



**Centers for Medicare & Medicaid Services**

# **Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey) Website Vendor User Guide**

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**Version 2.1**

**4/29/2024**

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## 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 Enrollee Survey vendors are required to sign in to the [QHP Enrollee Survey website](#) to perform the following activities by the deadline established by CMS:

- Submit at least one interim data file for testing purposes between April 3–5, 2024.
  - Vendors must submit at least one unencrypted test ZIP file containing files for two reporting units, including at least 100 records across the two reporting units.
  - The test period enables vendors and the QHP Enrollee Survey Project Team to test data submission protocols and make any necessary adjustments prior to the beginning of the data submission period.
- Submit all final data files between May 10–17, 2024, in accordance with the file specifications provided in the Code and Submit Data section of the [QHP Enrollee Survey: Technical Specifications for 2024](#).
  - The final data files must include responses from mail surveys received through May 3, 2024.
  - If vendors are still fielding the survey after May 3, 2024, they must accept and process data for all mail surveys received through the end of the protocol.
- Correct any errors returned by the QHP Enrollee Survey Project Team and submit revised data files between May 20–22, 2024.

Vendors will be notified when registration opens to access the [QHP Enrollee Survey website](#) ahead of test data submission.

Existing vendor users will be able to sign into the [QHP Enrollee Survey website](#) with their previously registered account.

New vendor users must take the following steps to access the website:

1. Register an account in CMS's [Identity Management \(IDM\)](#) system. For detailed steps on how to register an account, see [Section 2](#) (*Register a New User Account in CMS's IDM System*).
2. Request the QHP Survey Vendor role. For detailed steps on how to request the Vendor role, see [Section 3](#) (*Request a QHP Enrollee Survey Vendor Role*).
  - After receiving a confirmation email that the role request is approved, vendors will be able to sign in to the QHP Enrollee Survey website.

Vendors can contact [QHP\\_Survey@air.org](mailto:QHP_Survey@air.org) with any questions related to account setup, QHP Enrollee Survey website access, or the data submission process.

## 2. Register a New User Account in CMS's 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.

**Note:** If you have registered in the CMS IDM before and already have an existing CMS IDM account, please skip the steps in this section. Do not create a duplicate IDM account.

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

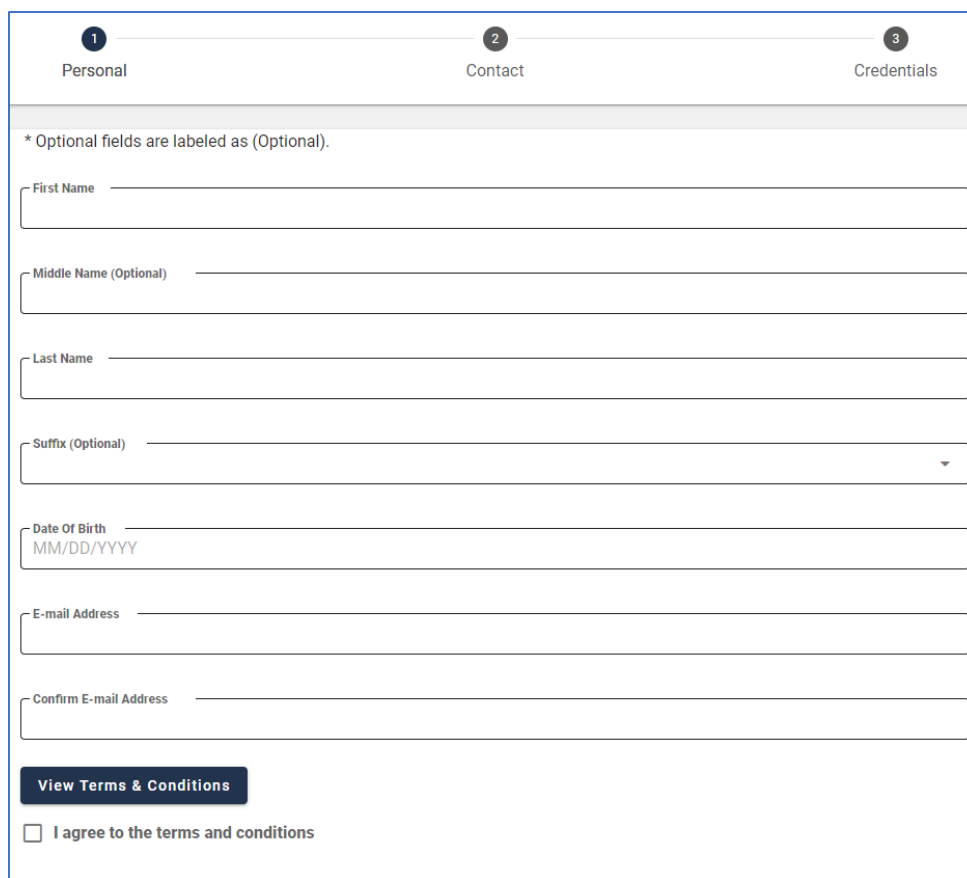
The **Sign In** page (Figure 1) appears.

The screenshot shows the CMS.gov | IDM IMPL Sign In page. At the top is the CMS.gov | IDM IMPL logo. Below it is the 'Sign In' heading. There are two input fields: 'User ID' and 'Password'. Below these is a checkbox labeled 'Agree to our Terms & Conditions'. A blue 'Sign In' button is positioned below the checkbox. A horizontal line with 'OR' in the center separates this from a box containing the link 'CMS PIV Card Only'. Below this is a section for 'PIV Users' with the text: 'To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login.' Another horizontal line with 'OR' in the center follows. Below this is a box containing the link 'New User Registration'. At the bottom of the page are three links: 'Forgot User ID', 'Forgot Password', and 'Unlock Account'.

Figure 1: CMS IDM Sign In Page

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

The **Personal** tab (Figure 2) of the IDM Self Service registration page appears.

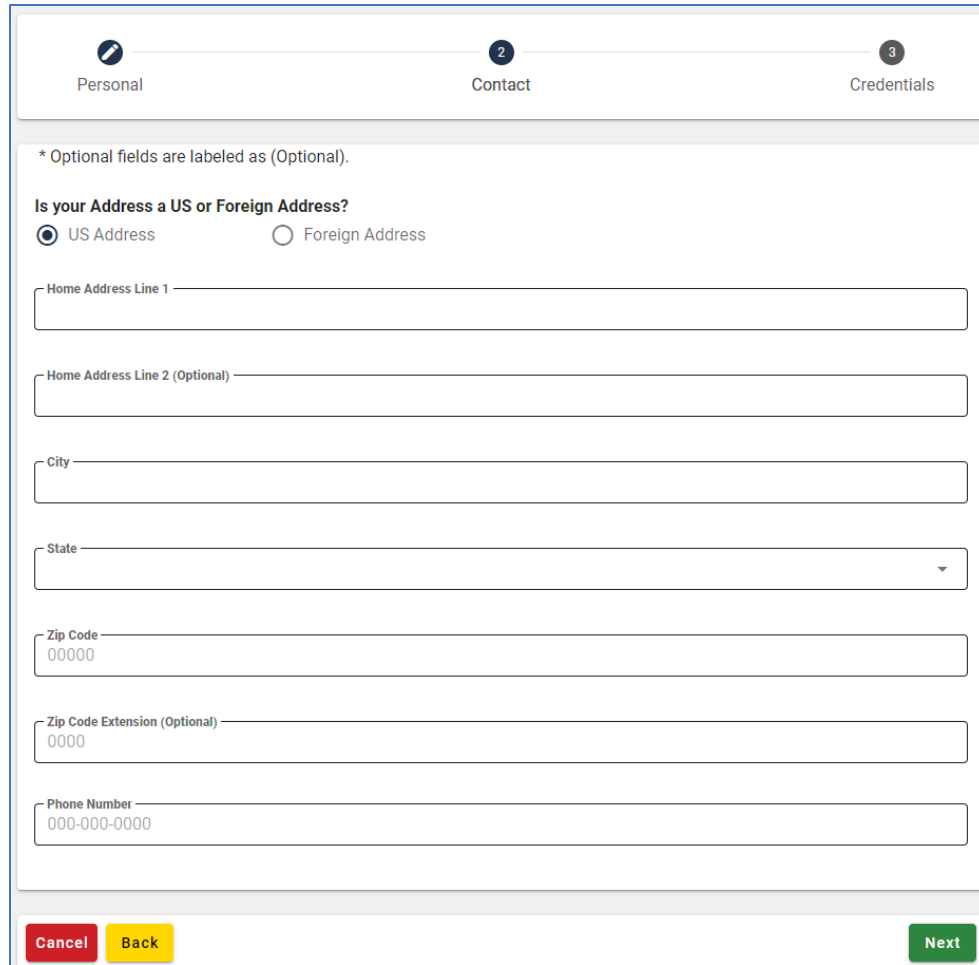


The form is titled "IDM System User Registration Form – Personal Tab" and is divided into three tabs: "1 Personal", "2 Contact", and "3 Credentials". The "Personal" tab is active. It contains a note: "\* Optional fields are labeled as (Optional)". The form fields are: "First Name" (text input), "Middle Name (Optional)" (text input), "Last Name" (text input), "Suffix (Optional)" (dropdown menu), "Date Of Birth" (text input with placeholder "MM/DD/YYYY"), "E-mail Address" (text input), and "Confirm E-mail Address" (text input). Below the fields is a "View Terms & Conditions" button and a checkbox labeled "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. **Please use the e-mail address that was provided to the QHP Project Team ahead of data submission.**
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 (Figure 3) 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 (Figure 4) of the IDM Self Service registration page appears.

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.

Personal

Contact

3

Credentials

\* Optional fields are labeled as (Optional).

User ID

New Password

Confirm Password

Security Questions

Answer

Cancel

Back

Submit

Figure 4: IDM System User Registration Form – Credentials Tab



### 3. Request a QHP Enrollee Survey Vendor Role

To access the Vendor Dashboard on the QHP Enrollee Survey website to upload data, vendors must request the “QHP Survey Vendor” role by signing into the CMS IDM system.

This section provides the steps that users must follow to sign into the IDM system to request the QHP Enrollee Survey Vendor role.

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

The **Sign In** page (Figure 5) appears.

**CMS.gov | IDM IMPL**

**Sign In**

User ID

Password

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

**Sign In**

OR

**CMS PIV Card Only**

**PIV Users:** To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login.

OR

**New User Registration**

[Forgot User ID](#)

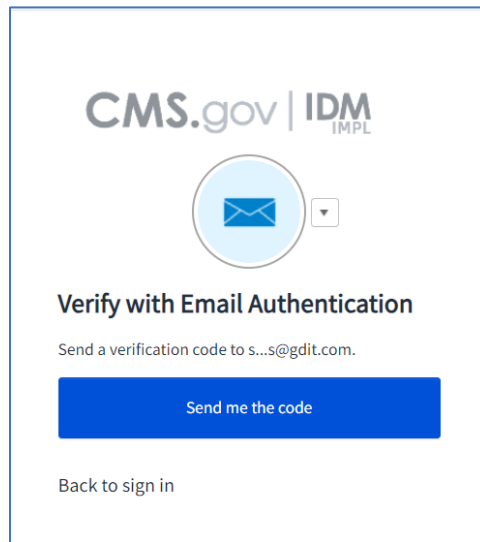
[Forgot Password](#)

[Unlock Account](#)

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.

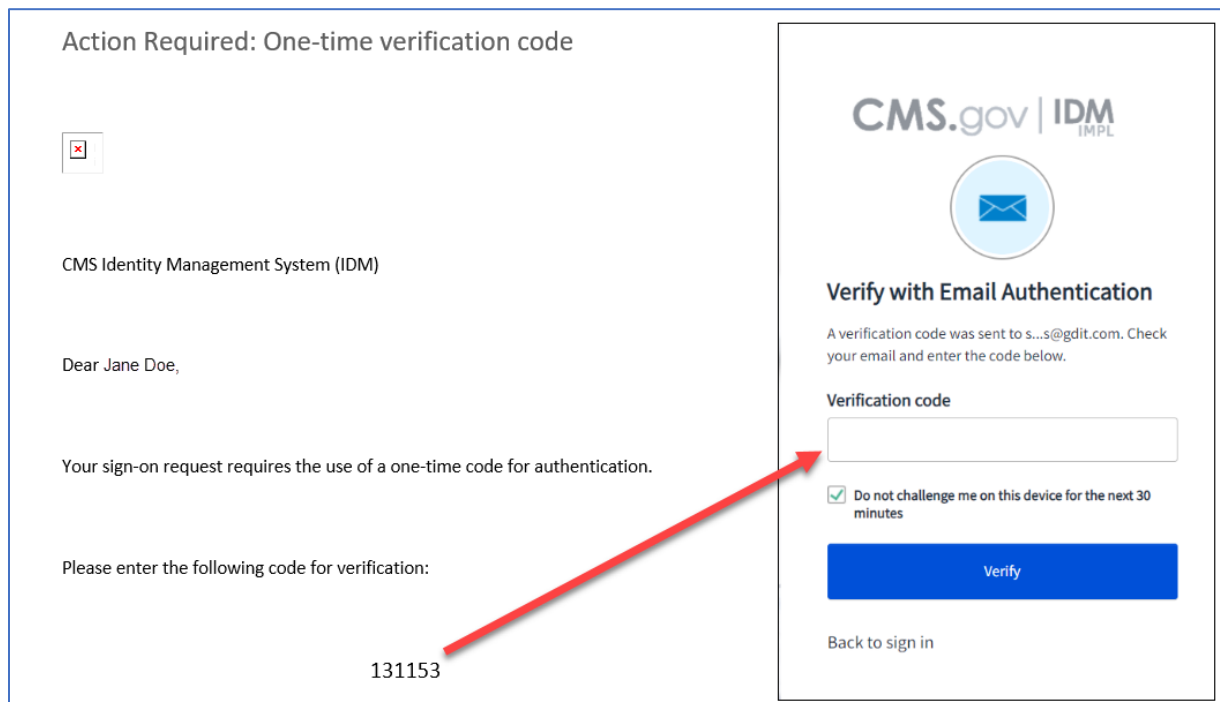
4. In the Verify with Email Authentication window (Figure 6) that appears, if you have multiple registered Multi-factor Authentication (MFA) devices, select an MFA factor by clicking on the drop-down arrow next to the mail icon.



The image shows a web window titled "CMS.gov | IDM IMPL". Below the header is a circular icon containing a blue envelope and a small downward-pointing arrow. The text "Verify with Email Authentication" is centered. Below this, it says "Send a verification code to s...s@gdit.com." and a large blue button labeled "Send me the code". At the bottom, there is a link that says "Back to sign in".

Figure 6: Verification Code Request

5. Follow the directions for the chosen MFA factor (MFA device).
6. If you chose email as the authentication factor, click the **Send me the code** button in the Verify with Email Authentication window (Figure 6) to request a one-time verification code via email.
7. Enter the verification code received into the **Verification code** field (Figure 7).



The image shows an email interface on the left and a verification window on the right. The email, from "CMS Identity Management System (IDM)", is addressed to "Dear Jane Doe," and states: "Your sign-on request requires the use of a one-time code for authentication. Please enter the following code for verification: 131153". A red arrow points from the code "131153" in the email to the "Verification code" input field in the verification window. The verification window, titled "CMS.gov | IDM IMPL", contains the text "Verify with Email Authentication" and "A verification code was sent to s...s@gdit.com. Check your email and enter the code below." It features a "Verification code" input field, a checkbox labeled "Do not challenge me on this device for the next 30 minutes" (which is checked), a blue "Verify" button, and a "Back to sign in" link at the bottom.

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

- Click the **Verify** button.

You will be taken to the IDM Self-Service dashboard.

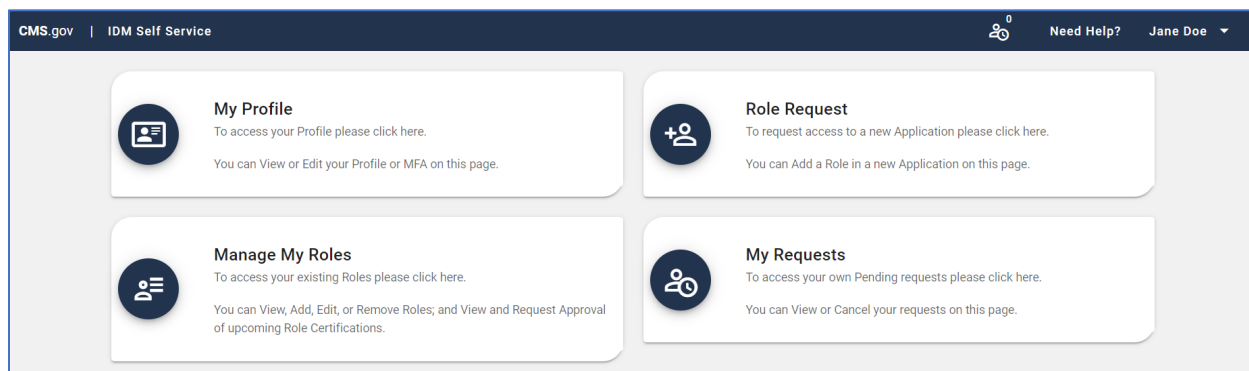


Figure 8: IDM Self Service Dashboard

- Click on the Role Request button located on the IDM Self-Service dashboard (Figure 8). The **Role Request** window (Figure 9) appears.

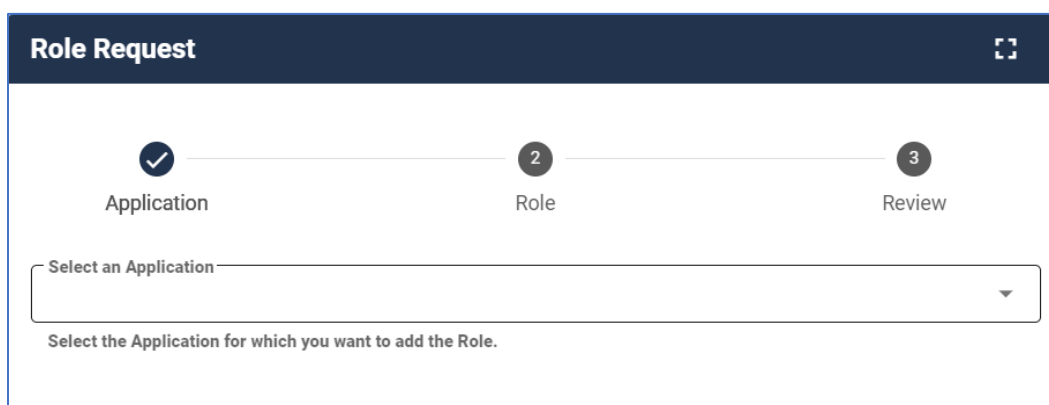


Figure 9: Role Request Page

- From the **Select an Application** drop-down list (Figure 9), select the “Qualified Health Plan Enrollee Satisfaction Survey” application.
- From the **Select a Role** drop-down list (Figure 10), select the “QHP Survey Vendor” role (Figure 11).

Role Request

✓

Application

✓

Role

3

Review

Selected Application

Qualified Health Plan Enrollee Satisfaction Survey

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.

View Helpdesk Details

Select a Role

Select the Role you want to request.

CancelBack

Figure 10: Role Request – Selecting the QHP Application

Role Request

\* Optional fields are labeled as (Optional).

✎

Application

✎

Role

3

Review

Selected Application

Qualified Health Plan Enrollee Satisfaction Survey

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.

View Helpdesk Details

Select a Role

End User

QHP Survey Issuer

QHP Survey Vendor

Approver

QHP Survey Approver

Help Desk

QHP Survey Support

Figure 11: Role Request – Selecting the QHP Issuer Role

10

Upon selecting the QHP Survey Vendor role, the initial **Remote Identity Proofing (RIDP)** page (Figure 12) 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 (Figure 13) appears.
16. Enter your Name, Date of Birth, and Email Address information into the respective fields.
17. Enter your Social Security Number into the Social Security Number field. Note that this information is *not* stored in the CMS IDM 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 you must enter your personal information in all fields, such as personal email address, personal phone number, and home address. Do not enter any business information. Any information you enter is *not* stored in the CMS IDM system and is only used for this identity proofing step.

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

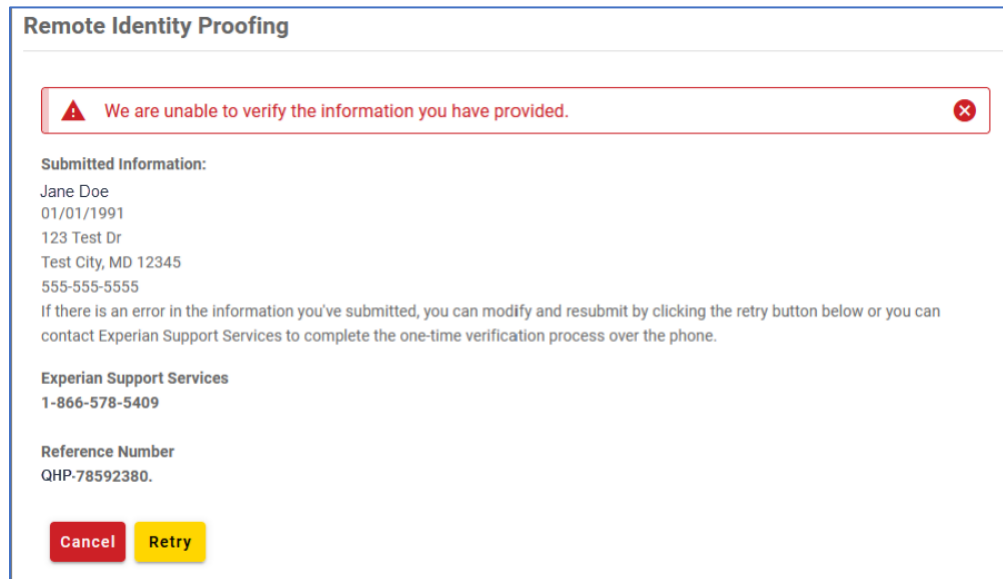
Figure 13: Identity Information Verification Form

19. Click the **Submit** button.

The RIDP process begins. Users who successfully complete Online Proofing will see a confirmation message on the screen, after which they can resume the role request process.

If the RIDP Online Proofing process is unsuccessful, the system will display an error message (Figure 14). 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,

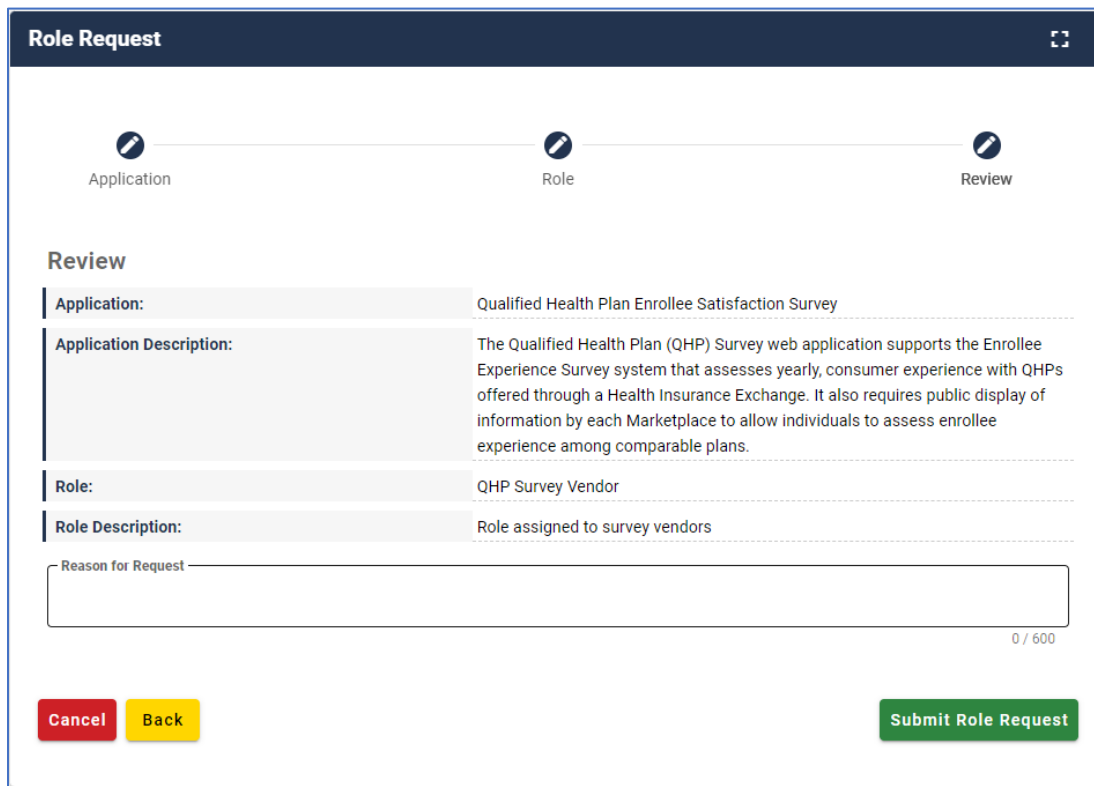
users can sign into the CMS IDM system and initiate the role request procedure again. If the Phone Proofing RIDP process is unsuccessful, users may contact the Application Help Desk at [QHP\\_Survey@air.org](mailto:QHP_Survey@air.org) to inquire about the Manual Proofing process.



The screenshot shows a web interface titled "Remote Identity Proofing". At the top, there is a red error banner 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 states: "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 as 1-866-578-5409. A "Reference Number" is shown as 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" (Figure 15).



The screenshot shows the "Role Request" page. At the top, there is a dark blue header with the title "Role Request" and a maximize icon. Below the header, there is a progress bar with three steps: "Application", "Role", and "Review". The "Review" step is currently active. Below the progress bar, there is a "Review" section with the following details: "Application: Qualified Health Plan Enrollee Satisfaction Survey", "Application Description: 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.", "Role: QHP Survey Vendor", and "Role Description: Role assigned to survey vendors". Below these details, there is a text box labeled "Reason for Request" with a character count "0 / 600". At the bottom, there are three buttons: "Cancel" (red), "Back" (yellow), and "Submit Role Request" (green).

Figure 15: Role Request – Entering the 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 into the QHP Enrollee Survey 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 (Figure 16) is displayed.



Figure 16: 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 (Figure 17) appears.

**CMS.gov | IDM IMPL**

### Sign In

User ID

Password

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

**Sign In**

OR

[CMS PIV Card Only](#)

**PIV Users:** To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login.

OR

[New User Registration](#)

[Forgot User ID](#)

[Forgot Password](#)

[Unlock Account](#)

Figure 17: 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 **Vendor Dashboard** (Figure 18) will appear. This dashboard will display vendor contact information, an interface to upload survey files, and the ability to view uploaded vendor submissions.

The screenshot shows the Vendor Dashboard for the CMS.gov Qualified Health Plan Enrollee Experience Survey System. The dashboard is divided into several sections:

- Vendor Information:** Displays contact information for the Test Vendor Company, including contact name, email, and phone number. It also provides a link to contact the QHP Survey team.
- Upload TEST Survey File:** A section for uploading survey files. It includes a file upload area with a "choose from folder" button and "Upload" and "Cancel" buttons. A note states that only CSV and ZIP files will be processed.
- Vendor Submissions:** A section providing instructions for CSV and ZIP file naming conventions. It includes a "Refresh" button.
- Survey CSV Files:** A section displaying a list of uploaded CSV files. It includes a "Refresh" button.
- Uploads:** A section displaying a list of uploaded files. It includes a "Refresh" button.
- CSV Report:** A section displaying a CSV report for the current cycle. It includes a "Vendor Survey Submission Report" button.

The footer of the dashboard includes links to Site Policies & Important Links, Privacy Policy, Plain Language, Freedom of Information Act, No Fear Act, Nondiscrimination & Accessibility, and Vulnerability Disclosure Policy. It also features the CMS.gov logo and a statement about the website being managed and paid for by the U.S. Centers for Medicare & Medicaid Services.

Figure 18: Vendor Dashboard

6. To upload survey files, review the naming convention requirements in the blue box.  
 CSV files must use the following naming convention: <Reporting Unit-ID>.csv. Upload CSV files one at a time or upload multiple CSV files in a ZIP file.  
 To assist with tracking multiple submissions, ZIP files should use the following naming convention: <VendorName>\_Submission\_<Letter>.<ZIP>. For example, vendors should use <VendorName>\_Submission\_A.<ZIP> for the first ZIP file, <VendorName>\_Submission\_B.<ZIP> for the second ZIP file, and so on.  
**Note:** ZIP files must contain properly named CSV files. The Project Team will reject an entire ZIP file if any CSV files within the ZIP file violate the CSV naming convention.
7. Uploaded files will appear in the Uploads pane. If you have uploaded a file that does not appear in the pane, please click Refresh.

Data submission files must include all variables specified in the Data Dictionary (Appendix G of the [QHP Enrollee Experience Survey: Technical Specifications for 2024](#)).

All data must be reported at the person level and include:

- All required variables associated with survey administration
- Final disposition codes and survey responses

All data included in the CSV files during data submission are considered final unless the Project Team requests revisions.

8. Initial validation results will be displayed on the vendor dashboard within the **Survey CSV Files** pane (Figure 19), which will show the following information:
  - Name of file
  - Status of submission (File Error, Pending/Failed/Passed Validation)
  - Submission type
  - Date submitted
9. Once the Analyst Review of the submitted files is complete, vendors will receive a notification indicating a change in file status:
  - Fail – Fatal discrepancies are identified; vendors must resubmit the failed data file within 3 business days.
  - Pass with Review – Warning discrepancies are identified; a review is required.  
  
Vendors must confirm with the Project Team via email whether (a) the responses are marked appropriately or (b) the vendor plans to resubmit the file.
  - Pass – No further action is required.
10. All submitted survey files must pass this step by 11:59 p.m. ET on **May 17, 2024**. If the Project Team identifies errors, vendors will receive a Primary Data Validation Report and must resubmit data within 3 business days. All resubmissions must be received and accepted by 11:59 p.m. ET on **May 22, 2024**.

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

**Qualified Health Plan Enrollee Experience Survey System**
Cassidy Shay | Sign Out

Home
Issuers
Vendors
FAQ
Contact
Dashboard

## Dashboard

**Vendor Information**

**Acme Health Services (AHS)**

Contact:  
Cassidy Shay  
Email: [cassidy.shay@gdit.com](mailto:cassidy.shay@gdit.com)

For changes to contact information please contact us at [QHP\\_Survey@air.org](mailto:QHP_Survey@air.org)

**Upload TEST Survey File**

**File \***  
Only CSV and ZIP files will be processed

Drag file here or  
[choose from folder](#)

[Upload](#)
[Cancel](#)

**Vendor Submissions**

**CSV Files**  
CSV filenames must use the following naming convention:  
<Reporting Unit ID>.csv.

**ZIP Files**  
To assist with tracking multiple submissions, ZIP files should use the following naming convention:  
<VendorName>\_Submission\_<Letter>.zip. For example, vendors should use <VendorName>\_Submission\_A.zip for the first ZIP file, <VendorName>\_Submission\_B.zip for the second ZIP file, and so on.

For technical assistance, please contact [QHP\\_Survey@air.org](mailto:QHP_Survey@air.org).

**Survey CSV Files**
[Refresh](#)

Name	Status	Submission Type	Uploaded Date	
> 12345-IA-PPQ.csv	Pending Validation	TEST	01/29/2024 12:10:51 PM EST	
> 54321-IA-PPQ.csv	Pending Validation	TEST	01/29/2024 12:10:51 PM EST	
> 99999-IA-PPQ.csv	Pending Validation	TEST	01/29/2024 12:10:51 PM EST	

Rows per page: 25
1-3 of 3
|<
<
>
>|

**Uploads**

Name	Submission Type	Uploaded Date	
GOOD_B.zip	TEST	01/29/2024 12:10:51 PM EST	
BAD_A.zip	TEST	01/29/2024 11:52:27 AM EST	
GOOD_B.zip	TEST	01/29/2024 11:51:33 AM EST	
GOOD_B.zip	TEST	01/29/2024 11:33:57 AM EST	
BAD_A.zip	TEST	01/29/2024 11:33:21 AM EST	

Rows per page: 5
1-5 of 13
|<
<
>
>|

**CSV Report**

Report includes data for all uploaded CSV files for the current cycle.

[Vendor Survey Submission Report](#)

Figure 19: Vendor Dashboard Showing Sample Uploaded Files

11. To download a CSV report of your uploaded CSVs for the current upload period, click the **Vendor Survey Submission Report** button within the CSV Report pane (Figure 20).

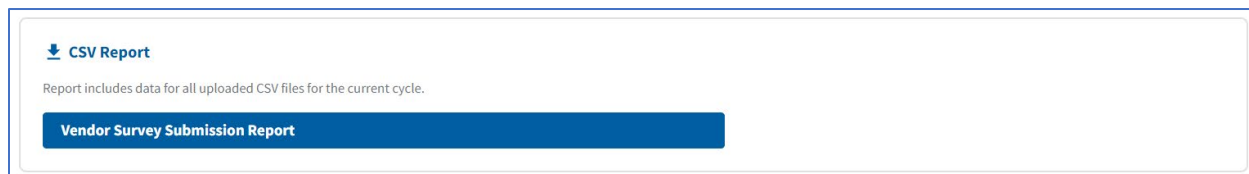


Figure 20: Vendor Dashboard – Button to Download CSV Report

For any questions regarding the data submission process, please contact [QHP\\_Survey@air.org](mailto:QHP_Survey@air.org).