

## **A Quick Reference Guide to Obtaining a Controlling Health Plan HPID**

### **High Level Steps:**

1. Register in the CMS Enterprise Portal
2. Register for a HIOS Account and gain access to HIOS
3. Register the Organization in HIOS
4. HIOS User Role Management
5. HPOES – Submitter completes the CHP HPID Application
6. HPID Number is Assigned

Users that need to obtain a Controlling Health Plan (CHP) Health Plan Identifier (HPID) will go through the CMS Enterprise Portal, access the Health Insurance Oversight System (HIOS), and apply for an HPID from the Health Plan and Other Entity System (HPOES). Detailed steps are provided below:

### **SECTION 1: Accessing CMS Enterprise Portal and HIOS**

**Step 1:** Navigate to the CMS Enterprise Portal (<https://portal.cms.gov>) and click “New User Registration” on the right side of the page.

**Step 2:** Complete the New User Registration process and receive email confirmation of user registration.

**Step 3:** Navigate back to the CMS portal and login using the new credentials.

**Step 4:** To establish access to HIOS through the CMS Enterprise portal, click “Request Access Now” and select HIOS from the system catalog. Select “HIOS Issuer” from the second dropdown that appears on the following page.

**Step 5:** Navigate to the HIOS registration page using the URL provided on the bottom of the page and complete the HIOS user registration process.

**Step 6:** Once the HIOS user registration request has been reviewed and approved by the HIOS Helpdesk, an email containing the HIOS authorization code will be provided.

**Step 7:** Repeat steps 3 and 4 in the CMS Enterprise Portal and enter the authorization code on the “Request New System Access” page.

**Step 8:** Log out of the CMS Enterprise Portal and log back in. Users should see a yellow “HIOS” button on the top left of the dashboard indicating successful access established to HIOS.

**Step 9:** Click on the yellow HIOS button, followed by the “Access HIOS” link on the left side of the page to navigate to the HIOS Homepage.

### **SECTION 2: HIOS Organization Registration**

**Step 1:** Click on the “Manage an Organization” button on the left side of the HIOS homepage. The user will select “Create New Organization” from the first dropdown and specify their organization type in the second dropdown.

**Step 2:** To determine if the organization already exists in HIOS, users will search by Federal Employer Identification Number (FEIN). If the organization does not exist in HIOS, users will need to click “Create Organization” at the bottom of the page and fill out the required fields on the next 2 pages.

**Step 3:** After submitting the organization request, users will receive an email notification once it has been reviewed and approved by the HIOS Helpdesk.

### **SECTION 3: HIOS Role Management**

**Step 1:** Once the organization has been successfully registered, click on “Role Management” button on the HIOS home page.

**Step 2:** Navigate to the “Request Role” tab, select the HPOES module, specify the Submitter role, and identify the company association for the user by entering the FEIN.

**Step 3:** Submit the role request.

**Step 4:** Receive an email notification once the role request has been reviewed and approved by the HIOS Helpdesk.

The below steps outline the process to obtain an HPID for a Controlling Health Plan:

1. Submitter User gains access to HPOES
2. Submitter User Completes and Submits the CHP HPID Application
3. The System approves the application
4. An HPID number is assigned

Users have the ability to obtain more than one HPID per Controlling Health Plan Organization:

Users may wish to complete more than one Controlling Health Plan HPID application per organization registered within HIOS. In this case, the user would proceed with the same application process but differentiate each CHP using the ‘CHP Description’ field displayed on the CHP application page. This field is optional for the first CHP application and required for the organization’s subsequent CHP applications.

### **SECTION 4: CHP HPID Application**

**Step 1:** Click on the “HPOES” button on the left side of the HIOS homepage.

**Step 2:** Select the “Apply for CHP HPID” button under the Controlling Health Plan (CHP) Function section on the left side of the HPOES homepage to initiate a CHP HPID application for the associated organization.

**Step 3:** Select the organization from the dropdown, provide a CHP Description (if desired) and provide either an NAIC number or Payer ID. If the Submitter user does not wish to provide either, they may enter “Not Applicable” in the Payer ID field.

**Step 4:** Certify to the accuracy of the application and submit it for system approval.

**Step 5:** Receive email confirmation of their CHP application submission.

**Step 6:** Receive a separate email confirmation of the approval of their CHP application with the newly assigned HPID.

### **SECTION 5: HPID number has been assigned**

**Note:** *The submitter user will receive an email notification once the application has been approved with the assigned HPID number. The HPID number will also be available to view within HPOES.*