Plan Finder Product Data Collection
Health Insurance Oversight System
Quick Reference Guide

The Plan Finder Product Data Collection is a module within the Health Insurance Oversight System (HIOS) responsible for collecting Issuer general identification information, product information, quarterly enrollment data for each product, and requesting component IDs for products. Issuers use Plan Finder to submit information about health insurance products in the Individual and Small Group Markets.
This guide provides an overview of Plan Finder functionality and how to view and edit Issuer information, create and edit products, and request component IDs.

Accessing Plan Finder

Users will need to go through the CMS Enterprise Portal and register for a CMS EIDM account and a HIOS user account. Refer to the "CMS Enterprise Portal and Health Insurance Oversight System Quick Reference Guide" for detailed steps on how to register for a CMS EIDM account, access HIOS, register an organization, create Issuer IDs, and request user role(s).

NOTE: Users will need to register their organization as a 'Company' in HIOS in order to receive an Issuer ID.

After successful login to HIOS, click the 'HIOS Plan Finder Product Data Collection (PF)' button on the HIOS Home Page to access the Plan Finder module.

Figure 1: HIOS – Plan Finder Home Page

View and Edit Issuer General Information

The Issuer General Information page displays the data entered for the Issuer's corporate information, contacts, customer service contact details, and Individual and Small Group Market.

1. From the Plan Finder Home Page, click the 'View Issuer Submitted Data' tab.
2. Select the 'Issuer General Information' link. Select an Issuer from the 'Issuer Name' drop-down menu to view corporate information, such as the HIOS Issuer ID, organization ID (Federal EIN), and State.
3. To edit Issuer information, click the 'Edit Issuer General Information' link.
4. Enter all applicable data on the 'Edit Issuer General Information' page.
5. Click the 'Submit' button and the changes will be sent for processing.

Figure 2: Issuer General Information

View and Edit Issuer Market Place Information

The Issuer Market Place Information page displays all the Marketplace related data. Only users with the Issuer Submitter role will be able to edit the data.

1. From the Plan Finder Home Page, click the 'View Issuer Submitted Data' tab.
2. Select the 'Issuer Market Place Information' link.
3. To edit information, click the 'Edit Issuer Market Place Information' link.

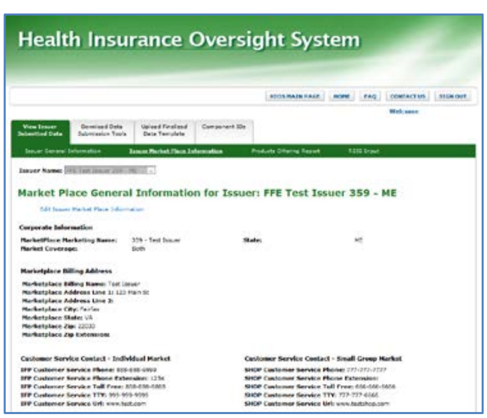

Figure 3: Issuer Market Place Information

View RBIS Input Data

The RBIS Input page displays the information transmitted from HIOS to the Rate and Benefits Information System (RBIS) for the purpose of RBIS reporting to include the small group health insurance market information. Additional RBIS suppression rules may impact what is displayed on Healthcare.gov.

1. From the Plan Finder Home Page, click the 'View Issuer Submitted Data' tab.
2. Select the 'RBIS Input' link. Select an Issuer from the 'Issuer Name' drop-down menu.

Figure 4: RBIS Input for Issuer

Create Products

All products must be associated to an Issuer ID. Users will need to have an Issuer Submitter role in order to add or edit products. Follow the steps below to create products.

1. From the Plan Finder Announcements page, click the ‘View Issuer Submitted Data’ tab.
2. Select the ‘Products Offering Report’ link. Select the Issuer Name and click the ‘Add New Product’ link.
3. Enter the required product information and click ‘Submit’. A new Product ID will be generated upon submission.

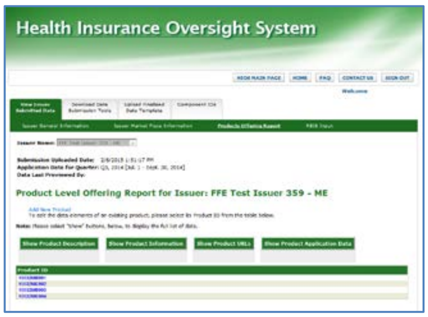

Figure 5: Add New Product

View and Edit Products

The Products Offering Report page displays the Issuer’s products and application data for each product. Follow the steps below to view and edit products.

1. From the Plan Finder Home Page, click the ‘View Issuer Submitted Data’ tab.
2. Select the ‘Products Offering Report’ link. Select an Issuer from the ‘Issuer Name’ drop-down menu.
3. Click the ‘Show’ buttons to display the full list of data.
4. To edit an existing product, select the ‘Product ID’ hyperlink for the desired product.
5. Enter all applicable data on the ‘Edit Product Data Elements’ page and click the ‘Submit’ button.

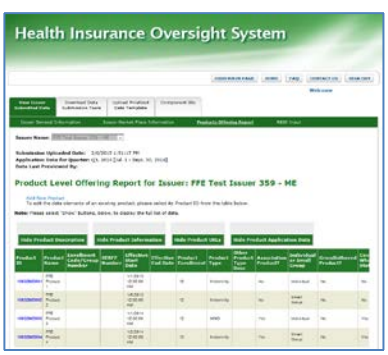

Figure 6: Products Offering Report

Request Component IDs

Users can request a Standard Component ID (SCID) used to identify an insurance plan prior to it being submitted as an “On exchange”, “Off exchange”, or both plan. Users must have a Submitter role to request component IDs for products. The SCID is used to create the official Plan ID once it is processed by the receiving system (i.e. Plan Management, RBIS).

1. From the Plan Finder Home Page, click the ‘Component IDs’ tab.
2. Select the ‘Request Component IDs’ link. Select an Issuer from the ‘Issuer’ drop-down menu and a Product.
3. Enter the number of IDs (maximum of 50 IDs per request) and click ‘Submit’. Additional Component IDs associated with that product can be viewed on the ‘View Component IDs’ page.

Figure 7: Request Component IDs

View Component IDs

1. From the Plan Finder Home Page, click the ‘Component IDs’ tab.
2. Select the ‘View Component IDs’ link. Select an Issuer from the ‘Issuer’ drop-down menu and the Product(s).
3. Click the ‘View Results’ button. The Component IDs for the selected product(s) will display on the page.

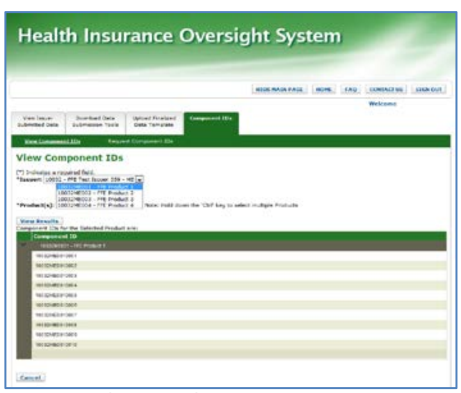

Figure 8: View Component IDs

Issuer Submission Tools

Users can download a pre-populated Excel template (version 2003, 2007, or 2010) with the selected Issuer’s latest submitted data and save the file to their desktop.

1. From the Plan Finder Home Page, click the ‘Download Data Submission Tools’ tab.
2. Select the ‘Issuer Submission Tools’ link.
3. Select the Excel format for the pre-populated Issuer template and select an Issuer from the ‘Issuer’ drop-down menu.
4. Click ‘Download Pre-Populated Issuer Template’.

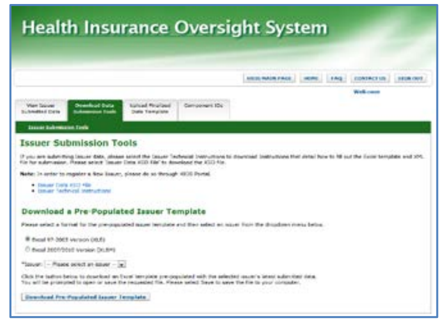

Figure 9: Issuer Submission Tools

Template Submission Process

Data submission templates get updated every quarter. Users need to submit the finalized data file in the following format:
Final_<IssuerNameWithNoSpaces><stateabbreviation>_<IssuerID>_<year><month><day>.xml

Use of this naming convention is a requirement for a successful submission. If the name of the finalized file is modified, it will not be processed.

1. From the Plan Finder Home Page, click the ‘Upload Finalized Data Template’ tab.
2. Click the ‘Browse’ button to select the finalized data file (.xls, .xlsx, .xml, or .zip).
3. Click ‘Upload’ to start the submission.
   NOTE: Once the template is loaded, there is a confirmation message which states that the upload was successful, but additional processing occurs after this which may result in failed validations which need to be addressed. These validation failures will cause the file submission to fail and an email will be generated with the error(s).
4. Successfully uploaded and processed files will generate an email message to the submission contacts verifying the successful submission.

NOTE: The data is transferred to the Rate and Benefits Information System (RBIS) via the Web Services application.

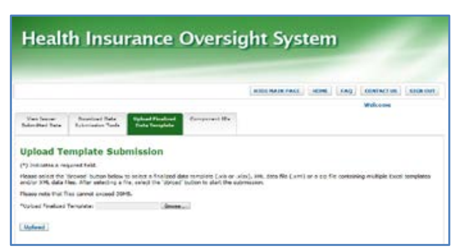

Figure 10: Upload Finalized Data Template

Plan Finder Frequently Asked Questions

Questions	Answers
Who can users contact for system support?	For system support, users can contact the Exchange Operations Support Center at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.
Why can a user not have a Submitter and Validator role for an Issuer organization?	Users can have either a Submitter or Validator role for one Issuer organization. Data submission and validation contacts cannot be the same ONE person. There must be at least two contacts for the Issuer organization. The combination of Issuer Name, State, and Market Type is unique. **NOTE:** Attestation contacts cannot be any type of submission or validation contact for the same Issuer. The file submission will fail and generate an email with an error.
What are the system requirements for Issuer data submission?	Users must have Microsoft Excel 2003, 2007, or 2010 installed on their computer and enable the Excel standard toolbar for macro security settings. Refer to the Plan Finder User Manual for instructions on how to set Excel macro security settings.
Why do users see a red circle(s) on the submission template?	When users select the 'Validate and Finalize' button, the file template will indicate missing required fields. The template will not allow users to "Validate and Finalize" until all field validation errors have been addressed. For detailed steps on how to validate and finalize file templates, refer to the Plan Finder User Manual available on CMS' website, http://www.cms.gov/CCIIO/Resources/Forms-Reports-and-Other-Resources.
Why can a user not edit the Issuer ID?	The Issuer ID cannot be changed since it is a primary key to other HIOS modules.
Can a user delete a product?	Users cannot edit the Product Name or the Product ID. Deletion of a product must be submitted to CMS for approval and can only be done in the backend.

Plan Finder Frequently Requested Roles

Users will need to go through the CMS Enterprise Portal to register for a CMS EIDM account and request access to HIOS. After successful account registration, users can request a role(s) for the Plan Finder module. The table below provides a description of the frequently requested roles.

HIOS Module	Roles and Description
Plan Finder **Product Data Collection**	**State Users:** The State representative can view all the Issuer organizations assigned to that State. **Issuer – 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. **Issuer – 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. **Issuer – Attester User:** The CEO or CFO contact of an organization. **NOTE:** The Primary and Backup Contact information 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.