

Health Insurance Oversight System (HIOS)

Portal User Manual (UM)



Version 37.00.00

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Portal User Manual Change History

December 2019 Revisions

- Updated screenshots and added text within the document to reflect the minor design updates made throughout the HIOS Portal application.

December 2020 Revisions

- Updated to reflect minor updates regarding Identity Management within the CMS Portal.

October 2021 Revisions

- Updated screenshots and added text within the document to reflect the minor design updates made throughout the HIOS Portal application.

March 2022 Revisions

- Updated the Request a Role section to include steps specific to requesting the Organization Role Approver role.
- Updated the Manage Approvals section to reflect the Approval Management functionality.

July 2022 Revisions

Updated the Request a Role section to include steps to identify as either a Primary ORA or Backup ORA when requesting the Organization Role Approver role.

1 Introduction

The Center for Consumer Information and Insurance Oversight (CCIIO), a division of the Department of Health and Human Services (HHS), is charged with helping implement many provisions of the Affordable Care Act. The Health Insurance Oversight System (HIOS) is a federal system of record and provides a centralized, multi-user interface (UI) for insurance issuers and state/territory regulators to submit, and CCIIO to store information on individual and small group major medical insurance. Information submitted to HIOS is transferred in accordance with CCIIO regulations to provide data updates to Healthcare.gov. The Healthcare.gov website displays this information to provide assistance to consumers in locating health insurance coverage available in the market.

1.1 Pre-Requisites and Information for HIOS System Access

These technical instructions explain how the HIOS application works within any compatible Internet browser application such as:

1. Google Chrome.
2. Mozilla Firefox.

Prior to accessing HIOS, users will need to obtain their Identity Management System (IDM) credentials. The credentials are obtained by completing registration through the IDM secure authentication process. Once registered, these credentials will be used to access Centers for Medicare & Medicaid Services (CMS) Enterprise Portal.

CMS Enterprise Portal is used for accessing CMS systems. HIOS is one of the systems that can be accessed through the CMS Portal using IDM authentication and authorization. Only users who are authenticated with the IDM procedures will be allowed to access the HIOS system.

IDM provides authentication and authorization capabilities and is tightly integrated with the CMS Enterprise Portal. Users register for an IDM account and obtain an IDM User ID and Password to access the CMS Enterprise Portal.

Pre-Requisites for HIOS Access:

- All users will be required to complete the Enterprise Portal registration process, which includes Identity Verification (ID Proofing).
- ID Proofing verifies that the individual referenced in the account is the same person creating the account.
- Additional information collected includes the following Personally Identifiable Information (PII) for purposes of the ID Proofing process: Social Security Number (SSN), Date of Birth, Home Address, and Primary Phone Number.

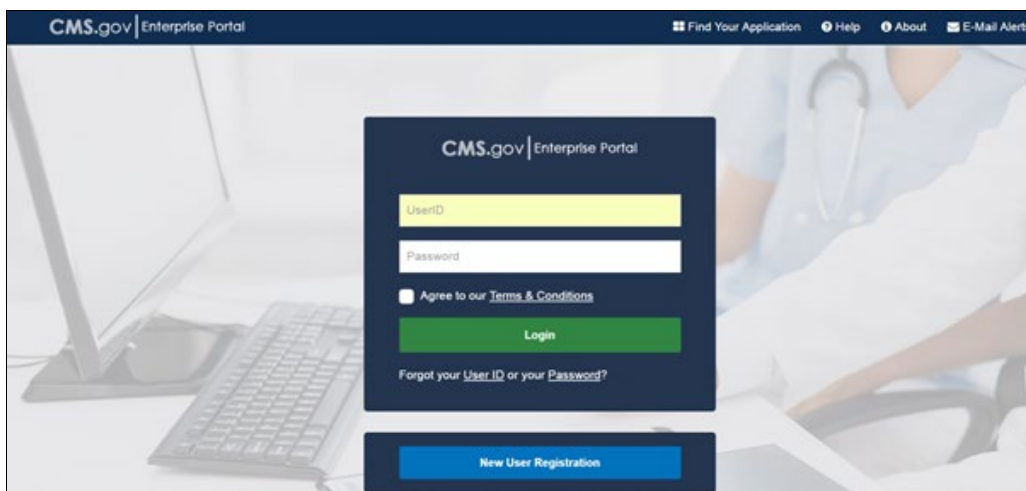
2 HIOS System Access

All IDM authorized and authenticated users will be able to access the HIOS system by navigating to the CMS Enterprise Portal using the secure uniform resource locator (URL): <https://portal.cms.gov/>. Users will be required to enter their credentials obtained by registering through the IDM system to access HIOS.

This manual provides steps and instructions on how new and existing users can get access to HIOS and use its different functionalities.

Figure 2-1 displays the CMS Enterprise Portal Home Page.

Figure 2-1: CMS Enterprise Portal Main Screen



2.1 New User Registration

New users complete the following steps to access HIOS.

1. Register for an IDM account.
2. Request access to HIOS through the CMS Enterprise Portal.

To register for an IDM account, new users will need to navigate to the CMS Enterprise Portal at <http://www.portal.cms.gov> to start the registration process. This registration process will require some PII such as (Date of Birth, Home Address, Full Name, Phone number, Credit Verification, etc.).

Select New User Registration at the bottom of the CMS Enterprise Portal Home Page, which will take you to the Step #1: Choose Your Application page (Figure 2-2).

Figure 2-2: Choose Your Application Page

Step #1: Select Your Application

Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.

HIOS

Terms & Conditions
OMB No.0938-1236 | Expiration Date: 03/31/2021 | Paperwork Reduction Act

Consent to Monitoring

By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1030 and 1030a. We encourage you to read the [HHS Rules of Behavior](#).

☒ I agree to the Terms and Conditions

Next Cancel

Select the HIOS application from the drop-down menu and agree to the terms and conditions by selecting the “I agree to the terms and conditions” checkbox. Once that checkbox is selected, the Next button will be made available.

On the Step #2: Register Your Information page, provide your personal information and select Next to continue with the registration process.

Figure 2-3 displays the Step #2: Register Your Information page:

Figure 2-3: Register Your Information Page

Step #2: Register Your Information

Step 2 of 3 - Please enter your personal and contact information.

All fields are required unless marked 'Optional'.

Enter First Name Enter Middle Name (optional) Enter Last Name Suffix (optional)

Enter Social Security Number (optional) Birth Month Birth Date Birth Year

Is Your Address US Based?
☒ Yes ☐ No

Enter Home Address #1 Enter Home Address #2 (optional)

Enter City State Enter Zip Code Enter Zip+4 (optional)

Enter E-mail Address Confirm E-mail Address

Enter Phone Number

Back **Next** Cancel

You will be navigated to the Step #3: Create User ID, Password & Challenge Questions page, where you will enter a user ID, password, and challenge question and answer. Once that is completed, select Next to continue.

Figure 2-4 displays the Step #3: Create User ID, Password & Challenge Questions:

Figure 2-4: Create User ID, Password & Challenge Questions Page


Step #3: Create User ID, Password & Security Question/Answer

Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer.

Enter User ID

Enter Password  Confirm Password 

Security answer to be used in case you forget your password or you need to unlock your account.

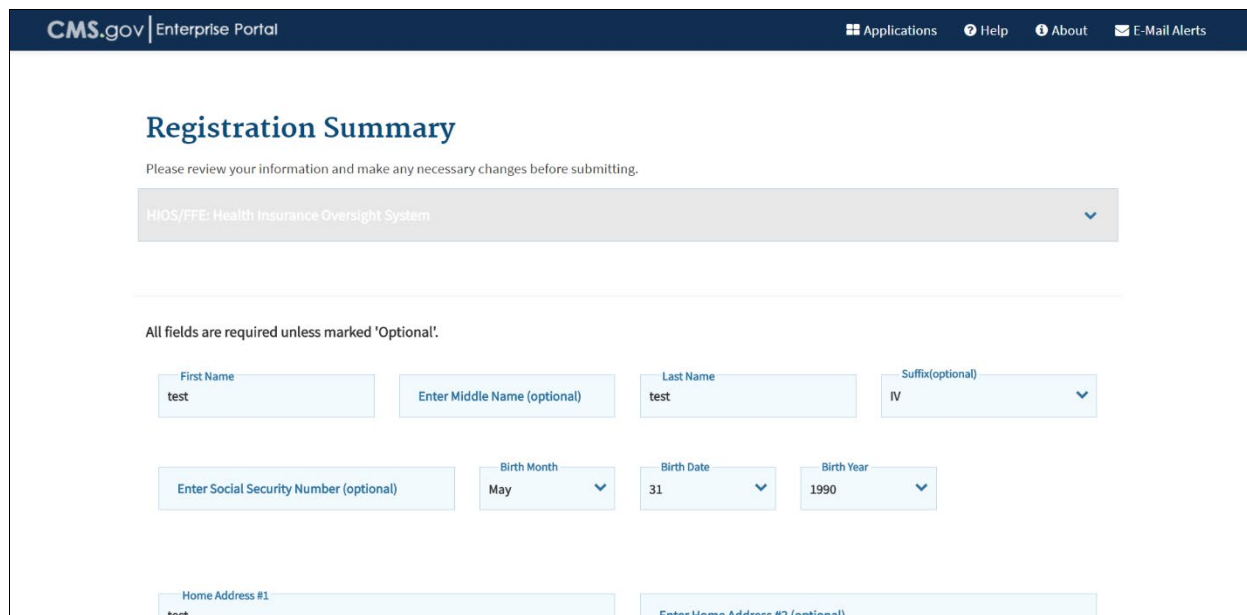
Select Your Security Question 

Enter Security Answer

Back Next Cancel

Review the information provided on the Registration Summary page and make any changes if necessary. Once complete select Submit User.

Figure 2-5 displays the Registration Summary page.

Figure 2-5: Registration Summary Page


Registration Summary

Please review your information and make any necessary changes before submitting.

HIOS/FFE: Health Insurance Oversight System 

All fields are required unless marked 'Optional'.

First Name test Enter Middle Name (optional) Last Name test Suffix(optional) IV 

Enter Social Security Number (optional) Birth Month May  Birth Date 31  Birth Year 1990 

Home Address #1 test Enter Home Address #2 (optional)

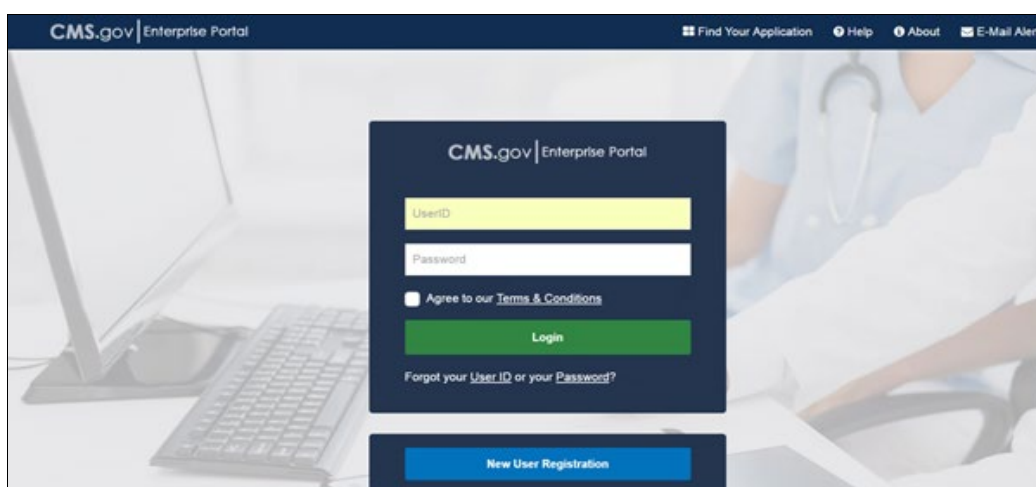
Back Next Cancel

After completing the registration process, you will receive an email acknowledging successful registration and the email will include the IDM User ID.

Once you receive the acknowledgement email that contains your User ID, you will need to request access to the HIOS System by signing into CMS Enterprise Portal.

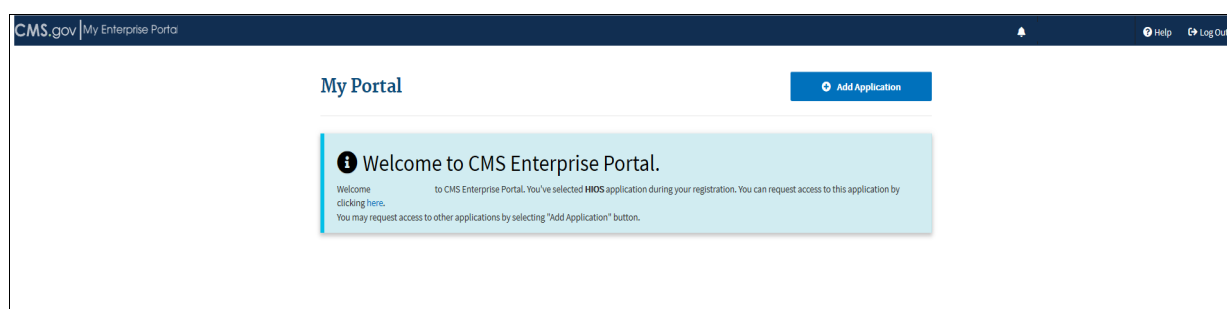
Figure 2-6 displays the CMS Enterprise Portal login screen.

Figure 2-6: CMS Enterprise Portal – Login



On the My Portal page, select the Add Application button (Figure 2-7).

Figure 2-7: My Portal Page – Request/Add Apps



On the Request Application Access Page, select HIOS from the Select an Application drop-down menu and then select Next. From the Select a Role section, select HIOS User and then select Next (Figure 2-8). This will open the Complete Identity Verification section.

Note: Do not select the HIOS Help Desk User.

Figure 2-8: Request Application Access

Request Application Access

- 1 Select an Application** ✓ Completed [Edit](#)
 ✓ HIOS
- 2 Select a Role** ✓ Completed [Edit](#)
 ✓ HIOS User
- 3 Complete Identity Verification**
 - 1 Identity Verification**
 This role requires an additional level of verification. You will be asked to provide additional information to verify your identity. Please select "Launch" to begin the identity verification process. You will return to the next step below when identity verification is complete.
[Launch](#)
- 4 Enter Role Details**
- 5 Enter Reason for Request**

[Cancel](#)

Select Launch and then Next on the Step #1 Identity Verification Overview page (Figure 2-9).

Figure 2-9: Identity Verification Overview Page

Step #1: Identity Verification Overview

To protect your privacy, you will need to complete Identity Verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.

1. Ensure that you have entered your legal name, current home address, primary phone number, date of birth and email address correctly. We will only collect personal information to verify your identity with Experian, an external Identity Verification provider.
2. Identity Verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a "soft inquiry" on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them.
3. You may need to have access to your personal and credit report information, as the Experian application will pose questions to you, based on data in their files. For additional information, please see the Experian Consumer Assistance website - <http://www.experian.com/help/>

If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. To continue this process, select 'Next'.

[Next](#) [Cancel](#)

On the Terms and Conditions page, select the checkbox "I agree to the terms and conditions" to accept the terms and conditions and select Next to continue (Figure 2-10).

Figure 2-10: Accept Terms & Conditions Page

Step #2: Accept Terms & Conditions

OMB No. 0938-1236 | Expiration Date: 04/30/2017 | (OMB Re-Certification Pending) | [Paperwork Reduction Act](#)

Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#), which describes how we use the information you provide.

Personal information is described as data that is unique to an individual, such as a name, address, telephone number, Social Security Number, and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal information to verify your identity. Your information will be disclosed to Experian, an external authentication service provider, to help us verify your identity. If collected, we will validate your Social Security Number with Experian only for the purposes of verifying your identity. Experian verifies the information you give us against their records. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

HHS Rules of Behavior

We encourage you to read the [HHS Rules of Behavior](#), which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.

I have read the HHS Rule of Behavior for Disposed User Accounts (addendum to the HHS Rule of Behavior (HHS DoB) document number HHS OIG 3013

☒ I agree to the Terms & Conditions

[Back](#) [Next](#) [Cancel](#)

You will need to complete the questions and answers on the Verify Your Identity screen. Once complete select Next which prompts an on-screen message confirming successful identity proofing (Figure 2-11). Select Next and you will be directed back to the Application page.

Figure 2-11: Verify Your Identity Confirmation Page

Step #4: Verify Your Identity

Confirmation

You have successfully completed the Remote Identity Proofing process.

[Next](#)

Enter information in the Role Request Detail section and then select Next (Figure 2-12). You will be directed to the Enter Reason for Request section. You will be asked to provide a reason for needing a HIOS Account. Once you are finished, select Submit. When the confirmation message pop-up appears, click OK. A Request New Application Access Acknowledgement will appear; select OK.

Figure 2-12: Role Request Detail Page

Step #2: Register Your Information

Step 2 of 3 - Please enter your personal and contact information.

All fields are required unless marked (optional).

Enter First Name Enter Middle Name (optional) Enter Last Name Suffix (optional) ▼

Birth Month ▼ Birth Date ▼ Birth Year ▼

Is Your Address U.S. Based?

☒ Yes ☐ No

Enter Home Address Line 1 Enter Home Address Line 2 (optional)

Enter City Select State ▼ Enter ZIP Code Enter ZIP+4 (optional)

Enter Email Address Confirm Email Address

Enter Phone Number

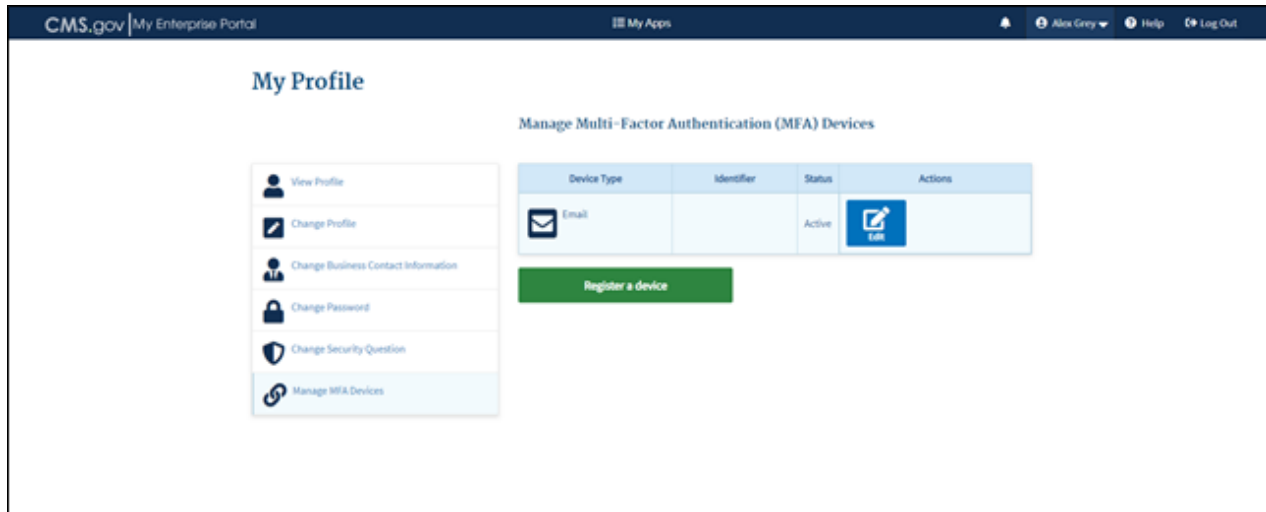
Back Next Cancel

It's necessary at this point to first log out of HIOS and then sign back in. You will need to sign back in by entering your User ID, password, and selecting the "agree to terms and conditions". Select Login.

On the Multi-Factor Authentication (MFA) page, select Send Email, enter the security code, and select Login. Verify that the HIOS Application is seen under My Portal homepage. When you register an MFA device you will be navigated to the MFA Information page (see Figure 2-13). Select the Name dropdown and select My Profile. On the My Profile webpage, select the Manage MFA Device.

Select an MFA device from the MFA Device Type drop-down (Figure 2-13). Follow the on-screen instructions for your selected device type to complete the registration.

Next you will see an on-screen message confirming successful registration of the device to your user profile. Select OK. This completes the MFA device registration process. Select Log Out to exit the CMS Portal.

Figure 2-13: MFA Information Page

You will next be prompted to associate a security code with your Phone, Computer, or E-mail. Select the device you wish to use to log in from the MFA Device Type drop-down menu, a Credential ID, and an MFA Device Description. Once that is complete, select Next to continue.

Figure 2-14 displays the Register Your Phone or Computer.

Figure 2-14: Register Your Phone, Computer, or E-mail Page

Register Multi-Factor Authentication (MFA) Device

Adding a MFA Code to your login, also known as Multi-Factor Authentication (MFA), can make your login more secure by providing an extra layer of protection to your User ID and Password.

Select the MFA device type that you want to use to login

Please note that you are only allowed two attempts to register your MFA device. If you are unable to register your MFA device within two attempts please log out, then log back in to try again.

Text Message (SMS) ▼

 Text Message (SMS)

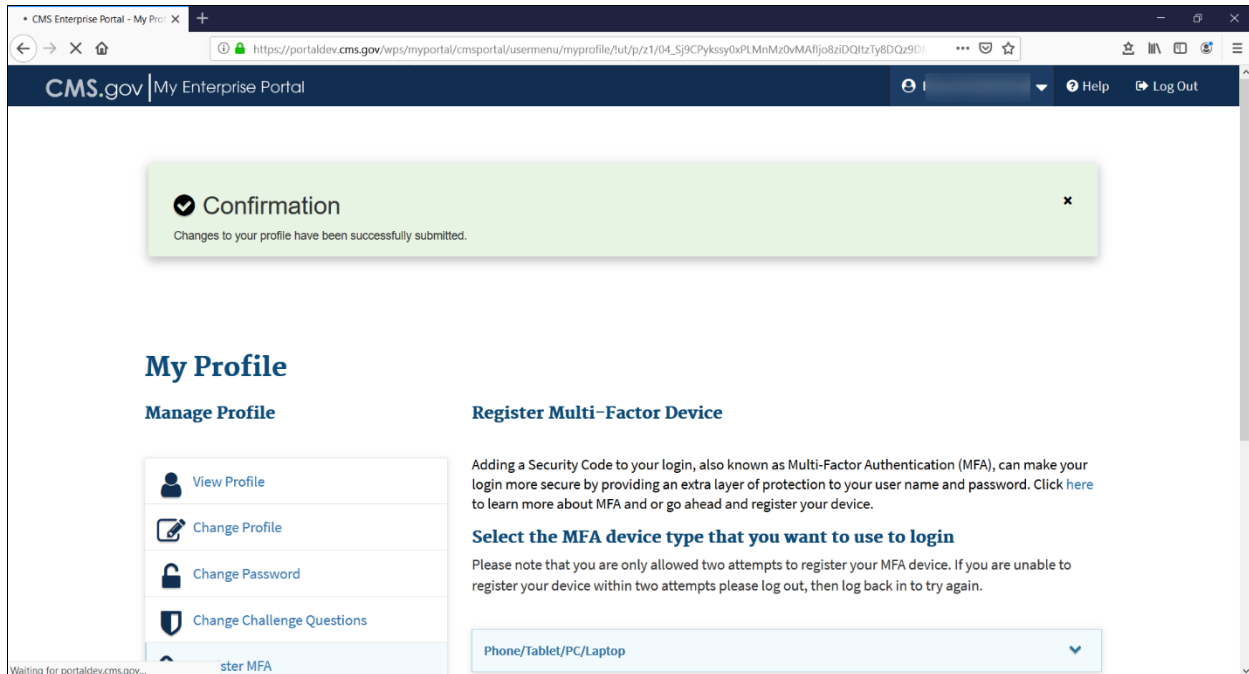
The SMS option will send your MFA Code directly to your mobile device via a text message. This option requires you to provide a ten (10) digits U.S. phone number for a mobile device that is capable of receiving text messages. Carrier service charges may apply for this option.

Enter Phone Number

Send MFA Code [Cancel](#)

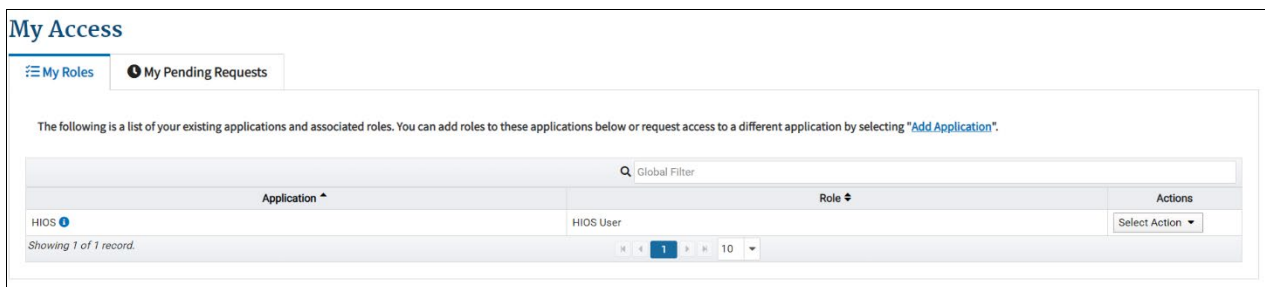
You will receive a message that your device has been successfully registered to their user profile. When you select OK, you will receive a message that your request was successfully completed (Figure 2-15). Select OK to continue.

Figure 2-15: Successful Completion Page



You will be able to see the HIOS application listed in the Manage Access tab of the View and Manage My Access page (Figure 2-16).

Figure 2-16: View and Manage My Access Page

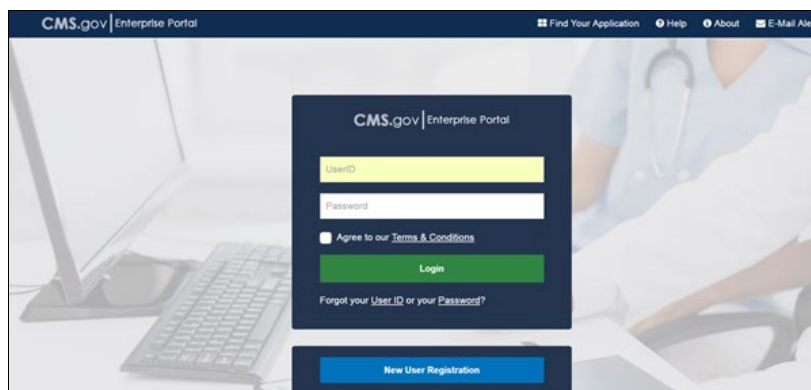


2.2 Existing HIOS Users

Existing HIOS users will follow the steps below to access HIOS once they have completed the IDM registration process. You will first log out of the system for your profile updates to take effect which then will prompt you to log back into the Enterprise Portal with your IDM user ID and password.

Figure 2-17 displays the CMS Enterprise Portal Page.

Figure 2-17: CMS Enterprise Portal Page – Login with IDM Credentials



After you have logged back into the CMS Enterprise Portal, select HIOS from the My Portal page and then the Overview link. Figure 2-18 displays the My Portal page.

Figure 2-18: My Portal Page



On the landing page, select the Access HIOS or the Access Plan Management & Market Wide Functions link to access the HIOS functionality.

Figure 2-19 displays the page that will allow access to the HIOS Home Page. Select the Access HIOS link to navigate to the HIOS Home Page.

Figure 2-19: Access HIOS Plan Management Landing Page


My Enterprise Portal


My Apps

HIOS | Plan Management | Market Wide Functions

Please use the links below to access the Health Insurance Oversight System (HIOS) or Plan Management and Market Wide Functions. Please note - these systems are protected by Multi-Factor Authentication (MFA). To access either system by clicking the links below, you will be asked to enter your CMS EIDM Username and Password, as well as enter a Security Code (VIP Token). If you have not registered a device to the portal to register a device and obtain a security code (VIP Token).

If you have any problems accessing HIOS or the Plan Management and Market Wide Functions, please contact the Exchange Operations Support Center [XOSC] at CMS_FEPS@cms.hhs.gov.

Health Insurance Oversight System (HIOS)

Please click the link below to access HIOS. If this is the first time you are accessing HIOS from the CMS Enterprise Portal, you may be prompted for your HIOS Username and Password.

[Access HIOS](#)

Plan Management and Market Wide Functions

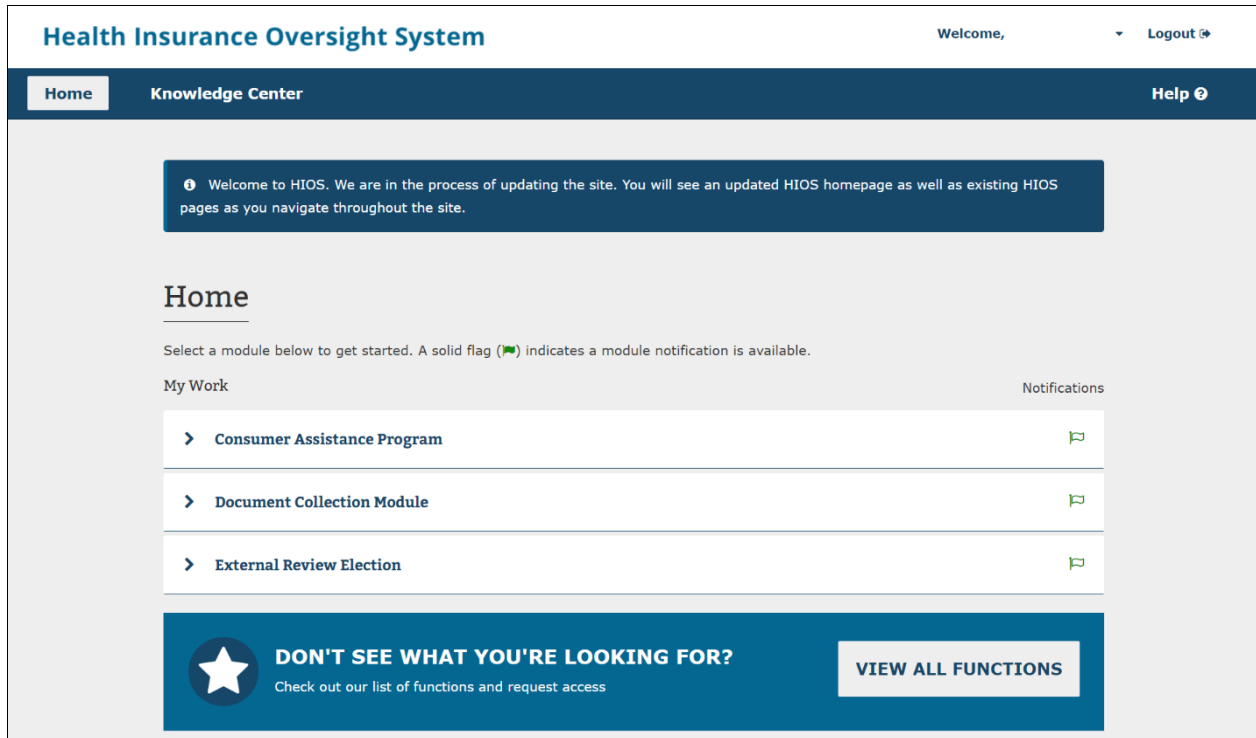
The Plan Management and Market Wide Functions portal is where issuers will access both Market Wide modules (like the Integrated Rate Review Module) and the Federally Facilitated Exchange's (FFE) Qualified Health Plan (QHP) application. Those seeking certification must also complete the Unified Rate Review submission. TEST

[Access Plan Management & Market Wide Functions](#)

3 HIOS Portal Home Page

Upon successful login, you will arrive on the HIOS Portal Home Page as shown in Figure 3-1.

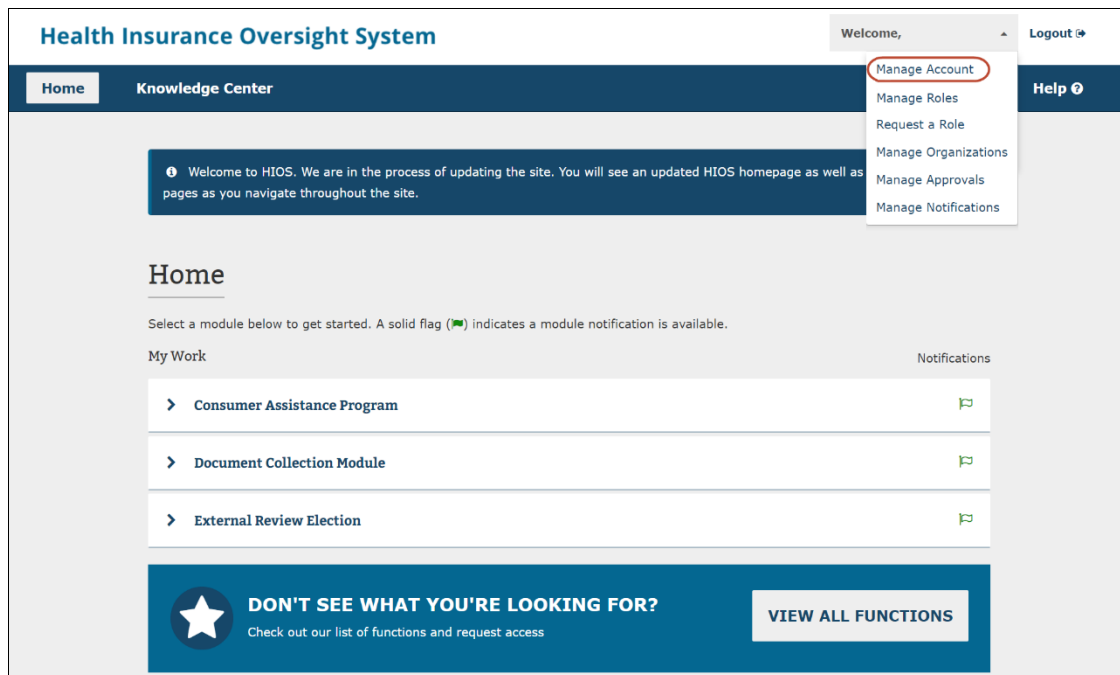
Figure 3-1: HIOS Portal Home Page



3.1 Manage Account

Users with a HIOS user account can edit some of the information they entered when they first created a HIOS account. As illustrated in Figure 3-2, the Manage Account functionality can be accessed from the welcome user drop-down on the HIOS Home Page.

Figure 3-2: HIOS Home Page – Manage Account Link



Once you select the link, you will be navigated to the Manage Account page as illustrated in Figure 3-3.

Figure 3-3: Manage Account Page

Manage Account

Please note, a field with an asterisk (*) before it is a required field.

Personal Information

HIOS Username

Title

* First Name

Middle Name

* Last Name

Suffix

* Job Title

* Organization Name

Email Address

US Based Address Information

* Address 1

Address 2

* City

* State

* ZIP Code (5 digits)

ZIP Plus 4 (4 digits)

* Phone (xxx-xxx-xxxx)

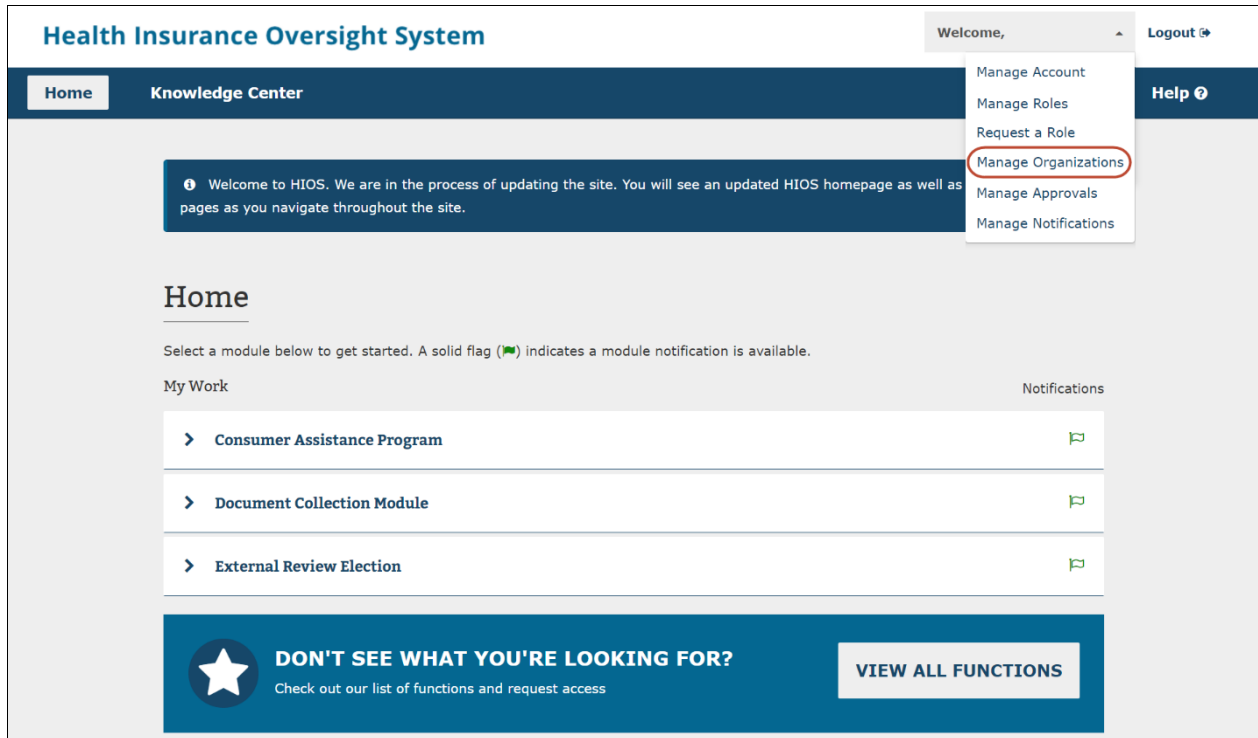
Phone Ext.

SUBMIT

3.2 Manage Organizations

You can access and view the Manage Organizations landing page from the HIOS Welcome drop-down menu (Figure 3-4).

Figure 3-4: HIOS Portal Home Page – Manage Organizations



On the Manage Organizations landing page, you can view descriptions for and navigate to the following pages: My Organizations, Create an Organization, Add an Issuer, Data Change Request, Add a Relationship, and Organization Search. You will also be able to see descriptions for the various types of Administrator Roles on the right side of the landing page (Figure 3-5).

Figure 3-5: Manage Organizations Landing Page

Manage Organizations

What would you like to work on today?

<u>My Organizations</u> My Organizations is where users with an administrative role can view or edit an organization's information.	<u>Create an Organization</u> Users can register their organizations within HIOS. Organizations must exist in HIOS before users can request a user role for the organization.	Administrator Roles Certain functionality such as My Organizations or Data Change Requests require users to have at least one of the following administrator roles: Company Administrator Representative who is solely responsible for editing Company and associated issuer level data, including relationship information. Issuer Administrator Representative who can edit Issuer level data only, including relationship information. Organization Administrator Representative of a Non-Federal Governmental Plan or Other Organization who is responsible for editing their organization data.
<u>Add an Issuer</u> Users can add an issuer for an insurance company within HIOS. Organizations must have been registered as a Company in order to add issuers.	<u>Data Change Request</u> Users can submit a data change request for organization information that cannot be edited through the My Organizations functionality. Data change requests will be submitted for approval, and users can review the status of their data change request.	
<u>Add a Relationship</u> Users can submit a request to establish a relationship between an organization and an issuer within HIOS.	<u>Organization Search</u> Users can search and view details for organizations registered in HIOS.	

3.2.1 My Organizations

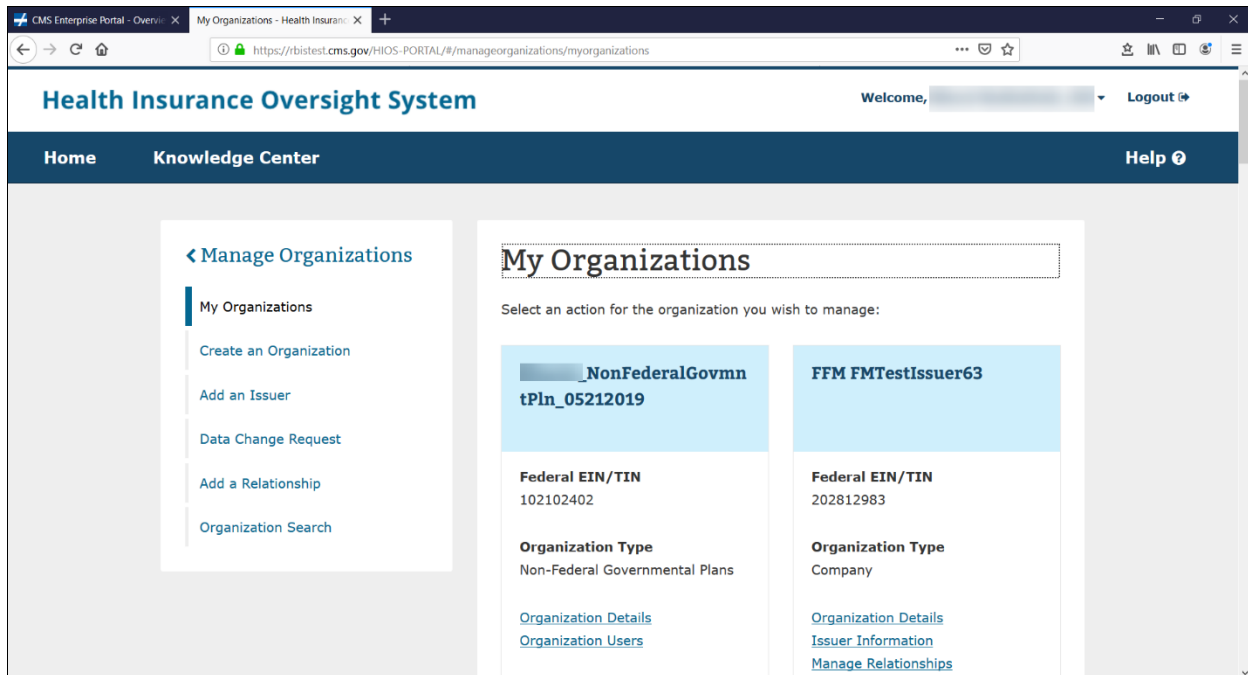
The My Organizations page (Figure 3-6) allows Company, Issuer, and Organization administrator users to view information for the organizations for which they have an administrative role. Each organization that a user has an administrator role for will appear as its own card with specific links on the My Organizations page. There is also a left-hand navigation menu that can take you back to the Manage Organizations landing page, Create an Organization page, Add an Issuer page, and Data Change Request page.

If an organization is an Insurance Company, company administrator users will have access to the Organization Details, Issuer Information, Organization Users, and Manage Relationships pages from the organization card. If you are only an issuer administrator, you will not see the Organization Users page.

If an organization is a Non-Insurance Company, company administrator users will have access to the Organization Details, Organization Users, and Manage Relationships pages from the organization card.

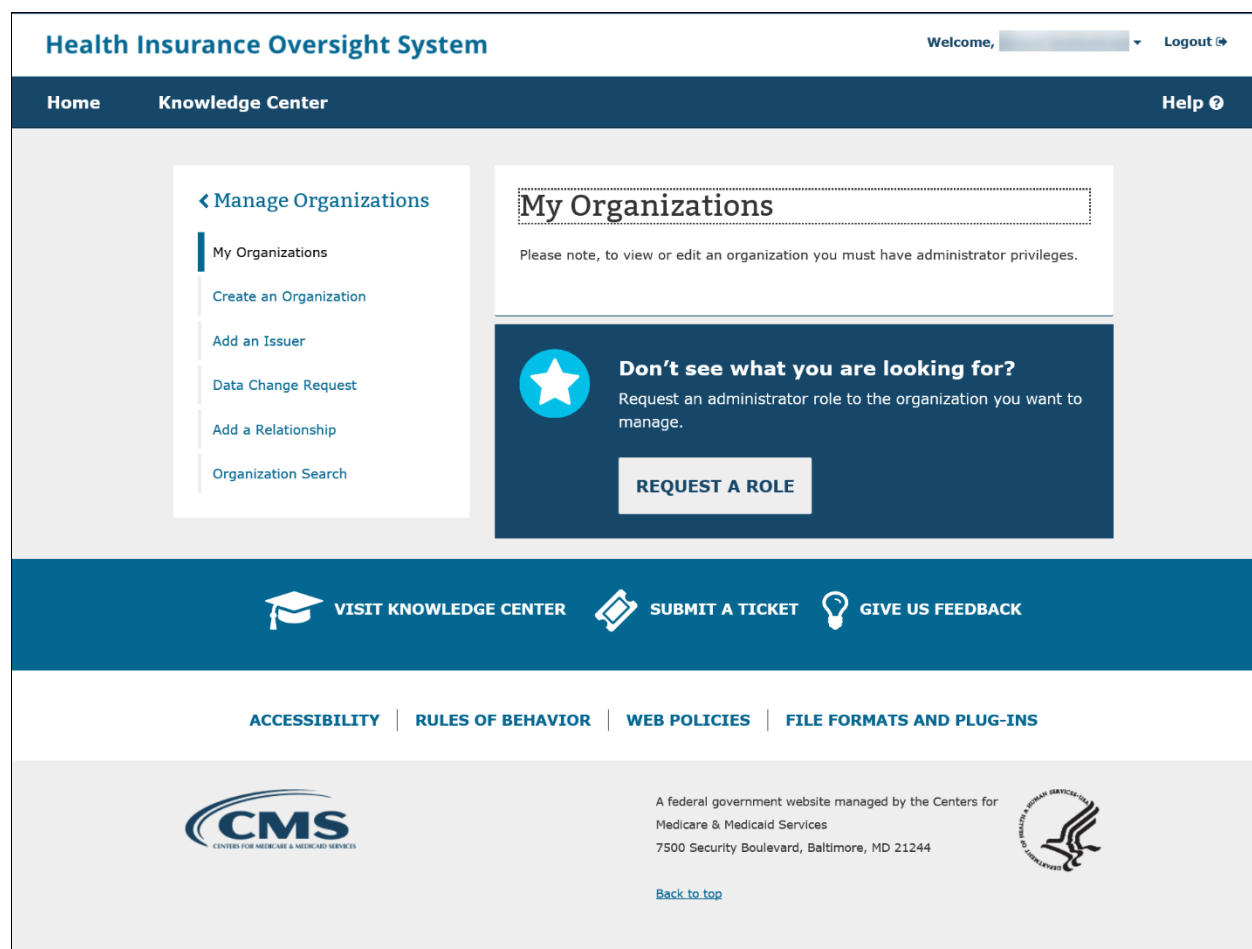
If an organization is a Non-Federal Governmental Health Plan or an Other Organization, organization administrator users will have access to the Organization Details and Organization Users pages from the organization card.

Figure 3-6: My Organizations Page for User with Administrator Role



Organization Details allows you to view and edit some of the organization's information. If you are only an issuer administrator user, you will not be able to edit the organizations information and will only see the information in a read-only format. Issuer Information allows you to view all the issuers associated to the insurance company. Organization Users allows you to view a list of users who have a role associated to that organization. Manage Relationships allows you to view a list of relationships for the insurance or non-insurance company.

If you do not have any administrator roles, the My Organizations page will appear with no organization cards (Figure 3-7). You can navigate to the Request a Role page to request an administrator role.

Figure 3-7: My Organizations Page for User without Administrator Role

3.2.1.1 Organization Details

After selecting Organization Details (Figure 3-8), you can view organization information and make edits. To make other changes related to existing organizational data, select Data Change Request. This functionality is described in detail in Section 3.5: Data Change Request.

You will be able to view your organization's Federal Employee Identification Number (FEIN) validation status, when applicable. The status is high-level and will only indicate whether the FEIN was successfully validated, failed validation, or is pending validation. As indicated in the failure notifications, the Company Administrator may need to contact the help desk to receive further information on their failure scenario.

Note: The FEIN and Company Legal Name fields will be locked down and disabled for editing when the FEIN Validation Status is Validated.

Figure 3-8: Organization Details

Organization Details

Leah Test Company 4 2018

Please note, a field with an asterisk (*) before it is a required field.

Organization Legal Information

Please note, some fields require a [data change request](#) as they cannot be edited on this page.

Organization Type	Incorporated State
Company	Kentucky (KY)

*** Organization Legal Name**

Leah Test Company 4 2018

* Federal EIN/TIN (9 digits)	Validation Status
988798798	Validation in Process

Additional Information

For insurance and non-insurance companies, there is an additional set of information collected called Third Party Administrator (TPA) Information. If you select EDGE Server and/or Enrollment as the TPA type, you will be asked to provide additional information for the company. Figure 3-9 displays the additional information that needs to be provided.

Figure 3-9: Organization Details – TPA Information

*** City**
herndon

*** State**
Virginia (VA)

*** ZIP Code (5 digits)**
44444

ZIP Plus 4
1234

Third Party Administrator (TPA) Information

TPA Type

☐ **EDGE Server**

☒ **Enrollment**

Please fill in the form below with your Company information.

Legal Business Address

*** Address Line 1**
4108 11th Pl

Address Line 2

*** City**
Herndon

*** State**
Virginia (VA)

*** ZIP Code (5 digits)**
20171

ZIP Plus 4

Primary Contact Information

*** Job Title**
Consultant

*** First Name**
John

*** Last Name**
Smith

*** Email Address**
test@test.com

*** Phone (xxx-xxx-xxxx)**
703-222-2222

Phone Ext.

☐ **Add Secondary Contact Information**

SUBMIT

Once the TPA information has been entered, submit your updates.

If you are only an Issuer Administrator, you will only see a read-only page of the insurance company information after selecting Organization Details (Figure 3-10).

Figure 3-10: Organization Details Page – View

< My Organizations

- Organization Details
- Issuer Information
- Manage Relationships

Organization Details

JN Test Company 12-12-17

Organization Legal Information

Organization Type Company	Incorporated State Colorado (CO)
Organization Legal Name JN Test Company 12-12-17	
Federal EIN/TIN 871263871	Validation Status Validation in Process

Domiciliary Address

Note: The domiciliary address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.

Address
123 Test Street
Oakton, Colorado 22124

3.2.1.2 Issuer Information

Users that are either a Company Administrator or an Issuer Administrator can view Issuers associated to the company on the Issuer Information page (Figure 3-11). From the table, users also have access to the Issuer Details or the Issuer Users page.

Figure 3-11: Issuer Information Page

[My Organizations](#)

- Organization Details
- Issuer Information**
- Organization Users
- Manage Relationships

Issuer Information

test001 Email Test Update

The following issuers are associated to test001 Email Test Update. To add another issuer, please navigate to the [Add an Issuer](#) page.

Showing 1-8 of 8 records Records per page 10 ▼

Issuer ID	Issuer Name	Registered State	Actions
19681	test001	CA	Issuer Details Issuer Users
22241	test001 UPDATE	KS	Issuer Details Issuer Users
33512	test001	NE	Issuer Details Issuer Users
52663	test001	AL	Issuer Details Issuer Users
62129	test001 UPDATE	AR	Issuer Details Issuer Users
65173	test001	VA	Issuer Details Issuer Users
85775	test001	ND	Issuer Details Issuer Users
88644	test001 Email Test Update	AZ	Issuer Details Issuer Users

[First](#)
[Previous](#)
1
[Next](#)
[Last](#)

3.2.1.2.1 Issuer Details

From the Issuer Information page (Figure 3-12), Company and Issuer administrator users can view Issuer Details and make edits. Fields that are editable on this page are Issuer Marketing Name, Market Type and Line of Business, and Domiciliary Address. To make other changes related to existing organizational data, a user can select Data Change Request.

If you are not an Issuer administrator for the selected issuer, you will only see the information in a read-only page (Figure 3-13).

Figure 3-12: Issuer Details Page

< Issuer Information

Issuer Details

Issuer Users

Issuer Details

test001

Please note, a field with an asterisk (*) before it is a required field.

Organization Legal Information

Please note, some fields require a [data change request](#) as they cannot be edited on this page.

Issuer ID 19681	Registered State California (CA)
Issuer Legal Name test001	Federal EIN/TIN 111111111
NAIC Company Code N/A	NAIC Group Code N/A

Additional Information

Issuer Marketing Name

Please note, users must select "Yes" for at least one of the following market type coverages and at least one associated line of business:

*** Does this issuer offer coverage in the Individual Market?**

☒ **Yes**
☐ **No**

*** Select all lines of business that apply for the Individual Market:**

☒ **Health Insurance Coverage (HIC)**
☐ **Mini-Med**
☐ **Student Health Plans**
☐ **Rx-only**

*** Does this issuer offer coverage in the Small Group Market?**

☒ **Yes**
☐ **No**

*** Select all lines of business that apply for the Small Group Market:**

☒ **Health Insurance Coverage (HIC)**
☐ **Mini-Med**
☐ **Expat**
☐ **Rx-only**

*** Does this issuer offer coverage in the Large Group Market?**

☒ **Yes**
☐ **No**

*** Select all lines of business that apply for the Large Group Market:**

☒ **Health Insurance Coverage (HIC)**
☐ **Mini-Med**
☐ **Expat**
☐ **Rx-only**

Domiciliary Address

Note: The domiciliary address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.

*** Address Line 1**

4554 city street1

Address Line 2

*** City**

Durham

*** State**

North Carolina (NC) ▼

*** ZIP Code (5 digits)**

45678

ZIP Plus 4 (4 digits)

SUBMIT

Figure 3-13: Issuer Details Page – View

Issuer Details

JN Test Company 12-12-17

Organization Legal Information

Issuer ID	Incorporated State
80381	Arizona(AZ)
Issuer Legal Name	Federal EIN/TIN
JN Test Company 12-12-17	871263871

Additional Information

Market Type and Associated Line of Business

Small Group

Health Insurance Coverage (HIC)

Domiciliary Address

Note: The domiciliary address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.

Address

1234 Test Street
Oakton, Virginia 22124

3.2.1.2.2 Issuer Users

The Issuer Users page (Figure 3-14) displays a table which lists all users that have a role associated at the issuer level. You can view or sort by the User Name, Module Name, Role, Job Title, Contact Type, or Approved Date. Only users that have the Company or Issuer administrator role can view the Issuer Users page for their specific issuer.

Figure 3-14: Issuer Users

Health Insurance Oversight System Welcome, [User] Logout

Home Knowledge Center Help

Issuer Information

- Issuer Details
- Issuer Users**

Issuer Users

000000001-test

Showing 1-3 of 3 records Records per page 10

Username	Module	Role	Job Title	Contact Type	Approved Date
	EDGE Server Management	Issuer EDGE Registration Request Submitter	Module Lead	N/A	01/27/2017
	Plan Finder Product Data Collection	Issuer	Module Lead	Primary Contact	10/18/2017
	Rates & Benefits Information System	Issuer	Module Lead	Primary Contact	10/18/2017

First Previous **1** Next Last

3.2.1.3 Organization Users

The Organization Users page (Figure 3-15) displays a table which lists all users that have a role associated to that organization. Users can view or sort by the User Name, Module Name, Role Name, Job Title, Contact Type, Requested Approved Date. Only users that have the Company or Organization administrator role can view the Organization Users page for their specific organization. If a user is only an Issuer administrator, then they will not have access to the Organization Users page.

Figure 3-15: Organization Users

Issuer Information

Organization Users

Manage Relationships

Organization Users

Insurance Co 000000007

Showing 1-10 of 25 records

Records per page10

Username	Module	Role	Approved Date	Actions
	Minimum Essential Coverage	Submitter	09/18/2018	View details
	Minimum Essential Coverage	Submitter	07/11/2014	View details
	HIOS Portal	Company Administrator	03/13/2018	View details
	Minimum Essential Coverage	Submitter	01/12/2017	View details
	Financial Management	Payee Data Submitter	05/01/2015	View details
	HIOS Portal	Company Administrator	09/28/2017	View details
	Financial Management	Payee Data Submitter	09/18/2014	View details
	HIOS Portal	Company Administrator	09/22/2014	View details

3.2.1.3.1 Organization Users – User Role Removal

Users with the Company and Organization Administrator have the ability to remove the user access from HIOS for a specific module and a specific role at the organization level. Please note, for roles not available for deletion on the Organization Users page, users may contact the Help Desk for assistance.

The Company and Organization Administrator can remove the user access for a specific role from the Organization Users page by selecting the View Details button and selecting the Remove Role button. The user will receive a confirmation message that the role has been deleted and is directed back to the Organization Users page. Once the role is removed, an email is sent out to the user whose role has been removed alerting them of the change. Additionally, once removed, the role will no longer appear on the Organization Users table. Please see Figures 3-16 through Figure 3-19.

Figure 3-16: Organization Users with View Details Button

< My Organizations		Organization Users																																																				
Organization Details		Insurance Co 000000007																																																				
Issuer Information		Showing 1-10 of 26 records Records per page 10 ▼																																																				
Organization Users		<table><tr><th><u>Username</u></th><th><u>Module</u></th><th><u>Role</u></th><th><u>Approved Date</u></th><th>Actions</th></tr><tr><td></td><td>CertComSystem</td><td>Submitter</td><td>09/18/2018</td><td>View details</td></tr><tr><td></td><td>Minimum Essential Coverage</td><td>Submitter</td><td>09/18/2018</td><td>View details</td></tr><tr><td></td><td>Minimum Essential Coverage</td><td>Submitter</td><td>07/11/2014</td><td>View details</td></tr><tr><td></td><td>HIOS Portal</td><td>Company Administrator</td><td>03/13/2018</td><td>View details</td></tr><tr><td></td><td>Minimum Essential Coverage</td><td>Submitter</td><td>01/12/2017</td><td>View details</td></tr><tr><td></td><td>Financial Management</td><td>Payee Data Submitter</td><td>05/01/2015</td><td>View details</td></tr><tr><td></td><td>HIOS Portal</td><td>Company Administrator</td><td>09/28/2017</td><td>View details</td></tr><tr><td></td><td>Financial Management</td><td>Payee Data Submitter</td><td>09/18/2014</td><td>View details</td></tr><tr><td></td><td>HIOS Portal</td><td>Company Administrator</td><td>09/22/2014</td><td>View details</td></tr></table>			<u>Username</u>	<u>Module</u>	<u>Role</u>	<u>Approved Date</u>	Actions		CertComSystem	Submitter	09/18/2018	View details		Minimum Essential Coverage	Submitter	09/18/2018	View details		Minimum Essential Coverage	Submitter	07/11/2014	View details		HIOS Portal	Company Administrator	03/13/2018	View details		Minimum Essential Coverage	Submitter	01/12/2017	View details		Financial Management	Payee Data Submitter	05/01/2015	View details		HIOS Portal	Company Administrator	09/28/2017	View details		Financial Management	Payee Data Submitter	09/18/2014	View details		HIOS Portal	Company Administrator	09/22/2014	View details
<u>Username</u>	<u>Module</u>	<u>Role</u>	<u>Approved Date</u>	Actions																																																		
	CertComSystem	Submitter	09/18/2018	View details																																																		
	Minimum Essential Coverage	Submitter	09/18/2018	View details																																																		
	Minimum Essential Coverage	Submitter	07/11/2014	View details																																																		
	HIOS Portal	Company Administrator	03/13/2018	View details																																																		
	Minimum Essential Coverage	Submitter	01/12/2017	View details																																																		
	Financial Management	Payee Data Submitter	05/01/2015	View details																																																		
	HIOS Portal	Company Administrator	09/28/2017	View details																																																		
	Financial Management	Payee Data Submitter	09/18/2014	View details																																																		
	HIOS Portal	Company Administrator	09/22/2014	View details																																																		
Manage Relationships																																																						

Figure 3-17: View User Details Page

View User Details

HIOS User Name	Role Submitter
First and Last Name	Contact Type N/A
Job Title Tester	Module Name CertComSystem
	Association Insurance Co 000000007
	Date of Role Approval 09/18/2018

REMOVE ROLE

[← BACK TO ORGANIZATION USERS](#)

Figure 3-18: View User Details – Confirmation Pop-Up

Confirm Removal of User Role

You are about to remove this user's role for your organization. Are you sure you would like to proceed?

[← RETURN TO VIEW USER DETAILS](#)

CONFIRM REMOVAL

HIOS User Name	Role Submitter
First and Last Name	Contact Type N/A
Job Title Tester	Module Name CertComSystem
	Association Insurance Co 000000007
	Date of Role Approval 09/18/2018

REMOVE ROLE

[← BACK TO ORGANIZATION USERS](#)

< My Organizations

Confirmation: The user's role has been removed. An email will be sent to the user notifying them of the change.

Organization Users

Insurance Co 000000007

Showing 1-10 of 25 records Records per page 10 ▼

<u>Username</u>	<u>Module</u>	<u>Role</u>	<u>Approved Date</u>	<u>Actions</u>
Minimum Essential Coverage	Submitter	09/18/2018	<button>View details</button>	
Minimum Essential Coverage	Submitter	07/11/2014	<button>View details</button>	
HIOS Portal	Company Administrator	03/13/2018	<button>View details</button>	
Minimum Essential Coverage	Submitter	01/12/2017	<button>View details</button>	
Financial Management	Payee Data Submitter	05/01/2015	<button>View details</button>	
HIOS Portal	Company Administrator	09/28/2017	<button>View details</button>	
Financial Management	Payee Data Submitter	09/18/2014	<button>View details</button>	
HIOS Portal	Company Administrator	09/22/2014	<button>View details</button>	

Users that are either a Company Administrator or an Issuer Administrator can view relationship information associated to the company or issuers on the Manage Relationships page (Figure 3-20). The relationship information will appear in a sortable table format with the following statuses: Pending, Approval Required, Approved, or Denied.

Figure 3-20: Manage Relationships Page

Manage Relationships

JN Test Company 12-12-17

The table below displays your organization's relationships. Please select "Add a Relationship" below to request new relationships.

[Add a Relationship](#)

Showing 1-2 of 2 records Records per page 10 ▼

Service Provider ↕	Service Receiver ↕	Relationship Type ↕	Status ↕	Actions
817263871 - JN Test Company Edit 3 on 3-6-18	24015 - JN Test Company 12-17 - AL	TPA Enrollment	Approval Required	View Details
817263871 - JN Test Company Edit 3 on 3-6-18	24015 - JN Test Company 12-17 - AL	TPA Enrollment	Approved	View Details

First Previous **1** Next Last

Users have the option to select View Details from within the table to view additional details for the relationship. If the status of the relationship is Approval Required, users will have the option to Approve or Deny the relationship from the View Relationship Details page (Figure 3-21). Once Approve or Deny is selected, a pop-up confirmation will appear for users to confirm their action (Figure 3-22).

Figure 3-21: View Relationship Details Page – Approve/Deny

View Relationship Details

Review the relationship information below and select "Approve Relationship" if this request is valid. If this is not a valid relationship, select "Deny Relationship".

Service Provider 817263871 - JN Test Company Edit 3 on 3-6-18	Effective Start Date 04-01-2018
Service Receiver 85586 - JN Test Company 11-13-17 Edit on 3-5 - AK	Effective End Date 04-02-2018
Relationship Type TPA Enrollment	Status Approval Required

APPROVE RELATIONSHIP

DENY RELATIONSHIP

[← BACK TO MANAGE RELATIONSHIPS](#)

Figure 3-22: Approve Relationship Confirmation

Approve Relationship Confirmation

You have selected to **approve** this relationship. Please confirm this is the task you want to complete.

← RETURN TO VIEW DETAILS

CONFIRM APPROVAL

Review the relationship information below and select "Approve Relationship" if this request is valid. If this is not a valid relationship, select "Deny Relationship".

Service Provider 817263871 - JN Test Company Edit 3 on 3-6-18	Effective Start Date 04-01-2018
Service Receiver 85586 - JN Test Company 11-13-17 Edit on 3-5 - AK	Effective End Date 04-02-2018
Relationship Type TPA Enrollment	Status Approval Required

APPROVE RELATIONSHIP

DENY RELATIONSHIP

[← BACK TO MANAGE RELATIONSHIPS](#)

If a relationship's effective end date has passed or if a relationship is already in an Approved or Denied status, users will not have access to the Approve/Deny functionality on the View page (Figure 3-23).

Figure 3-23: View Relationship Details

View Relationship Details

Service Provider 817263871 - JN Test Company Edit 3 on 3-6-18	Effective Start Date 03-05-2018
Service Receiver 25880 - JN Test Company 11-13-17 Edit on 3-5 - AL	Effective End Date 03-06-2018
Relationship Type TPA Enrollment	Status Approved

[← BACK TO MANAGE RELATIONSHIPS](#)

3.3 Creating an Organization

You can access the Create an Organization functionality from the Manage Organizations landing page. Through the Create an Organization functionality, you can register an organization in HIOS by completing four steps. In Step 1, select the organization's primary function (Figure 3-24). You are required to select the type of organization from the available options: Company, Non-Insurance company, Non-Federal, and Other Organization.

Figure 3-24: Create an Organization – Step 1

Manage Organizations

My Organizations

Create an Organization

Add an Issuer

Data Change Request

Add a Relationship

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

1

Select the Organization's Primary Function

* What is the organization's primary business?

☒
An insurance company that is a legal entity licensed to sell health insurance products and plans.

This organization may manage plan data including reporting product level data or Medical Loss Ratio information, create an Issuer for the organization, provide or receive TPA services, or work with other company specific data.

In HIOS, this type of organization is referred to as a **Company**.

☐
A company whose primary business does not include selling licensed health insurance products or plans.

This organization may come to HIOS to obtain a Health Plan Identifier or provide TPA services.

In HIOS, this type of organization is referred to as a **Non Insurance Company**.

☐
A Group Health Plan offered by a Non-Federal Governmental Organization to its non-federal governmental employees.

This organization may report plan information for purposes of HIPAA provision opt-out or external review election.

In HIOS, this type of organization is referred to as a **Non-Federal Governmental Health Plan**.

☐
Other - the above categories do not fit the organization's primary business.

This organization may be a Foreign entity that reports information for Minimum Essential Coverage.

In HIOS, this type of organization is referred to as an **Other Organization**.

NEXT

2

Enter Federal EIN/TIN

3

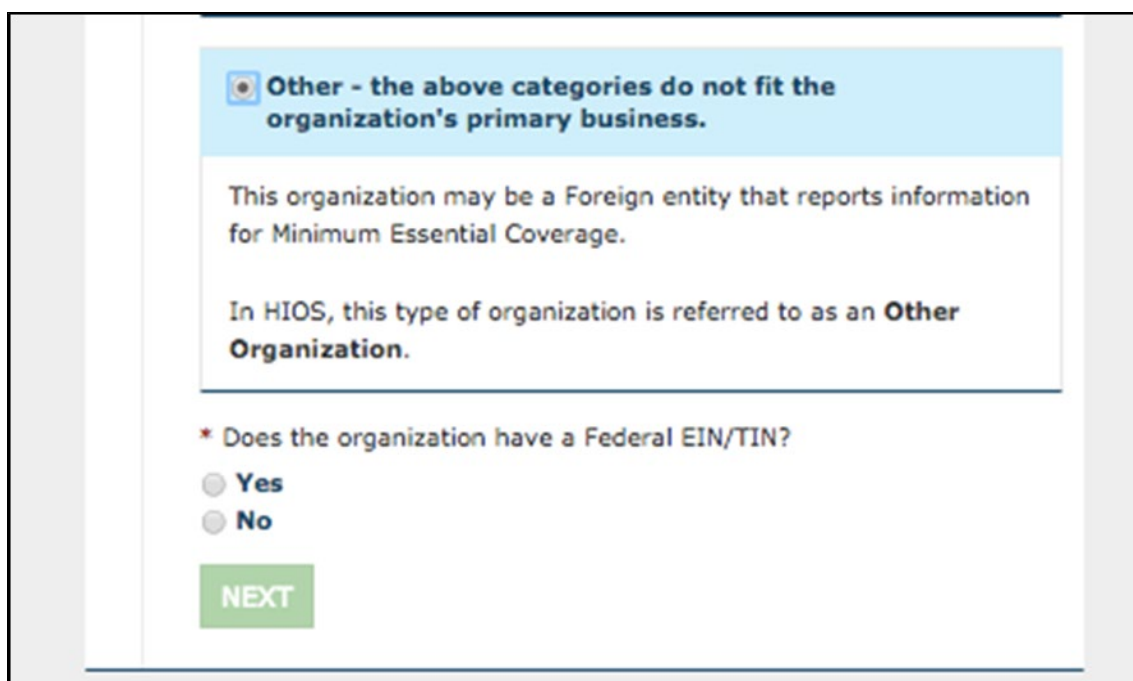
Organization Details

4

Confirm Your Request

If you select Other, an additional question will prompt you to indicate if the organization has a FEIN or Tax Identification Number (FEIN/TIN) or not (Figure 3-25). Depending on whether you answer Yes or No, Step 2 will either be to Enter a FEIN or Enter an Organization Name.

Figure 3-25: Create an Organization – Select Other



☒ **Other - the above categories do not fit the organization's primary business.**

This organization may be a Foreign entity that reports information for Minimum Essential Coverage.

In HIOS, this type of organization is referred to as an **Other Organization**.

* Does the organization have a Federal EIN/TIN?

☐ Yes

☐ No

NEXT

3.3.1 Company

This section will cover the process of creating a new Company organization in HIOS.

In Step 1, you will select that you are an insurance company that is a legal entity licensed to sell health insurance products and plans, which is a Company in HIOS. Step 2 will require users to enter the FEIN/TIN (Figure 3-26).

Figure 3-26: Create an Organization – Company – Step 2

< Manage Organizations

- My Organizations
- Create an Organization**
- Add an Issuer
- Data Change Request
- Add a Relationship

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

- 1 Select the Organization's Primary Function** [Revisit this step](#)
Company
- 2 Enter Federal EIN/TIN**
First, let's see if your organization already exists in the system.

* Enter the organization's FEIN and select "Search"
Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.
 [SEARCH](#)

[NEXT](#)
- 3 Organization Details**
- 4 Confirm Your Request**

In Step 3, you will need to enter the organization details (Figure 3-27). For Company organization types, the following fields are required: Organization Legal Name, Incorporated State. Enter details for the following fields: National Association of Insurance Commissioners (NAIC) Company Code, NAIC Group Code, Group Name, AM Best Number, Not for Profit, Co-op, and TPA information. You are required to enter the following fields for the Domiciliary Address: Address Line 1, City, State, and ZIP.

Figure 3-27: Create an Organization – Company – Step 3

3

Organization Details

Please enter your organization details below.

* Organization Legal Name

* Incorporated State

Additional Information

NAIC Company Code (5 Digits)

NAIC Group Code (5 Digits)

Group Name

AM Best Number (6 digits)

Company Information

☐ Not For Profit

☐ Co-Op

Domiciliary Address

* Address Line 1

Address Line 2

* City

* State

* ZIP Code (5 digits)

ZIP Plus 4 (4 digits)

Third Party Administrator (TPA) Information

TPA Type

☒ EDGE Server☐ Enrollment

Legal Business Address

* Address Line 1

Address Line 2

* City

* State

* ZIP Code (5 digits)

ZIP Plus 4 (4 digits)

Primary Contact Information

* Job Title

* First Name

* Last Name

* Email Address

* Phone (xxx-xxx-xxxx)

Phone Ext.

☐ Add Secondary Contact Information

NEXT

4

Confirm Your Request

You will get a chance to review a high-level summary of your request in Step 4 as shown in Figure 3-28. Once you have reviewed the information, you may submit your request for approval. The requesting users will receive an email once the new organization has been approved.

Figure 3-28: Create an Organization – Company – Step 4

1 Select the Organization's Primary Function [Revisit this step](#)

Company

2 Enter Federal EIN/TIN [Revisit this step](#)

182736817

3 Organization Details [Revisit this step](#)

Organization Details Provided

4 Confirm Your Request

Please select "Submit" to complete your request.

ORGANIZATION

182736817 - JN Test Company

SUBMIT [RESET](#)

3.3.2 Non-Insurance Company

This section will cover the process of creating a new Non-Insurance Company organization in HIOS.

In Step 1, select that you are a company whose primary business does not include selling licensed health insurance products or plans, which is a Non-Insurance Company in HIOS. Step 2 will require you to enter the FEIN/TIN (Figure 3-29).

Figure 3-29: Create an Organization – Non-Insurance Company – Step 2

< Manage Organizations

- My Organizations
- Create an Organization**
- Add an Issuer
- Data Change Request
- Add a Relationship

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

- 1 Select the Organization's Primary Function** [Revisit this step](#)
Non Insurance Company
- 2 Enter Federal EIN/TIN**
First, let's see if your organization already exists in the system.

* Enter the organization's FEIN and select "Search"
Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.
 [SEARCH](#)

[NEXT](#)
- 3 Organization Details**
- 4 Confirm Your Request**

In Step 3, enter the organization details (Figure 3-30). For Non-Insurance Company organization types, the following fields are required: Organization Legal Name, Incorporated State, and Domiciliary Address. You can also enter TPA information.

Figure 3-30: Create an Organization – Non-Insurance Company – Step 3

3

Organization Details
Please enter your organization details below.

* Organization Legal Name

* Incorporated State

Domiciliary Address

Note: The Domiciliary Address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.

* Address Line 1

Address Line 2

* City

* State

* ZIP Code (5 digits)

ZIP Plus 4 (4 digits)

Third Party Administrator (TPA) Information

TPA Type

☒ EDGE Server

☐ Enrollment

Please fill in the form below with your Company Information.

Legal Business Address

* Address Line 1

Address Line 2

* City

* State

* ZIP Code (5 digits)

ZIP Plus 4 (4 digits)

Primary Contact Information

* Job Title

* First Name

* Last Name

* Email Address

* Phone (xxx-xxx-xxxx)

Phone Ext.

☐ Add Secondary Contact Information

NEXT

4

Confirm Your Request

You will get a chance to review a high-level summary of your request in Step 4 as shown in Figure 3-31. Once you have reviewed the information, you may submit your request for approval. The requesting users will receive an email once the new organization has been approved.

Figure 3-31: Create an Organization – Non-Insurance Company – Step 4

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

- 1 Select the Organization's Primary Function** [Revisit this step](#)
Non Insurance Company
- 2 Enter Federal EIN/TIN** [Revisit this step](#)
182736812
- 3 Organization Details** [Revisit this step](#)
Organization Details Provided
- 4 Confirm Your Request**
Please select "Submit" to complete your request.

ORGANIZATION
182736812 - JN Test Non Insurance Company

[SUBMIT](#) [RESET](#)

3.3.3 Non-Federal Governmental Health Plans

This section will cover the process of creating a new Non-Federal Governmental Health Plan organization in HIOS.

In Step 1, select that you are a group health plan offered by a Non-Federal Governmental Organization to its non-federal governmental employees, which is a Non-Federal Governmental Health Plan in HIOS. Step 2 will require you to enter the FEIN/TIN (Figure 3-32).

Figure 3-32: Create an Organization – Non-Federal Governmental Health Plan – Step 2

< Manage Organizations

- My Organizations
- Create an Organization**
- Add an Issuer
- Data Change Request
- Add a Relationship

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

- 1 Select the Organization's Primary Function** [Revisit this step](#)
Non-Federal Governmental Plans
- 2 Enter Federal EIN/TIN**
First, let's see if your organization already exists in the system.

* Enter the organization's FEIN and select "Search"
Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.
 [SEARCH](#)

[NEXT](#)
- 3 Organization Details**
- 4 Confirm Your Request**

In Step 3, enter the organization details (Figure 3-33). For Non-Federal Governmental Health Plan organization types, you will need to enter the Organization Legal Name, select Self-Funded and/or Fully Insured as the Non-Fed Plan Type, and enter the Domiciliary Address.

Figure 3-33: Create an Organization – Non-Federal Governmental Health Plan – Step 3

3

Organization Details
Please enter your organization details below.

*** Organization Legal Name**

*** Non-Fed Plan Type**

☐ **Self Funded**
☐ **Fully Insured**

Domiciliary Address
Note: The Domiciliary address is the location in which an organization is incorporated/registered or organized, while the Business address is the location from where the organization can conduct their business.

*** Address Line 1**

Address Line 2

*** City**

*** State**

*** ZIP Code (5 digits)**

ZIP Plus 4 (4 digits)

NEXT

4

Confirm Your Request

You will get a chance to review a high-level summary of your request in Step 4 as shown in Figure 3-34. Once you have reviewed the information, you may submit your request for approval. The requesting users will receive an email once the new organization has been approved.

Figure 3-34: Create an Organization – Non-Federal Governmental Health Plan – Step 4

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

- 1 Select the Organization's Primary Function**
Non-Federal Governmental Plans
[Revisit this step](#)
- 2 Enter Federal EIN/TIN**
123896123
[Revisit this step](#)
- 3 Organization Details**
Organization Details Provided
[Revisit this step](#)
- 4 Confirm Your Request**
Please select "Submit" to complete your request.

ORGANIZATION
123896123 - JN Test Non-Fed

[SUBMIT](#) [RESET](#)

3.3.4 Other Organization Type

This section will cover the process of creating a new Other Organization Type organization in HIOS.

In Step 1, select the option of Other – the above categories do not fit the organizations primary business, which is an Other Organization type in HIOS. Step 2 will vary depending on if the organization indicates they have a FEIN/TIN (Figure 3-35). If they do have one, then Step 2 will be to enter the FEIN/TIN (Figure 3-36). If they do not have one, then Step 2 will be to enter the Organization Name.

Figure 3-35: Create an Organization – Other Organization – Step 2 FEIN

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

1

Select the Organization's Primary Function

Revisit this step

Other Organization Type

2

Enter Federal EIN/TIN

First, let's see if your organization already exists in the system.

* Enter the organization's FEIN and select "Search"

Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.

SEARCH

NEXT

3

Organization Details

4

Confirm Your Request

Figure 3-36: Create an Organization – Other Organization – Step 2 Name

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

1

Select the Organization's Primary Function

Revisit this step

Other Organization Type

2

Enter Organization Name

First, let's see if your organization already exists in the system.

* Enter the organization's name and select "Search"

To see if your organization already exists in the system, enter the organization name and select "Search". You must enter at least three characters before selecting search. If your organization is listed in the table, then you are already in the system. If your organization is not listed, proceed to the next step by selecting "Next".

SEARCH

NEXT

3

Organization Details

4

Confirm Your Request

If you need to search by Organization Name, the system will check to confirm that your organization is not already in the system based on resemblance to the name entered and display the results in a table (Figure 3-37). If you notice that the listed organizations are not your intended organization you can proceed forward.

Figure 3-37: Create an Organization – Other Organization – Step 2 Name Results

2 Enter Organization Name

First, let's see if your organization already exists in the system.

*** Enter the organization's name and select "Search"**

To see if your organization already exists in the system, enter the organization name and select "Search". You must enter at least three characters before selecting search. If your organization is listed in the table, then you are already in the system. If your organization is not listed, proceed to the next step by selecting "Next".

Showing results for "Jackie"

Organization Name	Address	Actions
Jackie Test Non-Fed	Herndon, VA	View details
Jackie Test Other	Herndon, VA	View details
Jackie Test Non-Fed	Herndon, VA	View details
Jackie Test Other	Herndon, VA	View details

Please note if an organization name returns results larger than 10 records, an error message will appear instructing you to refine your search and enter a more unique organization name (Figure 3-38).

Figure 3-38: Create an Organization – Other Organization – Name Results Error Message

Error: Search results set returned is too large. Please refine your search and enter the organization name

*** Enter the organization's name and select "Search"**

To see if your organization already exists in the system, enter the organization name and select "Search". You must enter at least three characters before selecting search. If your organization is listed in the table, then you are already in the system. If your organization is not listed, proceed to the next step by selecting "Next".

When creating an Other Organization, in order to successfully check if your organization already exists within Portal, enter at least 3 characters within the Search field before selecting the Search button (Figure 3-39). Please note, if less than 3 characters are entered in the Search field, an error message will display informing you that a minimum of 3 characters are required to be entered in the Search field.

Figure 3-39: Create an Organization – Other Organization – Organization Name Error Message

2 Enter Organization Name

First, let's see if your organization already exists in the system.

*** Enter the organization's name and select "Search"**

To see if your organization already exists in the system, enter the organization name and select "Search". You must enter at least three characters before selecting search. If your organization is listed in the table, then you are already in the system. If your organization is not listed, proceed to the next step by selecting "Next".

sd SEARCH

Error: Organization name must be at least three characters, with no special characters. Please make sure you entered 3 or more characters and no special characters, and try your search again.

In Step 3, enter the organization details (Figure 3-40). For Other Organization types, provide the Organization Location (US Address or Non-US address), enter the Organization Legal Name, the FEIN/TIN unless provided in Step 2, select the Address Type (Domiciliary Address or Business Address), and enter the address of the previously selected address type.

Figure 3-40: Create an Organization – Other Organization – Step 3

3

Organization Details

Please enter your organization details below.

* Organization Location

* Organization Legal Name

* Address Type

☐ Domiciliary Address
 ☐ Business Address

Domiciliary Address

Note: The Domiciliary address is the location in which an organization is incorporated/registered or organized, while the Business address is the location from where the organization can conduct their business.

* Address Line 1

Address Line 2

* City

* State

* ZIP Code (5 digits)

ZIP Plus 4 (4 digits)

Additional Details

In the text field below, please provide additional details for your organization request.

1000 characters left

NEXT

You will get a chance to review a high-level summary of your request in Step 4 as shown in Figure 3-41. Once you have reviewed the information, you may submit your request for approval. The requesting users will receive an email once the new organization has been approved.

Figure 3-41: Create an Organization – Other Organization – Step 4

Create an Organization

Please note, a field with an asterisk (*) before it is a required field.

1 Select the Organization's Primary Function [Revisit this step](#)

Other Organization Type

2 Enter Federal EIN/TIN [Revisit this step](#)

817236817

3 Organization Details [Revisit this step](#)

Organization Details Provided

4 Confirm Your Request

Please select "Submit" to complete your request.

ORGANIZATION
817236817 - Test Other Org

SUBMIT **RESET**

3.4 Add an Issuer

Access the Add an Issuer functionality from the Manage Organizations landing page. Through the Add an Issuer functionality, you can register an issuer under an existing insurance company in HIOS by completing four steps. In Step 1, identify the insurance company by searching by the FEIN/TIN (Figure 3-42).

Figure 3-42: Add an Issuer – Step 1

[← Manage Organizations](#)

- My Organizations
- Create an Organization
- Add an Issuer**
- Data Change Request
- Add a Relationship

Add an Issuer

Please note, a field with an asterisk (*) before it is a required field.

1

Search for an Organization

First, let's find the company to which you'd like to add an issuer.

*** Enter the organization's FEIN and select "Search"**

Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.

2

Issuer Registered State

3

Issuer Details

4

Confirm Your Request

You are required to identify the issuers registered state as part of Step 2 of the Add an Issuer process as shown in Figure 3-43.

Figure 3-43: Add an Issuer – Step 2

Add an Issuer

Please note, a field with an asterisk (*) before it is a required field.

1

Search for an Organization

Revisit this step

000000010 - 000000010-test

2

Issuer Registered State

* Registered State

NEXT

3

Issuer Details

4

Confirm Your Request

In Step 3, you will need to enter the Issuer Details (Figure 3-44). You have the option to enter the Issuer Marketing Name. You are required to enter information on if they offer coverage in the Individual Market, Small Group Market, and/or the Large Group Market by selecting Yes or No.

If you select Yes to any of the market type coverages, additional fields will display for the lines of business. You are also required to enter the Domiciliary Address. Once all the required fields are provided, proceed to step 4.

Figure 3-44: Add an Issuer – Step 3

Please note, users must select "Yes" for at least one of the following market type coverages and at least one associated line of business:

*** Does this issuer offer coverage in the Individual Market?**

☒ **Yes**
☐ **No**

*** Select all lines of business that apply for the Individual Market:**

☐ **HIC**
☐ **Mini-Med**
☐ **Student Health Plans**
☐ **Rx-only**

*** Does this issuer offer coverage in the Small Group Market?**

☒ **Yes**
☐ **No**

*** Select all lines of business that apply for the Small Group Market:**

☐ **HIC**
☐ **Mini-Med**
☐ **Expat**
☐ **Rx-only**

*** Does this issuer offer coverage in the Large Group Market?**

☒ **Yes**
☐ **No**

*** Select all lines of business that apply for the Large Group Market:**

☐ **HIC**
☐ **Mini-Med**
☐ **Expat**
☐ **Rx-only**

You will view a summary of information that was provided as part of the Add an Issuer process which includes the organization FEIN, organization name, and registered state displayed in Step 4 (Figure 3-45). If you have selected a non-compliant state or territory (AL, AK, FL, GA, PA, WI, AS, GU, MP, VI), additional text will appear informing you that you'll need to access the External Review Election (ERE) module. If you have deemed that the information is correct, select Submit for the request to be approved.

Figure 3-45: Add an Issuer – Step 4

Add an Issuer

Please note, a field with an asterisk (*) before it is a required field.

1

Search for an Organization

Revisit this step

871263871 - JN Test Company 12-12-17

2

Issuer Registered State

Revisit this step

Alabama (AL)

3

Issuer Details

Revisit this step

Issuer Details Provided

4

Confirm Your Request

Please select "Submit" to complete your request.

ORGANIZATION
871263871 - JN Test Company 12-12-17

REGISTERED STATE
Alabama (AL)

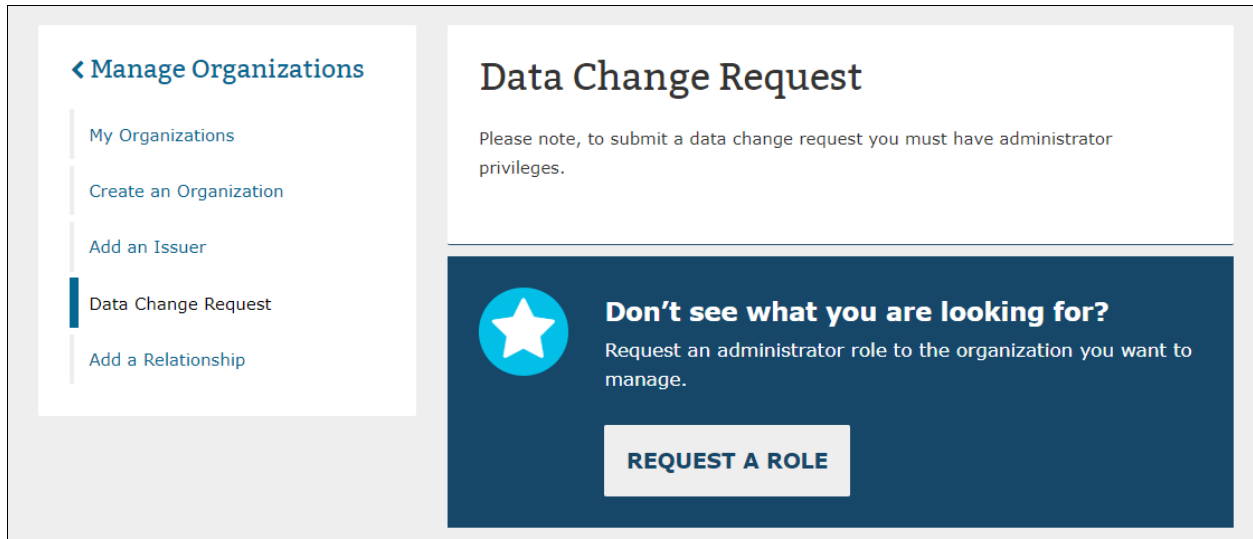
NOTE: The selected issuer's state is non-compliant with the State Review Process. Please access the External Review Election to enter your Appeals information.

SUBMIT

RESET

3.5 Data Change Request

Access the Data Change Request functionality from the Manage Organizations landing page. Users who do not have a company, issuer, or organization administrator role will not have access to submit a data change request (Figure 3-46). Instead, they can navigate to the Request a Role page on a separate Data Change Request page.

Figure 3-46: Data Change Request – No Administrator Roles

If you have a company, issuer, or Organization Administrator role, you will be navigated to the Manage Data Changes Tab. Administrator roles may create change requests for editing certain data elements related to Organization, Issuers, Products, etc. along with a reason for the change.

In addition to submitting data change requests, company, issuer, or Organization Administrators can view the latest status of their data change requests and view previous requests and request statuses.

To create new data change requests, select Create Request for Data Change on the Manage Data Changes page as illustrated in Figure 3-47. In addition, Data Change Request will also be available on the Organization Details page for Company Administrator, Issuer Administrator, and Organization Administrators. It can be accessed by navigating through the link demonstrated in Figure 3-48 and Figure 3-49.

Figure 3-47: HIOS Portal – Manage Data Changes

Manage Data Changes

Create Request for Data Change

Please select a Request Status from the drop-down list below or Search By Request ID and select the Enter button to view the corresponding requests.

Request Status: Pending Approval (OR) Enter

« First « Prev **1** Next » Last » Show Entries 10 Showing 1 to 9 of 9 entries

Request ID	Request Created Date	Status	Status Updated Date	NOTE	Action
DCR96	11/21/2017 8:48 AM	Pending Approval	11/21/2017 8:48 AM	Test	View
DCR95	11/21/2017 8:47 AM	Pending Approval	11/21/2017 8:47 AM	Test	View
DCR94	11/21/2017 8:46 AM	Pending Approval	11/21/2017 8:46 AM	Test	View
DCR93	11/21/2017 8:46 AM	Pending Approval	11/21/2017 8:46 AM	Test	View
DCR92	11/21/2017 8:46 AM	Pending Approval	11/21/2017 8:46 AM	test	View
DCR91	11/20/2017 5:01 PM	Pending Approval	11/20/2017 5:01 PM	Test	View
DCR90	11/20/2017 5:01 PM	Pending Approval	11/20/2017 5:01 PM	Test	View
DCR85	11/16/2017 11:01 PM	Pending Approval	11/16/2017 11:01 PM	Testing	View
DCR81	08/04/2017 10:38 AM	Pending Approval	08/04/2017 10:38 AM	hjkjhkhjk	View

Figure 3-48: Organization Details Page

< My Organizations

Organization Details

Issuer Information

Organization Users

Manage Relationships

Organization Details

test001 Email Test Update

Please note, a field with an asterisk (*) before it is a required field.

Organization Legal Information

Please note, some fields require a [data change request](#) as they cannot be edited on this page.

Organization Type

Company

Incorporated State

Virginia (VA)

* Organization Legal Name

test001 Email Test Update

* Federal EIN/TIN (9 digits)

111111111

Validation Status

Validation in Process

Additional Information

NAIC Company Code (5 digits)

NAIC Group Code (5 digits)

Group Name

testgroup

AM Best Number (6 digits)

Company Information

☐ Not For Profit

☐ Co-Op

Domiciliary Address

Note: The Domiciliary Address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.

* Address Line 1

1 main street Email Update

Address Line 2

* City

herndon

* State

Virginia (VA)

* ZIP Code (5 digits)

44444

ZIP Plus 4

1234

Third Party Administrator (TPA) Information

TPA Type

☐ EDGE Server

☐ Enrollment

SUBMIT

Figure 3-49: Issuer Details Page

← Issuer Information

Issuer Details

Issuer Users

Issuer Details

test001

Please note, a field with an asterisk (*) before it is a required field.

Organization Legal Information

Please note, some fields require a data change request as they cannot be edited on this page.

Issuer ID 19681	Registered State California (CA)
Issuer Legal Name test001	Federal EIN/TIN 111111111
NAIC Company Code N/A	NAIC Group Code N/A

Additional Information

Issuer Marketing Name

Please note, users must select "Yes" for at least one of the following market type coverages and at least one associated line of business:

*** Does this issuer offer coverage in the Individual Market?**

☒ **Yes**

☐ **No**

*** Select all lines of business that apply for the Individual Market:**

☒ **Health Insurance Coverage (HIC)**

☐ **Mini-Med**

☐ **Student Health Plans**

☐ **Rx-only**

*** Does this issuer offer coverage in the Small Group Market?**

☒ **Yes**

☐ **No**

*** Select all lines of business that apply for the Small Group Market:**

☒ **Health Insurance Coverage (HIC)**

☐ **Mini-Med**

☐ **Expat**

☐ **Rx-only**

*** Does this issuer offer coverage in the Large Group Market?**

☒ **Yes**

☐ **No**

*** Select all lines of business that apply for the Large Group Market:**

☒ **Health Insurance Coverage (HIC)**

☐ **Mini-Med**

☐ **Expat**

☐ **Rx-only**

Domiciliary Address

Note: The domiciliary address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.

*** Address Line 1**

4554 city street1

Address Line 2

*** City**

Durham

*** State**

North Carolina (NC) ▼

*** ZIP Code (5 digits)**

45678

ZIP Plus 4 (4 digits)

SUBMIT

3.5.1 Company Administrator – Data Changes

Company Administrators can create, review, and submit data change requests through the Manage Data Changes tab. Company Administrators can also create new data change requests through the Data Change Request link available on the Organization Details page.

3.5.1.1 Create Data Change Requests

Once the Company Administrator is on the Manage Data Changes page, you will be able to Create Request for Data Change by selecting on the button at the top of the Manage Data Changes page. The “What values would you like to change?” drop-down menu displays the data values that can be changed for Company, Issuer, and Product as illustrated in Figure 3-50.

Figure 3-50: Create Data Change Requests

Create Data Change Request

Please note, a field with an asterisk (*) before it is a required field.

What values would you like to change?

-- Please Select Organization Field --

FEIN/TIN

Organization Legal Name

Incorporated State

Organization Type

Organization Status

Issuer Registered State

Issuer Status

Product Name

Product Type

Product Status

Product Market Type

Issuer Legal Name

Organization Address

Organization Address type

Enter

Back

[WEB POLICIES](#) | [FILE FORMATS AND PLUG-INS](#)

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

DEPARTMENT OF HEALTH & HUMAN SERVICES USA

Once the value for the data change is selected, Company Administrators of multiple organizations will see a list of companies displayed in the drop-down menu. Company Administrators will then select the Company for which they are making the data change (FEIN/TIN, Organization Legal Name, Organization Type) in the drop-down menu, and then select the Enter button (Figure 3-51). The current value will be displayed, and the Company Administrator will need to enter the New Value or select from a predefined list of values and enter a Reason for change (250 characters max) before selecting the Submit button (Figure 3-52).

Figure 3-51: Company Data Changes – Select the Company

Create Data Change Request

Please note, a field with an asterisk (*) before it is a required field.

What values would you like to change?

Organization Type
Enter

Choose the Organization

-Please select the organization you are making the change for-
Enter

-Please select the organization you are making the change for-
Mel Test - Company - FEIN -321456987 - Company
MelTest IMPL 030719 - FEIN -753698412 - Company
Test 112233445 - FEIN -112233445 - Company
Mel Test - OtherOrg - Alexandria,

Back

Figure 3-52: Company Data Changes – Select the Field to Change

Create Data Change Request

Please note, a field with an asterisk (*) before it is a required field.

What values would you like to change?

Organization Type
Enter

Choose the Organization

Mel Test - Company - FEIN -321456987 - Company
Enter

Current Value	*New Value	*Reason for change
Company	-Select new value-	

Back

Submit

If a change to the Organization Type from Company or Non Insurance to Non-Federal Governmental Plans is needed, then the Company Administrator will need to select the Self-Funded or Fully Insured radio button before selecting the Submit button as illustrated in Figure 3-53.

Figure 3-53: Company or Non-Insurance to a Non-Federal Governmental Plan – Select Self-Funded or Fully Insured Radio Button

Create Data Change Request

Please note, a field with an asterisk (*) before it is a required field.

What values would you like to change?

Organization Type
Enter

Choose the Organization

Mel Test - Company - FEIN - 321456987 - Company
Enter

Current Value	*New Value	*Reason for change
Company	Non-Federal Governmental Plans Enter	

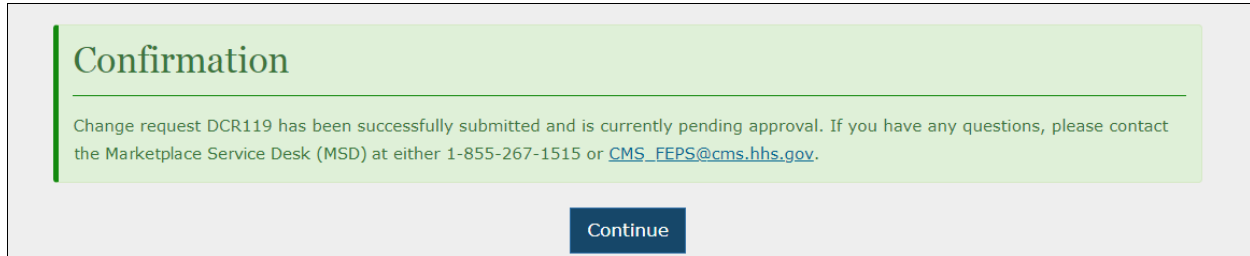
***Please select the type:**

☐ Self Funded
☐ Fully Insured

Back
Submit

Once the Company Administrator selects the Submit button on the Manage Change Request page, a Request ID will be assigned, along with a Pending Approval status. An on-screen Confirmation message will display as illustrated in Figure 3-54.

Figure 3-54: Confirmation Page for Change Request

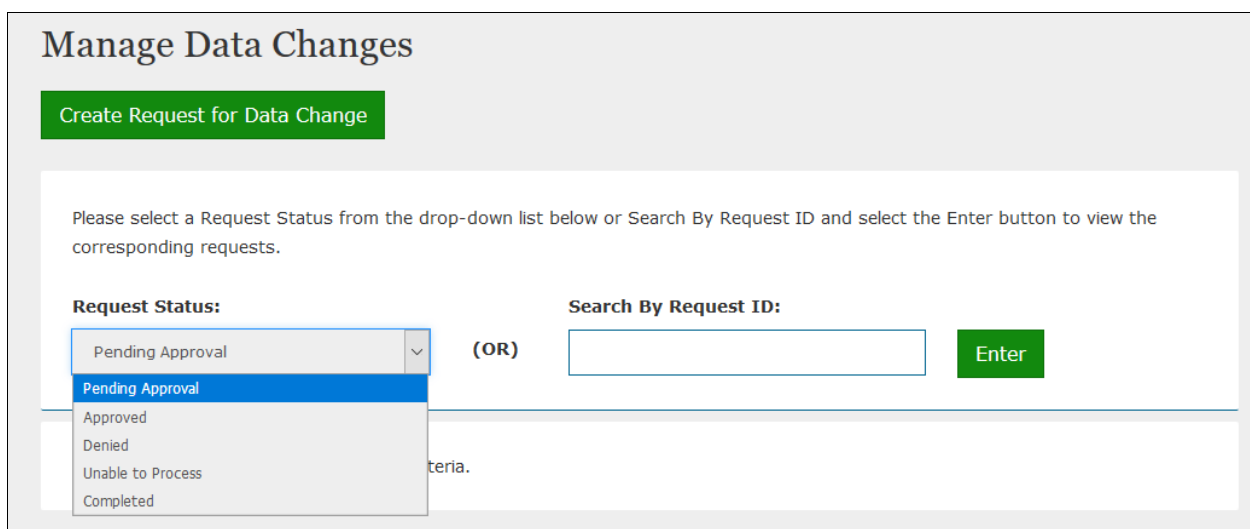


3.5.1.2 View Data Change Requests

Company Administrators can view data change requests on the Manage Data Changes page. When the users select the status of the change request from the Request Status drop-down menu or enter a valid Request ID in the Request ID field and select the Request ID Search button, a summary of the change requests and its statuses will be displayed in search results. The following statuses can be filtered as illustrated in Figure 3-55.

- Pending Approval
- Approved
- Denied
- Unable to Process
- Completed

Figure 3-55: Change Request Statuses



Company Administrators can select on the View link of the Action column and review the details of the change request as illustrated in Figure 3-56.

Figure 3-56: View a Change Request

The screenshot displays a web interface titled "Data Change Details View". It contains a table with two columns. The left column lists fields with their corresponding values, and the right column lists fields with their corresponding values. At the bottom left, there is a "Back" button.

Change Request ID	Request Created Date
DCR96	11/21/2017 8:48 AM
User Name	Federal EIN/TIN
	321321321
Organization Legal Name	Organization Type
Testing Non Fed Organization - TT 2.12.18	Non-Federal Governmental Plans
Current Value	New Value
Testing Non Fed Organization - Tara's	test
Supplement Attributes	Attribute
	Organization Legal Name
Note	
Test	

Back

3.5.2 Issuer Administrator – Data Changes

Issuer Administrators can create, review, and submit data change requests through the Manage Data Changes Tab. Issuer Administrators can also create new change requests through the Data Change Request on the Issuer Details page.

3.5.2.1 Create Data Change Requests

Once the Issuer Administrator is on the Manage Data Changes page, they will be able to Create Request for Data Change through the button at the bottom of the Manage Data Changes page. The What values would you like to change drop-down menu displays the values for the Issuer, and Product. Once the value for the data change is selected, Issuers will be displayed in the Choose the Issuer drop-down menu as illustrated in Figure 3-57.

Figure 3-57: Issuer Change Request

Create Data Change Request

Please note, a field with an asterisk (*) before it is a required field.

What values would you like to change?

Choose the Issuer

Current Value	*New Value (9 digits)	*Reason for change
Test 112233445		

If the change value is selected for a Product, then Choose the Issuer and Choose the product drop-down menus will be displayed for selection as illustrated in Figure 3-58. Once all the required fields are selected, the current value of the field to be changed will be displayed and the Issuer Administrator will need to enter the New Value, or select from a predefined list of values, and enter a Reason for change (250 characters max) before selecting the Submit button.

Figure 3-58: Product Change Request

Please note, a field with an asterisk (*) before it is a required field.

What values would you like to change?

Product Name

Choose the Issuer

Test 112233445 - 20387

Choose the product

Mallory PPO IFP Test Prod1- 20387NH001

Current Value	*New Value (9 digits)	*Reason for change
Mallory PPO IFP Test Prod1		

Once the Issuer Administrator selects the Submit button on the Manage Change Request page, a **Request ID** will be assigned, along with a Pending Approval status. An on-screen Confirmation message will display as illustrated in Figure 3-59.

Figure 3-59: Confirmation Page for Change Request

Confirmation

Change request DCR119 has been successfully submitted and is currently pending approval. If you have any questions, please contact the Marketplace Service Desk (MSD) at either 1-855-267-1515 or CMS_FEPS@cms.hhs.gov.

3.5.2.2 View Data Change Requests

Issuer Administrators can view data change requests on Manage Data Changes page. When the users select the status of the change request from the Request Status drop-down menu or enter a valid request ID in the Request ID field and select the Request ID Search button a summary of the change requests and its statuses will be displayed in search results as illustrated in Figure 3-60. The following statuses can be filtered on the Manage Data Changes page.

- Pending Approval
- Approved
- Denied

- Unable to Process
- Completed

Figure 3-60: Change Request Statuses

Manage Data Changes

Create Request for Data Change

Please select a Request Status from the drop-down list below or Search By Request ID and select the Enter button to view the corresponding requests.

Request Status:

Pending Approval

Pending Approval
Approved
Denied
Unable to Process
Completed

Search By Request ID:

Enter

(OR)

Request ID	Request Created Date	Status	Status Updated Date	NOTE	Action
DCR96	11/21/2017 8:48 AM	Pending Approval	11/21/2017 8:48 AM	Test	View
DCR95	11/21/2017 8:47 AM	Pending Approval	11/21/2017 8:47 AM	Test	View
DCR94	11/21/2017 8:46 AM	Pending Approval	11/21/2017 8:46 AM	Test	View

Issuer Administrators can review the data of the change requests displayed through the View link of the Action column as illustrated in Figure 3-61.

Figure 3-61: View Change Request

Data Change Details View

Change Request ID DCR96	Request Created Date 11/21/2017 8:48 AM
User Name	Federal EIN/TIN 321321321
Organization Legal Name Testing Non Fed Organization - TT 2.12.18	Organization Type Non-Federal Governmental Plans
Current Value Testing Non Fed Organization - Tara's	New Value test
Supplement Attributes	Attribute Organization Legal Name
Note Test	

[Back](#)

3.5.3 Organization Administrator – Data Changes

Organization Administrator can create, review, and submit data change requests through the Manage Data Changes Tab. Organization Administrator can also create new change requests through the Create Request for Data Change link available on the Edit page for Organization Administrator.

3.5.3.1 Create Data Change Requests

Once the Organization Administrator is on the Manage Data Changes page, they will be able to Create Request for Data Change through the button at the bottom of the Manage Data Changes page. The What values would you like to change drop-down menu displays the values for that Organization. Once the value for the data change is selected, the current value of the field to be changed will be displayed and the Organization admin will need to enter the New Value, or select from a predefined list of values, and enter a Reason for change (250 characters max) before selecting the Submit button.

Organization Administrator will have to select the incorporated state, if changing the Organization Type from Non-Fed to either Company or Non-Insurance Company as illustrated in Figure 3-62.

Figure 3-62: Non-Federal Government Plans to Company

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change?

Organization Type

Enter

Choose the Organization

Testing Non Fed Organization - TT 2.12.18 - FEIN -321321321 - Non-Federal Governmental Plans

Enter

Current Value	*New Value	*Reason for change
Non-Federal Governmental Plans	Company	

Please select an incorporated state:*

-Please select a state-

Back

Submit

Organization Administrator of Other Org selects the fields displayed for that organization. For multiple organizations, the Organization Administrator will see a list of organizations displayed in the drop-down menu and will need to select the organization for making the data change as illustrated in Figure 3-63. The current value will be displayed, and the user will need to enter the New Value, or select from a predefined list of values, and enter a Reason for change (250 characters max) before selecting the Submit button.

Figure 3-63: Multiple Organizations

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change?

Organization Type

Enter

Choose the Organization

-Please select the organization you are making the change for-

-Please select the organization you are making the change for-

Insurance Please - FEIN -963852741 - Company

JN Test Company 11-13-17 Edit on 3-5 - FEIN -192391823 - Company

JN Test Company Edit 3 on 3-6-18 - FEIN -817263871 - Company

JN Test Non Insurance 2-16-18 - FEIN -928379182 - Non Insurance Company

test001 Email Test Update - FEIN -111111111 - Company

Testing Non Fed Organization - TT 2.12.18 - FEIN -321321321 - Non-Federal Governmental Plans

Enter

If the Organization Administrator changes the Organization Type from Other organization to either Company or Non-Insurance Company, then a FEIN is required, and the user needs to select an incorporated state drop-down menu as illustrated in Figure 3-64.

Figure 3-64: Other Organization to a Company

Create Data Change Request

Please note, a field with an asterisk (*) before it is a required field.

What values would you like to change?

Organization Type

Choose the Organization

Mel Test - OtherOrg - Alexandria,

Current Value	*New Value	*Reason for change
Other Organization Type	-Select new value- Enter	

Once the Organization Administrator selects the Submit button on the Manage Change Request page, a **Request ID** will be assigned, along with a Pending Approval status. An on-screen Confirmation message will display as illustrated in Figure 3-65.

Figure 3-65: Confirmation Page for Change Request

Confirmation

Change request DCR119 has been successfully submitted and is currently pending approval. If you have any questions, please contact the Marketplace Service Desk (MSD) at either 1-855-267-1515 or CMS_FEPS@cms.hhs.gov.

3.5.3.2 View Data Change Requests

Organization Administrators can view data change requests on Manage Data Changes page. When the user selects the status of the change request from the Request Status drop-down menu or enters a valid Request ID in the Request ID field and selects the Request ID Search button a summary of the change requests and its statuses will be displayed in search results as illustrated in Figure 3-66. The following statuses can be filtered on the Manage Data Changes page.

- Pending Approval
- Approved
- Denied
- Unable to Process
- Completed

Figure 3-66: Change Request Statuses

Manage Data Changes

Create Request for Data Change

Please select a Request Status from the drop-down list below or Search By Request ID and select the Enter button to view the corresponding requests.

Request Status:

Pending Approval

Pending Approval

Approved

Denied

Unable to Process

Completed

Search By Request ID:

Enter

(OR)

Request ID	Request Created Date	Status	Status Updated Date	NOTE	Action
DCR96	11/21/2017 8:48 AM	Pending Approval	11/21/2017 8:48 AM	Test	View
DCR95	11/21/2017 8:47 AM	Pending Approval	11/21/2017 8:47 AM	Test	View
DCR94	11/21/2017 8:46 AM	Pending Approval	11/21/2017 8:46 AM	Test	View

Organization Administrators can review the details of the data change request by selecting the View link in the Action column as illustrated in Figure 3-67.

Figure 3-67: View Change Requests

Data Change Details View

Change Request ID DCR96	Request Created Date 11/21/2017 8:48 AM
User Name	Federal EIN/TIN 321321321
Organization Legal Name Testing Non Fed Organization - TT 2.12.18	Organization Type Non-Federal Governmental Plans
Current Value Testing Non Fed Organization - Tara's	New Value test
Supplement Attributes	Attribute Organization Legal Name
Note Test	

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3.6 Add a Relationship

You can access the Add a Relationship functionality from the Manage Organizations landing page. Through the Add a Relationship functionality, add a relationship between a third-party administrator (TPA) organization and issuers in HIOS by completing four steps. The relationship can be initiated by either the TPA or the issuer(s). In Step 1, identify the relationship type and answer if you are providing or receiving TPA services (Figure 3-68).

Figure 3-68: Add a Relationship – Step 1

< Manage Organizations

- My Organizations
- Create an Organization
- Add an Issuer
- Data Change Request
- Add a Relationship**

Add a Relationship

Please note, a field with an asterisk (*) before it is a required field.

1

Relationship Type

* What relationship are you trying to initiate?

☒ **TPA Enrollment**

* Is your organization providing or receiving the TPA Services?

☒ **My organization is providing TPA Services**

☐ **My organization is receiving TPA Services**

* Enter the organization's FEIN and select "Search"

Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.

2

Relationship Details

3

Relationship Attributes

4

Confirm Your Request

You will need to identify the other half of the relationship in Step 2, either the issuer(s) or the TPA depending on the answer provided in Step 1 (Figure 3-69).

Figure 3-69: Add a Relationship – Step 2

Manage Organizations

My Organizations

Create an Organization

Add an Issuer

Data Change Request

Add a Relationship

Add a Relationship

1

Relationship Type

Revisit this step

TPA Enrollment, Providing TPA Services,
928379182 - JN Test Non Insurance 2-16-18

2

Relationship Details

Revisit this step

* Enter the FEIN of the organization you are trying to establish a relationship with and select "Search"

Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.

192391823

SEARCH

Showing associated issuers related to "192391823 - JN Test Company 11-13-17 Edit on 3-5"

* SELECTED ORGANIZATION

192391823 - JN Test Company 11-13-17 Edit on 3-5

Showing 1-2 of 2 records Records per page 10

Select 2 issuers

Issuer Details

Registered State

☒

25880 - JN Test Company 11-13-17 Edit on 3-5

AL

☐

85586 - JN Test Company 11-13-17 Edit on 3-5

AK

First

Previous

1

Next

Last

NEXT

In Step 3, provide the relationship's effective start date and the effective end date (Figure 3-70).

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Figure 3-70: Add a Relationship – Step 3

< Manage Organizations

- My Organizations
- Create an Organization
- Add an Issuer
- Data Change Request
- Add a Relationship**

Add a Relationship

Please note, a field with an asterisk (*) before it is a required field.

- Relationship Type**
TPA Enrollment, Providing TPA Services,
817263871 - JN Test Company Edit 3 on 3-6-18
[Revisit this step](#)
- Relationship Details**
1 Issuer
[Revisit this step](#)
- Relationship Attributes**
Please enter the effective start and end date for the relationship.

*** Effective Start Date (MM/DD/YYYY)**

*** Effective End Date (MM/DD/YYYY)**

[NEXT](#)
- Confirm Your Request**

View a summary of information that was provided as part of the Add a Relationship process which includes the relationship type, organization and issuer information, and the effective start and end date displayed in Step 4 (Figure 3-71). If you have deemed the information to be correct, select Submit for the request to be approved (Figure 3-72).

Figure 3-71: Add a Relationship – Step 4

< Manage Organizations

- My Organizations
- Create an Organization
- Add an Issuer
- Data Change Request
- Add a Relationship**

Add a Relationship

Please note, a field with an asterisk (*) before it is a required field.

1

Relationship Type

TPA Enrollment, Providing TPA Services,
817263871 - JN Test Company Edit 3 on 3-6-18

Revisit this step

2

Relationship Details

1 Issuer

Revisit this step

3

Relationship Attributes

03/20/2018 to 03/21/2018

Revisit this step

4

Confirm Your Request

Please review and confirm if this is the correct information.

RELATIONSHIP TYPE

TPA Enrollment, Providing TPA Services, 817263871 - JN Test Company Edit 3 on 3-6-18

RELATIONSHIP DETAILS

85586 - JN Test Company 11-13-17 Edit on 3-5 (AK)

EFFECTIVE START DATE

03/20/2018

EFFECTIVE END DATE

03/21/2018

SUBMIT

RESET

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Figure 3-72: Add a Relationship – Confirmation Message

The screenshot shows the 'Add a Relationship' page in the HIOS Portal. On the left is a sidebar with the 'Manage Organizations' section expanded, showing options: My Organizations, Create an Organization, Add an Issuer, Data Change Request, and Add a Relationship (which is highlighted). The main content area has a green confirmation banner at the top stating: 'Confirmation: Your request has been submitted for approval. To check the status of the request, please navigate to the Manage Relationships page.' Below this is the heading 'Add a Relationship' and a note: 'Please note, a field with an asterisk (*) before it is a required field.' A progress indicator shows four steps: 1. Relationship Type (active), 2. Relationship Details, 3. Relationship Attributes, and 4. Confirm Your Request. Under step 1, there is a required field label '* What relationship are you trying to initiate?' with a radio button selected for 'TPA Enrollment'. A green 'NEXT' button is positioned below the field.

3.7 Organization Search

On the Organization Search page (Figure 3-73), you can search and view details for organizations registered in HIOS with a valid FEIN. The organization details are displayed in an editable format for users who already have the company administrator and organization administrator for the specific organization that is returned in the search.

Figure 3-73: Organization Search

The screenshot shows the 'Organization Search' page in the HIOS Portal. The top navigation bar includes 'Home' and 'Knowledge Center'. The left sidebar shows the 'Manage Organizations' section expanded, with 'Organization Search' highlighted. The main content area is titled 'Search Organizations' and contains a search form. The form has a required field label '* Enter Federal EIN/TIN' and a note: 'Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.' Below the note is a text input field and a grey 'SEARCH' button.

3.7.1 Company/Organization Administrator view

The organization details (Figure 3-74) are displayed in an editable format for users who already have the company administrator and organization administrator for the specific organization that is returned in the search.

Figure 3-74: Organization Search Results

The screenshot displays the 'Search Organizations' page. On the left is a sidebar with a 'Manage Organizations' header and a list of links: 'My Organizations', 'Create an Organization', 'Add an Issuer', 'Data Change Request', 'Add a Relationship', and 'Organization Search' (which is highlighted). The main content area is titled 'Search Organizations' and includes a note: 'Please note, a field with an asterisk (*) before it is a required field.' Below this is a search form with a label '* Enter Federal EIN/TIN', instructions to enter a 9-digit numeric value, a text input field containing '000000007', and a 'SEARCH' button. The search results section, titled 'Search results for "000000007"', shows a result for 'Insurance Co 000000007'. This result is displayed in a card with two columns: the left column shows 'Federal EIN/TIN' as '000000007' and 'Organization Type' as 'Company'; the right column contains two links, 'Organization Details' and 'Issuer Information'.

Insurance Co 000000007	
Federal EIN/TIN 000000007	Organization Details Issuer Information
Organization Type Company	

3.7.2 All HIOS Users View

The organization details are displayed in a read-only format for all the HIOS users who do not have company administrator or organization administrator role (Figure 3-75). The Issuer details are also displayed in a read-only format for all the HIOS users who do not have company administrator or organization administrator role (Figure 3-76 and Figure 3-77).

Figure 3-75: Organization Search – Organization Details Page for All HIOS Users

Organization Details

FMLoadTest0139

Organization Legal Information

Organization Type	Incorporated State
Company	Virginia (VA)
Organization Legal Name	
FMLoadTest0139	
Federal EIN/TIN	Validation Status
000038398	Validation in Process

Additional Information

Group Name

FMLoadTest Group

Domiciliary Address

Note: The domiciliary address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.

Address

Load Test Drive
Office 364
Fairfax, Virginia 93772

[← BACK TO SEARCH ORGANIZATIONS](#)

Figure 3-76: Organization Search – Issuer Information for All HIOS Users

Issuer Information

FMLoadTest0139

The following issuers are associated to FMLoadTest0139.

Showing 1-10 of 12 records Records per page 10 ▼

Issuer ID #	Issuer Name #	Registered State #	Actions
10020	FMLoadTest0139	Hawaii	Issuer Details
12869	FMLoadTest0139	Indiana	Issuer Details
22035	FMLoadTest0139	Kentucky	Issuer Details
43578	FMLoadTest0139	United States Virgin Islands	Issuer Details
49367	FMLoadTest0139	New Jersey	Issuer Details
54619	FMLoadTest0139	Mississippi	Issuer Details
70072	FMLoadTest0139	West Virginia	Issuer Details
86092	FMLoadTest0139	Texas	Issuer Details
89346	FMLoadTest0139	Alaska	Issuer Details
90798	FMLoadTest0139	Connecticut	Issuer Details

First Previous **1** 2 Next Last

[+ BACK TO SEARCH ORGANIZATIONS](#)

Figure 3-77: Organization Search – Issuer Details for all HIOS Users

Issuer Details
FM-Company-IMPL0-087

Organization Legal Information

Issuer ID 85941	Incorporated State Georgia(GA)
Issuer Legal Name FM-Company-IMPL0-087	Federal EIN/TIN 103213537
NAIC Company Code 38678	NAIC Group Code 38678

Additional Information

Issuer Marketing Name
FM-Company-IMPL0-087ISSUER-AK

Market Type and Associated Line of Business

Small Group
☒ Mini-Med

Domiciliary Address

Note: The domiciliary address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.

Address
593 Herndon Pkwy
Herndon, Virginia 20170

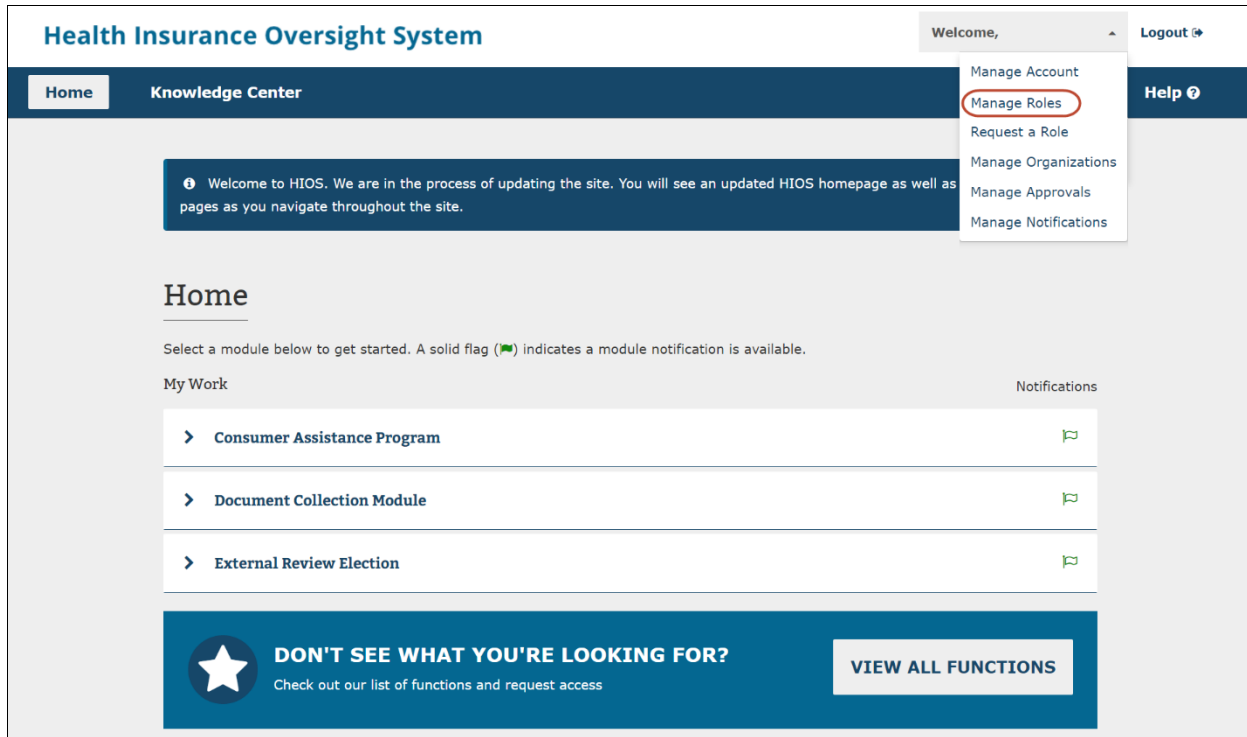
[• BACK TO ISSUER INFORMATION](#)

3.8 Role Management

All module access and role requests are to be completed in the Role Management section. You will be able to view your existing roles and access status as well as be able to submit module access permission requests and cross-reference requests to registered companies, issuers, and states (for state users only) all under Role Management.

The HIOS Home Page will display a Manage Roles link from the drop-down as illustrated in Figure 3-78.

Figure 3-78: HIOS Portal Home Page – Manage Roles



3.8.1 Manage Roles Page

You can view your existing roles and pending role requests on the Manage Roles page as displayed in Figure 3-79 and Figure 3-80.

The table will display the pending role requests first and then the approved requests after.

Figure 3-79: Manage Roles

Manage Roles

The table below displays your pending role requests and your approved roles. Please select "Add a new role" below to request a role.

[Add a new role](#)

Showing 1-10 of 206 records Records per page 10

Module	Role	Role Type	Association	Status	Action
Minimum Essential Coverage	Submitter	N/A	120312301 - SDVNnew10312019	Pending	View Details
Rates & Benefits Information System	Issuer	Small Group Market Validator	65314 - SDTEST2 - VA	Approved	View Details
Rates & Benefits Information System	Issuer	Small Group Market Submitter	65314 - SDTEST2 - VA	Approved	View Details
Rates & Benefits Information System	Issuer	Individual Market Validator	65314 - SDTEST2 - VA	Approved	View Details

You may select View Details to view additional information about the Pending or Approved role request. You will be navigated to the View Role Details page which will vary depending on the status of the role request. The two variations of the page are displayed in Figures 3-80 through Figure 3-83.

Figure 3-80: View Role Details – Pending Role Request

Health Insurance Oversight System

Welcome, [Logout](#)

[Home](#) [Knowledge Center](#) [Help](#)

View Role Details

Date Requested 08/04/2017	Role Type Submitter
Status Pending	Contact Type Primary Contact
Module Non-Federal Governmental Plans	Association Type NONFED
Role NonFed Submitter	Association Testing Non Fed Organization - Tara's

[CANCEL ROLE REQUEST](#)

[← BACK TO MANAGE ROLES](#)

Figure 3-81: View Role Details – Approved Role Request

Health Insurance Oversight System Welcome, [Logout](#)

[Home](#) [Knowledge Center](#) [Help](#)

View Role Details

Date Approved 08/08/2017	Role Type Assister Type
Status Approved	Contact Type N/A
Module Assister	Association Type GRANTEE
Role Assister Submitter	Association SBD I

[DELETE ROLE REQUEST](#)

[BACK TO MANAGE ROLES](#)

If you select the Cancel Role Request or Delete Role Request from the View Role Details page, the following confirmation pop-ups will be displayed.

Figure 3-82: Role Cancellation Confirmation

Role Cancellation Confirmation

You have selected to **cancel** a pending role request. Please confirm this is the task you want to complete.

[RETURN TO VIEW DETAILS](#) [CONFIRM CANCELLATION](#)

Figure 3-83: Role Deletion Confirmation

Role Deletion Confirmation

You have selected to **delete** an existing role. Please confirm this is the task you want to complete.

[RETURN TO VIEW DETAILS](#) [CONFIRM DELETION](#)

To view existing roles, complete the following steps:

1. From the HIOS Portal Home Page, select the Manage Roles link.
2. View additional details for the role request by selecting View Details in the Actions column.
3. Cancel or delete your pending or approved role requests from the View Role Details page.
4. Confirm your action on the pop-up. Once the request is submitted, the system shall display a confirmation message on the Manage Roles page.

3.8.2 Requesting a Role

To request an additional role or module access, a role request must be submitted. Be sure to review the Browse by Module page to ensure that the correct module and role is requested within the module.

To request a role, complete the following steps:

1. From the HIOS Portal Home Page, select the Request a Role link.
2. Select the Module needed.
3. Select the Requested Role. The system will only display the specific roles that apply to the module selected.
4. If applicable for the module and role selected, select the role type.
 - The role type radio buttons shall **NOT** be displayed for the following modules:
 - o ERE
 - o Non-Fed
 - o Financial Management
 - o Qualified Health Plan (QHP) Issuer Module
 - o QHP Rating Module
 - o QHP Benefits and Service Area
 - o State Evaluation module
 - o Unified Rate Review System
5. If applicable for the module, role, and role type selected, select the contact type.
6. Select the Association Type. Enter the information and select Search. If a search result is not displayed, the user registers the organization first or verify that the issuer, site, or state reference provided is accurate.
7. Review the role request and select the Submit button. The Reset button is also an option if the user wants to reset the steps and start over.

Figure 3-84 displays the role request for the Ratings/Reports Viewer role within the Marketplace Quality Management (MQM) module.

Figure 3-84: Ratings/Reports Viewer Role Request

Health Insurance Oversight System Welcome, [Logout](#)

[Home](#) [Knowledge Center](#) [Help](#)

Request a Role

Please note, a field with an asterisk (*) before it is a required field. For a detailed description of each module and available roles, please visit the [Browse by Module](#) page in the Knowledge Center.

Please note, you must first have an organization registered in HIOS in order to request access to a module.

- 1 Select a module** Marketplace Quality Module [Revisit this step](#)
- 2 Select a role** Ratings/Reports Viewer [Revisit this step](#)
- 3 Add association** 4 Associations [Revisit this step](#)

To add an Association to this role request, you must search for it in the system.

* Association Type

☒ **HIOS Issuer ID**

* Search for association

Please enter the HIOS Issuer ID below and select the Search button. Once an issuer is found, select the "Add" button to associate the Issuer to the role. The HIOS Issuer ID must be a 5 digit, numeric value. You must add at least 1 Issuer and may add up to 10 Issuers per submission.

[SEARCH](#)

Showing results for "69834"

69834 - Test Demo Comp (VA) [Remove](#)

[NEXT](#)

4 ITEMS ADDED TO REQUEST

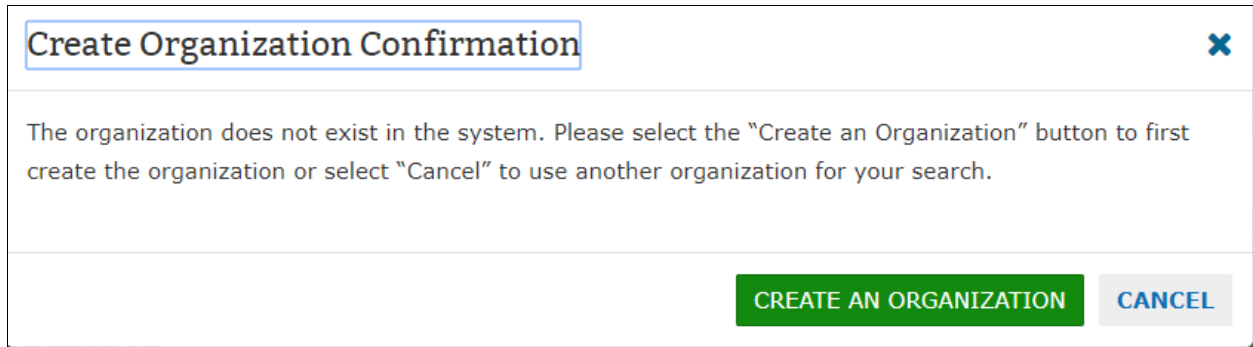
DE 53313 x **MI 55158 x**
IL 67116 x **VA 69834 x**
- 4 Confirm your request**

You can seek to request the Ratings/Reports Viewer role can associate themselves to multiple Issuers per request. Search for a valid Issuer and then select Add.

The system validates if there is an existing role request (for same role and association) in the Pending Requests. An error message will appear if the user already has a duplicate pending or approved role request.

The system will check that the Issuer IDs entered exist within HIOS and that you do not already have an existing association with the selected Organization. If an organization does not exist in the system, a pop-up message will display that allows you to first create the organization as displayed by Figure 3-85.

Figure 3-85: Organization Not Found – Navigate to Create an Organization



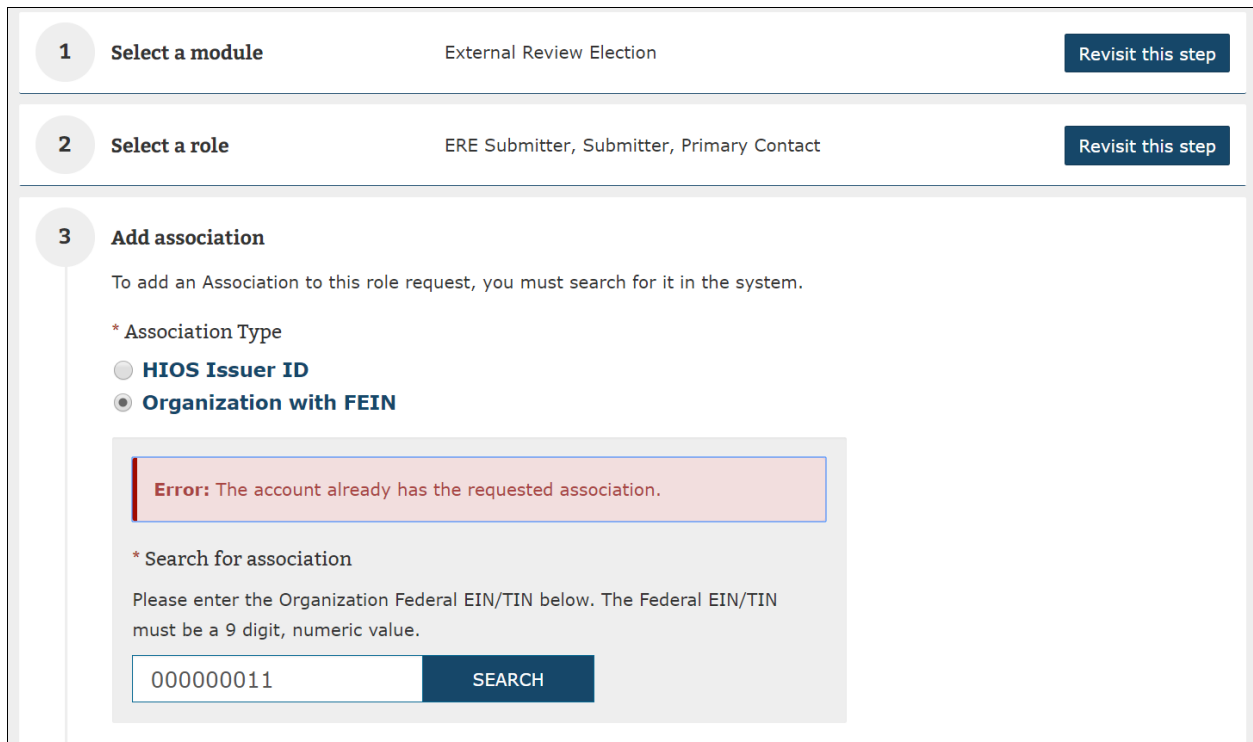
Create Organization Confirmation ✕

The organization does not exist in the system. Please select the "Create an Organization" button to first create the organization or select "Cancel" to use another organization for your search.

CREATE AN ORGANIZATION **CANCEL**

The system shall display the error message as in Figure 3-86 if you already have a role associated with the ID entered.

Figure 3-86: Existing Association Error Message



1 Select a module External Review Election **Revisit this step**

2 Select a role ERE Submitter, Submitter, Primary Contact **Revisit this step**

3 Add association

To add an Association to this role request, you must search for it in the system.

* Association Type

☐ **HIOS Issuer ID**

☒ **Organization with FEIN**

Error: The account already has the requested association.

* Search for association

Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.

000000011 **SEARCH**

Once you have submitted the desired role request, the system will display a Confirmation screen, displayed in Figure 3-87, to notify you of successful submission.

Figure 3-87: Role Request Confirmation Page

Confirmation: Your role request has been submitted for approval. Please log back in within 1-2 business days to check the status. ✕

Request a Role

Please note, a field with an asterisk (*) before it is a required field. For a detailed description of each module and available roles, please visit the [Browse by Module](#) page in the Knowledge Center.

Please note, you must first have an organization registered in HIOS in order to request access to a module.

1 Select a module

3.8.3 Requesting the Organization Role Approver Role

The Organization Role Approver (Figure 3-88) is a representative who is solely responsible for approving and denying pending role requests for their assigned organizations and/or issuers.

To request the Organization Role Approver role, complete the following steps:

1. From the HIOS Portal Home Page, select the Request a Role link.
2. Select the HIOS Portal Module and then select Next.
3. Select the Organization Role Approver Role and then select Organization Role Approver (ORA) as the role type. Select either Primary ORA and Backup ORA for the contact type and then select 'Next'.
4. Select the Association Type. Enter the information and select Search. If a search result is not displayed, the user registers the organization first or verify that the issuer, site, or state reference provided is accurate.
5. Enter the required Additional Details and select the checkbox to certify the information is correct. Select next (This role request requires that the user provide accurate information regarding job function, managers email address, managers name, provide a business justification and certify that the above information is correct. Failure to provide accurate and concise information may result in a denial of the role request.).
6. Review the role request and select the Submit button. The Reset button is also an option if you want to reset the steps and start over.

Figure 3-88: Request a Role – Organization Role Approver

Request a Role

Please note, a field with an asterisk (*) before it is a required field. For a detailed description of each module and available roles, please visit the [Browse by Module](#) page in the Knowledge Center.

Please note, you must first have an organization registered in HIOS in order to request access to a module.

1	Select a module	HIOS Portal	Revisit this step
2	Select a role	Organization Role Approver, Organization Role Approver (ORA), Primary ORA	Revisit this step
3	Add association		Revisit this step
4	Additional Details * Job Function * Your Manager's Email Address * Your Manager's Name Specify CMS POC or Account Manager * Provide Business Justification 1000 characters left Maximum 1000 characters ☐ I certify that the above information is true and that I should have the Organization Role Approver Role. NEXT		
5	Confirm your request		

5

Confirm your request

Please select "Submit" to complete your request.

MODULE

HIOS Portal

ROLE

Organization Role Approver, Organization Role Approver (ORA), Primary ORA

ASSOCIATIONS

☐ I certify that my organization is responsible for informing HIOS if I leave the organization or no longer require the ORA role. If this occurs, my organization will submit a service ticket to MSD requesting the ORA role to be removed from my account.

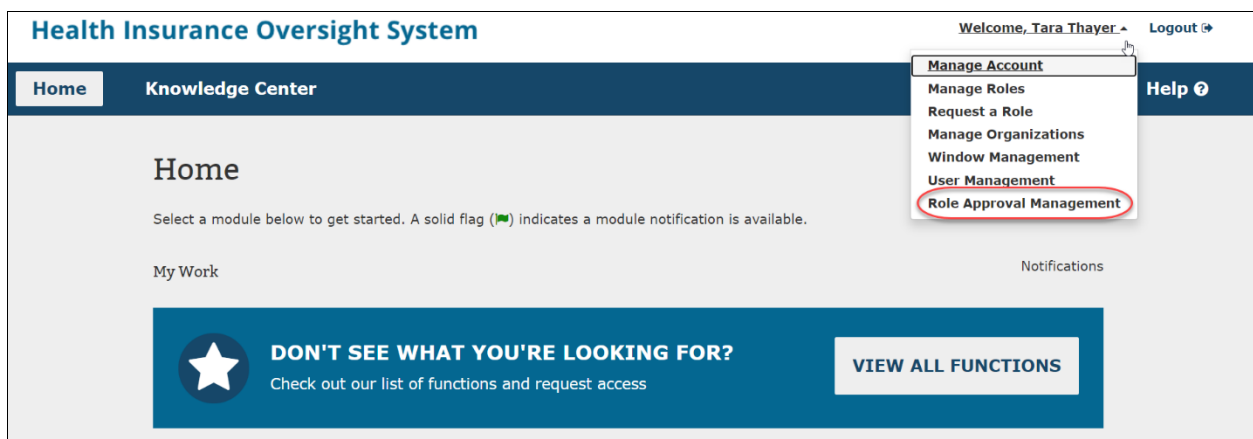
SUBMIT

RESET

3.9 Approvals

Users, with the appropriate role for their module, can Approve or Deny user role requests at both the module and organizational level. Users with approval roles will have the Role Approval Management link displayed in the drop-down on the HIOS Portal Home Page as displayed in Figure 3-89.

Figure 3-89: HIOS Portal Home Page – Approval Management



Under the Approvals tabs, you will have the option to view all Pending Approval, Approved, and Denied requests as displayed in Figure 3-90.

Figure 3-90: Approval Tabs – Request Status

Approval Management

Please note, a field with an asterisk (*) before it is a required field.

Role Approvals

Please select from the drop-down lists below to view corresponding requests.

* Role Approval Type
User Role Requests

* Module
Assister

* Request Status
Pending Approval

GET REQUESTS

Showing results for "User Role Requests" in the "Assister" module with the request status "Pending Approval".

Showing 1-1 of 1 records Records per page 10

Select all	Requester Username	Email	Module	Role	Association Type	Association	User Type	User Sub-Type
☐			Assister	Assister State	STATE	IL	N/A	N/A

First

Previous

1

Next

Last

APPROVE

DENY

Users with the HIOS User Role Approver role will see the User Role Requests tab, as displayed in Figure 3-91. Under this tab, users can approve or deny role requests for the modules for which they have permissions.

Figure 3-91: User Role Request Approvals

Approval Management

Please note, a field with an asterisk (*) before it is a required field.

Role Approvals

Please select from the drop-down lists below to view corresponding requests.

* Role Approval Type
User Role Requests

* Module
Assister

* Request Status
Pending Approval

GET REQUESTS

Showing results for "User Role Requests" in the "Assister" module with the request status "Pending Approval".

Showing 1-1 of 1 records Records per page 10

Select all	Requester Username	Email	Module	Role	Association Type	Association	User Type	User Sub-Type
☐			Assister	Assister State	STATE	IL	N/A	N/A

First Previous **1** Next Last

APPROVE **DENY**

Figure 3-92 displays the Organization Role Requests tab which only users with the Organization Role Approver role will be able to see. This role allows users to approve or deny requested associations between a user and a module for a particular Organization.

Figure 3-92: Organizational User Role Approvals

Approval Management

Please note, a field with an asterisk (*) before it is a required field.

Role Approvals

Please select from the drop-down lists below to view corresponding requests.

* Role Approval Type
Organization Role Requests

* Module
Pharmacy Benefits Managers

* Request Status
Pending Approval

GET REQUESTS

Showing results for "Organization Role Requests" in the "Pharmacy Benefits Managers" module with the request status "Pending Approval".

Showing 1-1 of 1 records Records per page 10

Select all	Requester Username	Email	Module	Role	Association Type	Association	User Type
☐			Pharmacy Benefits Managers	PBM Submitter	COMPANY	000000001 ,	N/A

First Previous **1** Next Last

APPROVE **DENY**

To approve or deny a record within one of the approvals tabs, the users would need to select the checkboxes next to the record, and then select the Approve or Deny button to approve or deny the selected records.

Once the users have selected at least one records checkbox and selected the Approve or Deny button, the users will be redirected to a Confirmation page where the users will be notified of a successful request, and/or if the system encountered any errors in processing the request.

Figure 3-93 displays the User Role Approvals Confirmation page where the system encountered an error in processing an Approval or Denial request.

Figure 3-93: User Role Request Approvals Confirmation Page

Confirmation: The role request(s) have been successfully approved.

Approval Management

Please note, a field with an asterisk (*) before it is a required field.

Role Approvals

Please select from the drop-down lists below to view corresponding requests.

* Role Approval Type
User Role Requests

* Module
State Flexibility Grant

* Request Status
Pending Approval

GET REQUESTS

Records that encountered an error will return to the Pending Approval Request Status once the users select the Continue button if it was not already successfully approved by any other user.

Some approval requests may be partially successful. The confirmation page will display the records that encountered error on top of the records that were successfully approved or denied.

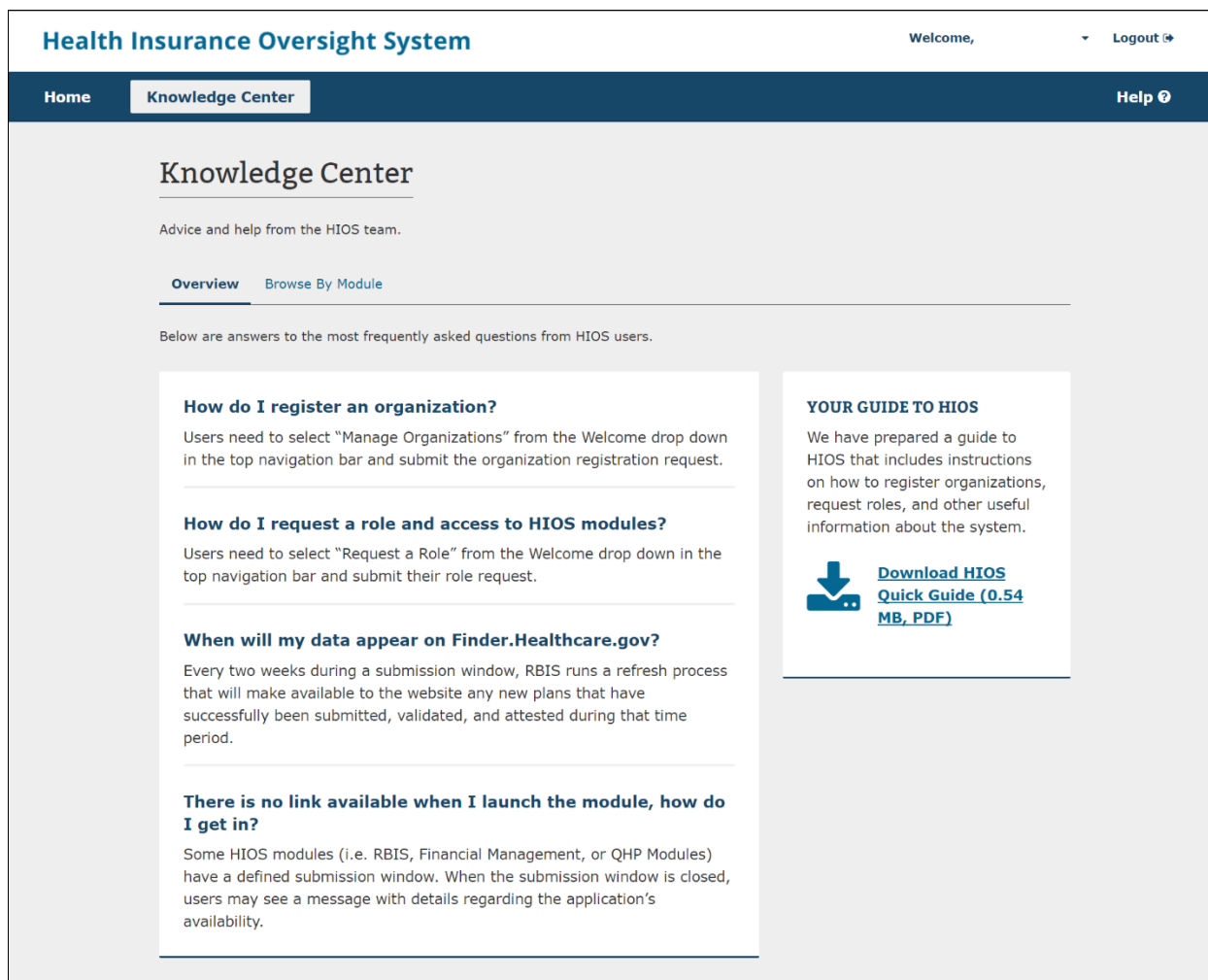
To approve or deny further records, the users may select the Continue button to be redirected to the previous page.

3.10 Knowledge Center

The following sections describe the different areas within the Knowledge Center.

3.10.1 Overview Page

The Knowledge Center – Overview page displays some of the most frequently asked questions (FAQs) from HIOS users (Figure 3-94). The page provides answer to these high-level questions. Additionally, you can download the HIOS Portal quick guide Portable Document Format (PDF) document which provides more in-depth detail to the main Portal functionality.

Figure 3-94: Knowledge Center – Overview Page

3.10.2 Browse by Module Page

The Knowledge Center – Browse by Module page displays the list of modules available within HIOS. When you expand a module accordion, you may read about the purpose of the module, the roles available to request in the module, and documents available for download if applicable. Figure 3-95 displays a portion of the Knowledge Center – Browse by Module page and Figure 3-96 displays one of the expanded accordions.

Figure 3-95: Knowledge Center – Browse by Module Page

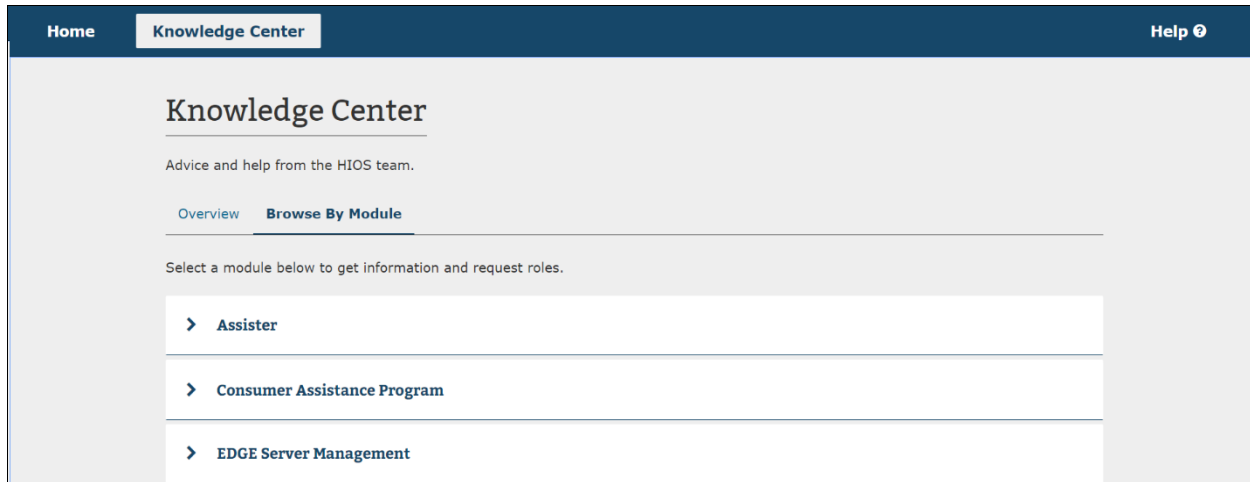
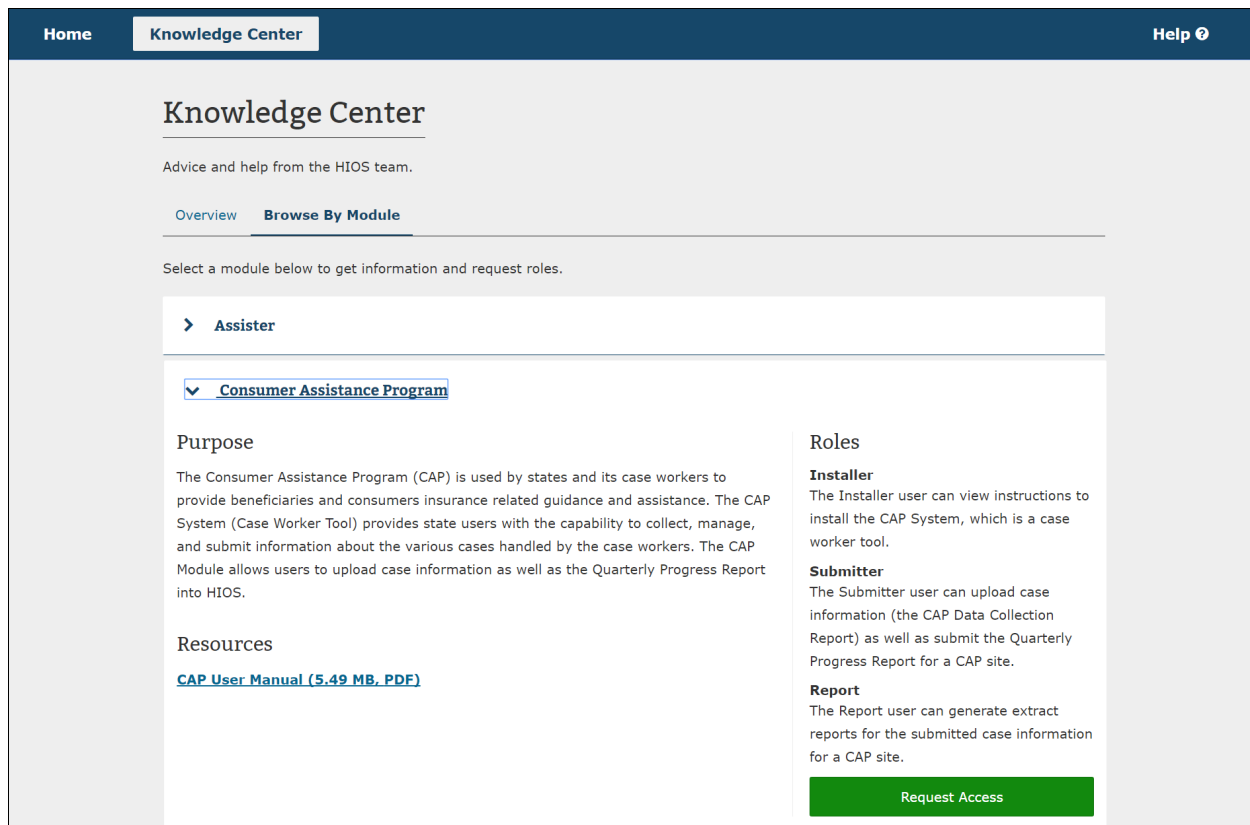


Figure 3-96: Knowledge Center – Browse by Module Expanded Accordion



3.10.3 Glossary Page

The Knowledge Center – Glossary page (Figure 3-97): A new tab has been added to the Knowledge Center called Glossary. When you select the Glossary tab, a page displays each of the HIOS terms with the definition underneath listed in alphabetical order.

Figure 3-97: Knowledge Center – Glossary

Knowledge Center

Advice and help from the HIOS team.

[Overview](#)
[Browse By Module](#)
[Glossary](#)

The below glossary includes key HIOS terms.

Association Product

Insurance products that are sponsored by an association and which are exempt from certain requirements.

Clinical Quality Measures

Information collected from healthcare providers regarding the effectiveness of care they have provided to subscribers. This information is used to generate QHP ratings as part of the Quality Rating System (QRS).

Company

An insurance company that is a legal entity licensed to sell health insurance products and plans.

Component ID

The product I.D. and the issuer I.D. combine with information at the plan level to create a unique identifier called the Standard Component I.D which maps the combination of specific benefits and cost sharing arrangements sold for a specific price.

Domiciliary Address

The domiciliary address is the address where the establishment is maintained or where the governing power of the enterprise is exercised.

4 Troubleshooting and FAQs

4.1 FAQs

Table 4-1 details FAQs as it relates to Portal.

Table 4-1: FAQs

Question	Answer
I forgot my password. What do I do?	Select the Forgot Password link on the CMS Enterprise Portal.
I do not see the module access button for the application I would like to access. What do I do?	Refer to the User Role Request section.
I received an error stating that I am locked out of my account. What should I do?	Contact the Marketplace Service Desk (MSD) at 1-855-CMS-1515 or email them at CMS_FEPS@cms.hhs.gov .
I do not see the specific issuer or company information I am looking for within for a specific module. What should I do?	Refer to User Role Request section.

4.2 Support

For additional assistance, please contact the MSD at CMS_FEPS@cms.hhs.gov or at 1-855-267-1515. This is the CMS Help Desk.

5 Acronyms

Table 5-1 details the acronyms and their definitions used throughout this document.

Table 5-1: Acronyms

Acronym	Definition
CCIIO	Center for Consumer Information and Insurance Oversight
CMS	Centers for Medicare & Medicaid Services
ERE	External Review Election
FAQs	Frequently Asked Questions
FEIN	Federal Employee Identification Number
HHS	Department of Health and Human Services
HIOS	Health Insurance Oversight System
IDM	Identity Management System
MFA	Multi-Factor Authentication
MQM	Marketplace Quality Management
MSD	Marketplace Service Desk
NAIC	National Association of Insurance Commissioners
PDF	Portable Document Format
PII	Personally Identifiable Information
QHP	Qualified Health Plan
SSN	Social Security Number
TIN	Tax Identification Number
TPA	Third Party Administrator
UI	User Interface
UM	User Manual
URL	Uniform Resource Locator