

## **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. HPOES – Authorizing Official Approves the Application
7. 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 then “Request New System Access,” selecting “HIOS” and “HIOS User” from the dropdowns.

**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. To determine if the organization already exists in HIOS, users will search by Federal Employer Identification Number (FEIN).

**Step 2:** If the organization does not exist in HIOS, users will need to register their organization by selecting an organization type, clicking on “Create Organization” at the bottom of the page, and filling out the information on the page including the domiciliary address.

**Step 3:** Receive an email notification once the organization request 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, the requested role (Submitter or Authorizing Official), and identify the company association for the user by entering the FEIN, and submit the role request.

**Step 3:** Receive an email notification once the role request has been reviewed and approved by the HIOS Helpdesk.

### **DESCRIPTION OF HPOES APPLICATION PROCESS**

In order to submit the application and obtain an HPID for a Controlling Health Plan, **both the Submitter and Authorizing Official users must have approved access to HPOES for their respective organization.** The below steps outline the process for each user to complete to obtain an HPID for a Controlling Health Plan:

1. Both the Submitter User and Authorizing Official gain access to HPOES
2. The Submitter User Completes the CHP HPID Application
3. The Submitter User submits the application for approval
4. The Authorizing Official reviews the application
5. The Authorizing Official approves the application
6. An HPID number is assigned

### **SECTION 4: CHP HPID Application (Submitter User)**

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

**Step 2:** Select the “Create Profile and Apply for 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 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. The organization must have an approved Authorizing Official in order to proceed forward with the application.

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

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

### **SECTION 5: CHP HPID Application (Authorizing Official)**

**Step 1:** Receive an email notification when an application has been submitted and is awaiting their approval.

**Step 2:** Click on the “HPOES” button on left side of the HIOS homepage.

**Step 3:** Click the “Pending Tasks” button on the left side of the HPOES homepage and select the application to be reviewed.

**Step 4:** Approve or reject the application.

**Step 5:** Once the Authorizing Official approves the application, an HPID will be assigned to the CHP.

**SECTION 6: 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.*