

# Enterprise Identity Management (EIDM) Health Insurance Oversight System (HIOS) Registration



# Agenda

- New Health Insurance Oversight System (HIOS) Home page available in April 2017
- HIOS Existing Users
- HIOS New Users
  - Create an Enterprise Identity Management System(EIDM) account
  - Create a HIOS account
  - Register a Device for Multi-Factor Authentication (MFA)
  - Access HIOS in the Centers for Medicare & Medicaid Services (CMS) Enterprise Portal
  - Register the Organization in HIOS
  - Create Issuer IDs
- Request User Roles in HIOS
- Manage Issuer Information
- Add and Edit Products
- Request Standard Component IDs
- Access the Qualified Health Plan (QHP) Modules
- New HIOS Portal Functionality



# New HIOS Home Page

# HIOS Home Page – Before April 2017

Users will see the green links on the HIOS Home Page to access HIOS modules.



**Health Insurance Oversight System**

[ACCESS PM](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome

### HIOS Home Page

**Organization Management & Administrative Functions:**

- [Manage Account](#)
- [Manage an Organization](#)
- [Role Management](#)

**HIOS Functions**

- [HIOS Plan Finder Product Data Collection \(PF\)](#)

**HIOS Main Page Announcements:**

Welcome to the Health Insurance Oversight System (HIOS).  
HIOS will be accessible through the CMS Enterprise Portal.

The following Modules are now live in HIOS:

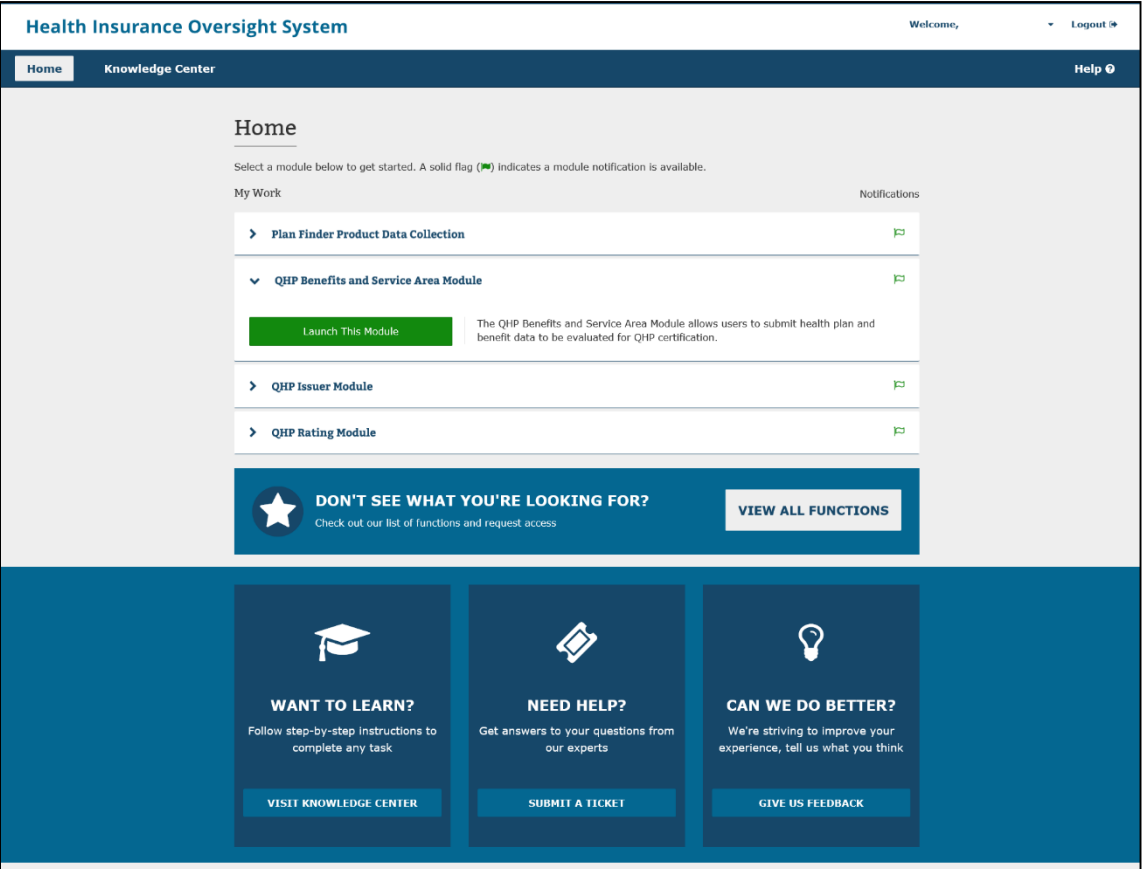
- HIOS Portal
- Plan Finder and Product Data Collection Module (PF)
- Rates and Benefits Information System (RBIS)
- Consumer Assistance Program (CAP)
- Medical Loss Ratio Data Collection System (MLR)
- Rate Review System (RRJ)
- Rate Review Grants Reporting System (RRG)
- Health Plan and Other Entity Enumeration System (HPOES)
- Document Collection Module- Form Filing Module (DCM- FFM)
- Document Collection Module- Market Conduct Module (DCM-MCM)
- Document Collection Module- State Document Collection (SDC)
- Minimum Essential Coverage (MEC)
- Non Federal Governmental Plan (Non-Fed)
- Assister (NAV)
- External Review Election (ERE)
- Marketplace Quality Module (MQM)

For any further inquiries or questions, please contact the Exchange Operations Support Center (XOSC) at [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov) or 1-855-267-1515.

[Accessibility](#) | [Rules of Behavior](#) | [Web Policies](#) | [File Formats and Plug-Ins](#)

# HIOS Home Page – April 2017

- HIOS redesign efforts are currently in development
- The new HIOS Home page will be available in April
- Users will select a module and then activate the “Launch This Module” link




Health Insurance Oversight System





Welcome, Logout


Home Knowledge Center Help


## Home


Select a module below to get started. A solid flag  indicates a module notification is available.


My Work Notifications

- > Plan Finder Product Data Collection 
- ▼ QHP Benefits and Service Area Module   
[Launch This Module](#) The QHP Benefits and Service Area Module allows users to submit health plan and benefit data to be evaluated for QHP certification.
- > QHP Issuer Module 
- > QHP Rating Module 

 **DON'T SEE WHAT YOU'RE LOOKING FOR?**  
Check out our list of functions and request access [VIEW ALL FUNCTIONS](#)

 **WANT TO LEARN?**  
Follow step-by-step instructions to complete any task [VISIT KNOWLEDGE CENTER](#)

 **NEED HELP?**  
Get answers to your questions from our experts [SUBMIT A TICKET](#)

 **CAN WE DO BETTER?**  
We're striving to improve your experience, tell us what you think [GIVE US FEEDBACK](#)



# HIOS Existing Users

# Existing HIOS Users – Before April 2017

Users with an existing HIOS account will not need to register again or create organizations in HIOS but should verify their account information. Before April follow these steps:

- Use the “Manage Account” function to update user information
- Use the “Manage an Organization” function to verify company information and Issuer IDs
- Use the “Role Management” function to view existing user roles or request new roles

**Health Insurance Oversight System**

ACCESS PM HOME FAQ CONTACT US SIGN OUT

Welcome

### HIOS Home Page

**Organization Management & Administrative Functions:**

- Manage Account
- Manage an Organization
- Role Management

**HIOS Functions**

- HIOS Plan Finder Product Data Collection (PF)

**HIOS Main Page Announcements:**

**Obtaining a Health Plan Identifier (HPID)**

Users needing to obtain an HPID for their organization will need to take the following steps in HIOS:

1. Register the organization in HIOS
2. Request access to the HPOES module through user role management
3. Complete an HPID application within the HPOES module
4. Once an HPID application has been successfully submitted, an HPID number will be assigned

Users may also access an HPID Quick Guide that provides an easy step-by-step reference for completing the necessary steps in HIOS and HPOES to obtain an HPID. You can view the Quick Guide in [graphic](#) or a [text](#) form at <http://www.cms.gov/Regulations-and-Guidance/HIPAA-Administrative-Simplification/Affordable-Care-Act/Health-Plan-Identifier.html>.

# Existing HIOS Users – April 2017

Users with an existing HIOS account can verify their account information using the following steps:

- Use the “Manage Account” function to update user information
- Use the “Manage Roles” function to view existing user roles or request new roles
- Use the “Manage Organizations” function to verify company information and Issuer IDs

**Health Insurance Oversight System**

Welcome, ▲ Logout

Home Knowledge Center Help

**Home**

Select a module below to get started. A solid flag (🚩) indicates a module notification is available.

My Work Notifications

- > **Plan Finder Product Data Collection** 🚩
- ▼ **QHP Benefits and Service Area Module** 🚩  
**Launch This Module** The QHP Benefits and Service Area Module allows users to submit health plan and benefit data to be evaluated for QHP certification.
- > **QHP Issuer Module** 🚩
- > **QHP Rating Module** 🚩





# HIOS New Users

# New HIOS Users

New HIOS users will need to complete the following steps:

- Create an EIDM account
- Create a HIOS account
- Register an MFA Device
- Access HIOS from the CMS Enterprise Portal
- Register an Organization if not currently existing in HIOS
- Request HIOS user roles
- Create Product IDs and Standard Component IDs for Plans
- Access the QHP Modules





Register for an EIDM Account to  
Access the CMS Enterprise Portal

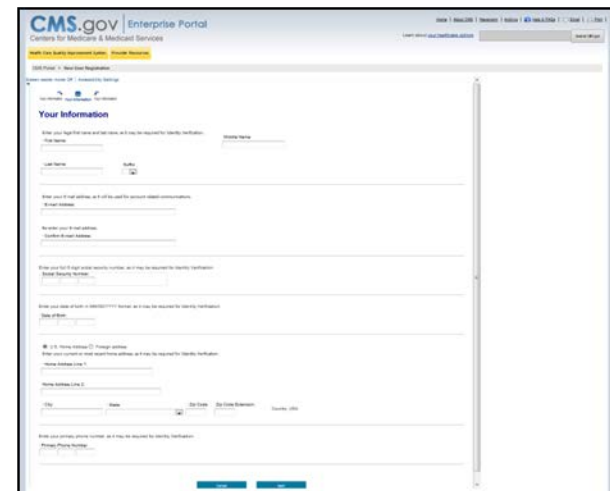
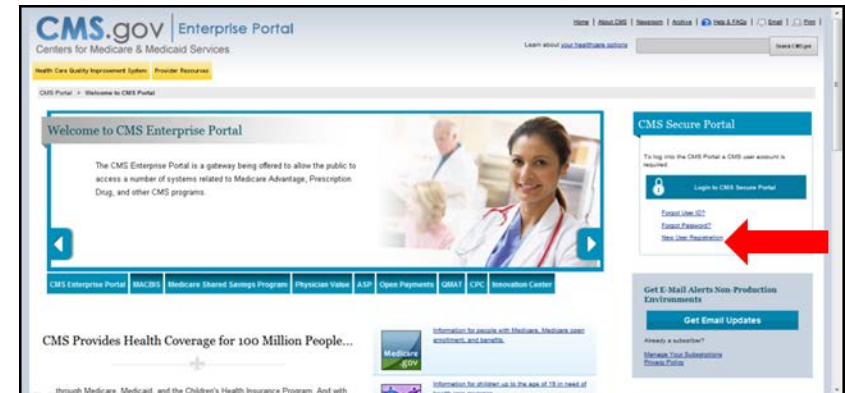
# EIDM Account Registration

New users will navigate to the CMS Enterprise Portal, <https://portal.cms.gov>

- Select the 'New User Registration' link
- Agree to the Terms and Conditions
- Enter the required information on the New User Registration page
- Create User ID and Password
- Select Challenge Questions and Answers
- Submit account request
- Receive email with EIDM User ID and Password

For CMS Enterprise Portal Support, contact the Exchange Operations Support Center at

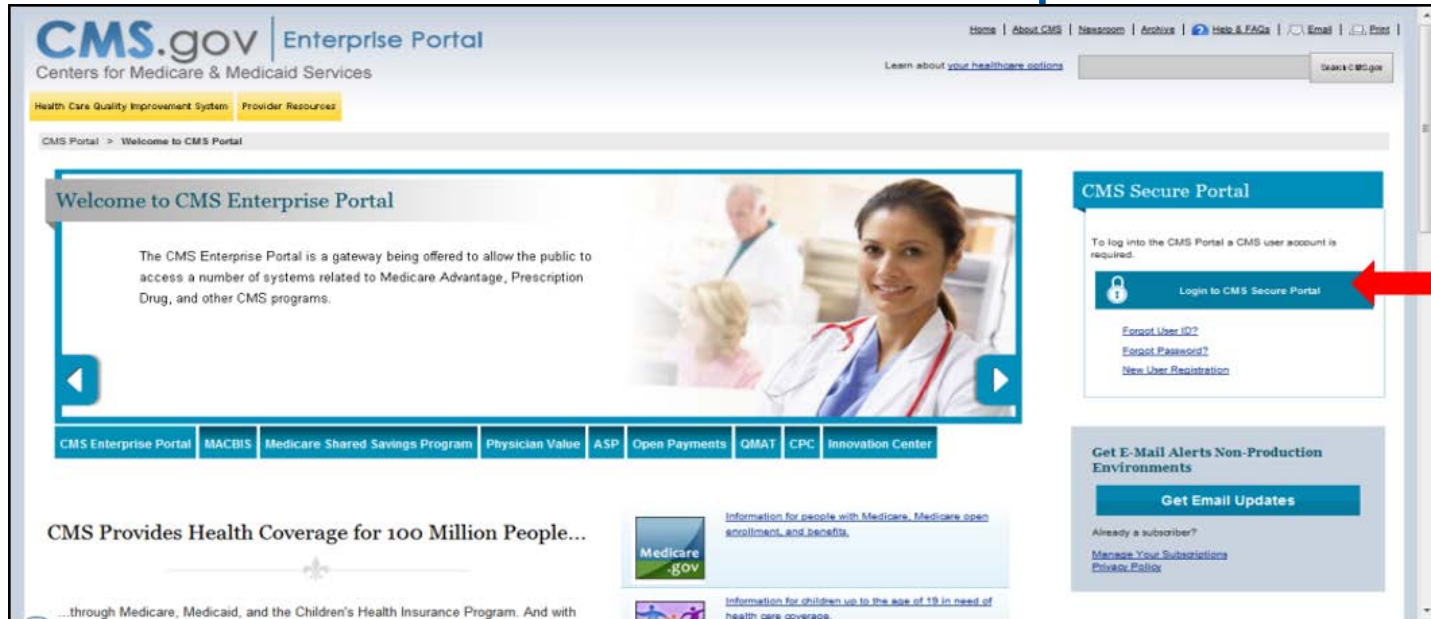
1-855-267-1515 or email [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov).





# Requesting a HIOS Account in the CMS Enterprise Portal

# Requesting a HIOS Account in the CMS Enterprise Portal



- New users will navigate to the CMS Enterprise Portal <https://portal.cms.gov>
- Select the “Login to CMS Secure Portal” link
- Agree to the Terms and Conditions
- Enter the EIDM User ID and Password



# Requesting a HIOS Account in the CMS Enterprise Portal (Continued)

- Select the “Request Access Now” button
- From the Access Catalog page, activate the “Request Access” button for HIOS
- Select the “Request New System Access” link
- Select “HIOS-HIOS Application” from the System Description drop-down menu
- Select “HIOS User” for the Role
- New users will need to select the URL provided on the page

Portal Help & FAQs | Print

CMS.gov Enterprise Portal

My Portal

CMS Portal > EIDM User Menu > My Access

Screen reader mode Off | Accessibility Settings

**My Access**

[Request New System Access](#)

[View and Manage My Access](#)

**Request New System Access**

Select a System and then a role to request access.

Depending on your Level of Assurance (LOA) and the role that you request access to, to satisfy system security requirements you may need to complete [Identify Verification](#), establish credentials for [Multi-Factor Authentication \(MFA\)](#), or change your password the next time you login to the system. This may require you to provide additional information as part of the role request process. If applicable, please note that your request cannot be fulfilled until Identify Verification is complete and Multi-Factor Authentication (MFA) is established.

System Description:

Role:

Enter validation data

Please enter a valid HIOS Authorization Code (i.e. HIOS Issuer ID or Company FEIN) to continue with the role request. If you are an existing HIOS user and do not have access to a valid HIOS Authorization Code, please contact the HIOS helpdesk:

Phone: 855-267-1515  
Email: CMS\_FOPS@CMS.HHS.GOV  
Hours of Operation: Monday - Friday 9:00 AM to 5:00 PM EST

If you are not an existing HIOS user, please select the hyperlink below to register for access to HIOS:  
<https://rbs.cms.gov/HIOS-MAIN:R/FromControl?op=requestHIOSAccount>

HIOS Authorization Code:

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules

# Requesting a HIOS Account in the CMS Enterprise Portal (Continued)

- New users will navigate to the “Request HIOS Account” page
- Complete the request form and activate the “Submit” button
- Once the account request has been approved, users receive an email with the HIOS Authorization Code

**Health Insurance Oversight System**

**Request HIOS Account**

Please note that you are applying for access to the Health Insurance Oversight System (HIOS). If you have any questions, please contact the Exchange Operations Support Center (XOSC) at Phone: 1-855-267-1515 or Email: [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov).

(\*) Indicates a required field

To initialize the request for a HIOS user account, please select if the base address for the requesting user is located in the United States by selecting "US User" or "Non-US User".

**Title (Name):**

**\*First Name:**

**Middle Name:**

**\*Last Name:**

**Suffix:**

**\*Job Title:**

**\*Organization Name:**

**\*Email Address:**

**Organization Address:**  US Address

US based Address Information

**Address Type:**

**Address Line 1:**

**Address Line 2:**

**\*City:**

**\*State:**

**ZIP code:**  -

**\*Phone (Format: 123-456-7890):**

**Phone Ext:**

[Accessibility](#) | [Rules of Behavior](#) | [Web Policies](#) | [File Formats and Plug-Ins](#)

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Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

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Access the QHP Modules



# Requesting a HIOS Account in the CMS Enterprise Portal (Continued)

- Users will need to log back in to the CMS Enterprise Portal
- Select “Request New System Access” link
- Select “HIOS-HIOS Application” for the System Description
- Select “HIOS User” for the Role
- Enter the HIOS Authorization Code
- Activate the “Submit” button
- Proceed with the on-screen instructions to verify your identity

The screenshot displays the 'Request New System Access' page in the CMS Enterprise Portal. The page title is 'Request New System Access'. Below the title, there are instructions: 'Select a System and then a role to request access.' and 'Depending on your Level of Assurance (LOA) and the role that you request access to, to satisfy system security requirements you may need to complete [Identity Verification](#), establish credentials for [Multi-Factor Authentication \(MFA\)](#) or change your password the next time you login to the system. This may require you to provide additional information as part of the role request process. If applicable, please note that your request cannot be fulfilled until Identity Verification is complete and Multi-Factor Authentication (MFA) is established.'

The form includes the following fields:

- System Description: HIOS-HIOS Application
- Role: HIOS User
- Enter validation data: A text area for entering a valid HIOS Authorization Code (i.e., HIOS Issuer ID or Company FEIN). A red arrow points to this field.

Below the form, there are two buttons: 'Cancel' and 'Submit'.



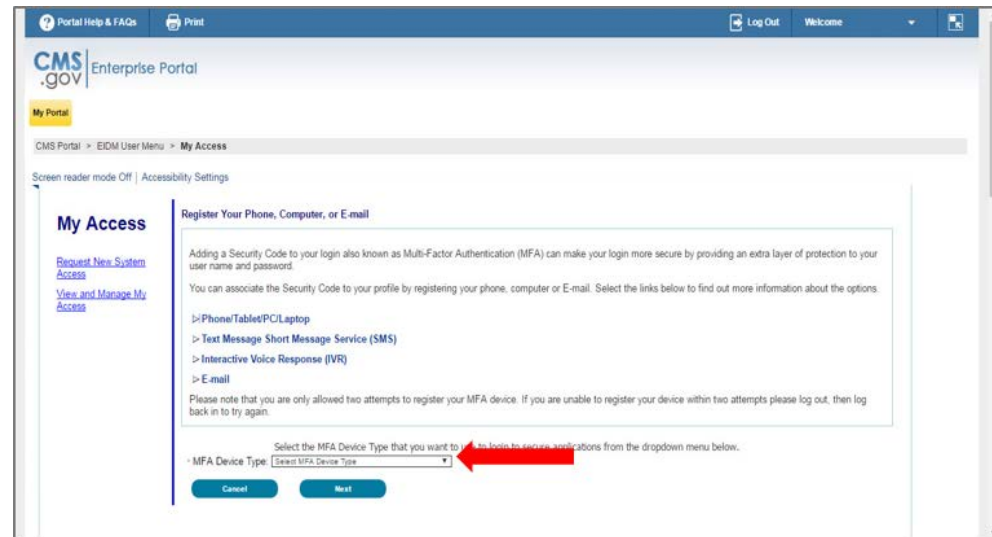


# Register a Device for Multi-Factor Authentication (MFA)

# New Users - Register a Device for Multi-Factor Authentication (MFA)

After successful completion of the remote identity proofing, new users will be prompted to complete the registration of a device for multi-factor authentication.

- Select a device from the “MFA Device Type” drop-down menu
- Follow the on-screen instructions for your selected device type
- Users will see an on-screen message confirming successful registration of the device to their user profile
- Log out of the CMS Enterprise Portal



The screenshot shows the 'My Access' page in the CMS Enterprise Portal. The page title is 'Register Your Phone, Computer, or E-mail'. Below the title, there is a section for selecting an MFA device type. A red arrow points to the 'MFA Device Type' dropdown menu, which currently shows 'Select MFA Device Type'. The page also includes a 'Cancel' button and a 'Next' button. The page content includes instructions on adding a security code and links for more information about MFA options: Phone/Tablet/PC/Laptop, Text Message Short Message Service (SMS), Interactive Voice Response (IVR), and E-mail. A note at the bottom states: 'Please note that you are only allowed two attempts to register your MFA device. If you are unable to register your device within two attempts please log out, then log back in to try again.'



# Existing Users - Register a Device for Multi-Factor Authentication (MFA)

Users with a HIOS account that have not registered a device will need to do so when logging into the CMS Enterprise Portal.

- Navigate to <https://portal.cms.gov>
- Select the “Login to CMS Secure Portal” link
- Agree to the Terms and Conditions
- Enter your EIDM User ID
- On the Welcome to CMS Enterprise Portal page, activate the “Register MFA Device” link
- Follow the on-screen instructions for your selected device type to complete the registration

The screenshot shows the CMS.gov Enterprise Portal login page. At the top, there are navigation links: Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below this is the CMS.gov logo and 'Enterprise Portal' text, followed by 'Centers for Medicare & Medicaid Services'. There are two yellow buttons: 'Health Care Quality Improvement System' and 'Provider Resources'. The main heading is 'Welcome to CMS Enterprise Portal'. Below this is a section titled 'Enter Security Code' with instructions: 'A Security Code is required to complete your login. To retrieve a Security Code, please select the Phone, Computer, or E-mail that you registered as your Multi-Factor Authentication(MFA) device when you originally requested access, from the MFA Device Type dropdown menu below. Security Codes expire, be sure to enter your Security Code promptly.' There are three sub-sections: 'Unable to Access Security Code?' with instructions on how to use the link, 'Need to Register an MFA Device?' with instructions on how to use the link, and a form with fields for Password, MFA Device Type (dropdown), and Security Code. There are 'Log In' and 'Cancel' buttons. At the bottom, there are three links: 'Forgot Password?', 'Unable to Access Security Code?', and 'Register MFA Device'. A red arrow points to the 'Register MFA Device' link.

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

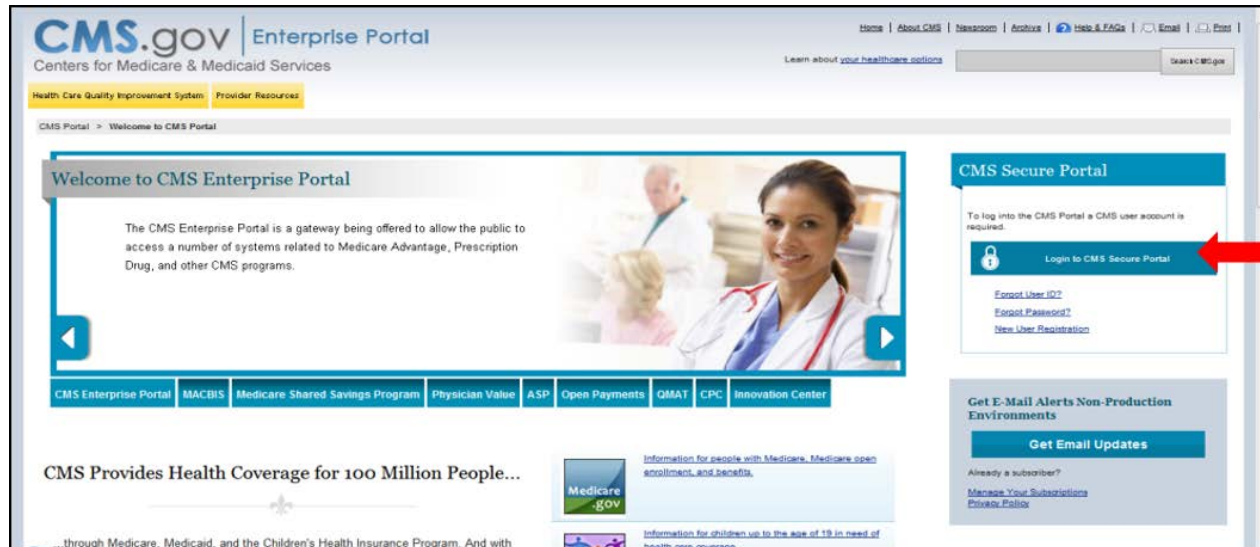
Create Products and Plans

Access the QHP Modules



# Access HIOS in the CMS Enterprise Portal

# Access HIOS in the CMS Enterprise Portal



- Navigate to the CMS Enterprise Portal <https://portal.cms.gov>
- Select the “Login to CMS Secure Portal” link
- Agree to the Terms and Conditions
- Enter your User ID and activate the “Next” button

# Access HIOS in the CMS Enterprise Portal

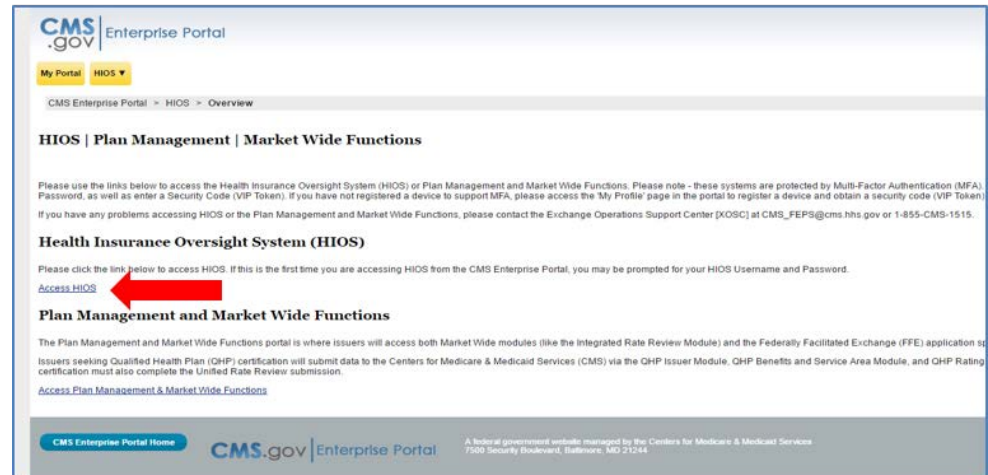
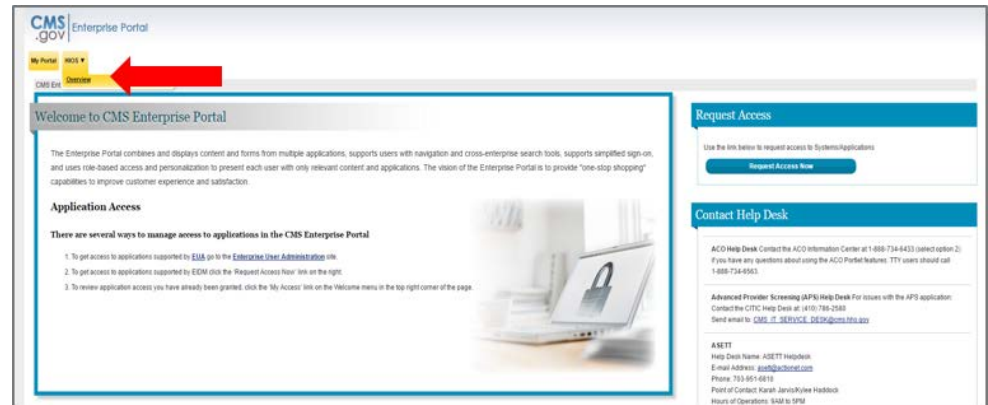
- Enter your Password
- Select the MFA Device Type
- A security code will be sent to your device or registered e-mail address
- Enter the Security Code
- Activate the “Log In” button

The screenshot displays the CMS.gov Enterprise Portal login interface. At the top, the CMS.gov logo and 'Enterprise Portal' text are visible, along with navigation links for Home, About CMS, Newsroom, Archive, Help & FAQs, Email, and Print. Below the logo, there are two yellow buttons: 'Health Care Quality Improvement System' and 'Provider Resources'. A blue banner reads 'Welcome to CMS Enterprise Portal'. The main content area is titled 'Enter Security Code' and contains the following text: 'A Security Code is required to complete your login. To retrieve a Security Code, please select the Phone, Computer, or E-mail that you registered as your Multi-Factor Authentication(MFA) device when you originally requested access, from the MFA Device Type dropdown menu below. Security Codes expire, be sure to enter your Security Code promptly. Unable to Access Security Code? If you are unable to access a Security Code, you may use the "Unable To Access Security Code?" link. To use this link you will be directed away from this page. For security purposes, you will be prompted to answer your challenge questions before the Security Code is generated. The Security Code will be sent to the email address in your profile. You will be required to login again with your User ID, Password and Security Code. You may also call your Application Help Desk to obtain a Security Code. After you receive the Security Code using this link or from your Help Desk, you must select the 'One-Time Security Code' option from the MFA Device Type dropdown menu. Need to Register an MFA Device? If you have not registered an MFA device and would like to do so now, you may use the "Register MFA Device" link. For security purposes you will be prompted to login again and answer your challenge questions before registering an MFA device.' Below the text are three input fields: 'Password:', 'MFA Device Type: Select MFA Device Type' (a dropdown menu), and 'Security Code:'. At the bottom of the form are two buttons: 'Log In' and 'Cancel'. Below the buttons are three links: 'Forgot Password?', 'Unable to Access Security Code?', and 'Register MFA Device'.



# Access HIOS in the CMS Enterprise Portal (Continued)

- Users that have registered in EIDM and HIOS will now see a yellow “HIOS” button displayed on the dashboard
- Selecting the “HIOS” button and then the “Overview” link will open the HIOS landing page
- On the HIOS | Plan Management | Market Wide Functions landing page, select the “Access HIOS” hyperlink







# Register an Organization in HIOS

# Manage Organizations – Before April 2017

- New users to HIOS will not have any organization associations or role permissions to access HIOS modules
- Select the “Manage an Organization” link to create an organization before requesting user roles



**Health Insurance Oversight System**

ACCESS PM HOME FAQ CONTACT US SIGN OUT

Welcome

### HIOS Home Page

**Organization Management & Administrative Functions:**

- Manage Account
- Manage an Organization**
- Role Management

**HIOS Functions**

- HIOS Plan Finder Product Data Collection (PF)

**HIOS Main Page Announcements:**

Welcome to the Health Insurance Oversight System (HIOS).  
HIOS will be accessible through the CMS Enterprise Portal.

The following Modules are now live in HIOS:

- HIOS Portal
- Plan Finder and Product Data Collection Module (PF)
- Rates and Benefits Information System (RBIS)
- Consumer Assistance Program (CAP)
- Medical Loss Ratio Data Collection System (MLR)
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- Rate Review Grants Reporting System (RRG)
- Health Plan and Other Entity Enumeration System (HPOES)
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[Accessibility](#) | [Rules of Behavior](#) | [Web Policies](#) | [File Formats and Plug-Ins](#)

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules

# Manage Organizations – April 2017

Select the “Manage Organizations” link to create an organization.

**Health Insurance Oversight System**

Welcome, Logout

Home Knowledge Center Help

**Home**

Select a module below to get started. A solid flag (🚩) indicates a module notification is available.

My Work Notifications

- Plan Finder Product Data Collection 🚩
- QHP Benefits and Service Area Module 🚩
  - Launch This Module
  - The QHP Benefits and Service Area Module allows users to submit health plan and benefit data to be evaluated for QHP certification.
- QHP Issuer Module 🚩
- QHP Rating Module 🚩



# Create New Organization

- On the Manage an Organization page, select “Create new organization” from the drop-down menu
- Select “Company” as the organization type. Users will need to register as a “Company” in order to create Issuer IDs.
- Enter the Federal Employer Identification Number (FEIN)/Tax Identification Number and activate the “FEIN/TIN Search” button

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

**Manage an Organization** Manage Organization Relationships

**Manage an Organization**

Please specify the primary purpose of your visit:

Please click [Organization Types \(PDF - 160KB\)](#) for a list of organization types and their definitions.

Please select the type of organization:

Please enter your organization's 9 digit Federal EIN /TIN below and select 'FEIN/TIN Search' to determine if your organization currently exists in HIOS.

Federal EIN/TIN

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules

# Create New Organization (Continued)

If an organization does not exist, users need to register the new organization by selecting the “Create Organization” button.

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

**Manage an Organization** Manage Organization Relationships

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Please select the type of organization:

Please enter your organization's 9 digit Federal EIN /TIN below and select 'FEIN/TIN Search' to determine if your organization currently exists in HIOS.

Federal EIN/TIN

#### Organization

**No Organization Found**

You may register your organization in HIOS by selecting the 'Create Organization' button below to enter your organization's information.

Create an EIDM  
Account

Create a  
HIOS  
Account

Register an  
MFA Device

Register an  
Organization  
in HIOS

Request  
User Roles

Create  
Products and  
Plans

Access the  
QHP  
Modules

# Create New Organization (Continued)

Enter the organization's information and select the "Continue" button.

The screenshot shows the 'Health Insurance Oversight System' registration page. At the top, there is a green header with the system name. Below the header is a navigation bar with buttons for 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. A 'Welcome' message is displayed. The main section is titled 'Register New Organization' and includes instructions to fill in the form. A note states that asterisks indicate required fields. The form contains the following fields: 'Organization Type' (set to 'Company'), '\*Organization Legal Name' (text input), 'Federal EIN/TIN' (set to '567789900'), a link for 'Domiciliary Address', '\*Address Line 1' (text input), 'Address Line 2' (text input), '\*City' (text input), '\*State' (dropdown menu), '\*ZIP code' (text input), and 'ZIP Plus 4' (text input). At the bottom of the form are 'Back' and 'Continue' buttons. The footer contains links for 'Accessibility', 'Rules of Behavior', 'Web Policies', and 'File Formats and Plug-Ins', along with the address: 'U.S. Department of Health & Human Services · 200 Independence Avenue, S.W. · Washington, D.C. 20201'.



# Create New Organization (Continued)

Enter the organization's attribute information and select the "Review/Continue" button to proceed to submit the request.

The screenshot shows the 'Health Insurance Oversight System' interface. At the top, there is a green header with the system name. Below the header is a navigation bar with buttons for 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. A 'Welcome' message is displayed. The main section is titled 'Register Attributes For New Organization' and includes a prompt: 'Please fill in the form below with your Company's attribute information.' A note states: '\*Note: (\*) Indicates a required field.' The form contains the following fields: '\*Incorporated State:' with a dropdown menu; 'NAIC Company Code (99999):' with a text input field and a blue question mark icon; 'NAIC Group Code (99999):' with a text input field; 'Group Name:' with a text input field; 'AM Best Number (999999):' with a text input field; 'Not For Profit:' with a checkbox; and 'Co-Op:' with a checkbox. At the bottom of the form are two buttons: 'Back' and 'Review/Continue'.

Create an EIDM  
Account

Create a  
HIOS  
Account

Register an  
MFA Device

Register an  
Organization  
in HIOS

Request  
User Roles

Create  
Products and  
Plans

Access the  
QHP  
Modules



Create Issuer IDs



# Create Issuer IDs

Users can add Issuers to the organization by activating the “Add Issuer” button.

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

**Manage an Organization** Manage Organization Relationships

**Manage an Organization**

Please specify the primary purpose of your visit:

Please click [Organization Types \(PDF - 160KB\)](#) for a list of organization types and their definitions.

Please select the type of organization:

Please enter your organization's 9 digit Federal EIN /TIN below and select 'FEIN/TIN Search' to determine if your organization currently exists in HIOS.

Federal EIN/TIN  [FEIN/TIN Search](#)

**Organization**

Organization Legal Name	Organization Type	Federal EIN/TIN	Action
Test Company 222	Company	22222222	<ul style="list-style-type: none"><li><a href="#">View</a></li><li><a href="#">Edit</a></li></ul>

**Issuers**

Page size: 10 2 items in 1 page

Issuer ID	Issuer Legal Name	Registered State	Action
12132	Test Company 222	VA	<ul style="list-style-type: none"><li><a href="#">View</a></li><li><a href="#">Edit</a></li></ul>
71022	Test Company 222	NC	<ul style="list-style-type: none"><li><a href="#">View</a></li><li><a href="#">Edit</a></li></ul>

[Back](#) [Add Issuer](#)

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules

# Register New Issuer

- Complete the New Issuer registration form and activate the “Save and Add Another Issuer” button
- Review the Issuer information and activate the “Submit” button
- Upon submission, a New Issuer Confirmation page will display a notification that the request to register the Issuer has been submitted for approval.
- Once approved, the newly created Issuer will be assigned an ID.

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

### Register New Issuer

Please fill in the form below with your Issuer's information.

**Note: (\*) Indicates a required field.**

Issuer Legal Name: **Test Company 222**

Issuer Marketing Name:

\*Registered State:

Federal EIN:

NAIC Company Code:

NAIC Group Code:

\*Market Type and Line of Business:

Individual

Individual Line of Business

Health Insurance Coverage

Mini-Med

Student Health Plans

Rx-only

Small Group

Small Group Line of Business

Health Insurance Coverage

Mini-Med

Expatriate

Rx-only

Large Group

Large Group Line of Business

Health Insurance Coverage

Mini-Med

Expatriate

Rx-only

[Domiciliary Address](#)

\*Address Line 1:

Address Line 2:

\*City:

\*State:

\*ZIP code:

ZIP Plus 4:

[Back](#) [Save and Add Another Issuer](#)

Below are the Issuers that you have requested to create. To remove an Issuer from the table, you may select the Delete link on that row.

Issuer Legal Name	Registered State	Actions
Test Company 222	HI	<a href="#">View</a> <a href="#">Delete</a>

[Submit](#)

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules

# View Issuer IDs

Issuer IDs will be displayed in the "Issuers" section of the Manage an Organization page.

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

**Manage an Organization** Manage Organization Relationships

**Manage an Organization**

Please specify the primary purpose of your visit:

Please click [Organization Types \(PDF - 160KB\)](#) for a list of organization types and their definitions.

Please select the type of organization:

Please enter your organization's 9 digit Federal EIN /TIN below and select 'FEIN/TIN Search' to determine if your organization currently exists in HIOS.

Federal EIN/TIN

**Organization**

Organization Legal Name	Organization Type	Federal EIN/TIN	Action
Test Company 222	Company	222222222	<ul style="list-style-type: none"><li>View</li><li>Edit</li></ul>

**Issuers**

Page size: 10 3 items in 1 page

Issuer ID	Issuer Legal Name	Registered State	Action
12132	Test Company 222	VA	<ul style="list-style-type: none"><li>View</li><li>Edit</li></ul>
21791	Test Company 222	HI	<ul style="list-style-type: none"><li>View</li></ul>
71022	Test Company 222	NC	<ul style="list-style-type: none"><li>View</li><li>Edit</li></ul>

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules



# Request User Roles in HIOS

# Requesting User Roles in HIOS – Before April 2017

To request a role, select the “Role Management” link.

**Health Insurance Oversight System**

ACCESS PM HOME FAQ CONTACT US SIGN OUT

Welcome

### HIOS Home Page

**Organization Management & Administrative Functions:**

- Manage Account
- Manage an Organization
- Role Management**

**HIOS Functions**

- HIOS Plan Finder Product Data Collection (PF)

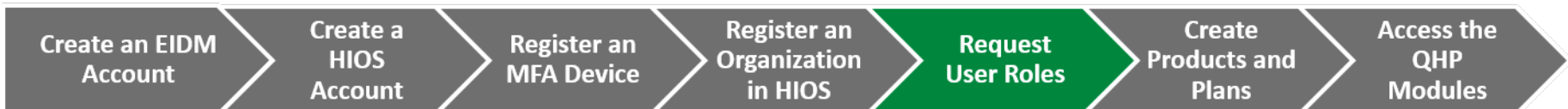
**HIOS Main Page Announcements:**

**Obtaining a Health Plan Identifier (HPID)**

Users needing to obtain an HPID for their organization will need to take the following steps in HIOS:

1. Register the organization in HIOS
2. Request access to the HPOES module through user role management
3. Complete an HPID application within the HPOES module
4. Once an HPID application has been successfully submitted, an HPID number will be assigned

Users may also access an HPID Quick Guide that provides an easy step-by-step reference for completing the necessary steps in HIOS and HPOES to obtain an HPID. You can view the Quick Guide in [graphic](#) or a [text](#) form at <http://www.cms.gov/Regulations-and-Guidance/HIPAA-Administrative-Simplification/Affordable-Care-Act/Health-Plan-Identifier.html>.



# Requesting User Roles in HIOS – April 2017 (New Users)

New users can request a role by selecting the “Request a Role” link on the HIOS Home page.

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

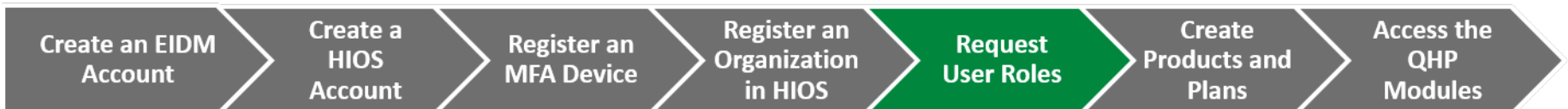
[Home](#) [Knowledge Center](#) [Help](#)

Welcome to HIOS. We are in the process of updating the site. You will see an updated HIOS homepage as well as existing HIOS pages as you navigate throughout the site.

**NEW TO HIOS? START HERE.**  
Before you can begin using HIOS, you need to request a role.

[REQUEST A ROLE](#)

Not sure what role to request? Go to the [Knowledge Center](#) to learn more.



# Requesting User Roles in HIOS – April 2017 (Existing Users)

Existing HIOS users can request a role by selecting the “Manage Roles” link on the Home page.

Health Insurance Oversight System

Welcome, Logout

Home Knowledge Center Help

Manage Account  
Manage Roles  
Manage Organizations

## Home

Select a module below to get started. A solid flag (🚩) indicates a module notification is available.

My Work Notifications

- > Plan Finder Product Data Collection 🚩
- ▼ QHP Benefits and Service Area Module 🚩  
[Launch This Module](#)  
The QHP Benefits and Service Area Module allows users to submit health plan and benefit data to be evaluated for QHP certification.
- > QHP Issuer Module 🚩
- > QHP Rating Module 🚩

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules

# Requesting User Roles in HIOS (Continued)

- Select the “Request Role” tab
- Select the desired “Module” from the drop-down menu

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

Manage Roles **Request Role**

### Request Role

All fields are required.

Please select a Module from the drop-down list below and follow the prompts to submit a role request. For a description of each module, select [Module Descriptions \(PDF - 5MB\)](#)

**Module:**

- Select Module--
- Assister
- CertComSystem (CCS)
- Consumer Assistance Program System (CAP)
- DCM-Enforcement and Consumer Protections (DCM-ECP)
- EDGE Server Management (ESM)
- External Review Election (ERE)
- Financial Management
- Form Filing Module (DCM-FFM)
- HIOS Plan Finder Product Data Collection (PF)
- HIOS Portal
- Health Plan and Other Entity Enumeration System (HPOES)
- Market Conduct Module (DCM-MCM)
- Marketplace Quality Module (MQM)
- Medical Loss Ratio Data Collection System (MLR)
- Minimum Essential Coverage (DCM-MEC)
- Non-Federal Governmental Plans (Non-Fed)
- QHP Benefits and Service Area Module
- QHP Issuer Module
- QHP Rating Module
- Rate Review Grant Reporting System (RRG)
- Rate Review System (RRJ)
- Rates & Benefits Information System (RBIS)
- State Document Collection Module (DCM-SDC)
- State Evaluation
- Unified Rate Review System

[File Formats and Plug-Ins](#)

**Note:** For users who are not sure which module to chose, select the “Module Descriptions” link. The Portable Document Format (PDF) file will open up which displays the purpose of each module and the applicable user roles.

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules



# Requesting User Roles in HIOS (Continued)

- Displayed is an example of a role request for the Plan Finder Product Data Collection Module
- Users will need to enter an Issuer ID to proceed with a role request submission

Module Descriptions (PDF - 835KB)'. The form contains four dropdown menus: 'Module:' (selected: HIOS Plan Finder Product Data Collection (PF)), 'Requested Role:' (selected: Issuer), 'User Type:' (selected: Individual Market Submitter), and 'User Sub-Type:' (selected: Primary Contact). Below these is an 'Association:' dropdown menu (selected: HIOS Issuer ID). At the bottom of the form, there is a text input field for 'Issuer ID' and a 'Search' button. At the very bottom of the page, there are links for 'Accessibility', 'Rules of Behavior', 'Web Policies', and 'File Formats and Plug-Ins'."/>

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

Manage Roles **Request Role**

### Request Role

**All fields are required.**

Please select a Module from the drop-down list below and follow the prompts to submit a role request. For a description of each module, select [Module Descriptions \(PDF - 835KB\)](#)

**Module:** HIOS Plan Finder Product Data Collection (PF) ▼

**Requested Role:** Issuer ▼

**User Type:** Individual Market Submitter ▼

**User Sub-Type:** Primary Contact ▼

**Association:** HIOS Issuer ID ▼

Please enter the HIOS Issuer ID below and select the Search button. Once an issuer is found, select the Add Issuer button to associate the Issuer to the role. You may add up to 10 Issuers per submission.

**Issuer ID :**  Search

[Accessibility](#) | [Rules of Behavior](#) | [Web Policies](#) | [File Formats and Plug-Ins](#)

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

**Request User Roles**

Create Products and Plans

Access the QHP Modules

# Requesting User Roles in HIOS (Continued)

- Displayed is an example of a role request for the QHP Issuer Module
- Users will need to enter an Issuer ID to proceed with a role request submission

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

Manage Roles **Request Role**

### Request Role

**All fields are required.**

Please select a Module from the drop-down list below and follow the prompts to submit a role request. For a description of each module, select [Module Descriptions \(PDF - 835KB\)](#)

**Module:**

**Requested Role:**

**User Sub-Type:**

**Association:**

Please enter the HIOS Issuer ID below and select the Search button. Once an issuer is found, select the Add Issuer button to associate the Issuer to the role. You may add up to 10 Issuers per submission.

**Issuer ID :**

[Accessibility](#) | [Rules of Behavior](#) | [Web Policies](#) | [File Formats and Plug-Ins](#)

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Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

**Request User Roles**

Create Products and Plans

Access the QHP Modules

# User Roles in HIOS

Listed are frequently requested roles for HIOS:

HIOS Module	User Role
HIOS Portal	<ul style="list-style-type: none"><li>• Company Administrator- A representative who is solely responsible for editing Company and associated issuer level data.</li><li>• Issuer Administrator: A representative who can edit Issuer level data only.</li></ul>
Plan Finder Product Data Collection	<ul style="list-style-type: none"><li>• Issuer Submitter: A primary representative of issuer organization and the primary contact for the submission.</li><li>• Issuer Validator: A primary representative of issuer organization who can validate the data submitted by the issuer.</li><li>• Attestation User: An official within an organization, usually CEO or CFO, who attests the data submitted.</li></ul>

# User Roles in HIOS (Continued)

Listed are frequently requested roles for HIOS:

HIOS Module	User Role
QHP Issuer Module	<ul style="list-style-type: none"><li data-bbox="511 504 1806 725">• Issuer Submitter – Users with this role can submit data necessary to complete the QHP Issuer application. Submitters can also cross validate applications to ensure consistency.</li><li data-bbox="511 765 1806 1039">• Issuer Validator – Users with this role can validate all sections of the QHP Issuer application for accuracy, cross validate the final submission and submit the application after successful cross validation.</li><li data-bbox="511 1079 1845 1239">• Issuer Attester – Users with this role can access the QHP Plan Confirmation Module and view the list of approved plans.</li></ul>

# User Roles in HIOS (Continued)

Listed are frequently requested roles for HIOS:

HIOS Module	User Role
QHP Benefits and Service Area Module	<ul style="list-style-type: none"><li data-bbox="610 511 1812 786">• Issuer Submitter - Users with this role can submit data necessary to complete the QHP Benefits and Service Area application. Submitters can also cross validate applications to ensure consistency.</li><li data-bbox="610 829 1750 1105">• Issuer Validator - Users with this role can validate all sections of the QHP Benefits and Service Area application for accuracy, cross validate the final submission and submit the application after successful cross validation.</li></ul>

# User Roles in HIOS (Continued)

Listed are frequently requested roles for HIOS:

HIOS Module	User Role
QHP Rating Module	<ul style="list-style-type: none"><li data-bbox="589 542 1748 763">• Issuer Submitter - Users with this role can submit data necessary to complete the QHP Rating application. Submitters can also cross validate applications to ensure consistency.</li><li data-bbox="589 799 1806 1078">• Issuer Validator - Users with this role can validate all sections of the QHP Rating application for accuracy, cross validate the final submission and submit the application after successful cross validation.</li></ul>

# Manage Roles

Users can view their roles and access permissions by selecting the “Manage Roles” tab.

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

**Manage Roles** Request Role

**Manage Roles**

Username: Testuser@testcompany.com

**Pending Role Requests**

Module	Role	Association Type	Association	Request Created Date	Actions
HIOS Plan Finder Product Data Collection (PF)	Issuer	Issuer	65173 - test001 - VA	2/1/2017 12:46 PM	<a href="#">Cancel</a>

**Approved Roles**

**QHP Benefits and Service Area Module**

Role	Association Type	Association	User Sub-Type	Actions
Issuer Submitter	Issuer	65173 - test001 - VA	Backup Contact	<a href="#">Delete</a>

**QHP Issuer Module**

Role	Association Type	Association	User Sub-Type	Actions
Issuer Submitter	Issuer	65173 - test001 - VA	Primary Contact	<a href="#">Delete</a>

**QHP Rating Module**

Role	Association Type	Association	User Sub-Type	Actions
Issuer Submitter	Issuer	65173 - test001 - VA	Backup Contact	<a href="#">Delete</a>

Create an EIDM Account

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Access the QHP Modules



# Manage Issuer Information in the HIOS Plan Finder Product Data Collection Module



# View and Edit Issuer Information – Before April 2017

- View and edit Issuer and Marketplace information in Plan Finder
- On the HIOS Home Page, select the “HIOS Plan Finder Product Data Collection (PF)” link
- On the Plan Finder Announcements page, select the “View Issuer Submitted Data” tab

**Health Insurance Oversight System**

ACCESS PM HOME FAQ CONTACT US SIGN OUT

Welcome

**HIOS Home Page**

Organization Management & Administrative Functions:

- Manage Account
- Manage an Organization
- Role Management

HIOS Functions

- HIOS Plan Finder Product Data Collection (PF)**

**Health Insurance Oversight System**

**Plan Finder**

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

Welcome

View Issuer Submitted Data Download Data Submission Tools Upload Finalized Data Template Component IDs

**Announcements**

Welcome to the Plan Finder module of Health Insurance Oversight System (HIOS). Issuer users can submit their Health Insurance products information in the Individual and Small Group markets. State Department of Insurance users can view insurance data within your state.

If you have policy questions regarding the HealthCare.gov Plan Finder, please e-mail [CCIIOPlanFinder@cms.hhs.gov](mailto:CCIIOPlanFinder@cms.hhs.gov).

If you need technical assistance regarding product-level data submissions, please contact the Exchange Operations Support Center (XOSC) at 1-855-CMS-1515 or [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov).

**Related Links**

- [HealthCare.gov](#)
- [Content Requirements for HealthCare.gov - Center for Consumer Information & Insurance Oversight](#)
- [Archive of Memos](#)
- [Training Resources](#)

# View and Edit Issuer Information – April 2017

- On the HIOS Home page, select “Plan Finder Product Data Collection”
- Activate the “Launch This Module” link

Health Insurance Oversight System

Welcome, Logout

Home Knowledge Center Help

Welcome to HIOS. We are in the process of updating the site. You will see an updated HIOS homepage as well as existing HIOS pages as you navigate throughout the site.

### Home

Select a module below to get started. A solid flag (🚩) indicates a module notification is available.

My Work Notifications

Plan Finder Product Data Collection 🚩

Launch This Module

The Plan Finder Module collects issuer general information, product information, quarterly application data and may create component IDs for each product.

**DON'T SEE WHAT YOU'RE LOOKING FOR?** Check out our list of functions and request access. **VIEW ALL FUNCTIONS**

**WANT TO LEARN?** Follow step-by-step instructions to complete any task. **VISIT KNOWLEDGE CENTER**

**NEED HELP?** Get answers to your questions from our experts. **SUBMIT A TICKET**

**CAN WE DO BETTER?** We're striving to improve your experience, tell us what you think. **GIVE US FEEDBACK**

# View and Edit Issuer Information – April 2017 (Continued)

- Users will be redirected to the Plan Finder Announcements page
- Select the “View Issuer Submitted Data” tab

The screenshot shows the Health Insurance Oversight System (HIOS) Plan Finder interface. At the top, there is a green header with the text "Health Insurance Oversight System" and "Plan Finder". Below the header is a navigation bar with buttons for "HIOS MAIN PAGE", "HOME", "FAQ", "CONTACT US", and "SIGN OUT". A red arrow points to the "View Issuer Submitted Data" tab, which is the first of five tabs in a row. The other tabs are "Download Data Submission Tools", "Upload Finalized Data Template", "Issuer Aggregate Reports", and "Component IDs". Below the tabs is a main content area with a green heading "Announcements". The text in the announcements section reads: "Welcome to the Plan Finder module of Health Insurance Oversight System (HIOS). Issuer users can submit their Health Insurance products information in the Individual and Small Group markets. State Department of Insurance users can view insurance data within your state. If you have policy questions regarding the HealthCare.gov Plan Finder, please e-mail [CCIIOPlanFinder@cms.hhs.gov](mailto:CCIIOPlanFinder@cms.hhs.gov). If you need technical assistance regarding product-level data submissions, please contact the Exchange Operations Support Center (XOSC) at 1-855-CMS-1515 or [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov)." To the right of the main content area is a "Welcome" section with a "Related Links" box containing four links: "HealthCare.gov", "Content Requirements for HealthCare.gov - Center for Consumer Information & Insurance Oversight", "Archive of Memos", and "Training Resources". At the bottom of the page, there is a footer with links for "Accessibility", "Rules of Behavior", "Web Policies", and "File Formats and Plug-Ins", followed by the text "U.S. Department of Health & Human Services · 200 Independence Avenue, S.W. · Washington, D.C. 20201".

# View and Edit Issuer General Information

- Select the “View Issuer Submitted Data” tab
- Activate the “Issuer General Information” link
- Select Issuer Name from the drop-down menu and activate the “Get Issuer Information” button
- To edit, activate the “Edit Issuer General Information” link
- Editable fields include:
  - Website
  - Customer service contact information

**Health Insurance Oversight System**  
Plan Finder

Navigation: [HIOS MAIN PAGE](#) | [HOME](#) | [FAQ](#) | [CONTACT US](#) | [SIGN OUT](#)

Welcome

View Issuer Submitted Data | Download Data Submission Tools | Upload Finalized Data Template | Component IDs

Issuer General Information | Issuer Marketplace Information | Products Offering Report | RBIS Input

### Issuer General Information

(\*) Indicates a required field.

Please select an Issuer from the Issuer Name dropdown menu below and then activate the Get Issuer Information button to view the Issuer General Information.

\*Issuer Name:

#### FFE Test Company - VA

Submission Uploaded Date: 3/2/2016 1:39:08 PM  
Application Data for Quarter: Q3, 2015 [Jul. 1 - Sept. 30, 2015]  
Data Last Previewed By:

[Edit Issuer General Information](#)

**Corporate Information**

Issuer Legal Name: FFE Test Company  
Issuer ID: 81731  
Market Coverage: Both  
NAIC Company Code:

State: VA  
Issuer Marketing Name:  
Federal EIN: 111111111  
NAIC Group Code:

**Address**

Address Line 1: 123 Peach Street  
Address Line 2:  
City: Fairfax  
State: VA  
Zip: 22033

**Individual and Small Group Market**

Do you offer individual? Yes  
WebSite: <http://www.ffetest-indy.com>  
Do you offer small group? Yes  
WebSite: <http://www.ffetest-group.com>

**Customer Service Contact - Individual Market**

Local Number: 111-111-1111  
Extension: 123456  
Toll Free Number: 111-111-1111  
TTY:  
WebSite: <http://www.ffetest-service.com>

**Customer Service Contact - Small Group Market**

Local Number: 1222222222  
Extension:  
Toll Free Number: 1222222222  
TTY:  
WebSite: <http://www.ffetest-service.com>

### Issuer Contacts

Page Size: 10 | Displaying 1 - 2, of 2 found.

Contact Role	Primary or Backup	Name	Phone Number	Extension	E-mail
Data Submission Contact - Individual Market	Backup Contact	TestUser A	17035523111	7039	TestUserA@ffetest-service.com
Data Submission Contact - Individual Market	Primary Contact	TestUser B	17035521234	1234	TestUserB@ffetest-service.com

### Ratings - Individual Market

Is Issuer rated by any rating company in the last two years? Yes

Rating Company	Rating Type	Rating	Rating Company Other/Describe	Rating Type Other/Describe
Standard & Poor's	Value	AAA		

### Ratings - Small Group Market

Is Issuer rated by any rating company in the last two years? No

Rating Company	Rating Type	Rating	Rating Company Other/Describe	Rating Type Other/Describe
No records to display.				

# View and Edit Issuer Marketplace Information

- Select the “View Issuer Submitted Data” tab
- Activate the “Issuer Marketplace Information” link
- Select Issuer Name from the drop-down menu and activate the “Get Issuer Information” button
- To edit, activate the “Edit Issuer Marketplace Information” link
- Editable fields include:
  - Issuer Marketplace marketing name
  - Marketplace issuer billing address information
  - Customer service contact information

**Health Insurance Oversight System**  
Plan Finder

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

Welcome

View Issuer Submitted Data Download Data Submission Tools Upload Finalized Data Template Component IDs

Issuer General Information **Issuer Marketplace Information** Products Offering Report RBIS Input

### Marketplace General Information

(\*) Indicates a required field.

Please select an Issuer from the Issuer Name dropdown menu below and then activate the Get Issuer Information button to view the Marketplace General Information.

\*Issuer Name: FFE Test Issuer 359 - ME

#### FFE Test Issuer 359 - ME

[Edit Issuer Marketplace Information](#)

#### Corporate Information

**Issuer Legal Name:** FFE Test Issuer 359  
**Issuer Marketplace Marketing Name:** Tennessee Rural Health Insurance Company dba Farm Bureau Health Plans  
**Market Coverage:** Both **State:** ME

#### Marketplace Billing Information

**Marketplace Billing Name:** Test Issuer  
**Marketplace Address Line 1:** testing  
**Marketplace Address Line 2:**  
**Marketplace City:** Fairfax  
**Marketplace State:** VA  
**Marketplace Zip:** 22055  
**Marketplace Zip Extension:** 1234

#### Customer Service Contact - Individual Market

**IFP Customer Service Phone:** 888-888-9999  
**IFP Customer Service Phone Extension:** 1234  
**IFP Customer Service Toll Free:** 111-111-1111  
**IFP Customer Service TTY:** 999-999-9999  
**IFP Customer Service URL:** www.test.com

#### Customer Service Contact - Small Group Market

**SHOP Customer Service Phone:** 777-777-7777  
**SHOP Customer Service Phone Extension:**  
**SHOP Customer Service Toll Free:** 666-666-6666  
**SHOP Customer Service TTY:** 777-777-6666  
**SHOP Customer Service URL:** www.testshop.com



# Add and Edit Products in the HIOS Plan Finder Product Data Collection Module



# Access the Plan Finder Product Data Collection Module - Before April 2017

- The HIOS Plan Finder Product Data Collection Module is a tool for Issuers to submit information about health insurance products in the Individual and Small Group Markets
- Select the “HIOS Plan Finder Product Data Collection (PF)” link

**Health Insurance Oversight System**

[ACCESS PM](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome

### HIOS Home Page

**Organization Management & Administrative Functions:**

- [Manage Account](#)
- [Manage an Organization](#)
- [Role Management](#)

**HIOS Functions**

- [HIOS Plan Finder Product Data Collection \(PF\)](#)

**HIOS Main Page Announcements:**

Welcome to the Health Insurance Oversight System (HIOS).  
HIOS will be accessible through the CMS Enterprise Portal.  
The following Modules are now live in HIOS:

- HIOS Portal
- Plan Finder and Product Data Collection Module (PF)
- Rates and Benefits Information System (RBIS)
- Consumer Assistance Program (CAP)
- Medical Loss Ratio Data Collection System (MLR)
- Rate Review System (RRJ)
- Rate Review Grants Reporting System (RRG)
- Health Plan and Other Entity Enumeration System (HPOES)
- Document Collection Module- Form Filing Module (DCM- FFM)
- Document Collection Module- Market Conduct Module (DCM-MCM)
- Document Collection Module- State Document Collection (SDC)
- Minimum Essential Coverage (MEC)
- Non Federal Governmental Plan (Non-Fed)
- Assister (NAV)
- External Review Election (ERE)
- Marketplace Quality Module (MQM)

For any further inquiries or questions, please contact the Exchange Operations Support Center (XOSC) at [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov) or 1-855-267-1515.

[Accessibility](#) | [Rules of Behavior](#) | [Web Policies](#) | [File Formats and Plug-Ins](#)

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

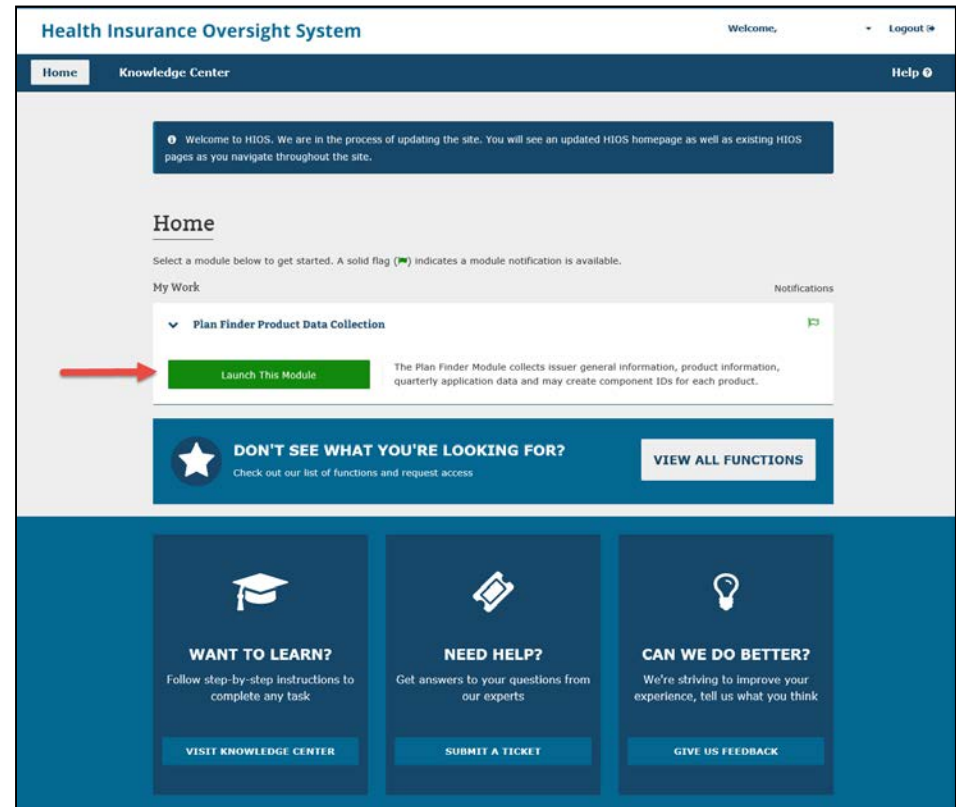
Request User Roles

Create Products and Plans

Access the QHP Modules

# Access the Plan Finder Product Data Collection Module – April 2017

From the HIOS Home page, select “Plan Finder Product Data Collection” and then activate the “Launch This Module” link.



Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules



# Create Product IDs

- Users will need a Submitter user role to create Product IDs
- Select the “View Issuer Submitted Data” tab
- Select the “Products Offering Report” link
- Select the Issuer Name and Activate the “Get Issuer Information” button
- All products must be associated to an Issuer ID
- Activate the “Add New Product” link. This link is only enabled for the Submitter user role for the Issuer selected for the product.

The screenshot displays the Health Insurance Oversight System Plan Finder interface. At the top, there is a navigation bar with links for HIOS MAIN PAGE, HOME, FAQ, CONTACT US, and SIGN OUT. Below this is a>Welcome message and a set of tabs: View Issuer Submitted Data, Download Data Submission Tools, Upload Finalized Data Template, and Component IDs. The main content area is titled 'Product Level Offering Report' and includes a dropdown menu for 'Issuer Name' set to 'FFE Test Company - VA' and a 'Get Issuer Information' button. Below this, the system displays details for the selected issuer, including the submission upload date (3/2/2016 1:39:08 PM) and application data for the quarter (Q3, 2015). A table of product IDs is shown, with the first entry being 81731VA001. The interface also features several 'Show' buttons for product details and a note about displaying the full list of data.

Create an EIDM Account

Create a HIOS Account

Register an MFA Device

Register an Organization in HIOS

Request User Roles

Create Products and Plans

Access the QHP Modules

# Add New Product

- On the Add New Product page, enter the required product information and activate the “Submit” button
- A new Product ID will be automatically generated upon submission

The screenshot shows the 'Add New Product' form in the Health Insurance Oversight System Plan Finder. The form is titled 'Add New Product' and includes a navigation bar with links for 'HIOS MAIN PAGE', 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. Below the navigation bar, there are tabs for 'View Issuer Submitted Data', 'Download Data Submission Tools', 'Upload Finalized Data Template', and 'Component IDs'. The form contains several fields for product information, including 'Issuer Name' (set to 'FFE Test Company - VA'), 'Submission Uploaded Date' (3/2/2016 1:39:08 PM), and 'Application Data for Quarter' (Q3, 2015 [Jul. 1 - Sept. 30, 2015]). The form also includes a section for 'Add New Product' with a note that (\*) indicates a required field. The form is divided into two columns of fields. The left column includes fields for 'Product ID' (Not assigned yet), 'Product Name', 'Enrollment Code/Group Number', 'Product Type', 'Other Product Type Description', 'Association Product', 'Product Enrollment' (less than 10 digit number), 'Individual or Small Group', 'Website Address (Benefit at a Glance)', 'Website Address (Formulary)', 'Website Address (Provider)', 'Covers Whole State', and 'Approved Product'. The right column includes fields for 'Number of Applications Received', 'Number of Applications Denied', 'Number of Uprated Offers', 'Number of Administrative Disqualifiers', 'SERFF Number' (XXXX-000000000), 'Open or Closed' (set to Open), 'Closed Reason', 'Other Closed Reason', 'Grandfathered Product', 'Effective Start Date' (MM/DD/YYYY), and 'Effective End Date' (MM/DD/YYYY). At the bottom of the form, there are 'Submit', 'Cancel', and 'Back' buttons.

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# View and Edit Products

- Select the “View Issuer Submitted Data” tab
- Select the “Products Offering Report” link
- Select the “Issuer Name” from the drop-down menu
- Activate the “Get Issuer Information” button
- Activate the “Show” buttons to view product details
- Activate the “Product ID” hyperlink to navigate to the Edit Product Data Elements page

**Health Insurance Oversight System**  
Plan Finder

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

Welcome

View Issuer Submitted Data Download Data Submission Tools Upload Finalized Data Template Component IDs

Issuer General Information Issuer Marketplace Information **Products Offering Report** RBIS Input

**Product Level Offering Report**

(\*) Indicates a required field.

Please select an Issuer from the Issuer Name dropdown menu below and then activate the Get Issuer Information button to view the Product Level Offering Report.

\*Issuer Name: FFE Test Issuer 359 - ME Get Issuer Information

**FFE Test Issuer 359 - ME**

Submission Uploaded Date: 2/6/2015 1:51:17 PM  
Application Data for Quarter: Q3, 2015 [Jul. 1 - Sept. 30, 2015]  
Data Last Reviewed By:

Add New Product  
To edit the data elements of an existing product, please select its Product ID from the table below.

Please select "Show" buttons below to display the full list of data.

Product ID	Product Name	Enrollment Code/Group Number	SERFF Number	Effective Start Date	Effective End Date	Product Enrollment	Product Type	Other Product Type Desc	Association Product?	Individual or Small Group
10032ME001	FFE Product 1	5555555		1/1/2013		10	Indemnity		No	Individual
10032ME002	FFE Product 2			1/6/2013		12	Indemnity		No	Small Group
10032ME003	FFE Product 3			1/1/2014		12	HMO		Yes	Individual
10032ME004	FFE Product 4			1/2/2014		13	Indemnity		Yes	Small Group
10032ME007	TestProduct123			1/20/2016	12/31/2016	50000	PPO		No	Individual

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# Request Standard Component IDs in the HIOS Plan Finder Product Data Collection Module

# Standard Component IDs (SCIDs)

- A Standard Component ID (SCID) is the base identification of an insurance plan prior to it being submitted as an “On exchange”, “Off exchange”, or “both” plan
- The SCID is used to create the official Plan ID once it’s processed by the Plan Management system
- Users must have a Plan Finder Submitter role to request SCIDs for products
- From the Plan Finder Announcements page, select the “Component IDs” tab

**Health Insurance Oversight System**  
Plan Finder

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

View Issuer Submitted Data Download Data Submission Tools Upload Finalized Data Template **Component IDs**

**Announcements**

Welcome to the Plan Finder module of Health Insurance Oversight System (HIOS). Issuer users can submit their Health Insurance products information in the Individual and Small Group markets. State Department of Insurance users can view insurance data within your state.

If you have policy questions regarding the HealthCare.gov Plan Finder, please e-mail [CCIOPlanFinder@cms.hhs.gov](mailto:CCIOPlanFinder@cms.hhs.gov).

If you need technical assistance regarding product-level data submissions, please contact the Exchange Operations Support Center (XOSC) at 1-855-CMS-1515 or [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov).

**Welcome**

**Related Links**

- [HealthCare.gov](#)
- [Content Requirements for HealthCare.gov - Center for Consumer Information & Insurance Oversight](#)
- [Archive of Memos](#)
- [Training Resources](#)

Accessibility | Rules of Behavior | Web Policies | File Formats and Plug-Ins

U.S. Department of Health & Human Services - 200 Independence Avenue, S.W. - Washington, D.C. 20201



# Request Component IDs

- Select the “Component IDs” tab
- Select the “Request Component IDs” link
- Select the Issuer
- Select the Product
- Enter the number of Component IDs needed
- A maximum of 50 IDs are available per request
- Activate the “Submit” button

The screenshot displays the 'Health Insurance Oversight System Plan Finder' interface. At the top, there are navigation links: 'HIOS MAIN PAGE', 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. Below these is a 'Welcome' message. A menu bar contains 'View Issuer Submitted Data', 'Download Data Submission Tools', 'Upload Finalized Data Template', and 'Component IDs'. Under 'Component IDs', there are two sub-links: 'View Component IDs' and 'Request Component IDs'. The 'Request Component IDs' form includes a note: '(\*) Indicates a required field.' The form fields are: '\*Issuer:' with a dropdown menu showing '10032 - FFE Test Issuer 359 - ME'; '\*Product:' with a dropdown menu showing '10032ME001 - FFE Product 1'; and '\*Number of IDs:' with a text input field and the note 'Maximum 50 IDs per request'. At the bottom of the form are 'Submit' and 'Cancel' buttons.

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# View Component IDs

- Select the “Component IDs” tab
- Select the “View Component IDs” link
- Select the desired Issuer
- Select the desired Product
- Activate the “View Results” button

The screenshot displays the 'Health Insurance Oversight System Plan Finder' interface. At the top, there are navigation links: 'HIOS MAIN PAGE', 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. Below these is a 'Welcome' message. The main navigation area includes tabs for 'View Issuer Submitted Data', 'Download Data Submission Tools', 'Upload Finalized Data Template', and 'Component IDs'. The 'Component IDs' tab is active, showing sub-links for 'View Component IDs' and 'Request Component IDs'. The 'View Component IDs' section contains a form with the following fields:

- \*Issuer:** A dropdown menu with the selected value '10032 - FFE Test Issuer 359 - ME'. A tooltip is visible showing a list of products: '10032ME001 - FFE Product 1', '10032ME002 - FFE Product 2', '10032ME003 - FFE Product 3', and '10032ME004 - FFE Product 4'.
- \*Product(s):** A dropdown menu with the selected value '10032ME004 - FFE Product 4'. A note next to it says: 'Note: Hold down the 'Ctrl' key to select multiple Products'.

Below the form is a 'View Results' button. Underneath, it says 'Component IDs for the Selected Product are:' followed by a table:

Component ID
10032ME001 - FFE Product 1
10032ME0010001
10032ME0010002
10032ME0010003
10032ME0010004
10032ME0010005
10032ME0010006
10032ME0010007
10032ME0010008

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Access the QHP Modules



# Access the QHP Modules

- Log into the CMS Enterprise Portal
- Select the yellow “HIOS” tab
- Activate the “Access Plan Management & Market Wide Functions” hyperlink

The screenshot shows the CMS Enterprise Portal interface. At the top left is the CMS.gov logo and 'Enterprise Portal'. Below it are two yellow tabs: 'My Portal' and 'HIOS'. A breadcrumb trail reads 'CMS Enterprise Portal > HIOS > Overview'. The main heading is 'HIOS | Plan Management | Market Wide Functions'. Below this is a paragraph of instructions: '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). Password, as well as enter a Security Code (VIP Token). If you have not registered a device to support MFA, please access the 'My Profile' page in 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 or 1-855-CMS-1515.' There are three sub-sections: 'Health Insurance Oversight System (HIOS)' with a link 'Access HIOS'; 'Plan Management and Market Wide Functions' with a link 'Access Plan Management & Market Wide Functions' highlighted by a red arrow; and a footer with 'CMS Enterprise Portal Home', 'CMS.gov | Enterprise Portal', and 'A federal government website managed by the Centers for Medicare & Medicaid Services 7500 Security Boulevard, Baltimore, MD 21244'.

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Access the QHP Modules

# Access the QHP Modules – Before April 2017

Under Plan Management Functions, select the green QHP Module link to navigate to the Plan Management System.

The screenshot shows the 'Health Insurance Oversight System' homepage. At the top, there are navigation buttons: ACCESS HIOS, HOME, FAQ, CONTACT US, and SIGN OUT. Below these is a 'Welcome' message. The main heading is 'Plan Management and Market Wide Functions Home Page'. On the left, there are two sections: 'Organization Management & Administrative Functions' with links for 'Manage Account', 'Manage an Organization', and 'Role Management'; and 'Plan Management Functions' with links for 'QHP Issuer Module', 'QHP Benefits and Service Area Module', and 'QHP Rating Module'. The right side features 'Plan Management And Market Wide Functions Main Page Announcements' with two paragraphs of text and contact information for the Exchange Operations Support Center (XOSC).

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Access the QHP Modules

# Access the QHP Modules – April 2017

From the HIOS Home page, select the QHP Benefits and Service Area Module and then activate the “Launch This Module” link.

The screenshot shows the 'Health Insurance Oversight System' Knowledge Center. At the top, there is a navigation bar with 'Home' and 'Knowledge Center' links, and a 'Help' icon. A welcome message states: 'Welcome to HIOS. We are in the process of updating the site. You will see an updated HIOS homepage as well as existing HIOS pages as you navigate throughout the site.' Below this, the 'Home' section prompts the user to 'Select a module below to get started. A solid flag (🚩) indicates a module notification is available.' Under 'My Work', three modules are listed: 'QHP Benefits and Service Area Module' (with a green 'Launch This Module' button), 'QHP Issuer Module', and 'QHP Rating Module'. A 'DON'T SEE WHAT YOU'RE LOOKING FOR?' section offers a 'VIEW ALL FUNCTIONS' button. At the bottom, three service tiles are visible: 'WANT TO LEARN?' with a 'VISIT KNOWLEDGE CENTER' button, 'NEED HELP?' with a 'SUBMIT A TICKET' button, and 'CAN WE DO BETTER?' with a 'GIVE US FEEDBACK' button.

Create an EIDM  
Account

Create a  
HIOS  
Account

Register an  
MFA Device

Register an  
Organization  
in HIOS

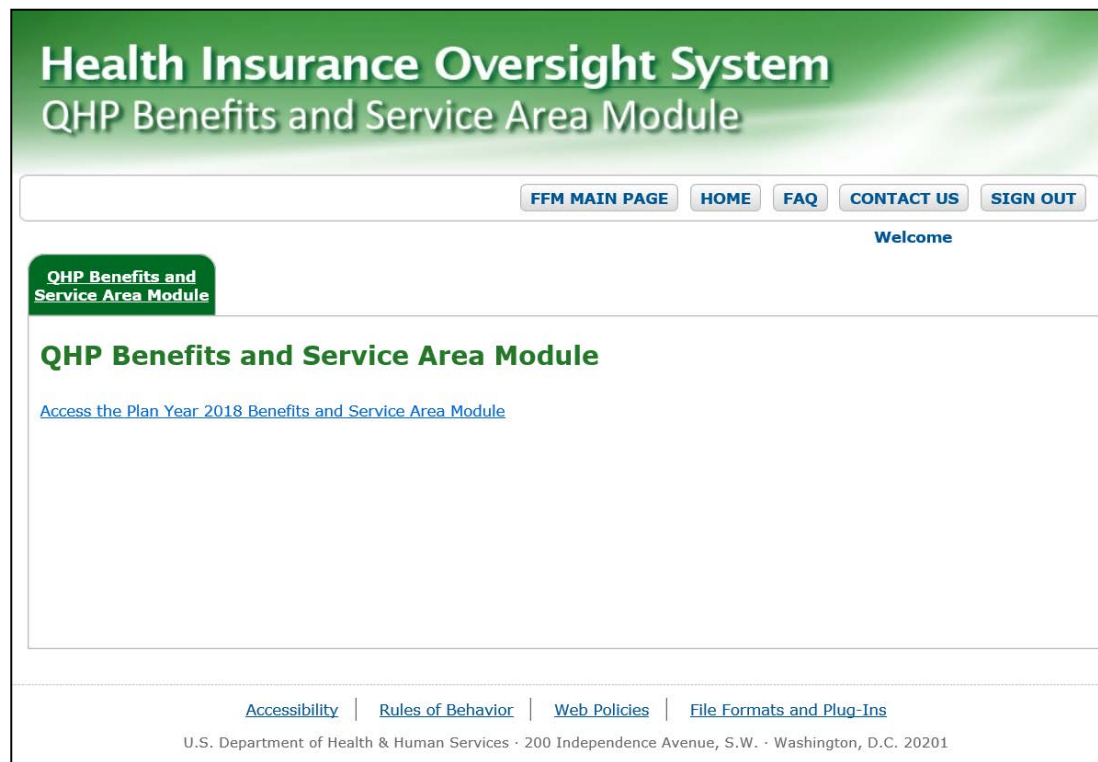
Request  
User Roles

Create  
Products and  
Plans

Access the  
QHP  
Modules

# Navigate to the Plan Management System

During the CMS submission window, the link to access the Plan Year QHP Module will be enabled to allow users to navigate to the Plan Management system.



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# Navigate to the Plan Management System

Displayed is the Plan Management user interface.

The screenshot displays the PLAN MANAGEMENT user interface. At the top, the title "PLAN MANAGEMENT" is prominently displayed in a large, blue, sans-serif font. To the right of the title, there is a "Text Size: A A A" control. Below the title, the "PLAN YEAR : 2017" is shown, along with a "Welcome," message and a "Logout" link. The main content area is titled "Benefits & Service Area Module - Summary". On the right side of this section, there is a PDF icon and a link for "Instructions and Reference Material (PDF) [2.36 MB]". Below this, there are two tabs: "Data Submitter" (which is active) and "Data Validator". The main content area contains a section titled "Start working on a Benefits and Service Area Module Submission". Under this section, there is a label "Issuer:" followed by a dropdown menu showing "65173 VA test001" and a blue button labeled "Start Benefits Module". Below this is another section titled "Resume an Existing Submission". This section contains a table with columns for "Issuer ID:", "Issuer Name:", "State:", "Last Update:", "Status:", and "Action:". The table is currently empty, with the text "No data available in table" centered below the column headers. Below the table, it says "Showing 0 to 0 of 0 entries". At the bottom of the page, the "PLAN MANAGEMENT" title is repeated in a smaller font. To the right of this title, there is a footer containing the text: "A federal government website managed by the Centers for Medicare & Medicaid Services" and "7500 Security Boulevard, Baltimore, MD 21244". To the right of the footer text is the CMS logo, which consists of the letters "CMS" in a stylized font with a blue and yellow arc above it, and the text "CENTERS FOR MEDICARE & MEDICAID SERVICES" below it.

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# New HIOS Portal Functionality

# HIOS Portal Release 21.00

- Portal CR-1472 – Manage Organization Data- View Roles
  - CR Description: This CR includes the addition of new functionality in the HIOS Portal that will enable Admin (Company, Issuer) users to manage organization data and view users who have roles associated with their organization.
- To be able to access this functionality, users should have either of the following roles:
  - **Company Administrator** (associated with a 9 digit FEIN/TIN)- A representative of the Company who will be solely responsible for editing of Company level information. A company can have any number of Company administrators. A user with a submitter or validator role for a Company cannot be a Company administrator.
  - **Issuer Administrator** (associated with a 5 digit HIOS issuer id)- A representative of the Issuer who will be solely responsible for editing of the Issuer level information. Each issuer can have multiple Administrators. A user with a Submitter or Validator role cannot be an Issuer Administrator.



# Portal CR-1472 – Current View

Users will need to follow these steps to access this page:

- Login to HIOS Portal
- Navigate to Manage an Organization
- Select “Create new organization” from the primary purpose drop down
- Enter the FEIN/TIN for the organization
- If the user is an administrator for the Organization FEIN/TIN entered, the current view only displays the “View” and “Edit” hyperlinks for the Company and the associated Issuers

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

**Manage an Organization** Manage Organization Relationships Manage Data Changes

**Manage an Organization**

Please specify the primary purpose of your visit:

Please click [Organization Types \(PDF - 150KB\)](#) for a list of organization types and their definitions.

Please select the type of organization:

Please enter your organization's 9 digit Federal EIN /TIN below and select 'FEIN/TIN Search' to determine if your organization currently exists in HIOS.

Federal EIN/TIN

**Organization**

Organization Legal Name	Organization Type	Federal EIN/TIN	Action
00000044 Test	Company	00000044	<a href="#">View</a> <a href="#">Edit</a>

**Issuers**

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

Issuer ID	Issuer Legal Name	Registered State	Action
78597	00000044 Test	AR	<a href="#">View</a> <a href="#">Edit</a>



# Portal CR-1472 – Future View

- The user logged into HIOS has a Company Administrator role for the FEIN-000000044. Therefore, the “View Roles” hyperlink is being displayed both at the Organization level and for the Associated issuers (78597) in the table below.
- Note: If the user only had an Issuer Administrator role for the Issuer 78597, then the “View Roles” hyperlink would only be displayed in the Issuer table and not in the Organization table.

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

Manage an Organization Manage Organization Relationships Manage Data Changes

**Manage an Organization**

Please specify the primary purpose of your visit:

Please click [Organization Types \(PDF - 160KB\)](#) for a list of organization types and their definitions.

Please select the type of organization:

Please enter your organization's 9 digit Federal EIN / TIN below and select 'FEIN/TIN Search' to determine if your organization currently exists in HIOS.

Federal EIN/TIN

**Organization**

Organization Legal Name	Organization Type	Federal EIN/TIN	Action
000000044 Test	Company	000000044	<ul style="list-style-type: none"><li><a href="#">View</a></li><li><a href="#">Edit</a></li><li><a href="#">View Roles</a></li></ul>

**Issuers**

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

Issuer ID	Issuer Legal Name	Registered State	Action
78597	000000044 Test	AR	<ul style="list-style-type: none"><li><a href="#">View</a></li><li><a href="#">Edit</a></li><li><a href="#">View Roles</a></li></ul>

# Portal CR-1472 – View Roles Page 1

Once the user selects the “View Roles” hyperlink at the Organization level, the following page shall display all the users who have roles for different modules associated with the FEIN for the organization.

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

### View Roles

Organization Name: 000000044 - 000000044 Test

« First « Prev 1 Next » Last » Show Entries 10 Showing 1 to 5 of 5 entries

User Name	Module Name	Role Name	Request Approved Date	
Tester1	Financial Management	Payee Data Approver	01/27/2017	▾
testsbm562 Test	Financial Management	Payee Data Approver	10/16/2013	▾
testsbm544 Test	Financial Management	Payee Data Submitter	10/16/2013	▾
Tester2	HIOS Portal	Company Administrator	10/17/2016	▾
Tester3	HIOS Portal	Company Administrator	02/22/2016	▾

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# Portal CR-1472 – View Roles Page 2

Once the user selects the “View Roles” hyperlink at the Issuer level, the following page shall display all the users who have roles for different modules associated with the Issuer ID.

**Health Insurance Oversight System**

HOME FAQ CONTACT US SIGN OUT

Welcome

### View Roles

Organization Name: 78597 - 000000044 Test - AR

« First « Prev 1 Next » Last » Show Entries 10 Showing 1 to 5 of 5 entries

User Name	Module Name	Role Name	Request Approved Date
Tester1	EDGE Server Management (ESM)	Issuer EDGE Registration Request Submitter	01/27/2017
• Requestor Job Title: Module Lead			
Tester2	HIOS Plan Finder Product Data Collection (PF)	Issuer	11/14/2016
• Requestor Job Title: Module Lead			
• User Role Type: Individual Market Validator			
• User Role Sub Type: Primary Contact			
Tester3	HIOS Plan Finder Product Data Collection (PF)	Issuer	01/09/2017
Tester4	Rates & Benefits Information System (RBIS)	Issuer	11/14/2016
Tester5	Rates & Benefits Information System (RBIS)	Issuer	01/09/2017

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# Questions?

- If you have questions, please contact the Exchange Operations Support Center (XOSC):
  - Email: [CMS\\_FEPS@cms.hhs.gov](mailto:CMS_FEPS@cms.hhs.gov)
  - Phone: (855) 267-1515
- Additional resources are available on the CMS website:  
<http://www.cms.gov/CCIIO/Resources/Training-Resources/index.html>

# Questions

