HIOS Manage Relationships Functionality
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 IDM account. IDM is the acronym for CMS' 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.). IDM handles the identity verification of users trying to request access to CMS systems. A CMS IDM account ensures that only authorized/registered users can access protected information and systems through the CMS Enterprise Portal.

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 Marketplace Service Desk at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.

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

1. Navigate to the CMS Enterprise Portal (https://portal.cms.gov) and select the **New User Registration** at the bottom of the page. (Refer to Figure 1).
2. Choose Your Application page, select your application from the drop-down list. Review and accept the Terms & Conditions before selecting **Next** to continue with the registration process.
3. It will require you to enter personal information (SSN is not collected here) and will require you to create your User ID and Password. You must select security question and answer for identity verification and account management. Review the information on the Registration Summary page, make any necessary changes, and select **Submit User**. After completing the registration, an email acknowledging successful registration to IDM will be sent, along with your User ID.

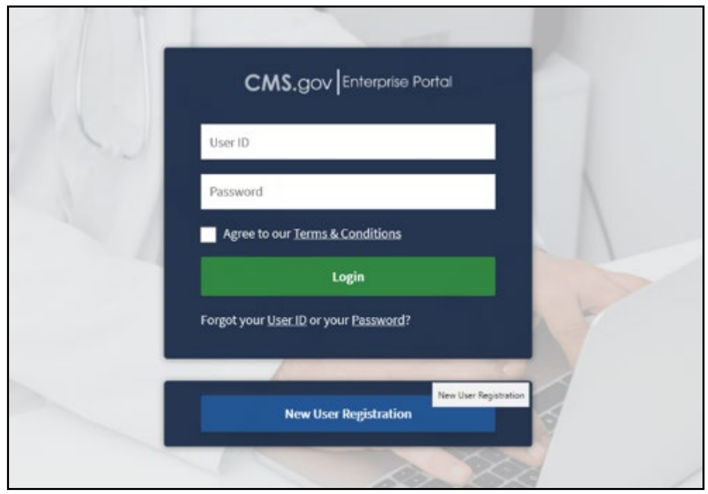

Figure 1: CMS Enterprise Portal Homepage

2 Request a HIOS Role and Complete Remote Identity Proofing (For New Users)

1. Navigate to the CMS Enterprise Portal (https://portal.cms.gov).
2. Enter your User ID and your Password and select the Terms and conditions checkbox before selecting the **Login** button (Refer to Figure 2).

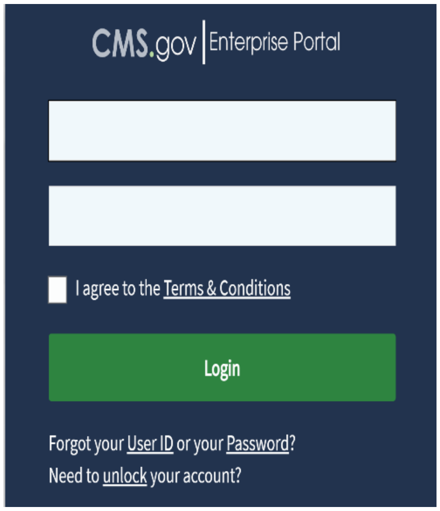

Figure 2: CMS Enterprise Portal – Log

3. On the My Portal page, select **Add Application** or select **Here** (Refer to Figure 3).

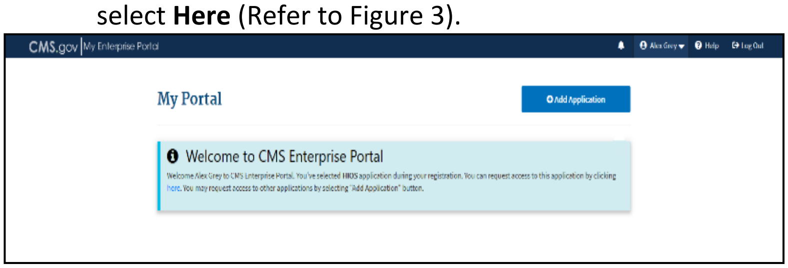

Figure 3: My Portal – Select Request/Add Apps

4. Select an Application **HIOS.**

5. In the drop-down under Select a Role, select **HIOS User** and then select **Launch** (Refer to Figure 4).

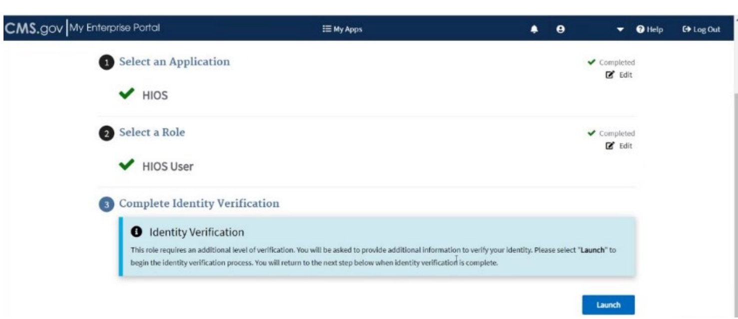

Figure 4: Launch Identity Verification

6. 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 (Refer to Figure 5).

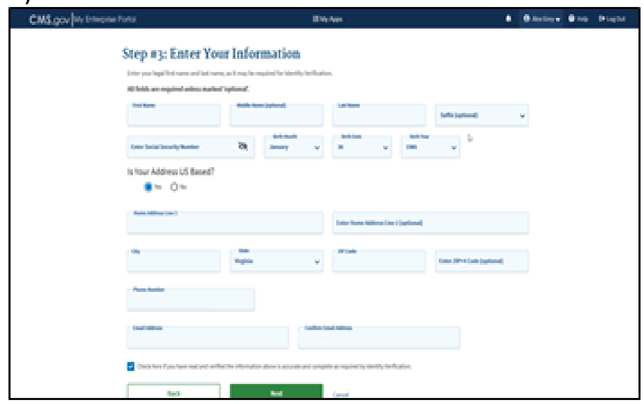

Figure 5: Request New System Access

7. Once you complete the questions and answers on the Verify Identity screen, select the **Next** button. You will see an on-screen message confirming successful remove identity proofing.
8. Click on **Next** button, it will direct you back to Application page, you will need to enter your information for Role Request Detail.
9. Once you entered the data for the Role Request Detail, clicked on **Next**. It will direct you to the next section "Enter Reason for Request". You will need to provide your reason get your HIOS Account to be approved.
10. Log out of HIOS and resign back into HIOS. Enter your User ID and your Password. Select your MFA Device, enter your security code, and select **Login.** You will see the HIOS Application under My Portal webpage.

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. Navigate to the CMS Enterprise Portal (https://portal.cms.gov) home page (Refer to Figure 2).
2. Enter your User ID and your Password. Select your MFA Device, enter your security code, and select **Login.**
3. Please go to your name dropdown and select My Profile.
4. Select an MFA device from the **MFA Device Type** drop-down (Refer to Figure 6). Follow the on-screen instructions for your selected device type to complete the registration.
5. You will see an on-screen message confirming successful registration of the device to your user profile. Select the **OK** button. This completes the MFA device registration process. Select **Log Out** to exit the CMS Portal.

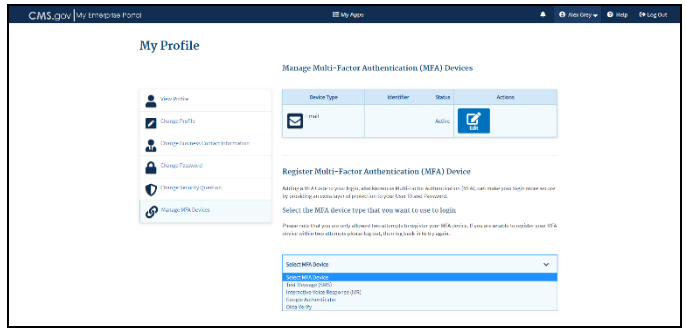

Figure 6: CMS Enterprise Portal – Register a Multi-Factor Authentication Device

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 enter your User ID and Password and select the MFA Device Type. A one-time security code will be sent to your registered device. Enter the Security Code and select the Terms and Conditions checkbox before selecting the **Login** button (Refer to Figure 7).

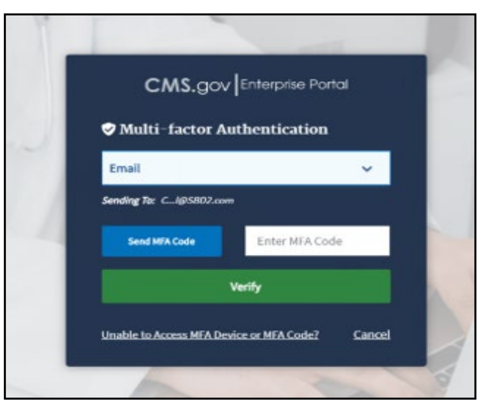

Figure 7: Enter User ID, Password and MFA Device

2. You will now see the HIOS button card on the My Portal page. Select the HIOS card and then the **Overview** link (Refer to Figure 8).
3. On the landing page, select the **Access HIOS** or the

Figure 8: My Portal - HIOS Access

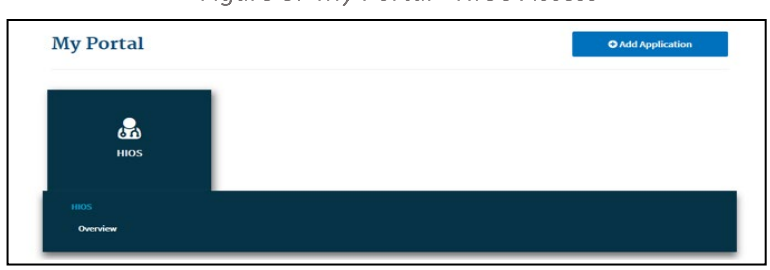

Figure 9: CMS Enterprise Portal – Access HIOS or Access Plan Management and Market Wide Functions

5 Register an Organization (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 Organizations** functionality allows new users to create an organization before requesting a user role(s).

1. Select the **Manage Organizations** link on the HIOS Home Page (Refer to Figure 10).

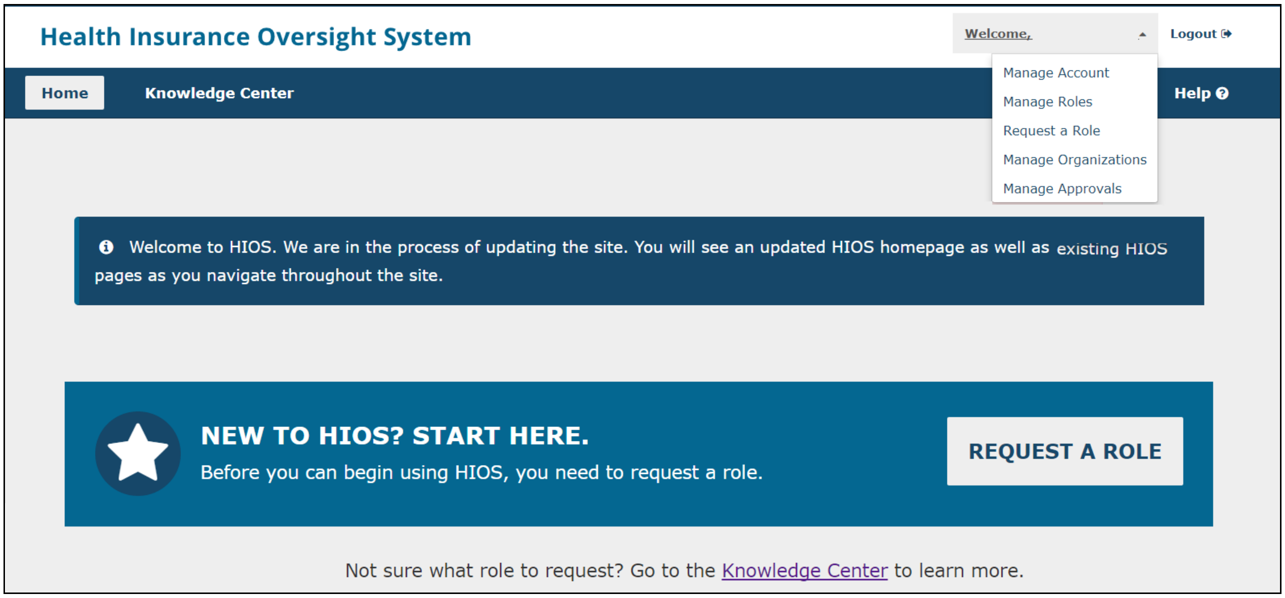

Figure 10: HIOS Home Page

2. On the Manage Organizations page, select **Create an Organization** (Refer to Figure 11).
3. Select the Organization's Primary Function. Third Party Administrators (TPAs) will be either an **Insurance Company** or a **Non-Insurance Company**. Note: Service Providers should not register as an **Other Organization** or **Non-Federal Organization**.
4. Provide a Federal EIN/TIN to conduct a search to determine if the organization currently exists in HIOS (Refer to Figure 12).

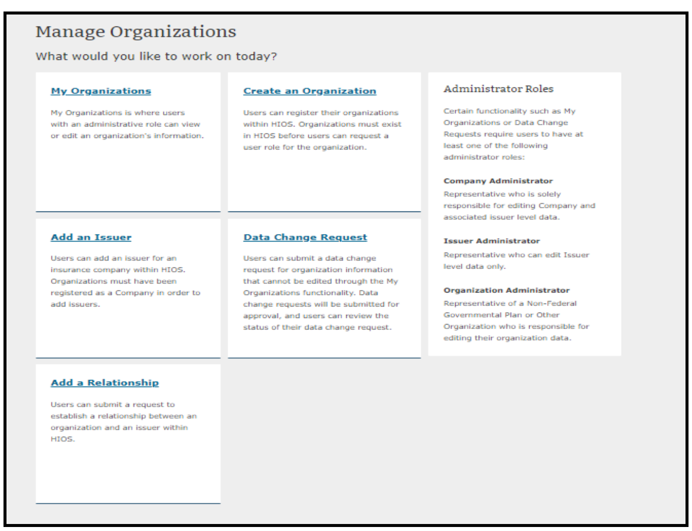

Figure 11: HIOS – Manage an Organization

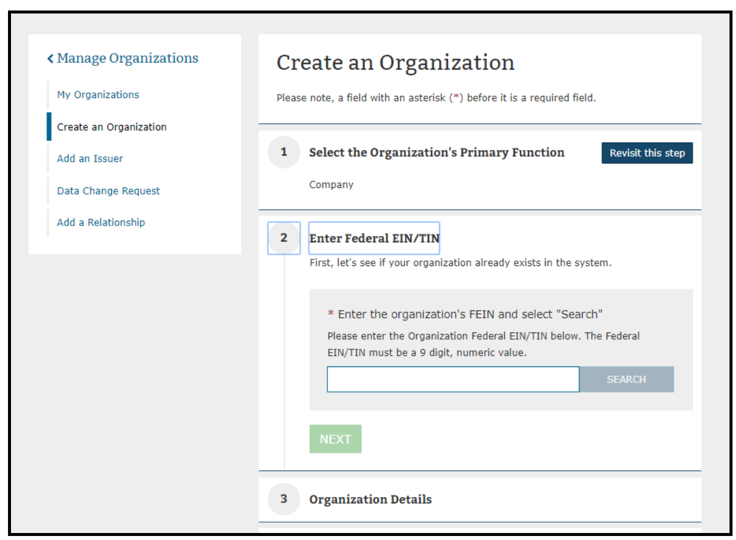

Figure 12: HIOS – Enter Federal EIN/TIN

5. If an organization does not exist, proceed forward to Step 3 where you will enter your organization's details. Step 3 will also include the option to add the TPA attribute which is required for the Manage Relationships Functionality (Refer to Figure 13).

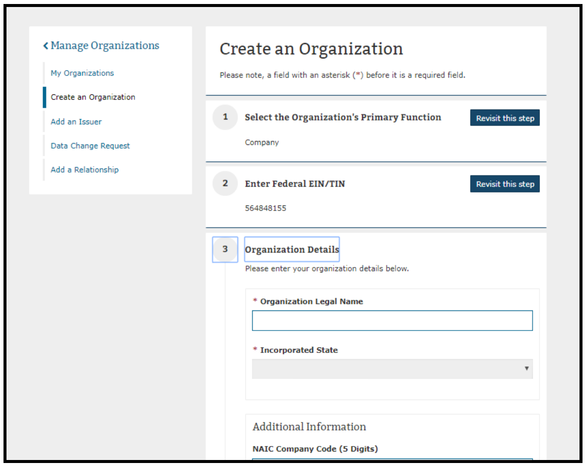

Figure 13: Register Attributes for New Organization

6. In Step 4, you will review the organization information. You may revisit any previous steps to update the information. Once the information has been reviewed, select the **Submit** button.
7. Select **Manage Organizations** from the left-hand navigation menu to navigate back to the Manage Organizations page.
8. On the Manage Organizations page, select **Add an Issuer** (Refer to Figure 14).

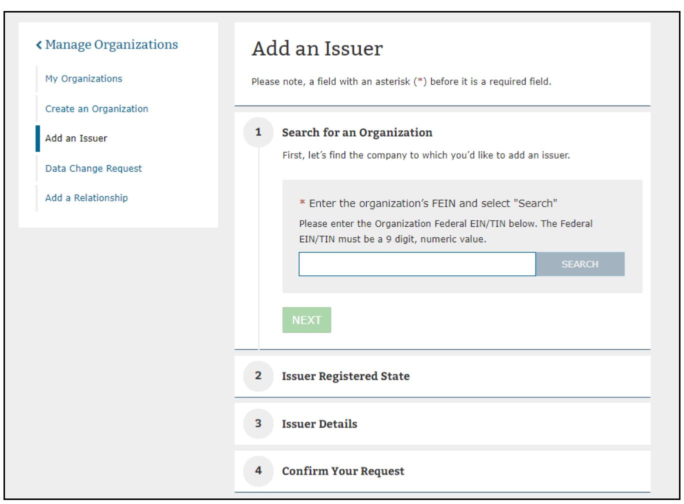

Figure 14 - Add an Issuer

9. Search for the organization you would like to add an issuer to by entering the Federal EIN/TIN and select **Search**. Note: Only Insurance Company organizations can have issuers.
10. Select the Issuer Registered State and proceed forward to enter the Issuer Details.
11. In Step 3, enter the Issuer Details and select **Next** (Refer to Figure 15).
12. In Step 4, you will review the issuer information. You may revisit any previous steps to update the information. Once the information has been reviewed, select the **Submit** button.
13. You will see a confirmation message at the top of the page notifying you to log back in to HIOS within 1-2 business days to check the status of your request.

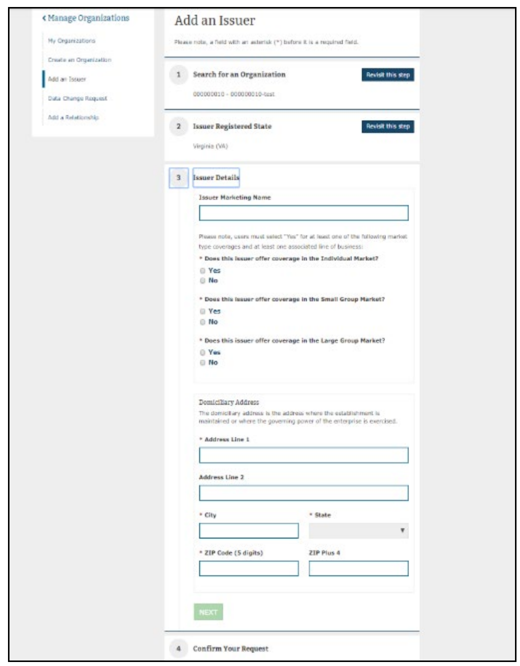

Figure 15 - Issuer Details

6 Request HIOS Module Roles

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

1. Select the **Request a Role** link on the HIOS Home Page.
2. On the Request a Role page, there is a link for the Browse by Module page where a description of each module and the role functionality is provided.
   a. Note: Prior to Managing TPA Relationships, users will need to request a **Company Administrator** or an **Issuer Administrator** role in the **HIOS Portal** Module. Only these 2 user roles will have access to this functionality.
3. Select the HIOS Portal Module from Step 1 and select **Next**.
4. Select a role (Company Administrator or Issuer Administrator) from Step 2 and select **Next**.
   a. If you selected the Company Administrator role, provide an Organization ID related to the company **Providing TPA Services**
   b. If you selected the Issuer Administrator role, provide a HIOS Issuer ID related to the issuer **Receiving TPA Services**.
5. Enter the Organization ID for the association in Step 3 and then select the **Search** button. If an Organization ID does not exist, you will see a popup message instructing you to select the Create an Organization button to first create the organization or select the Cancel button to use another Organization ID (Refer to Figure 16).
6. Select the **Add** button to associate the role to multiple Issuers per request. The system allows up to 10 Issuers per submission (Refer to Figure 17).
7. Proceed to submit the role request in Step 4. You will 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, select the **Manage Roles** link from the welcome drop-down menu.

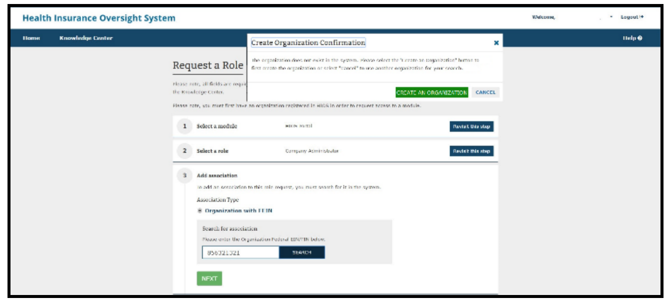

Figure 16: HIOS – Organization Does Not Exist

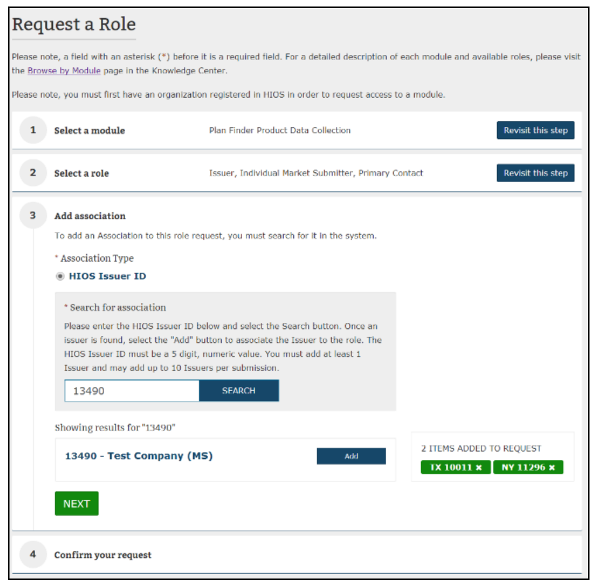

Figure 17: HIOS – Request Role

7 Edit an Existing Organization

If an organization exists in HIOS, users with an administrative role can edit an organization's details. If the TPA attribute was not adding during creation of an organization, then users will need to edit the organization in order to add the TPA attribute required for the Manage Relationships Functionality.

1. Select the **Manage Organizations** link on the HIOS Home Page.
2. On the Manage Organizations page, select **My Organizations**.
3. Select **Organizational Details** link for the organization you wish to manage.
4. Some fields require a data change request, as they cannot be edited on this page. The following groups of information include fields can be edited on the organization details page: Organization Legal Information, Additional Information, Domiciliary Address, and Third-Party Administration Type.
   a. Note: TPA service providers already in the system should view the organization details page to ensure that they have the correct TPA attribute. TPA Information will not appear for Non-Federal and Other Organizations (Refer to Figure 18).
5. Review the organizations details page. Once the information has been reviewed, select the **Submit** button.
6. You will see a confirmation message at the top of the page notifying changes have been saved. Select **My Organizations** from the left-hand navigation menu to navigate back to the My Organizations page.

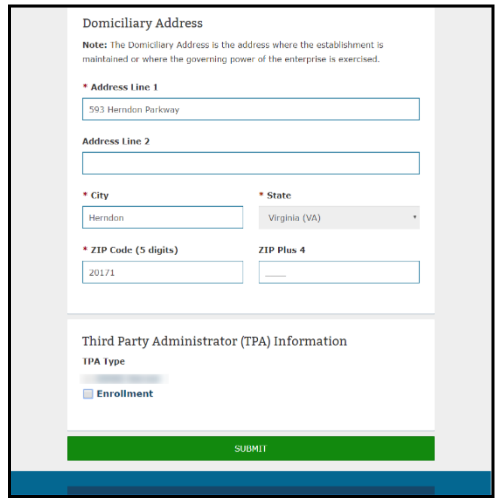

Figure 18: HIOS – Edit Organization Details Page

8 Add a TPA Relationship

The purpose of the 'Add a Relationship' functionality is to establish a relationship between Third Party Administrators (TPAs) and the organizations they provide one or more services. A relationship requires one TPA (Companies and/or Non-Insurance Companies) and one or more consumer of services (consumer). The consumer of services must be an Insurance Company with at least one Issuer associated with the company. A relationship can be initiated by either party and will require approval from the other party.

Users can submit a request to establish a relationship between an organization and an issuer within HIOS.

1. Select the **Manage Organizations** link on the HIOS Home Page
2. On the Manage Organizations page, select **Add a Relationship.**
3. Select the **Relationship** Type, indicate with the appropriate radio button if your organization is **Providing** or **Receiving** TPA Services, Enter the organization's FEIN and select "Search". If **Receiving** TPA Services: Mark the checkboxes next to as many issuers, for the relationship, as needed. (Refer to Figure 19). Select **Next** from Step 1.
4. Enter the organization's FEIN and select "Search". If **Providing** TPA Services**:** Mark the checkboxes next to as many issuers, for the relationship, as needed. (Refer to Figure 20). Select **Next** from Step 2.
5. Enter the date that the relationship starts and the date the relationship ends from Step 3 and Select **Next.**

6. Proceed to submit the relationship request in Step 4. You will see a confirmation message notifying you to log back in to HIOS to check the status of your request. To see your TPA relationship(s), select the **Manage Organizations** link from the welcome drop-down menu, select My Organizations, and select **Manage Relationships.** Only users who have an administrative role will be able to view the relationships for their organization.

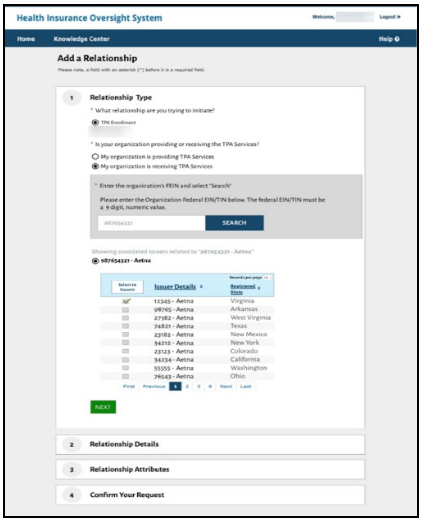

Figure 19: HIOS – Issuer Requests Company

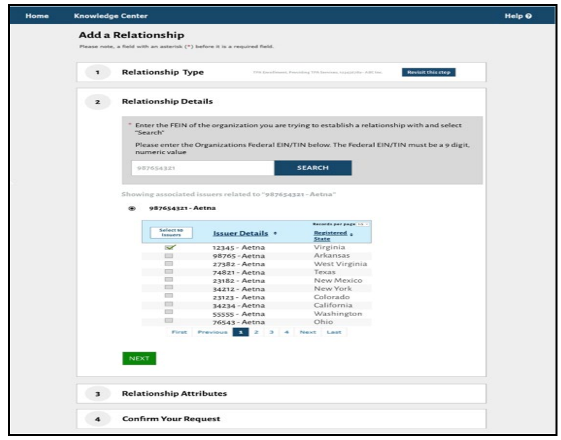

Figure 20: HIOS – Company Requests Issuer

9 Manage Relationships

Users with an administrative role will receive an email notifying them they need to "approve" a relationship. They can view any relationships that are in the system for that organization on the Manage Relationship page.

1. Select the **Manage Organizations** link on the HIOS Home Page.
2. On the Manage Organizations page, select the **My Organizations** link.
3. Select **Manage Relationships** (Refer to Figure 21).
4. Relationships with a **Pending** status need the other organization's approval. Relationships with an **Approval Required** need your approval. Select **View Details** to review the relationship details. (Refer to View Figure 22).
5. On the View Details page, you can select **Approve Relationship** if this a valid request or **Deny Relationship** if this is not a valid relationship.
6. You will see a confirmation pop-up related to your choice. Once confirmed, select **Manage Organizations** to view your organizations and relationships. The relationship requestor will need to check back into HIOS to see if their request was approved.

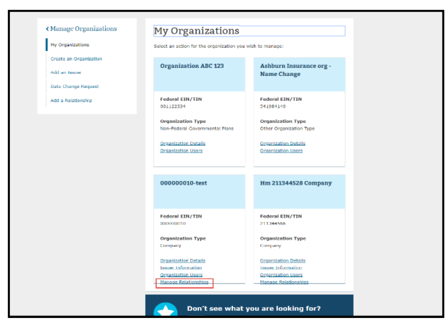

Figure 21: HIOS – Manage Relationships

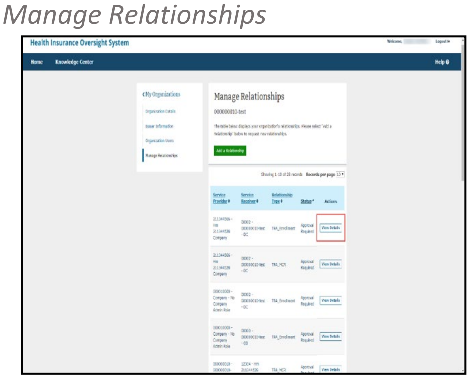

Figure 22: HIOS – View Details Page

Roles Required to Access and Utilize Manage Relationships

The table below provides a description of the frequently requested roles.

HIOS Module	Roles and Description
HIOS Portal	**Company Administrator** is a representative of a Company or Non-Insurance Company that can 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 role for a Company cannot be a Company Administrator. **Issuer Administrator** is 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.

Frequently Asked Questions

Questions	Answers
Who can users contact for system support?	For Production system support, users can call the Marketplace Service Desk at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.
How do users access the 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.
Where do users request roles and access to HIOS modules?	Module access and role requests are done via the Request a Role function on the HIOS Home Page. To submit a request, users select the **Request a Role** link from the Welcome drop-down menu, 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.
What are the Effective Start and End Dates?	The date when the relationship starts and ends. The effective End date cannot be before the effective Start Date and the time between the Start/End dates cannot be more than 10 years.
How do users access the Manage Relationship page?	The Manage Relationship page can be accessed from the My Organizations page for organizations that users have an administrative role for. Only users who have a company, organization, or issuer administrator role may access this page.
Which roles allow users to edit organization information?	Users should have the Company Administrator, Issuer Administrator, or Organization Administrator role to edit organization information and complete such tasks as updating the TPA information for that organization.
What are the statuses on The Manage Relationship page?	The relationships can have the following statuses: • Approval Required (for relationships that need your approval) • Pending (for relationships that need the other organization's approval) • Approved • Denied