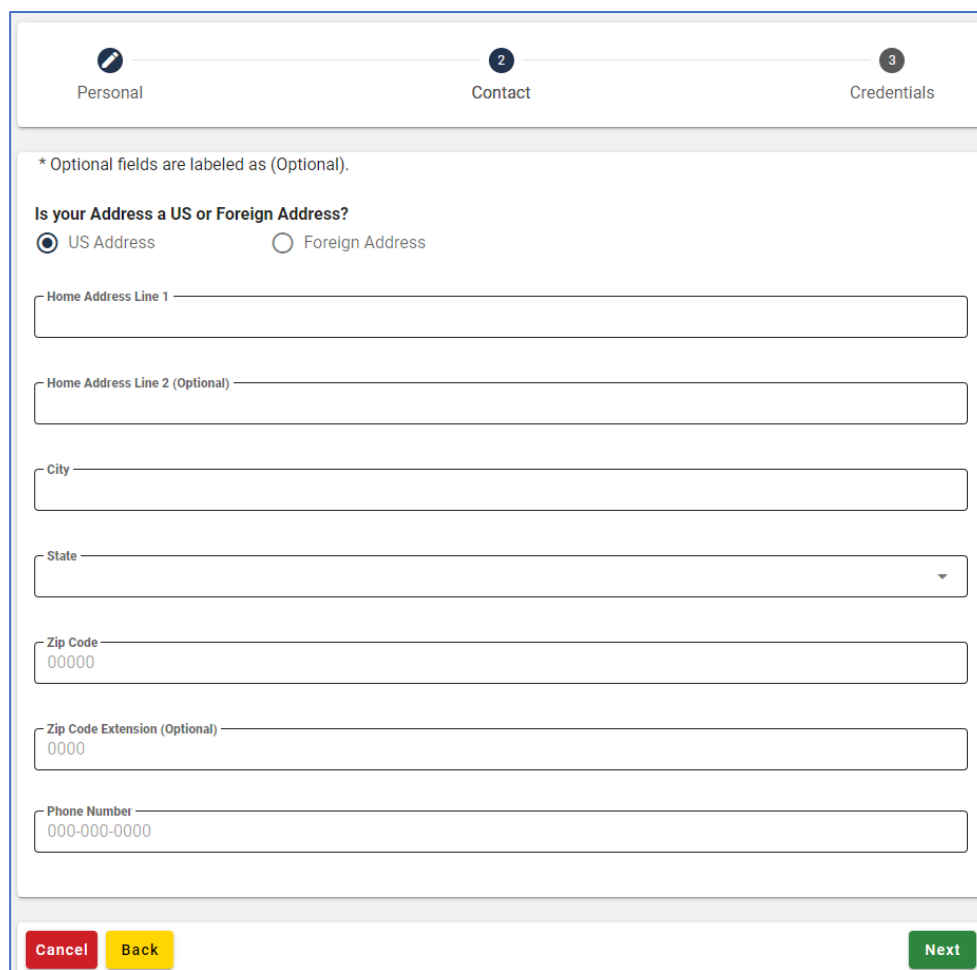
Confirm E-mail Address

[View Terms & Conditions](#)

☐ I agree to the terms and conditions

Figure 2: IDM System User Registration Form – Personal Tab

3. Enter the Name, Date of Birth, and E-mail Address information into the respective fields of the IDM system User Registration form. **You must use the email address where you received the QHP Enrollee Survey attestation process e-mail.**
4. Read the IDM system Terms and Conditions, click the checkbox to acknowledge agreement with the Terms and Conditions, and then click the **Next** button.
The Contact tab of the IDM Self Service registration page appears.



Personal Contact Credentials

* Optional fields are labeled as (Optional).

Is your Address a US or Foreign Address?

☒ US Address ☐ Foreign Address

Home Address Line 1

Home Address Line 2 (Optional)

City

State

Zip Code
00000

Zip Code Extension (Optional)
0000

Phone Number
000-000-0000

Cancel Back Next

Figure 3: IDM System User Registration Form – Contact Tab

5. If the home address is located inside the US, keep the default “US Address” setting. If the home address is located outside of the United States, click the **Foreign Address** radio button.
6. Enter the Home Address and Phone Number information into the respective fields and then click the **Next** button.

The Credentials tab of the IDM Self Service registration page appears.

The screenshot shows the 'Credentials' tab of the IDM System User Registration Form. At the top, there are three tabs: 'Personal', 'Contact', and 'Credentials' (which is selected and has a '3' in a circle above it). Below the tabs, a note states: '* Optional fields are labeled as (Optional)'. The form contains the following fields: 'User ID' (text input), 'New Password' (password input with an eye icon), 'Confirm Password' (password input with an eye icon), 'Security Questions' (dropdown menu), and 'Answer' (text input). At the bottom, there are three buttons: 'Cancel' (red), 'Back' (yellow), and 'Submit' (green).

Figure 4: IDM System User Registration Form – Credentials Tab

7. Enter the desired user ID and password into the respective fields of the User registration form.
8. Click the Select Challenge Question list box and choose a challenge question from the list that appears.
9. Type the challenge question answer into the Challenge Question Answer field.
10. Click the **Submit** button to submit the account registration request.
The system displays a message that indicates the account was successfully created.

3. Request a QHP Issuer Role

In order to access the Issuer Dashboard on the QHP Enrollee Survey website to complete the attestation process, Issuers must request the “QHP Survey Issuer” role by signing in to the IDM system.

This section provides the steps that users must follow to sign in to the IDM system to request the QHP Issuer role.

1. Navigate to <https://home.idm.cms.gov/>.

The Sign In page appears.

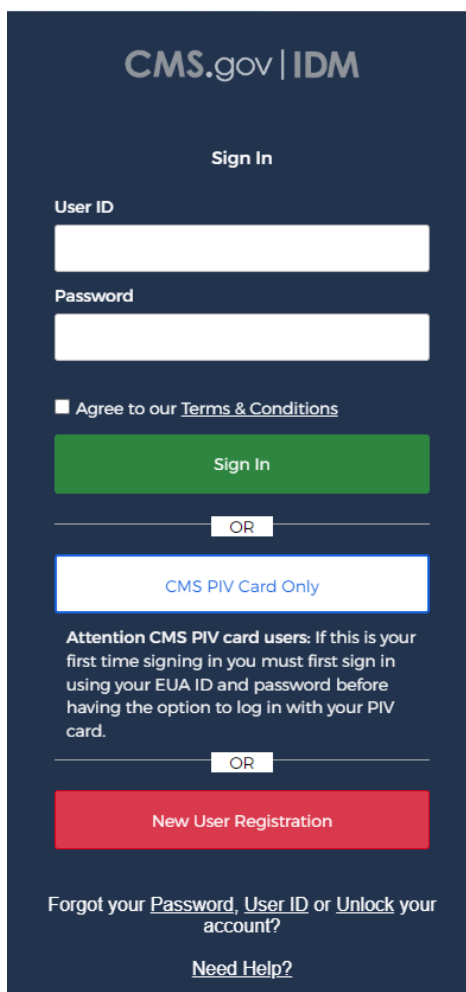


Figure 5: CMS IDM Sign In Page

2. Enter the user ID and password, created while registering an account, into the respective fields.
3. Read the Terms & Conditions, click the check box to acknowledge agreement, and then click the **Sign In** button.
4. If prompted, select a Multi-factor Authentication (MFA) factor.

5. Follow the directions for the chosen MFA factor (MFA device).

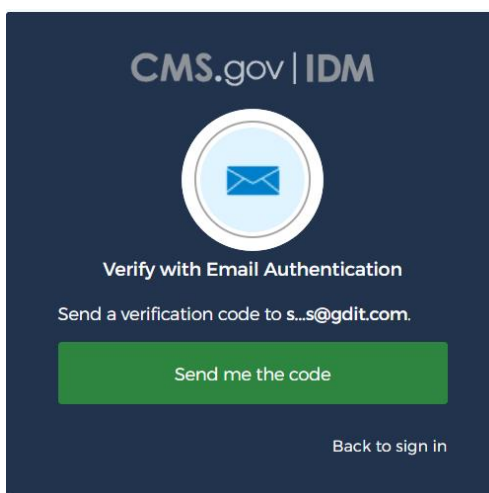


Figure 6: Verification Code Request

6. When the Verify with Email Authentication window appears, click the **Send me the code** button to request a one-time verification code.
7. Enter the verification code received into the Verification code field.

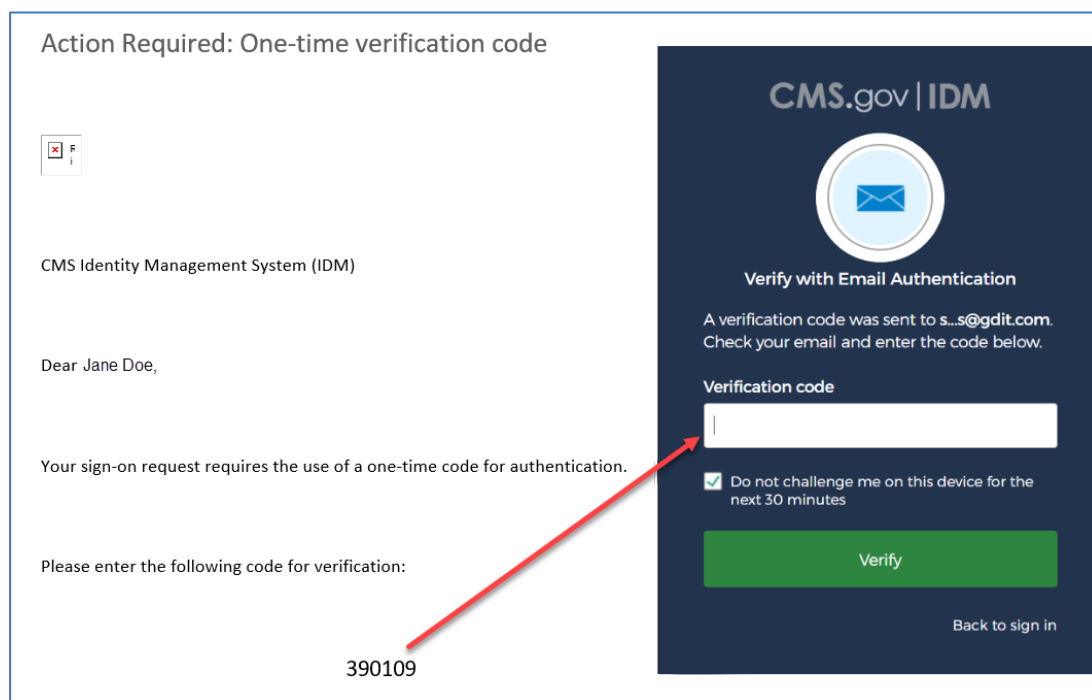


Figure 7: One-time Verification Code Email and the Verification Code

8. Click the **Verify** button.
You will be taken to the IDM Self-Service dashboard.

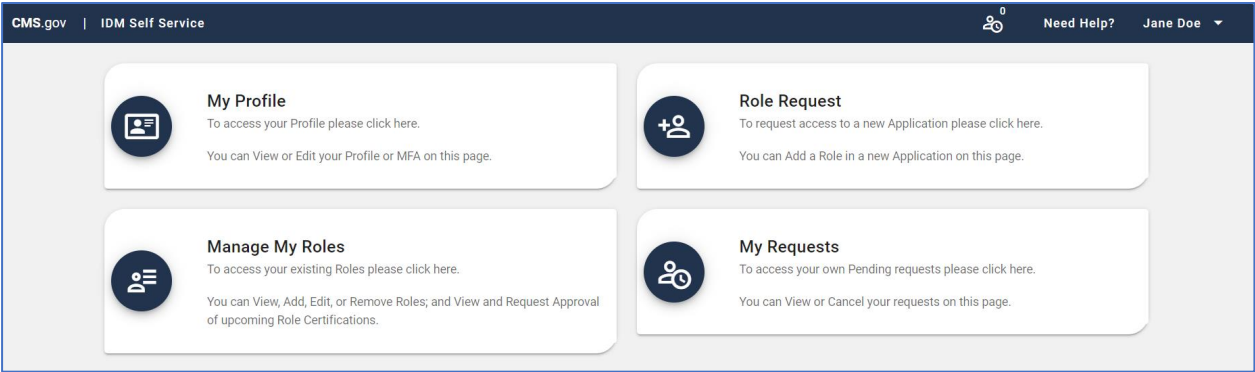


Figure 8: IDM Self Service Dashboard

9. Click on the **Role Request** button located on the IDM Self-Service dashboard.
The Role Request window appears.

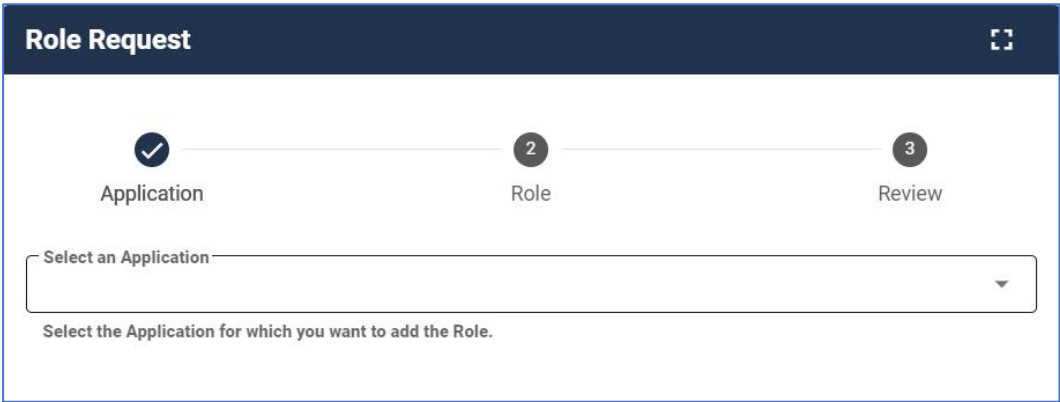


Figure 9: Role Request Page

10. From the Select an Application drop-down list, select the “Qualified Health Plan Enrollee Satisfaction Survey” application.

The screenshot shows the 'Role Request' form with a progress bar at the top. The progress bar has three steps: 'Application' (marked with a checkmark), 'Role' (marked with a checkmark), and 'Review' (marked with a '3'). Below the progress bar, the 'Selected Application' section is titled 'Qualified Health Plan Enrollee Satisfaction Survey'. It contains a paragraph: 'The Qualified Health Plan (QHP) Survey web application supports the Enrollee Experience Survey system that assesses yearly, consumer experience with QHPs offered through a Health Insurance Exchange. It also requires public display of information by each Marketplace to allow individuals to assess enrollee experience among comparable plans.' Below this paragraph is a button labeled 'View Helpdesk Details'. Underneath the button is a dropdown menu labeled 'Select a Role' with a downward arrow. Below the dropdown menu is the text 'Select the Role you want to request.' At the bottom of the form are two buttons: 'Cancel' (red) and 'Back' (yellow).

Figure 10: Role Request – Selecting the QHP Application

11. From the Select a Role drop-down list, select the “QHP Survey Issuer” role.

The screenshot shows the 'Role Request' form with the 'Select a Role' dropdown menu open. The dropdown menu is divided into three sections: 'End User', 'Approver', and 'Help Desk'. Under 'End User', there are two options: 'QHP Survey Issuer' (highlighted in blue) and 'QHP Survey Vendor'. Under 'Approver', there is one option: 'QHP Survey Approver'. Under 'Help Desk', there is one option: 'QHP Survey Support'. Below the dropdown menu is the text 'Select the Role you want to request.' At the bottom of the form are two buttons: 'Cancel' (red) and 'Back' (yellow).

Figure 11: Role Request – Selecting the QHP Issuer Role

Upon selecting the QHP Survey Issuer role, the initial Remote Identity Proofing (RIDP) page will be displayed.

Role Request

Application Role RIDP Review

Remote Identity Proofing

Identity Verification - What to Expect

To complete this role request, it is important to note that Experian, a trusted and reliable agent, needs to collect further details about you.

Please ensure that you have entered your full legal name, current home address, your personal primary phone number, date-of-birth, and your personal e-mail address correctly to ensure a seamless and secure process.

For additional information or assistance, we encourage you to visit the Experian Customer Assistance website: <http://www.experian.com/help>

Experian identity verification is limited to US addresses and US territories only. If you have a foreign address please call your [Tier 1 Help Desk](#) to verify your identity.

[View Terms & Conditions](#)

☐ I agree to the terms and conditions

Cancel **Back** **Next**

Figure 12: Role Request – Initial RIDP Page

12. Review the Identity Verification description statement.
 13. Click the **View Terms & Conditions** link and review the RIDP terms and conditions.
 14. Click the **I agree to the terms and conditions** check box to acknowledge agreement with the terms and conditions.
 15. Click the **Next** button.
- The Identity Verification form appears.

Role Request

✓

Application

✓

Role

✓

RIDP

4

Review

Remote Identity Proofing

We collect your PII (Personal Identifiable Information) for identity verification only. Please ensure the information you enter is accurate.

All fields are required, except those marked as "Optional"

Legal First Name

Legal Last Name

Middle Name (Optional)

Suffix (Optional)

Date Of Birth
MM/DD/YYYY

Social Security Number
000-00-0000

Personal E-mail Address

Confirm Personal E-mail Address

Home Address Line 1

Home Address Line 2 (Optional)

City

State

Zip Code
00000

Zip Code Extension (Optional)
0000

☐ Save home address to my profile

Personal Phone Number (Mobile is preferred)
000-000-0000

Cancel

Back

Submit

Figure 13: Identity Information Verification Form

16. Enter your Name, Date of Birth, and Email Address information into the respective fields. **You must use the email address where you received the QHP Enrollee Survey attestation process e-mail (the same email address you used to set up your CMS IDM account).**
17. Enter your Social Security Number (SSN) into the Social Security Number field. Note that this information is *not* stored in the CMS system and is only used for this identity proofing step.

18. Enter your Home Address information and Phone Number information into the respective fields. Note that this information is *not* stored in the CMS system and is only used for this identity proofing step.

19. Click the **Submit** button.

The RIDP process begins. Users that successfully complete Online Proofing will see a confirmation message on the screen and then users can resume the role request process.

If the RIDP Online Proofing process is unsuccessful, the system will display an error message. Users must contact Experian using the contact information and Reference Number provided in the error message and perform Phone Proofing. If Phone Proofing is successful, users can sign in to the IDM system and initiate the role request procedure again. If the Phone Proofing RIDP process is unsuccessful, users may contact the Application Help Desk at QHP_Survey@air.org and inquire about the Manual Proofing process.

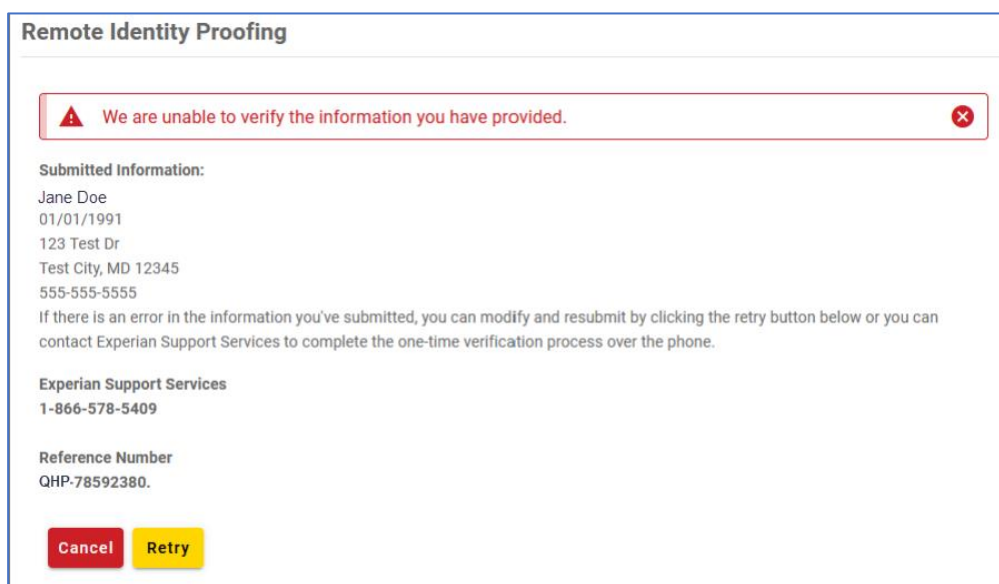
The screenshot shows a web interface titled "Remote Identity Proofing". At the top, there is a red-bordered box with a warning icon and the text "We are unable to verify the information you have provided." Below this, the "Submitted Information:" is listed: Jane Doe, 01/01/1991, 123 Test Dr, Test City, MD 12345, 555-555-5555. A message follows: "If there is an error in the information you've submitted, you can modify and resubmit by clicking the retry button below or you can contact Experian Support Services to complete the one-time verification process over the phone." Below this, "Experian Support Services" is listed with the number 1-866-578-5409. A "Reference Number" is also provided: QHP-78592380. At the bottom, there are two buttons: "Cancel" (red) and "Retry" (yellow).

Figure 14: RIDP Online Proofing Error Message

Once the RIDP process is successfully completed, the Role Request page will display a text box titled "Reason for Request."

20. Enter a brief justification statement into this field to provide a justification for the role request.
21. Click the **Submit Role Request** button.

The Role Request page displays a Request ID and a message informing you that the request was successfully submitted.

Once you receive a confirmation email that the role request is approved, you will be able to Sign In to the QHP EES website.

4. Sign In to QHP Enrollee Survey Website

This section provides the steps that users must follow to sign in to the QHP Enrollee Survey website.

1. Navigate to <https://qhpsurvey.cms.gov/>.

The Home page is displayed.

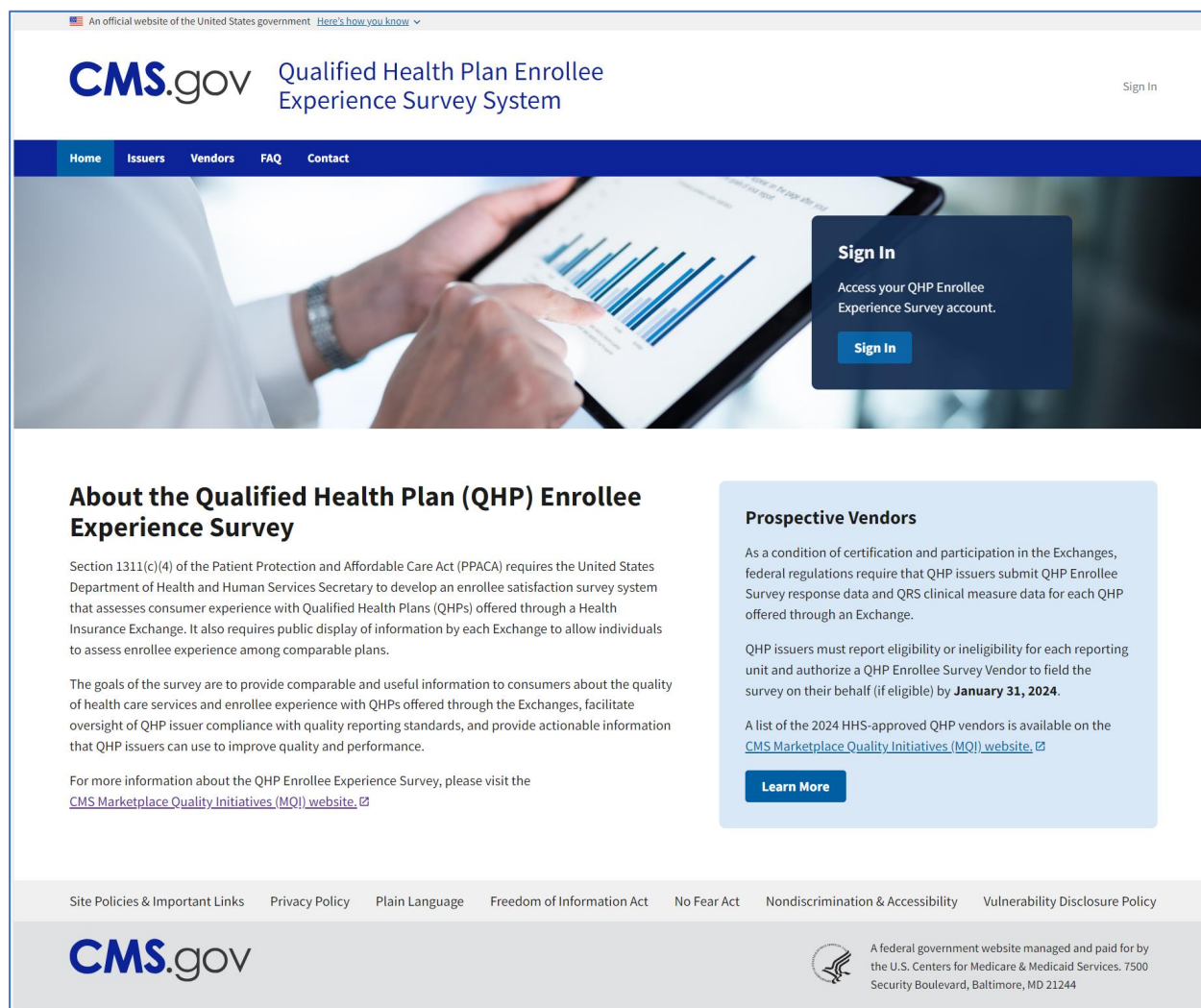


Figure 15: QHP ESS Website Home Page

2. Click on the **Sign in** button in the Sign In box or the Sign In link at the top right of the page to access your QHP Enrollee Survey website account.

The IDM Sign In page appears.

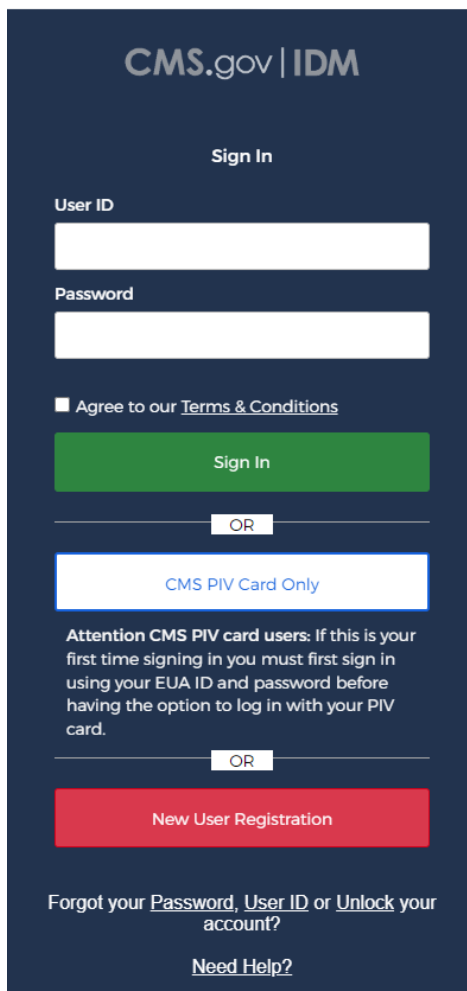
The image shows a sign-in page for CMS.gov | IDM. The page has a dark blue background. At the top, the text "CMS.gov | IDM" is displayed in white. Below this, the heading "Sign In" is centered. There are two input fields: "User ID" and "Password", both with white text on a dark blue background. Below the password field is a checkbox labeled "Agree to our Terms & Conditions". A green "Sign In" button is positioned below the checkbox. A horizontal line with the word "OR" in the center separates the sign-in section from the PIV card section. The PIV card section has a blue header "CMS PIV Card Only". Below this, a message states: "Attention CMS PIV card users: If this is your first time signing in you must first sign in using your EUA ID and password before having the option to log in with your PIV card." Another horizontal line with the word "OR" in the center follows. Below this is a red "New User Registration" button. At the bottom, there are links for "Forgot your Password, User ID or Unlock your account?" and "Need Help?".

Figure 16: CMS IDM Sign In Page

3. Enter your User ID and Password.
4. Click the check box to acknowledge agreement, then click the **Sign In** button.
5. Follow the directions for the chosen MFA factor (MFA device) and then click on the **Verify** button.

The Issuer Dashboard will appear. For accounts associated with more than one Issuer, a list of all Issuers will be displayed.

An official website of the United States government [Here's how you know](#)

CMS.gov Qualified Health Plan Enrollee Experience Survey System John Doe | Sign Out

Home Issuers Vendors FAQ Contact **Dashboard**

Dashboard

Your account is associated with more than one issuer. Please select an issuer below.

ACME HEALTH PLAN INC.	(0 of 3 Completed)
ACME HEALTH PLAN OF VIRGINIA	(0 of 3 Completed)
ACME HEALTH PLAN OF IOWA	(0 of 3 Completed)

[1] Pursuant to 45 C.F.R. §§ 156.1120(a)(3) and 156.1125(b)(3), QHP issuers participating in the Exchange must include information in their respective QRS and QHP Enrollee Experience Survey data submissions only for those enrollees at the level specified by HHS.

[2] For purposes of QRS and QHP Enrollee Experience Survey participation eligibility, the term “offered” includes all reporting units that are operational through an Exchange (i.e., reporting units that are available for purchase through an Exchange [SHOP or individual], accepting new members or groups, or have active or existing members).

[3] 45 C.F.R. §§ 156.1120(a) and 156.1125(b).

[4] The QHP Enrollee Experience Survey minimum enrollment requirement aligns with standards set forth in 45 C.F.R. § 156.1125(b)(1). CMS established the minimum enrollment requirement for QRS to align with the QHP Enrollee Experience Survey minimum enrollment requirement and to support a sufficient size for credible and reliable results.

Site Policies & Important Links Privacy Policy Plain Language Freedom of Information Act No Fear Act Nondiscrimination & Accessibility

Vulnerability Disclosure Policy

CMS.gov

A federal government website managed and paid for by the U.S. Centers for Medicare & Medicaid Services, 7500 Security Boulevard, Baltimore, MD 21244

Figure 17: Issuer Dashboard when Account is Associated with Multiple Issuers

6. Select an Issuer from the list for which you would like to complete the attestation. Note that this list will only show reporting units for which you are the designated contact.

The user authorization page appears.

An official website of the United States government [Here's how you know](#) ▼

CMS.gov Qualified Health Plan Enrollee Experience Survey System John Doe | Sign Out

[Home](#) [Issuers](#) [Vendors](#) [FAQ](#) [Contact](#) **Dashboard**

Dashboard

[← Back to Issuer List](#)

User Authorization for ACME HEALTH PLAN INC.

I attest that I am authorized by the Issuer to complete the attestation of the eligibility criteria and select an approved vendor for **ACME HEALTH PLAN INC.**

Figure 18: Issuer Dashboard – User Authorization

7. If you are not authorized to complete the attestation for the selected entity, click on “No”.
8. If you are authorized to complete the attestation for the selected entity, click on “Yes”.

The Issuer Dashboard with a view of the Issuer and Reporting Unit information is displayed.

Qualified Health Plan Enrollee Experience Survey System

John Doe | Sign Out

[Home](#)
[Issuers](#)
[Vendors](#)
[FAQ](#)
[Contact](#)
[Dashboard](#)

Dashboard

[Back to Issuer List](#)

Issuer Information

ACME HEALTH PLAN INC.

Authorized Contact:
John Doe
Email: john.doe@email.com

For changes to contact information or any questions related to this process, please contact us at QHP_Survey@air.org

Instructions

The 2024 Quality Rating System (QRS) and Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey) Operational Instructions are available on the [CMS Marketplace Quality Initiatives \(MQI\) website](#). Issuers should review the instructions in this document thoroughly to prepare reporting units to collect and submit QHP Enrollee Survey response data, generate and validate sample frames, confirm reporting unit information and select a survey vendor, and provide information regarding reporting unit ineligibility, if applicable.

Issuers must authorize an approved survey vendor to submit data on their behalf for the national implementation of the QHP Enrollee Experience Survey. In order to authorize a survey vendor, a QHP issuer must complete the QHP Enrollee Experience Survey Vendor Authorization Process below for each of their reporting units.

Reporting Units

Reporting Unit ID	Attestation Status	Eligibility Status	Authorized Vendor	Ineligibility Reason
> 12345-IA-HMO	Not Started	Incomplete		
> 12355-IA-HMO	Not Started	Incomplete		
> 12365-IA-HMO	Not Started	Incomplete		

Rows per page: 25 1-3 of 3

If a reporting unit is not listed, please notify QHP_Survey@air.org.

CSV Reports

Reports include data for all Issuers and Reporting Units associated to your login.

Attestations Eligibility Vendor Selection Report

Note

Qualified Health Plan (QHP) Enrollee Experience Survey enrollee response data must be submitted for each product type offered through an Exchange for two consecutive years (i.e., 2023 and 2024) that had more than 500 enrollees as of **July 1, 2023**, and more than 500 enrollees as of **January 1, 2024**.

The minimum enrollment threshold is determined by the total number of enrollees within the reporting unit, not by the number of survey-eligible enrollees.

Reporting units discontinued before June 15 of the ratings year (i.e., June 15, 2024) are exempt from QHP Enrollee Experience Survey requirements. For an eligible reporting unit impacted by a QHP issuer change in ownership (e.g., merger, acquisition) effective as of January 1 of the ratings year, the QHP issuer that assumes the reporting unit is responsible for meeting these requirements.

The Centers for Medicare & Medicaid Services (CMS) will **not** accept voluntary data submissions for reporting units that do not meet eligibility criteria as defined above.

Figure 19: Issuer Dashboard – View of Issuer and Reporting Unit Information

- Under the Reporting Units panel, click on the arrow to the left of the Reporting Unit ID to view the attestation questions/prompts to attest to reporting unit eligibility or ineligibility. Follow the question prompts to verify all required information (for example, general information; enrollment status as of July 1, 2023; enrollment status as of January 1, 2024; year plan began

operating; operational status in 2022, 2023, and 2024; and whether the reporting unit will discontinue prior to June 15, 2024).

- After following the prompts and providing the requested information, eligible reporting units will be prompted with a drop-down menu to select the appropriate survey vendor or ineligible reporting units will be prompted with a drop-down menu to select the appropriate ineligibility reason. Issuers will also be able to enter additional comments, if needed.

Reporting Units

Reporting Unit ID	Attestation Status	Eligibility Status	Authorized Vendor	Ineligibility Reason
38234-VA-EPO	In Progress	Incomplete		

Did this reporting unit operate on an Exchange in 2023? MODIFIED

☐ No ☒ Yes

Will this reporting unit operate on an Exchange in 2024 as the exact same product type?

☐ No ☒ Yes

Will this reporting unit be discontinued prior to June 15, 2024?

☒ No ☐ Yes

Did this reporting unit have an enrollment status greater than 500 as of July 1, 2023?
This count includes all enrollees, not just survey eligible enrollees, from both SHOP and individual markets.

☐ No ☒ Yes

Please enter the total number of all enrollees in the QHPs associated with this reporting unit as of July 1, 2023.
This count should include all enrollees, not just survey eligible enrollees, for both SHOP and individual markets.

Did the reporting unit have an enrollment status greater than 500 as of January 1, 2024 for the exact same product type?
This count includes all enrollees, not just survey eligible enrollees, from both SHOP and individual markets.

☐ No ☒ Yes

Please enter the total number of all enrollees in the QHP associated with this reporting unit as of January 1, 2024.
This count should include all enrollees, not just survey eligible enrollees, from both SHOP and individual markets.

What was the first year this reporting unit was operational for the exact same product type?

Has this reporting unit been operational for at least three years for the exact same product type?
See Exhibit 1 in the 2024 Operational Instructions for definitions of operational, not operational, and discontinued. This field asks whether this reporting unit has been operational on the Exchange in 2022, 2023, and 2024 for the exact same product type. It does not ask whether this reporting unit has reported or submitted QRS clinical measure data and QHP Enrollee Survey response data to CMS for three consecutive years. Please review the definitions of "Operational" and "Not Operational" in the Notes section for additional information.

☐ No ☒ Yes

Based on your selection, this reporting unit ID is eligible. Please confirm your Authorized Vendor: *

Save **Cancel**

Reporting Unit ID	Attestation Status	Eligibility Status
48161-MO-EPO	Not Started	Incomplete

Rows per page: 25 1-2 of 2

If a reporting unit is not listed, please notify QHP_Survey@air.org.

Figure 20: Issuer Dashboard – Attestation Questions/Prompts

- Click on the **Save** button to save your responses to all the attestation questions. If you click **Cancel**, the attestation questions will be returned to their last saved state.

The Attestation Status and Eligibility Status columns of the Reporting Unit table will be updated accordingly to reflect the current state of the attestation process for the corresponding Reporting Unit ID.

Issuers must select each reporting unit and follow the question prompts to verify all required information for each of the reporting units.

Issuers also have the ability to export the data in the Reporting Units data table to a csv file.

12. To download a CSV report that includes saved responses for all Issuers and Reporting Units associated to your login, click the **Attestations Eligibility Vendor Selection Report** button towards the bottom of the Dashboard page.

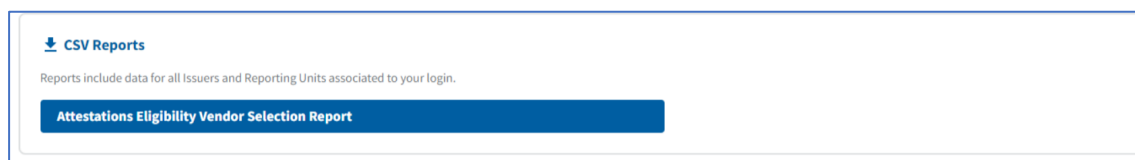


Figure 21: Issuer Dashboard – Button to Download CSV Report

For any questions regarding the attestation process, please contact QHP_Survey@air.org.