

Health Insurance Oversight System

Portal User Manual



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Table 1: Frequently Asked Questions 106

Portal User Manual Change History

October 2018 Revisions

- Enhancements have been added including new organization search functionality and user role removal functionality for administrative users.

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 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. Internet Explorer (version 7 or higher)
2. Mozilla Firefox (version 5 or higher)

Prior to accessing HIOS, users will need to obtain their Enterprise Identity Management System (EIDM) credentials. The credentials are obtained by completing registration through the EIDM secure authentication process. Once registered, these credentials will be used to access 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 EIDM authentication and authorization. Only users who are authenticated with the EIDM procedures will be allowed to access the HIOS system.

Enterprise Identity Management System (EIDM) provides authentication and authorization capabilities and is tightly integrated with the CMS Enterprise Portal. Users must register for an EIDM account and obtain an EIDM 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, Date of Birth, Home Address and Primary Phone Number.

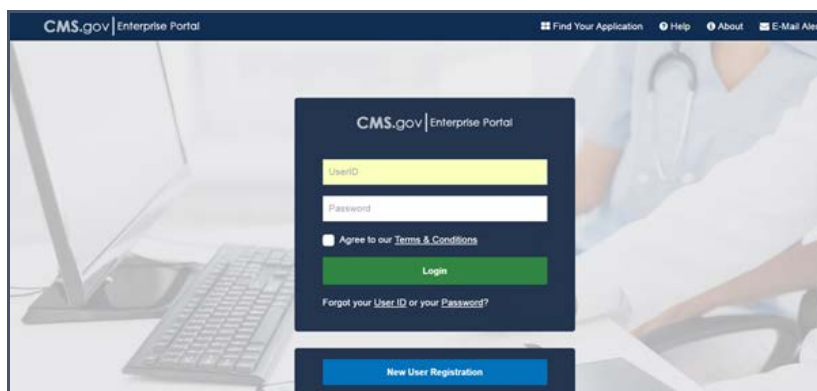
2 HIOS System Access

All EIDM authorized and authenticated users will be able to access the HIOS system by navigating to the CMS Enterprise Portal using the secure URL: <https://portal.cms.gov/>. Users will be required to enter their credentials obtained by registering through the EIDM 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 1 displays the CMS Enterprise Portal Home page.

Figure 1: CMS Enterprise Portal Main Screen



2.1 New User Registration

New users must complete the following steps to access HIOS.

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

To register for an EIDM 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 personally identifiable information (PII) such as (Social Security number, Date of Birth, Home Address, Full name, Phone number, etc.).

Users must select New User Registration at the bottom of the CMS Enterprise Portal Home page, which will take them to the Step #1: Choose Your Application page (refer to Figure 2).

Figure 2: Choose Your Application Page

CMS.gov | Enterprise Portal Applications Help About E-Mail Alerts

Step #1: Choose Your Application

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

HIOS/FFE: Health Insurance Oversight System

Terms & Conditions

OMB No. 0938-1236 | Expiration Date: 04/30/2017 |

OMB No.0938-1236 | Expiration Date: 04/30/2017 (OMB Re-Certification Pending) | 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.1001 and 1030. We encourage you to

☒ I agree to the terms and conditions

Next Cancel

Users must select the HIOS application from the drop-down menu and must 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, users must provide their personal information and select Next to continue with the registration process.

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

Figure 3: Register Your Information Page

CMS.gov | Enterprise Portal Applications Help About E-Mail Alerts

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

Users will then be navigated to the Step #3: Create User ID, Password & Challenge Questions page, where they must enter a user ID, password, and challenge questions and answers. Once that is completed, users must select Next to continue with the registration process.

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

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

The screenshot shows the 'Step #3: Create User ID, Password & Challenge Questions' page. The header includes 'CMS.gov | Enterprise Portal' and navigation links for Applications, Help, About, and E-Mail Alerts. The main heading is 'Step #3: Create User ID, Password & Challenge Questions' with a subtext: 'Step 3 of 3 - Please create User ID and Password, Select Challenge questions and provide answers.' The form contains the following fields:

- 'Enter User ID' text input.
- 'Enter Password' and 'Enter Confirm Password' text inputs.
- Three sets of challenge questions, each consisting of a dropdown menu for the question and a text input for the answer. The questions are labeled 'Select Challenge Question #1', '#2', and '#3'.
- At the bottom, there are three buttons: 'Back' (green), 'Next' (green), and 'Cancel' (gray).

The user must review the information they have provided on the Registration Summary page. The user should make any necessary changes on this page and select Submit User.

Figure 5 displays the Registration Summary page:

Figure 5: Registration Summary Page

The screenshot shows the 'Registration Summary' page. The header is the same as Figure 4. The main heading is 'Registration Summary' with a subtext: 'Please review your information and make any necessary changes before submitting.' Below this is a dropdown menu showing 'HIOS/FFE: Health Insurance Oversight System'. A note states: 'All fields are required unless marked 'Optional''. The form contains the following fields:

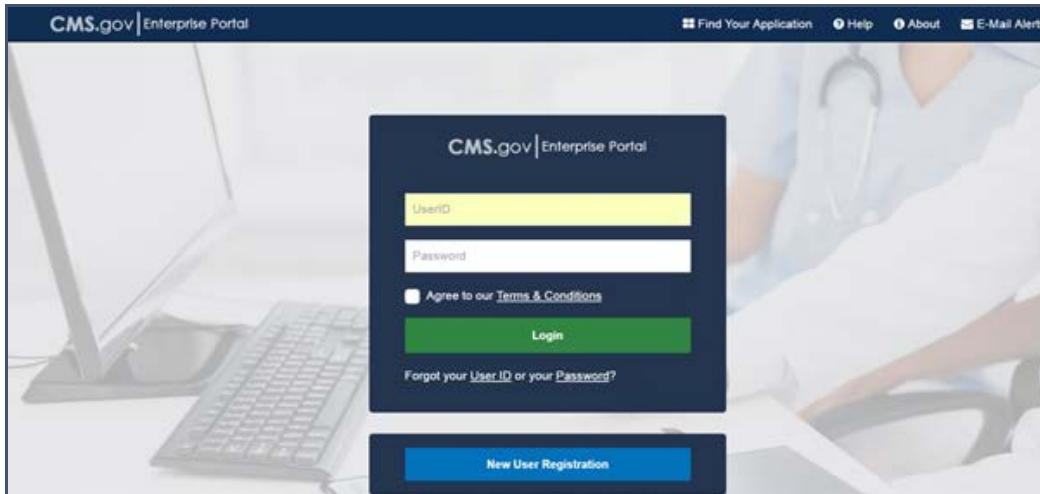
- 'First Name' text input with the value 'test'.
- 'Enter Middle Name (optional)' text input.
- 'Last Name' text input with the value 'test'.
- 'Suffix(optional)' dropdown menu with the value 'IV'.
- 'Enter Social Security Number (optional)' text input.
- 'Birth Month' dropdown menu with the value 'May'.
- 'Birth Date' dropdown menu with the value '31'.
- 'Birth Year' dropdown menu with the value '1990'.
- 'Home Address #1' text input with the value 'test'.
- 'Enter Home Address #2 (optional)' text input.

After completing the registration process, users will also receive an email acknowledging successful registration and the email will include the EIDM user ID.

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

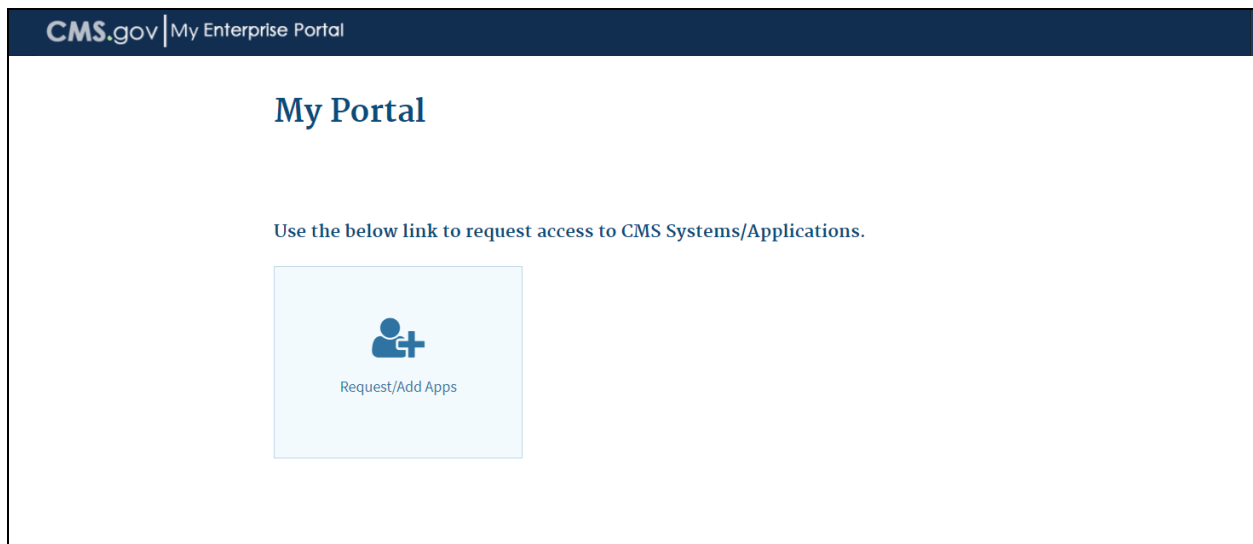
Figure 6 displays the CMS Enterprise Portal login screen:

Figure 6: CMS Enterprise Portal - Login



On the My Portal page, users must select Request/Add Apps (refer to Figure 7).

Figure 7: My Portal Page – Request/Add Apps



On the Access Catalog page, the user must select Request Access for the HIOS application (refer to Figure 8).

Figure 8: Access Catalog Page

Access Catalog Start typing to filter apps... **REQUEST ADMIN ROLE** **SHOW ALL**

Application	Description	Help Desk Information	Request Access
FFSDCS	The Fee for Service Data Collection System (FFSDCS) application collects...	Help Desk Information 844-876-0765 CLFShelpdesk@dcca.com ASPhelpdesk@dcca.com	Request Access
BCRS Web	The Benefits Coordination & Recovery System (BCRS) allows a user to...	Help Desk Information 1-866-454-8065 cobhelp@rhassociates.com	Request Access
Bundled Payments EFT	Bundled Payments for Care Improvement Data File Transfer.	Help Desk Information BundledPayments@cms.hhs.gov	Request Access
CCIO Enrollment Resolution and Reconciliation System	The CCIO Enrollment Resolution and Reconciliation System (CERRS) supports...	Help Desk Information 703-554-2807 help_desk@ccqnosante.com	Request Access
Cisco WebEx SaaS	The CMS WebEx cloud offering consists of access to the WebEx Training...	Help Desk Information 410-786-3090 (Option #1) QTS_WebEx@cms.hhs.gov	Request Access
COB	Access to this application is restricted to Trading Partners that exchange...	Help Desk Information 800-927-8069 mapohelp@cms.hhs.gov	Request Access
Connexion	Connexion provides suppliers with secure online access to their Medica...	Help Desk Information 877-577-5331 cbic_admin@palmettoqba.com	Request Access
CPMS (CO-OP Program Management System)	CO-OP Program Management System (CPMS) is used to track and manage information...	Help Desk Information 855-267-1515 CMS_FEPS@cms.hhs.gov	Request Access
DMEPOS Bidding System (DBIDS)	Durable Medical Equipment Prosthetics Orthotics & Supplies DMEPOS...	Help Desk Information 877-577-5331 cbic_admin@palmettoqba.com	Request Access
EIDM Reports	The EIDM Reports application provides access to various EIDM reports...	Help Desk Information EIDMSupport@ossinc.com	Request Access
Electronic Correspondence Referral System (ECRS) Web	This application allows authorized users to fill out various online forms...	Help Desk Information 646-458-6740 ecrsupport@ehimedicare.com	Request Access
Electronic Retroactive Processing Transmission (eRPT)	The Electronic Retroactive Processing Transmission (eRPT) is a web-based...	Help Desk Information 800-927-8069 mapohelp@cms.hhs.gov	Request Access

My Access
You currently do not have access to any applications. Please use the access catalog to request access to the applications.

My Pending Requests
You do not have any pending requests at this time.

On the Request New System Access page, users must select HIOS Application from the System Description drop-down menu and HIOS User for the Role (refer to Figure 9).

Figure 9: Request New System Access Page

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 [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.

* System Description: Please select a role

* 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_FEPS@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-UI/FrontController?op=requestHIOSSAccount>

* HIOS Authorization Code:

Cancel **Submit**

On the Request New System Access page, users must select the hyperlink provided to register for access to HIOS. Users will need to complete the Request HIOS Account form and submit for approval. Please note that the Request HIOS Account form accepts user requests from within and outside the US.

Figure 10 and Figure 11 displays the Request HIOS Account forms for both US and Non-US users:

Figure 10: Request HIOS Account Form – US Address

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 Marketplace Service Desk at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.

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

Personal Information

Title

* First Name

Middle Name

* Last Name

Suffix

Work Information

* Job Title

* Organization Name

* Email

* Organization Location

US Address

* Address Line 1

Address Line 2

* City

* State

* ZIP Code (5 digits)

ZIP Plus 4 (4 digits)

* Phone (xxx-xxx-xxxx)

Phone Ext.

SUBMIT

Figure 11: Request HIOS Account Form – Non-US Address

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 Marketplace Service Desk at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.

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

Personal Information

Title

* First Name

Middle Name

* Last Name

Suffix

Work Information

* Job Title

* Organization Name

* Email

* Organization Location

* Address Line 1

Address Line 2

* City or Town

* Province, Region or State

* Country

* Zip Code or Postal PIN Code

* Phone

Phone Ext.

SUBMIT

Once approved, authenticated users will receive an email with their HIOS credentials, account information and an authorization code to request access to HIOS in the Enterprise Portal.

Once the users receive the email from HIOS registration along with the authorization code, they are required to enter the authorization code in the 'HIOS Authorization Code' field on the Request New System Access page as illustrated in Figure 12 and select Submit.

Figure 12: Request New System Access - Enter Authorization Code Screen

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 [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.

System Description: HIOS-HIOS Application Please select a role

Role: HIOS User

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_FEP5@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://fhs.cms.gov/HIOS-BEG-REGISTER-USER/>

HIOS Authorization Code:

Cancel Submit

Next, the user will be navigated to the Identity Verification page. The user must review the information on the page and select Next to continue (refer to Figure 13).

Figure 13: Identity Verification Screen

Identity Verification

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:

- Ensure that you have entered your legal name, current home address, primary phone number, date of birth and E-mail address correctly. We will only collect personal information to verify your identity with Experian, an external Identity Verification provider.
- 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.
- 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, users must select the checkbox "I agree to the terms and conditions" to accept the terms and conditions and select Next to continue.

Figure 14 displays the Terms and Conditions page.

Figure 14: Terms and Conditions Page

My Access

- [Request New System Access](#)
- [View and Manage My Access](#)
- [Annual Certification](#)

Terms and Conditions

OMB No: 0936-1236 | 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 Rules of Behavior for Privileged User Accounts (addendum to the HHS Rules of Behavior (HHS RoB), document number HHS-OCIO-2013-0003S and dated July 24, 2013), and understand and agree to comply with its provisions. I understand that violations of the HHS Rules of Behavior for Privileged User Accounts or information security policies and standards may lead to disciplinary action and that these actions may include termination of employment, removal or debarment from work on federal contracts or projects, revocation of access to federal information, information systems, and/or facilities, criminal penalties, and/or imprisonment. I understand that exceptions to the HHS Rules of Behavior for Privileged User Accounts must be authorized in advance in writing by the OpDiv Chief Information Officer or his/her designee. I also understand that violation of certain laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS Rules of Behavior for Privileged User Accounts draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.

Identity Verification

I understand that the identity proofing services being requested are regulated by the Fair Credit Reporting Act and that my explicit consent is required to use these services. I understand that any special procedures established by CMS for identity proofing using Experian have been met and the services requested by CMS to Experian will be used solely to confirm the applicant's identity to avoid fraudulent transactions in the applicant's name.

☐ I agree to the terms and conditions

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

The user must review the information they have entered on the Your Information page, make any necessary updates, and select Next to continue. On the Verify Identity page, the user must answer questions to confirm their identity and select Next to continue. The user should receive the message displayed in Figure 15 once they have completed the Remote Identity Proofing process.

Figure 15: Complete Step Up Page

My Access

- [Request New System Access](#)
- [View and Manage My Access](#)
- [Annual Certification](#)

Complete Step Up

You have successfully completed the Remote Identity Proofing process.

[Next](#)

The user will be navigated to the Multi-Factor Authentication Information page (see Figure 16) and must select Next to continue with the process.

Figure 16: Multi-Factor Authentication Information Page

My Access

- [Request New System Access](#)
- [View and Manage My Access](#)
- [Annual Certification](#)

Multi-Factor Authentication Information

To protect your privacy, you will need to add an additional level of security to your account. This will entail successfully registering your Phone, Computer or E-mail, before continuing the role request process.

To continue this process, please select 'Next'.

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

Users must associate a security code with their Phone, Computer, or E-mail. Users must select the device they 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, the user must select Next to continue.

Figure 17 displays the Register Your Phone, Computer, or E-mail page:

Figure 17: Register Your Phone, Computer, or E-mail Page

CMS.gov | My Enterprise Portal

Screen reader mode Off | Accessibility Settings

My Access

[Request New System Access](#)
[View and Manage My Access](#)
[Annual Certification](#)

Register Your Phone, Computer, or E-mail

Adding a Security 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 name and password. You can associate the Security Code to your profile by registering your Phone, Computer or E-mail. Select the links below to find out more information about the options.

- Phone/Tablet/PC/Laptop
To use the Validation and ID Protection (VIP) access software on your phone or computer, you must download the VIP Access software, if you do not already have it. Select the following link - <https://m.vip.systatrec.com>
- Text Message Short Message Service (SMS)
- Interactive Voice Response (IVR)
- E-mail

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.

Select the MFA Device Type that you want to use to login to secure applications from the dropdown menu below.

MFA Device Type:

Credential ID:

MFA Device Description:

Next **Cancel**

The user will receive a message that their device has been successfully registered to their user profile. Once the user selects OK on this page, they will receive a message that their request was successfully completed (refer to Figure 18). The user must select OK again to continue.

Figure 18: Successful Completion Page

CMS.gov | My Enterprise Portal

Screen reader mode Off | Accessibility Settings

My Access

[Request New System Access](#)
[View and Manage My Access](#)
[Annual Certification](#)

Successful Completion!

Your request has successfully completed. You will need to logout and then log in to access the Health Insurance Oversight System Application. Select 'OK' to continue.

OK

The user will be able to see the HIOS application listed in the Manage Access tab of the View and Manage My Access page (refer to Figure 19).

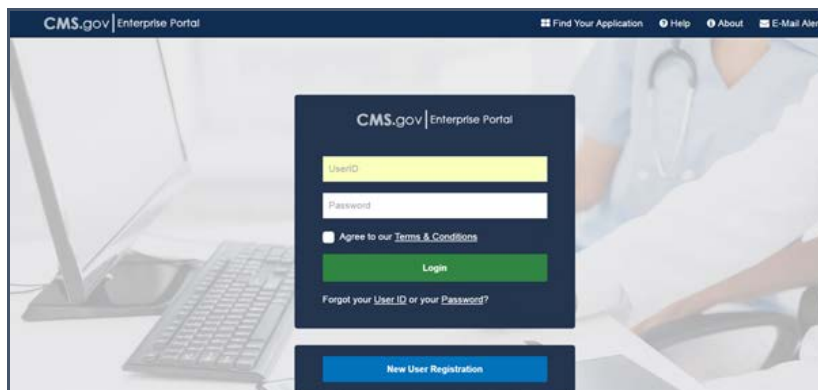
Figure 19 displays the View and Manage My Access page:

Figure 19: 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 EIDM registration process and have been granted access to the HIOS system. Users must first log out of the system for their profile updates to take effect. Users will then log back into the Enterprise Portal with their EIDM user ID and password.

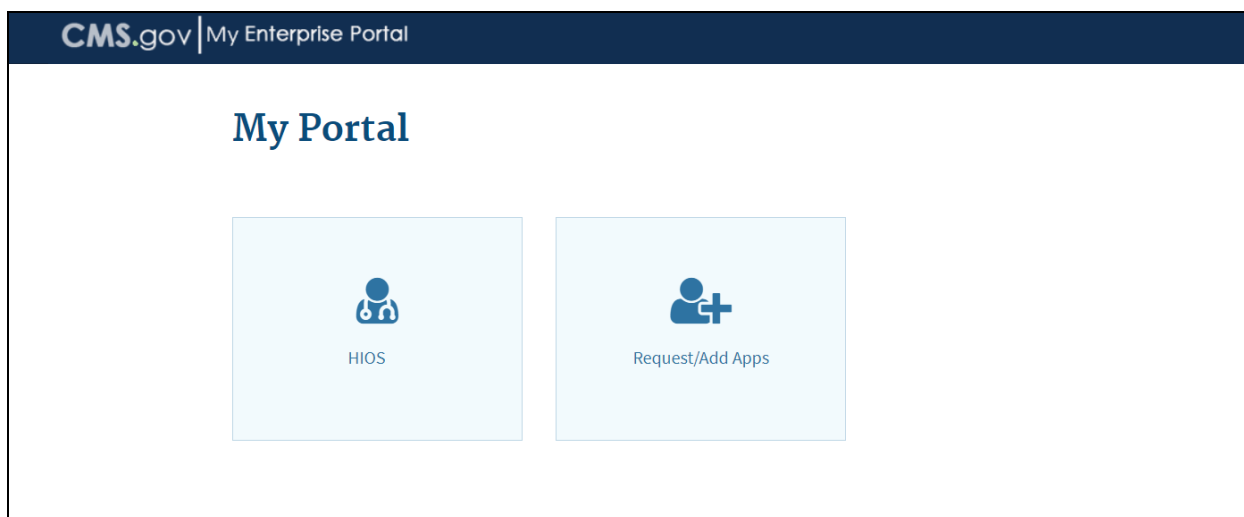
Figure 20 displays the CMS Enterprise Portal Page.

Figure 20: CMS Enterprise Portal Page - Login with EIDM Credentials

After users have logged into the CMS Enterprise Portal, they must select HIOS from the My Portal page and then the Overview link.

Figure 21 displays the My Portal page.

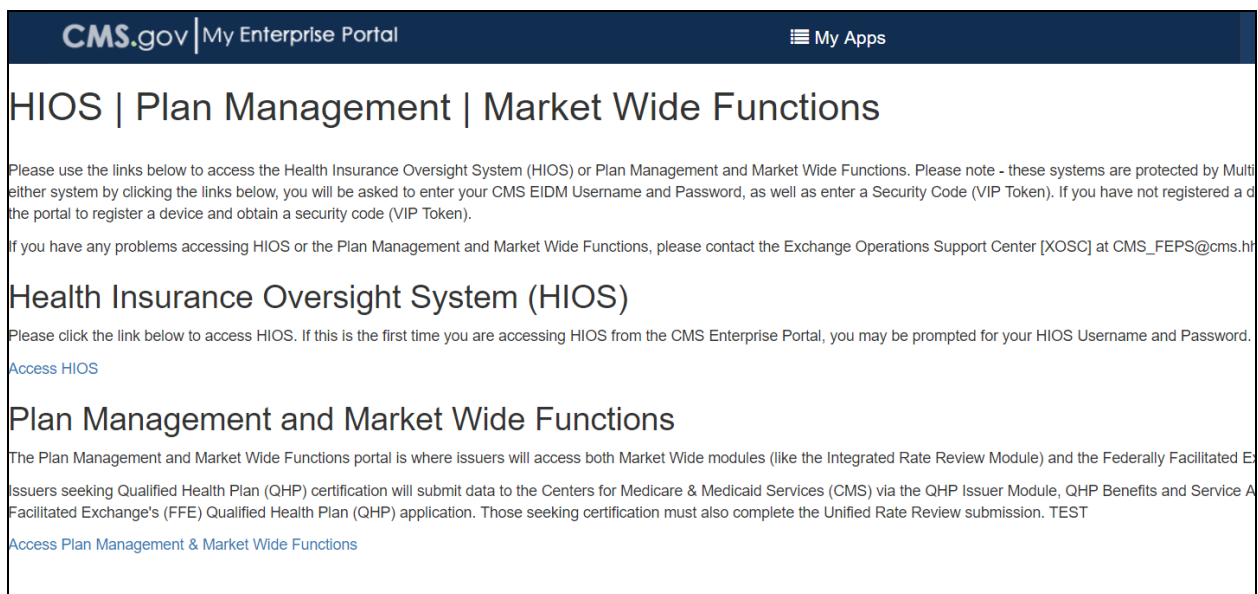
Figure 21: My Portal Page



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

Figure 22 displays the page that will allow the users to access the HIOS Home page. Users will select the 'Access HIOS' link to navigate to the HIOS Home page.

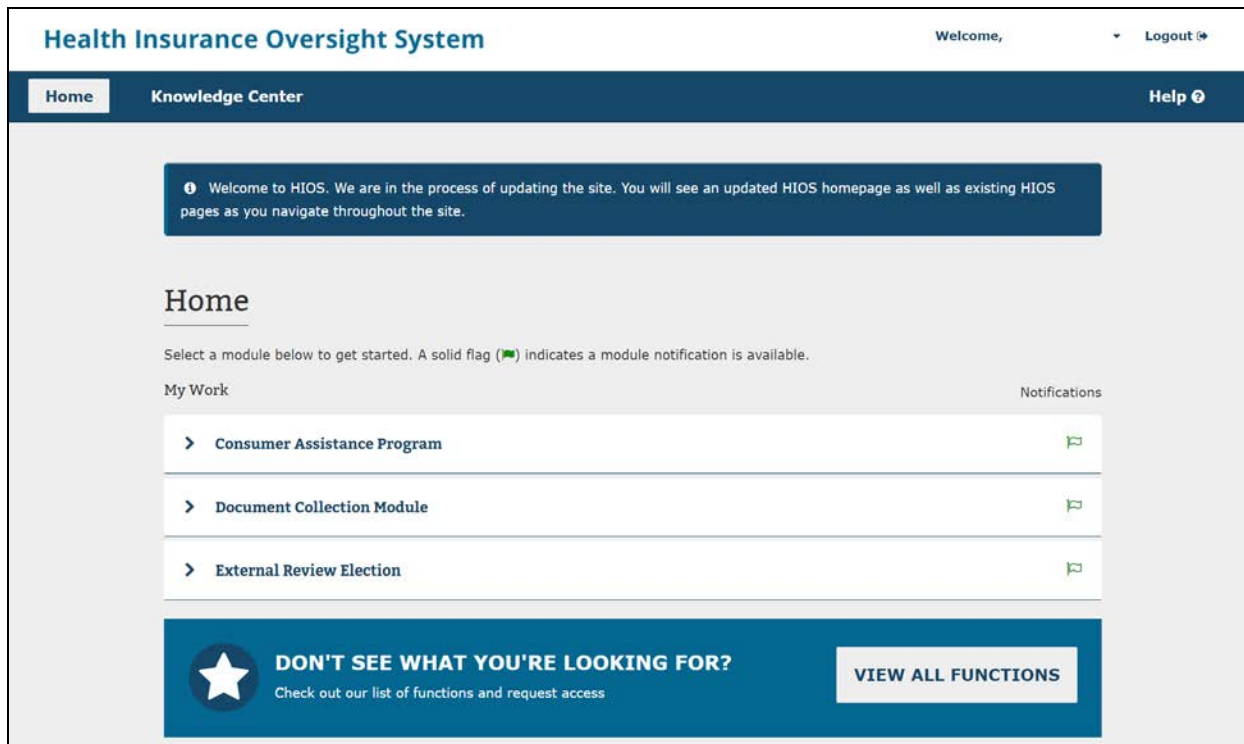
Figure 22: Access HIOS, Plan Management Landing Page



3 HIOS Portal Home Page

Upon successful login, the users will arrive on the HIOS Portal Home Page as shown in Figure 23.

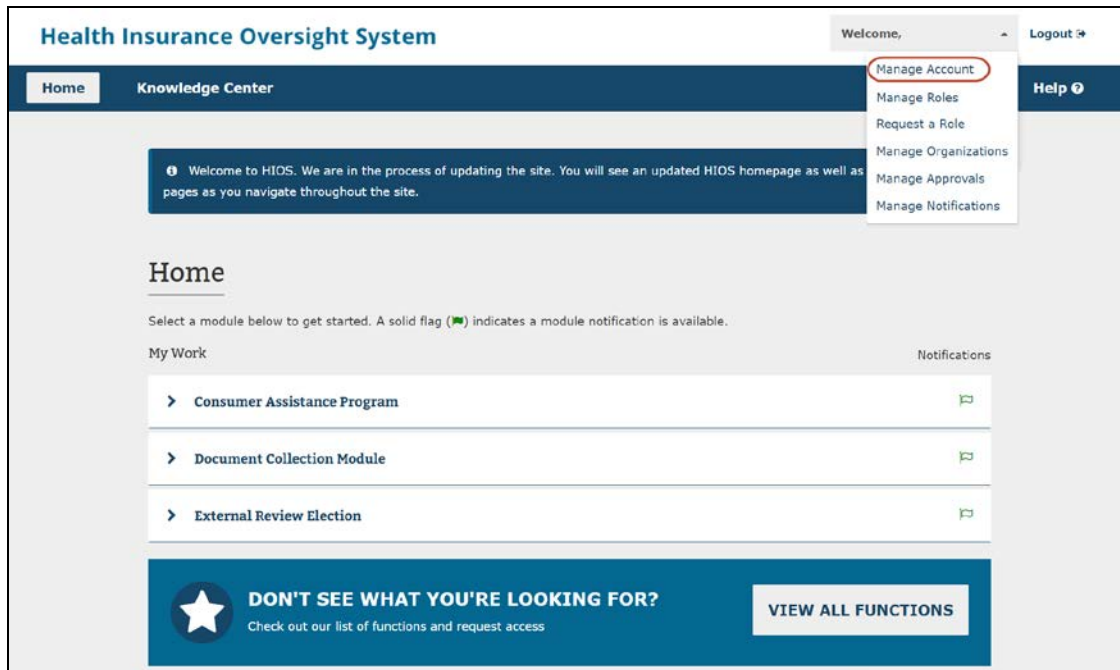
Figure 23: HIOS Portal Home Page



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 24 below, the Manage Account functionality can be accessed from the welcome user drop down on the HIOS home page.

Figure 24: HIOS Home Page – Manage Account Link



Once the users select the link, they will be navigated to the Manage Account page as illustrated below.

Figure 25: 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)

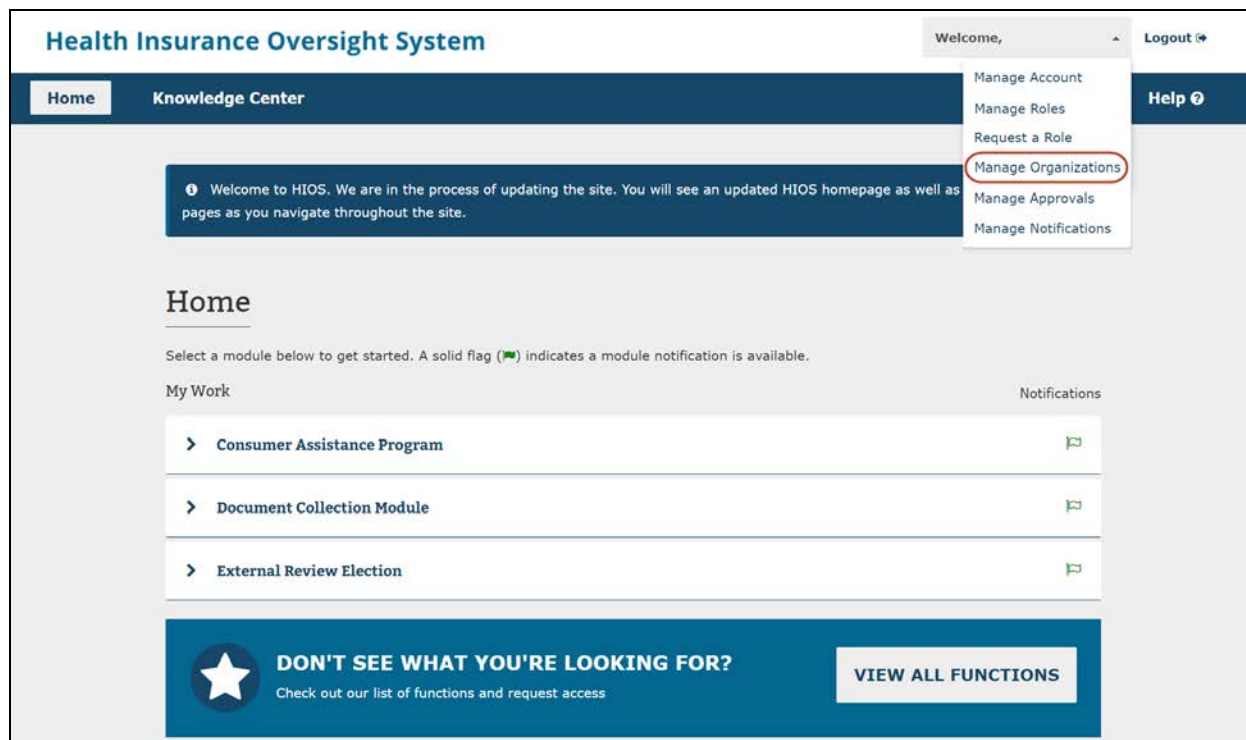
Phone Ext.

SUBMIT

3.2 Manage Organizations

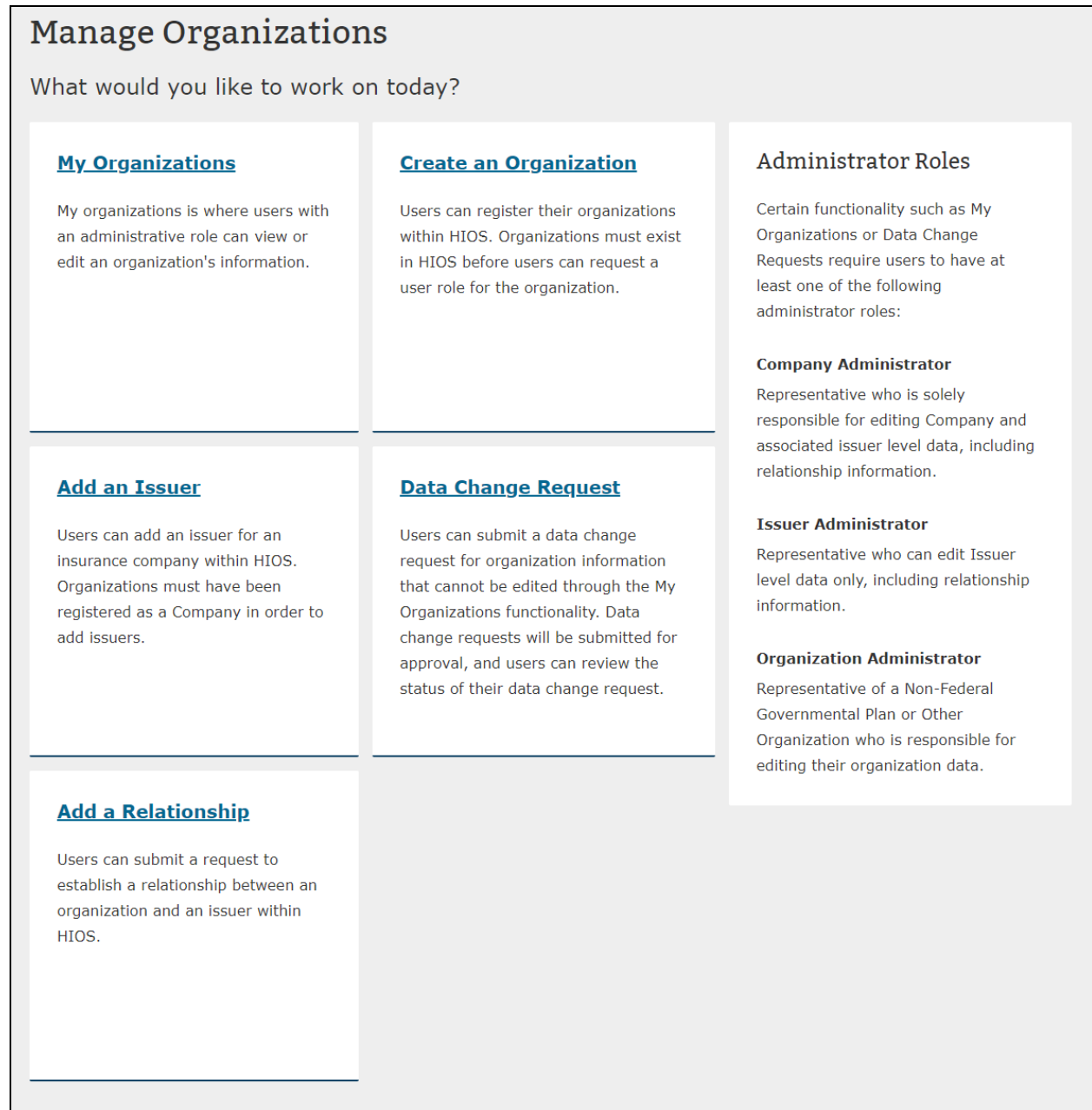
Users can access and view the Manage Organizations landing page from the HIOS Welcome drop-down menu. Please refer to Figure 26 below.

Figure 26: HIOS Portal Home Page – Manage Organizations



On the Manage Organizations landing page, users can view descriptions for and navigate to the following pages: My Organizations, Create an Organization, Add an Issuer, Data Change Request, and Add a Relationship. Users will also be able to see descriptions for the various types of Administrator Roles on the right side of the landing page. Please refer to Figure 27 below.

Figure 27: Manage Organizations Landing Page



3.2.1 My Organizations

The My Organizations page allows Company, Issuer, and Organization administrator users to view information for the organizations they have an administrative role for. 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 a user back to the Manage Organizations landing page, Create an Organization page, Add an Issuer page, and Data Change Request page. Please refer to Figure 28.

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 a user is only an issuer administrator, they 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 28: My Organizations Page for User with Administrator Role

[Manage Organizations](#)

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

My Organizations

Select an action for the organization you wish to manage:

Testing Non Fed Organization - TT 2.12.18

Federal EIN/TIN
321321321

Organization Type
Non-Federal Governmental Plans

[Organization Details](#)
[Organization Users](#)

JN Test Company 10-23-14 Other

Address
Oakton, Virginia

Organization Type
Other Organization Type

[Organization Details](#)
[Organization Users](#)

JN Test Company 12-12-17

Federal EIN/TIN
871263871

Organization Type
Company


[Organization Details](#)
[Issuer Information](#)
[Manage Relationships](#)

test001 Email Test Update

Federal EIN/TIN
111111111

Organization Type
Company

[Organization Details](#)
[Issuer Information](#)
[Organization Users](#)
[Manage Relationships](#)



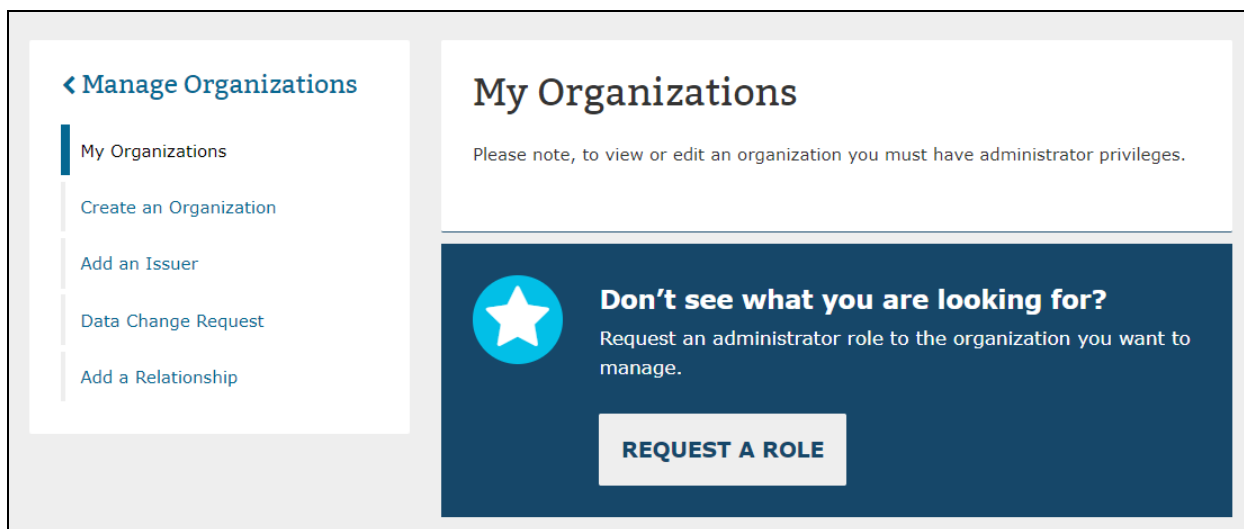
Don't see what you are looking for?
Request an administrator role to the organization you want to manage.

REQUEST A ROLE

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

If a user does not have any administrator roles, the My Organizations page will appear with no organization cards. Users can navigate to the Request a Role page to request an administrator role. Please refer to Figure 29 below.

Figure 29: My Organizations Page for User without Administrator Role



3.2.1.1 Organization Details

After selecting Organization Details, users can view organization information and make edits. Please refer to Figure 30 below. To make other changes related to existing organizational data, a user can select 'Data Change Request'. This functionality is described in detail in 3.5.

Users will also be able to view their organization's 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 30: 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	
<input type="text" value="Leah Test Company 4 2018"/>	
* Federal EIN/TIN (9 digits)	Validation Status
<input type="text" value="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 users select EDGE Server and/or Enrollment as the TPA type, they will be asked to provide additional information for the company. The screenshot below displays the additional information that needs to be provided.

Figure 31: Organization Details – TPA Information

The screenshot shows a web form for entering TPA information. At the top, there are four input fields: City (herndon), State (Virginia (VA)), ZIP Code (5 digits) (44444), and ZIP Plus 4 (1234). Below these is a section titled "Third Party Administrator (TPA) Information". Under "TPA Type", there are two radio buttons: "EDGE Server" (unchecked) and "Enrollment" (checked). A message says "Please fill in the form below with your Company information." followed by "Legal Business Address". There are two address lines: "Address Line 1" (4108 11th Pl) and "Address Line 2" (empty). Below the address lines are four more input fields: City (Herndon), State (Virginia (VA)), ZIP Code (5 digits) (20171), and ZIP Plus 4 (empty). The "Primary Contact Information" section includes fields for Job Title (Consultant), First Name (John), Last Name (Smith), Email Address (test@test.com), and Phone (703-222-2222). There is also a "Phone Ext." field (empty) and a checkbox for "Add Secondary Contact Information" (unchecked). A green "SUBMIT" button is at the bottom right of the form.

Once the TPA information has been entered, users can submit their updates.

If a user is only an Issuer Administrator, they will only see a read-only page of the insurance company information after selecting Organization Details. Please refer to Figure 32 below.

Figure 32: Organization Details Page - View

The screenshot displays the 'Organization Details' page. On the left is a sidebar with a back arrow and the text 'My Organizations'. Below this are three menu items: 'Organization Details' (highlighted with a blue bar), 'Issuer Information', and 'Manage Relationships'. The main content area is titled 'Organization Details' and shows 'JN Test Company 12-12-17'. Below this is a section for 'Organization Legal Information' containing two columns of data: Organization Type (Company), Incorporated State (Colorado (CO)), Organization Legal Name (JN Test Company 12-12-17), Federal EIN/TIN (871263871), and Validation Status (Validation in Process). The final section is 'Domiciliary Address', which includes a note about the address and the specific address: 123 Test Street, Oakton, Colorado 22124.

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. Please refer to Figure 33 below. From the table, users also have access to the Issuer Details or the Issuer Users page.

Figure 33: 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, 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. Please refer to Figure 34 below. To make other changes related to existing organizational data, a user can select 'Data Change Request'.

If a user is not an Issuer administrator for the selected issuer, they will only see the information in a read-only page. Please refer to Figure 35 below.

Figure 34: 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	Registered State
19681	California (CA)
Issuer Legal Name	Federal EIN/TIN
test001	111111111
NAIC Company Code	NAIC Group Code
N/A	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 35: Issuer Details Page - View

[< Issuer Information](#)

Issuer Details

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 displays a table which lists all users that have a role associated at the issuer level. Users 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. Please refer to Figure 36 below.

Figure 36: 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 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. Please refer to Figure 37 below.

Figure 37: 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 has 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 38 – 41.

Figure 38: Organization Users with View Details button

Organization Users
Insurance Co 000000007

Showing 1-10 of 26 records Records per page 10 ▼

<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

Figure 39: 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 40: 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	Module Name
Tester	CertComSystem
	Association
	Insurance Co 000000007
	Date of Role Approval
	09/18/2018

REMOVE ROLE

◀ BACK TO ORGANIZATION USERS

Figure 41: Organization Users - Confirmation message after removal is complete

The screenshot displays the 'Organization Users' page for 'Insurance Co 000000007'. A green confirmation banner at the top states: 'Confirmation: The user's role has been removed. An email will be sent to the user notifying them of the change.' Below this, a table lists the organization's users. The table has columns for Username, Module, Role, Approved Date, and Actions. The 'Approved Date' column is sorted in descending order. There are 25 records in total, with 10 shown on this page.

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

3.2.1.4 Manage Relationships

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. The relationship information will appear in a sortable table format with the following statuses: Pending, Approval Required, Approved, or Denied. Please refer to Figure 42 below.

Figure 42: 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. Once Approve or Deny is selected, a pop-up confirmation will appear for users to confirm their action. Please refer to Figure 43 and Figure 44 below.

Figure 43: 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 44: 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. Please refer to Figure 45 below.

Figure 45: View Relationship Details

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

[← BACK TO MANAGE RELATIONSHIPS](#)

3.3 Creating an Organization

Users can access the Create an Organization functionality from the Manage Organizations landing page. Through the Create an Organization functionality, users can register an organization in HIOS by completing four steps. In Step 1, users must select the organization's primary function. Users are required to select the type of organization from the available options: Company, Non-Insurance company, Non-federal, and Other Organization. Please refer to Figure 46 below.

Figure 46: 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 a user selects 'Other', an additional question will prompt the user to indicate if the organization has a Federal Employee Identification Number or Tax Identification Number (FEIN/TIN) or not. Please refer to Figure 43 below. Depending on if a user answers Yes or No, Step 2 will either be to Enter an FEIN or Enter an Organization Name.

Figure 47: Create an Organization – Select Other

The screenshot shows a web form for creating an organization. At the top, a light blue box contains the text: **Other - the above categories do not fit the organization's primary business.** Below this, a white box contains the text: **This organization may be a Foreign entity that reports information for Minimum Essential Coverage.** and **In HIOS, this type of organization is referred to as an Other Organization.** Below the white box, there is a question: *** Does the organization have a Federal EIN/TIN?** with two radio button options: **Yes** and **No**. At the bottom left, there is a green button labeled **NEXT**.

3.3.1 Company

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

In Step 1, users will select that they 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. Please refer to below Figure 48.

Figure 48: 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, users will need to enter the organization details. For Company organization types, the following fields are required: Organization Legal Name, Incorporated State. They can enter details for the following fields: NAIC Company Code, NAIC Group Code, Group Name, AM Best Number, Not for Profit, Co-op, and Third Party Administrator information. Users are required to enter the following fields for the Domiciliary Address: Address Line 1, City, State, and ZIP. Please refer to Figure 49 below.

Figure 49: 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:

AN 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

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

Users will get a chance to review a high-level summary of their request in Step 4 as shown in Figure 50. Once a user has reviewed the information, they may submit their request for approval. The requesting users will receive an email once the new organization has been approved.

Figure 50: 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, users will select that they 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 users to enter the FEIN/TIN. Please refer to below Figure 51.

Figure 51: 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, users will need to enter the organization details. For Non Insurance Company organization types, the following fields are required: Organization Legal Name, Incorporated State, and Domiciliary Address. Users can also enter Third Party Administrator information. Please refer to Figure 52 below.

Figure 52: 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

Users will get a chance to review a high-level summary of their request in Step 4 as shown in Figure 53. Once a user has reviewed the information, they may submit their request for approval. The requesting users will receive an email once the new organization has been approved.

Figure 53: 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, users will select that they 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 users to enter the FEIN/TIN. Please refer to below Figure 54.

Figure 54: 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, users will need to enter the organization details. For Non-Federal Governmental Health Plan organization types, users 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. Please refer to Figure 55 below.

Users will get a chance to review a high-level summary of their request in Step 4 as shown in Figure 56. Once a user has reviewed the information, they may submit their request for approval. The requesting users will receive an email once the new organization has been approved.

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

Figure 56: 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** [Revisit this step](#)
Non-Federal Governmental Plans
- 2 Enter Federal EIN/TIN** [Revisit this step](#)
123896123
- 3 Organization Details** [Revisit this step](#)
Organization Details Provided
- 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, users will select the option of Other – the above categories do not fit the organization's primary business, which is an Other Organization type in HIOS. Step 2 will vary depending on if the organization indicates they have an FEIN/TIN. If they do have one, then Step 2 will be to enter the FEIN/TIN. If they do not have one, then Step 2 will be to enter the Organization Name. Please refer to below Figure 57 and Figure 58.

Figure 57: 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 58: 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 a user needs to search by Organization Name, the system will check to confirm that the user's organization is not already in the system based on resemblance to the name entered and display the results in a table. If the user sees that the listed organizations are not their intended organization, then they can proceed forward. Please refer to Figure 59 below.

HIOS

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Figure 59: 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	<input type="button" value="View details"/>
Jackie Test Other	Herndon, VA	<input type="button" value="View details"/>
Jackie Test Non-Fed	Herndon, VA	<input type="button" value="View details"/>
Jackie Test Other	Herndon, VA	<input type="button" value="View details"/>

In Step 3, users will need to enter the organization details. For Other Organization types, users will need to 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. Please refer to Figure 60 below.

Figure 60: 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

Users will get a chance to review a high-level summary of their request in Step 4 as shown in Figure 61. Once a user has reviewed the information, they may submit their request for approval. The requesting users will receive an email once the new organization has been approved.

Figure 61: 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

Users can access the Add an Issuer functionality from the Manage Organizations landing page. Through the Add an Issuer functionality, users can register an issuer under an existing insurance company in HIOS by completing four steps. In Step 1, users must identify the insurance company by searching by the FEIN/TIN. Please refer to Figure 62 below.

Figure 62: 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.

NEXT

2

Issuer Registered State

3

Issuer Details

4

Confirm Your Request

Users are required to identify the issuer's registered state as part of Step 2 of the Add an Issuer process as shown in Figure 63 below.

Figure 63: 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 users will need to enter the Issuer Details. Users have the option to enter the Issuer Marketing Name. Users 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 users select 'Yes' to any of the market type coverages, additional fields will display for the lines of business. Users are also required to enter the Domiciliary Address. Once all the required fields are provided, users can proceed to step 4. Please refer to Figure 64 below.

Figure 64: 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**

Users 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. If the user has selected a non-compliant state or territory (AL, AK, FL, GA, PA, WI, AS, GU, MP, VI), additional text will appear informing users they need to access the ERE module. If the information is deemed correct by the user, they can select 'Submit' for the request to be approved. Please refer to Figure 65 below.

Figure 65: 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.

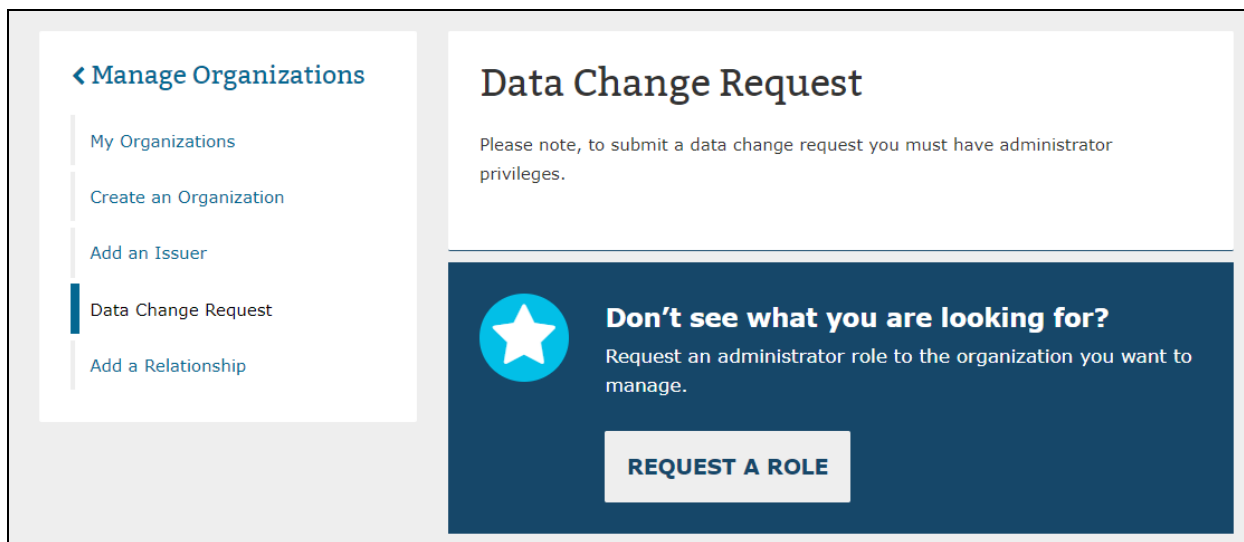
SUBMIT

RESET

3.5 Data Change Request

Users can 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. Instead, they can navigate to the Request a Role page on a separate Data Change Request page. Please refer to Figure 66 below.

Figure 66: Data Change Request – No Administrator Roles



If the user has a company, issuer, or organization administrator role, they 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, users will select 'Create Request for Data Change' on the Manage Data Changes page as illustrated in Figure 67. 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 68 and Figure 69.

Figure 67: HIOS Portal – Manage Data Changes

Manage Data Changes

Please select a Request Status from the drop-down list below to view the corresponding requests

[Create Request for Data Change](#)

Request Status
Pending Approval ▼

Search by Request ID
 REQUEST ID SEARCH

[« First](#)
[« Prev](#)
[1](#)
[Next »](#)
[Last »](#)
Show Entries 10 ▼
Showing 1 to 9 of 9 entries

<u>Request ID</u>	<u>Request Created Date</u>	<u>Status</u>	<u>Status Updated Date</u>	<u>NOTE</u>	<u>Action</u>
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 68: 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

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Figure 69: 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**

Address Line 2

*** City**

*** State**

North Carolina (NC) ▼

*** ZIP Code (5 digits)**

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, they 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 70.

Figure 70: Create Data Change Requests

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change?

-Please Select Organization Field- ▼

- 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

ACCESSIBILITY | RULES | FILE FORMATS AND PLUG-INS

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. 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. Refer to Figure 71 and Figure 72.

Figure 71: Company Data Changes – Select the Company

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change? Organization Type ▼

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

Figure 72: Company Data Changes – Select the Field to Change

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change? FEIN/TIN ▼

Choose the Organization

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

Current Value	*New Value	*Reason for change
192391823	<input type="text"/>	<input type="text"/>

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 73.

**Figure 73: Company or Non-Insurance to a Non-Federal Governmental Plan –
Select Self-Funded or Fully Insured Radio Button**

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change? Organization Type ▼

Choose the Organization JN Test Company 11-13-17 Edit on 3-5 - FEIN -192391823 - Company ▼

Current Value	*New Value	*Reason for change
Company	Non-Federal Governmental Plans ▼	<input type="text"/>

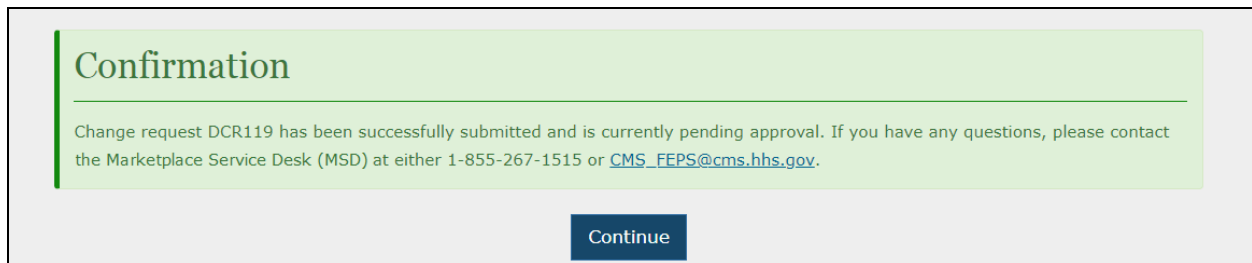
Please select the type:*

☐ 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 74.

Figure 74: 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 75.

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

Figure 75: Change Request Statuses

Manage Data Changes

Please select a Request Status from the drop-down list below to view the corresponding requests

[Create Request for Data Change](#)

Request Status
Pending Approval
Pending Approval
Approved
Denied
Unable to Process
Completed

Search by Request ID

[REQUEST ID SEARCH](#)

Showing 1 to 9 of 9 entries

<u>Request ID</u>	<u>Request Created Date</u>	<u>Status</u>	<u>Status Updated Date</u>	<u>NOTE</u>	<u>Action</u>
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

Company Administrators can select on the 'View' link of the Action column as shown in Figure 86 and review the details of the change request as illustrated in Figure 76.

Figure 76: View a 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

3.5.2 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 77.

Figure 77: Issuer Change Request

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change? Issuer Legal Name ▼

Choose the Issuer JN Test Company 11-13-17 Edit on 3-5 - 25880 ▼

Current Value	*New Value	*Reason for change
JN Test Company 11-13-17 Edit on 3-5	<input type="text"/>	<input type="text"/>

Back Submit

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 78. 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 78: Product Change Request

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change? Product Name ▼

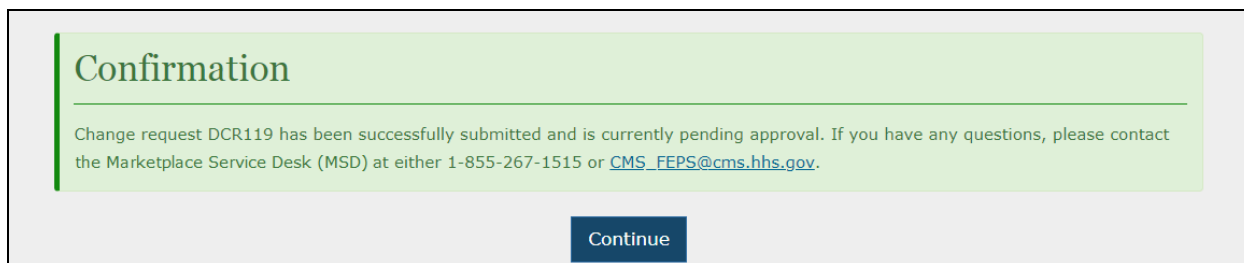
Choose the Issuer test001 UPDATE - 22241 ▼

Choose the product Paul Test- 22241KS001 ▼

Current Value	*New Value	*Reason for change
Paul Test	<input type="text"/>	<input type="text"/>

Back Submit

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 79.

Figure 79: Confirmation Page for Change Request


Confirmation

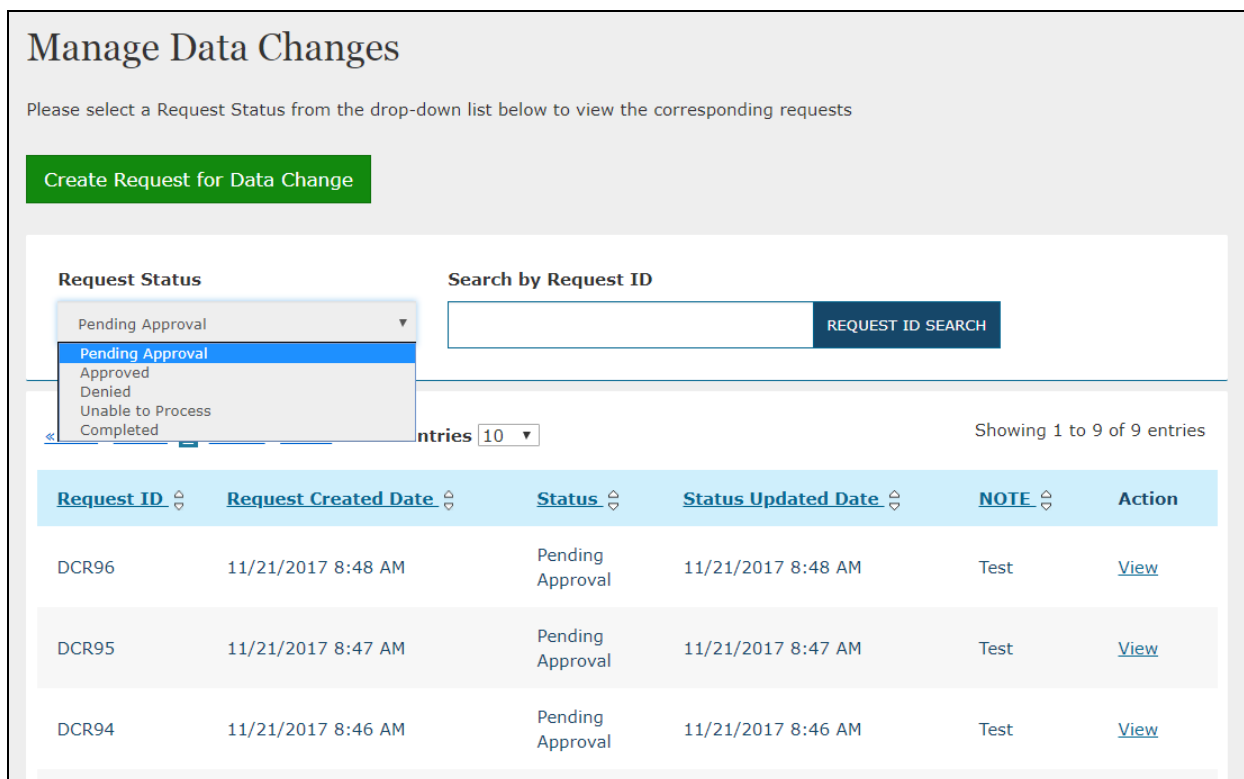
Change request DCR119 has been successfully submitted and is currently pending approval. If you have any questions, please contact the Marketplace Service Desk (MSD) at either 1-855-267-1515 or CMS_FEPS@cms.hhs.gov.

[Continue](#)

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 80. The following statuses can be filtered on the Manage Data Changes page.

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

Figure 80: Change Request Statuses


Manage Data Changes

Please select a Request Status from the drop-down list below to view the corresponding requests

[Create Request for Data Change](#)

Request Status **Search by Request ID**

Pending Approval
 Pending Approval
 Approved
 Denied
 Unable to Process
 Completed

[REQUEST ID SEARCH](#)

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

Issuer Administrators can review the data of the change requests displayed through the 'View' link of the Action column as illustrated in Figure 81.

Figure 81: 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 particular 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 82.

Figure 82: Non-Federal Government Plans to Company

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change? Organization Type ▼

Choose the Organization

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

Current Value	*New Value	*Reason for change
Non-Federal Governmental Plans	Company ▼	<input type="text"/>

Please select an incorporated state:* -Please select a state- ▼

[Back](#) [Submit](#)

Organization Administrator of 'Other Org' selects the fields displayed for that particular type of 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 83. 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 83: Multiple Organizations

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change? Organization Type ▼

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

If the Organization Administrator changes the Organization Type from Other organization to either Company or Non Insurance Company, then an FEIN is required, and the user needs to select an incorporated state drop-down menu as illustrated in Figure 84.

Figure 84: Other Organization to a Company

Create Data Change Request

Note: (*) Indicates a required field

What values would you like to change? Organization Type ▼

Choose the Organization

JN Test Other US Address 12-5 - Oakton, ▼

Current Value	*New Value	*Reason for change
Other Organization Type	Company ▼	<input type="text"/>

Please enter an FEIN: *

Please select an incorporated state: * -Please select a state- ▼

[Back](#) [Submit](#)

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 85.

Figure 85: 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.

[Continue](#)

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 86. The following statuses can be filtered on the Manage Data Changes page.

- Pending Approval
- Approved

- Denied
- Unable to Process
- Completed

Figure 86: Change Request Statuses

Manage Data Changes

Please select a Request Status from the drop-down list below to view the corresponding requests

Create Request for Data Change

Request Status

Pending Approval
Pending Approval
Approved
Denied
Unable to Process
Completed

Search by Request ID
REQUEST ID SEARCH

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

Organization Administrators can review the details of the data change request by selecting the 'View' link in the Action column as illustrated in Figure 87.

Figure 87: 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	

Back

3.6 Add a Relationship

Users can access the Add a Relationship functionality from the Manage Organizations landing page. Through the Add a Relationship functionality, users can 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, users must identify the relationship type and answer if they are providing or receiving TPA services. Please refer to Figure 88 below.

Figure 88: 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**

Users 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. Please refer to Figure 89 below.

Figure 89: Add a Relationship – Step 2

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

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 3-5AL

☐

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

First

Previous

1

Next

Last

NEXT

In Step 3, users will provide the relationship's effective start date and the effective end date. Please refer to Figure 90 below.

HIOS

Portal User Manual – Last Updated October 2018

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Figure 90: Add a Relationship – Step 3

The screenshot displays the 'Add a Relationship' interface in Step 3. On the left is a sidebar with a 'Manage Organizations' header and a list of options: 'My Organizations', 'Create an Organization', 'Add an Issuer', 'Data Change Request', and 'Add a Relationship' (which is highlighted with a blue bar). The main content area is titled 'Add a Relationship' and includes a note: 'Please note, a field with an asterisk (*) before it is a required field.' The process is divided into four steps: 1. Relationship Type (showing 'TPA Enrollment, Providing TPA Services, 817263871 - JN Test Company Edit 3 on 3-6-18'), 2. Relationship Details (showing '1 Issuer'), and 3. Relationship Attributes (the current step). Step 3 contains two required date fields: '* Effective Start Date (MM/DD/YYYY)' and '* Effective End Date (MM/DD/YYYY)', each with a calendar icon. A green 'NEXT' button is positioned below these fields. Step 4, 'Confirm Your Request', is partially visible at the bottom.

Users will 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. If the information is deemed correct by the user, they can select 'Submit' for the request to be approved. Please refer to Figure 91 and Figure 92 below.

Figure 91: 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

Figure 92: 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 title 'Manage Organizations' and a list of links: 'My Organizations', 'Create an Organization', 'Add an Issuer', 'Data Change Request', and 'Add a Relationship' (which is highlighted with a blue bar). The main content area has a green confirmation banner at the top that reads: '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, 2. Relationship Details, 3. Relationship Attributes, and 4. Confirm Your Request. Step 1 is currently active. Under 'Relationship Type', there is a required field question: '* What relationship are you trying to initiate?' with a radio button selected for 'TPA Enrollment'. A green 'NEXT' button is located below the radio button.

Manage Organizations

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

Confirmation: Your request has been submitted for approval. To check the status of the request, please navigate to the Manage Relationships page.

Add a Relationship

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

- Relationship Type**
 - * What relationship are you trying to initiate?
 - ☒ **TPA Enrollment**
 - NEXT**
- Relationship Details**
- Relationship Attributes**
- Confirm Your Request**

3.7 Organization Search

On the Organization Search page, users can search and view details for organizations registered in HIOS with a valid Federal Employee Identification Number (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 93: Organization Search

Health Insurance Oversight System

Home Knowledge Center

< Manage Organizations

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

Search Organizations

* Enter Federal EIN/TIN

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

SEARCH

3.7.1 Company/Organization Administrator view

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 94: Organization Search Results

< Manage Organizations

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

Search Organizations

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

* Enter Federal EIN/TIN

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

SEARCH

Search results for "000000007"

Insurance Co 000000007

Federal EIN/TIN
000000007

Organization Type
Company

[Organization Details](#)
[Issuer Information](#)

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. 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 95: Organization Search – Organization Details Page for All HIOS Users

Organization Details
FMLoadTest0139

Organization Legal Information

Organization Type Company	Incorporated State Virginia (VA)
Organization Legal Name FMLoadTest0139	
Federal EIN/TIN 000038398	Validation Status 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 96: 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 97: Organization Search - Issuer Details for all HIOS users

Issuer Details
FM-Company-IMPL0-087

Organization Legal Information

Issuer ID 65941	Incorporated State Georgia(GA)
Issuer Legal Name FM-Company-IMPL0-087	Federal EIN/TIN 103213537
NAIC Company Code 28678	NAIC Group Code 28678

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

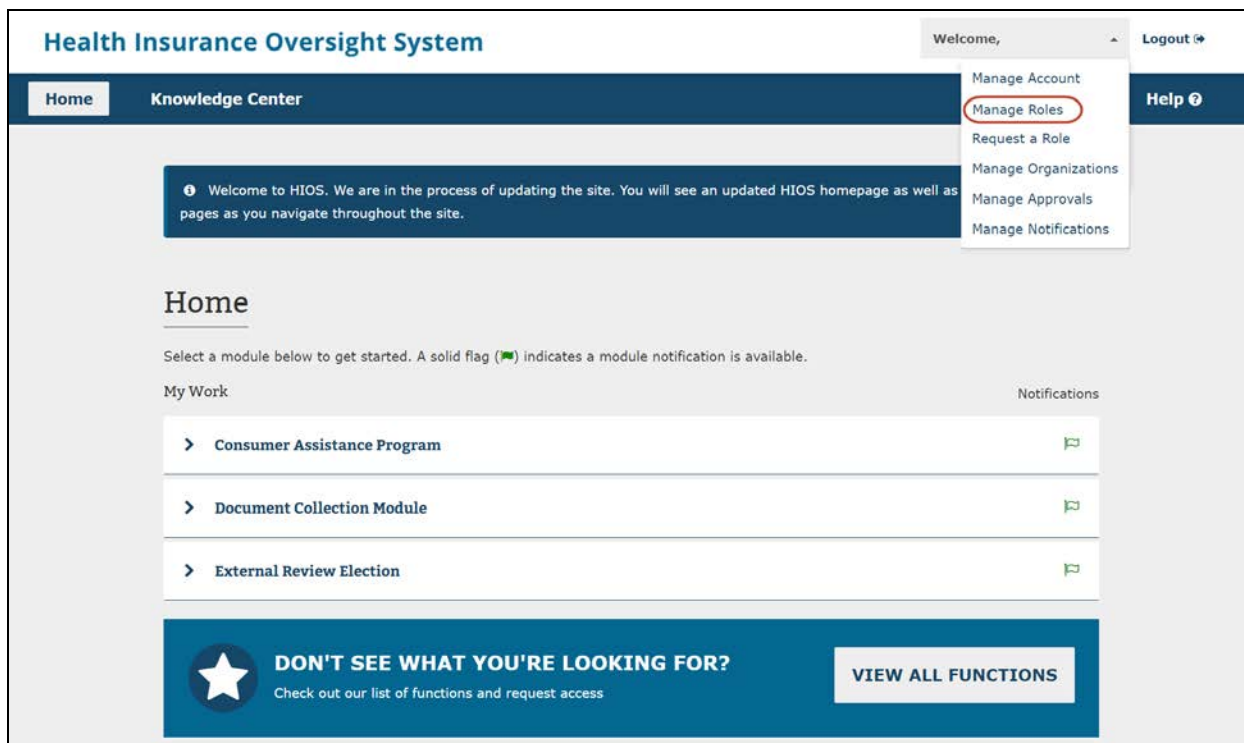
[• BACK TO ISSUER INFORMATION](#)

3.8 Role Management

All module access and role requests are to be completed in the Role Management section. Users will be able to view their existing roles and access status. Users will also 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 98 below.

Figure 98: HIOS Portal Home Page – Manage Roles



3.8.1 Manage Roles Page

The users can view their existing roles and pending role requests on the Manage Roles page as displayed below in Figure 99 and Figure 100.

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

Figure 99: Manage Roles

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

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

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 21-30 of 124 records **Records per page** 10

Module	Role	Role Type	Association	Status	Actions
Consumer Assistance Program	Submitter	N/A	829925 - CA - California Consumer Assistance Program	Approved	View Details
Enforcement and Consumer Protections	ECP State Submitter	N/A	Alabama	Approved	View Details
External Review Election	ERE Submitter	N/A	10854 - JN Test Company Edit 2 on 11-21-14 - AK	Approved	View Details
External Review Election	ERE Submitter	N/A	52545 - JN Test Company Edit 2 on 11-21-14 - AS	Approved	View Details
External Review Election	ERE Submitter	N/A	62933 - JN Test Company Edit 2 on 11-21-14 - VI	Approved	View Details
External Review Election	ERE Submitter	N/A	77517 - JN Test Company Edit 2 on 11-21-14 - AL	Approved	View Details
External Review Election	ERE Submitter	N/A	95021 - JN Test Company Edit 2 on 11-21-14 - FL	Approved	View Details
External Review Election	ERE Submitter	N/A	172637162 - JN Test Company 10-23-14 Non-Fed	Approved	View Details
External Review Election	ERE Submitter	N/A	981273981 - JN Test Non-Fed 12-11-15	Approved	View Details
Financial Management	Payee Approver	N/A	N/A	Approved	View Details

First Previous 1 2 **3** 4 5 Next Last

Users may select 'View Details' to view additional information about the Pending or Approved role request. Users 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 below.

Figure 100: View Role Details – Pending Role Request

The screenshot shows the 'View Role Details' page for a pending role request. The page has a header with 'Health Insurance Oversight System', 'Welcome,' with a dropdown arrow, and 'Logout' with an external link icon. A navigation bar contains 'Home', 'Knowledge Center', and 'Help' with an external link icon. The main content area is titled 'View Role Details' and contains a white box with the following 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

Below the details is a red button labeled 'CANCEL ROLE REQUEST'. At the bottom of the page is a link: [← BACK TO MANAGE ROLES](#).

Figure 101: View Role Details – Approved Role Request

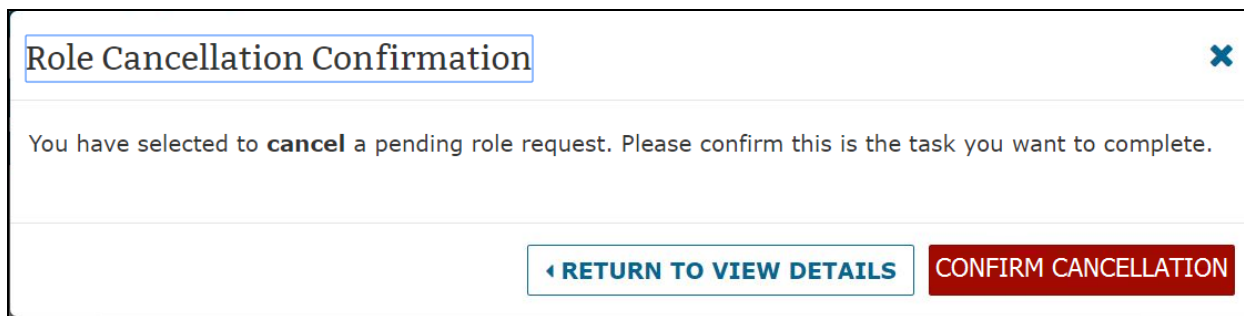
The screenshot shows the 'View Role Details' page for an approved role request. The page layout is identical to Figure 100. The details box contains the following information:

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

Below the details is a red button labeled 'DELETE ROLE REQUEST'. At the bottom of the page is a link: [← BACK TO MANAGE ROLES](#).

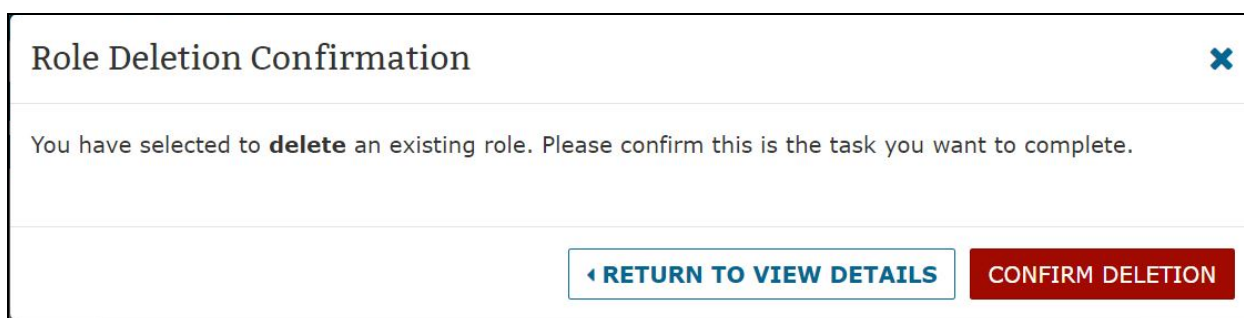
If the user selects Cancel Role Request or Delete Role Request from the View Role Details page, the following confirmation pop-ups will be displayed.

Figure 102: Role Cancellation Confirmation



The dialog box has a title bar with the text 'Role Cancellation Confirmation' and a close button (X) in the top right corner. Below the title bar, the main text reads: 'You have selected to **cancel** a pending role request. Please confirm this is the task you want to complete.' At the bottom of the dialog, there are two buttons: a light blue button with a left-pointing arrow and the text 'RETURN TO VIEW DETAILS', and a red button with the text 'CONFIRM CANCELLATION'.

Figure 103: Role Deletion Confirmation



The dialog box has a title bar with the text 'Role Deletion Confirmation' and a close button (X) in the top right corner. Below the title bar, the main text reads: 'You have selected to **delete** an existing role. Please confirm this is the task you want to complete.' At the bottom of the dialog, there are two buttons: a light blue button with a left-pointing arrow and the text 'RETURN TO VIEW DETAILS', and a red button with the text 'CONFIRM DELETION'.

To view existing roles, complete the following steps:

1. From the HIOS Portal Home Page, select the 'Manage Roles' link.
2. Users can view additional details for the role request by selecting View Details in the Actions column.
3. Users can cancel or delete their pending or approved role requests from the View Role Details page.
4. Users will need to confirm their 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 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 must register 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 104 displays the role request for the Ratings/Reports Viewer role within the Marketplace Quality Management (MQM) module.

Figure 104: 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 Confirm your request**

4 ITEMS ADDED TO REQUEST

DE 53313 [x](#) **MI 55158** [x](#)

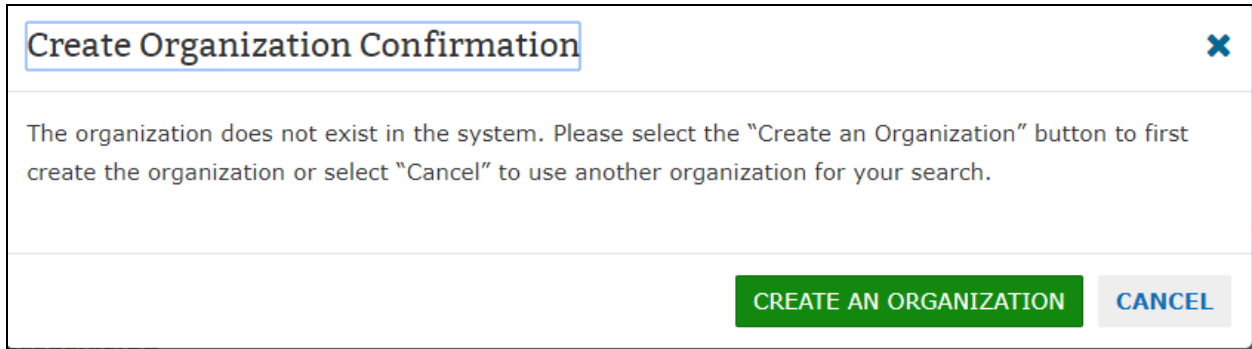
IL 67116 [x](#) **VA 69834** [x](#)

Users seeking to request the Ratings/Reports Viewer role can associate themselves to multiple Issuers per request. These users need to Search a valid Issuer and then select the Add button.

The system shall validate if there is an existing role request (for same role and association) in the Pending Requests. The system shall throw an error message 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 the users 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 users to first create the organization as displayed by Figure 105.

Figure 105: Organization Not Found – Navigate to Create an Organization



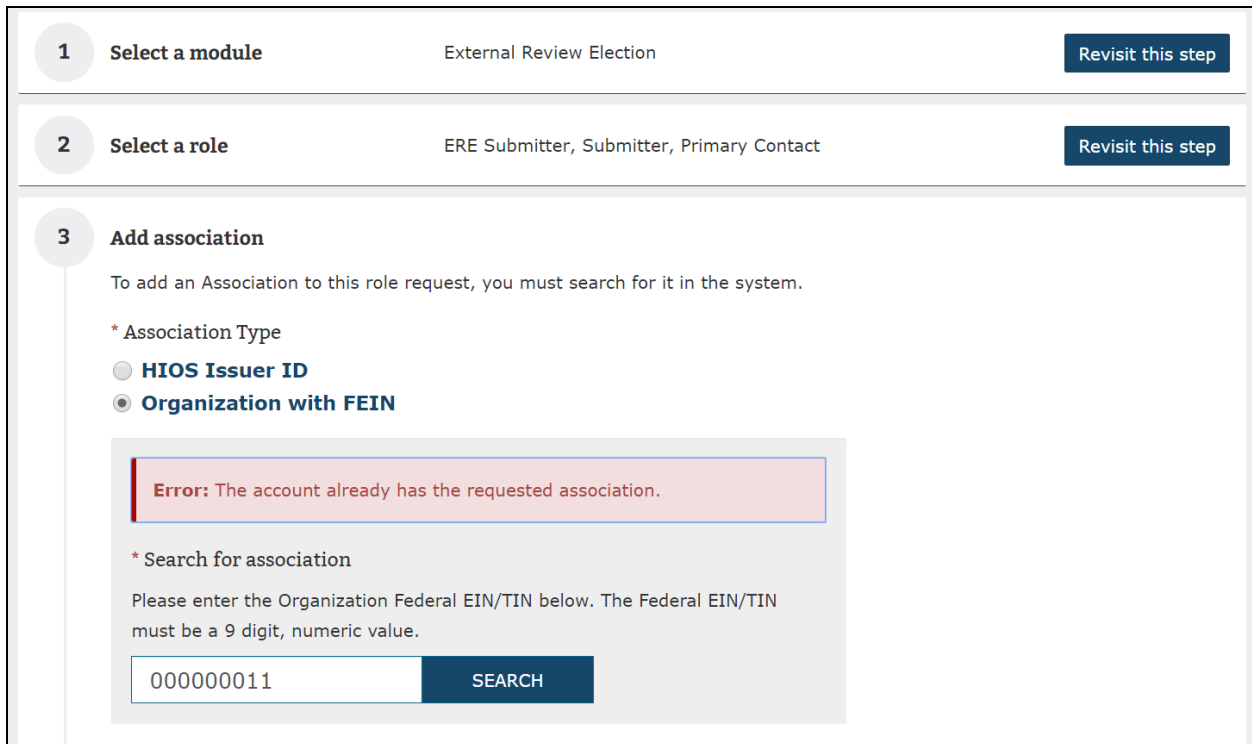
Create Organization Confirmation ✕

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 106 if the user already has a role associated with the ID entered.

Figure 106: 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.

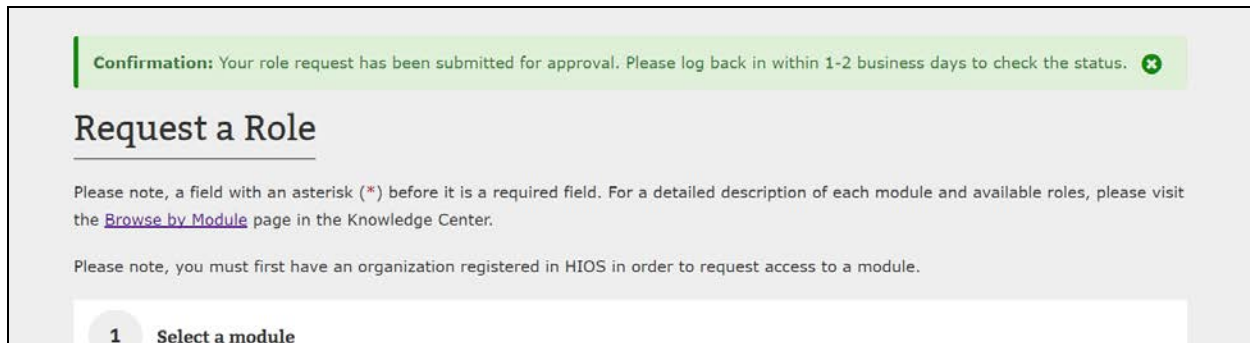
*** Search for association**

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

SEARCH

Once the users have submitted the desired role request, the system will display a Confirmation screen, displayed in Figure 107, to notify the users of the successful submission.

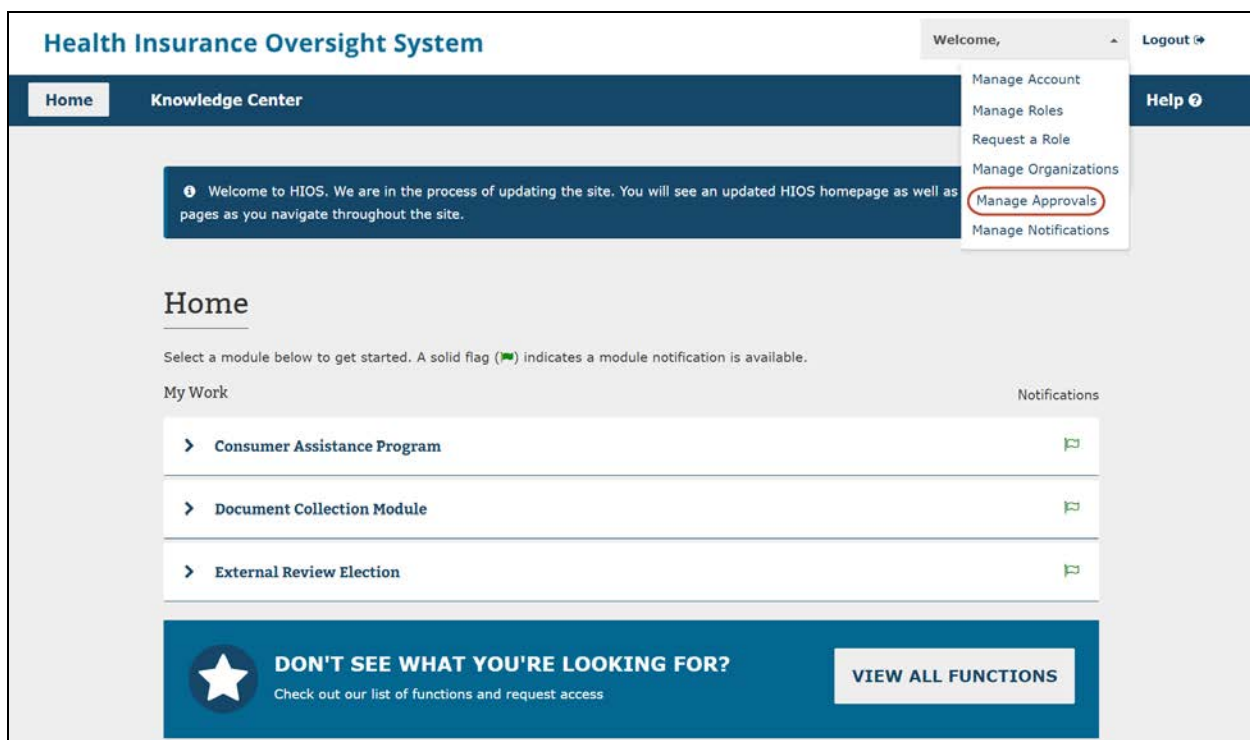
Figure 107: Role Request Confirmation Page



3.9 Approvals

Users, with the appropriate role for their module, have the ability to Approve or Deny user role requests at both the module and organizational level. Users with approval roles will have the Manage Approvals link displayed in the drop down on the HIOS Portal Home page as displayed in Figure 108.

Figure 108: HIOS Portal Home Page – Manage Approvals



Under the Approvals tabs, users will have the option to view all Pending Approval, Approved, and Denied requests as displayed in Figure 109.

Figure 109: Approval Tabs – Request Status

The screenshot displays the 'User Role Request Approvals' interface. At the top, there are five tabs: 'New Organization Approvals', 'User Account Approvals', 'User Role Approvals' (which is selected), 'Organizational User Role Approvals', and 'Manage Data Change Approvals'. Below the tabs, the title 'User Role Request Approvals' is shown. A message states: 'Please select a Module from the drop-down list below to view the corresponding requests.' There are two dropdown menus: 'Module:' with 'Assister' selected, and 'Request Status:' with 'Pending Approval' selected. Below these, another message says: 'Please select the checkboxes for the records you wish to approve or deny from the table below. Once the selection has been made, please select the 'Approve' or 'Deny' button under the table to complete the desired action.' A pagination bar shows 'Showing 1 to 1 of 1 entries' and a 'Show Entries' dropdown set to '10'. Below this is a table with the following columns: 'Select', 'Requestor Username', 'Job Title', 'Module', 'Role', 'Association Type', 'Association', 'User Type', and 'Us St Ty'. The table contains one entry: a checkbox, 'Test Engineer', 'Assister', 'Assister State', 'State', and 'TX'. At the bottom of the interface are two buttons: 'Approve' (green) and 'Deny' (red).

Users with the HIOS User Role Approver role will see the User Role Approvals tab, as displayed in Figure 110. Under this tab, users can approve or deny role requests for the modules for which they have permissions.

Figure 110: User Role Request Approvals

[New Organization Approvals](#)
[User Account Approvals](#)
[User Role Approvals](#)
[Organizational User Role Approvals](#)
[Manage Data Change Approvals](#)

User Role Request Approvals

Please select a Module from the drop-down list below to view the corresponding requests.

Module: Assister ▼
Request Status: Pending Approval ▼

Please select the checkboxes for the records you wish to approve or deny from the table below. Once the selection has been made, please select the 'Approve' or 'Deny' button under the table to complete the desired action.

[« First](#)
[« Prev](#)
1
[Next »](#)
[Last »](#)
 Show Entries 10 ▼
Showing 1 to 1 of 1 entries

Select	Requestor Username ⌵	Job Title ⌵	Module ⌵	Role ⌵	Association Type ⌵	Association ⌵	User Type ⌵	User State ⌵
<input type="checkbox"/>		Test Engineer	Assister	Assister State	State	TX		

Approve
Deny

Figure 111 displays the Organizational User Role Approvals tab which only users with the Role Approver Administrator 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 111: Organizational User Role Approvals

Please select a Module from the drop-down list below to view the corresponding requests.

Module: Non-Federal Governmental Plans ▼

Request Status: Pending Approval ▼

Please select the checkboxes for the records you wish to approve or deny from the table below. Once the selection has been made, please select the 'Approve' or 'Deny' button under the table to complete the desired action.

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

Select	Requestor Username	Job Title	Module	Role	Association Type	Association	User Sub-Type
<input type="checkbox"/>			Non-Federal Governmental Plans	NonFed Submitter	Non-Federal Governmental Plans	JN Test NF 7-26-17	Primary Contact

Approve Deny

In order 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 record's 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 112 displays the User Role Approvals Confirmation page where the system encountered an error in processing an Approval or Denial request.

Figure 112: User Role Request Approvals Confirmation Page

New Organization Approvals	User Account Approvals	User Role Approvals	Organizational User Role Approvals	Manage Data Change Approvals	
Confirmation: The following role requests have been successfully Approved for the Health Plan and Other Entity Enumeration System module:					
Role	Requestor Username	Association Type	Association	User Type	User Sub-Type
Submitter		Other Organization Type	HM Non US Org 1201-6		
<div>Continue</div>					

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.

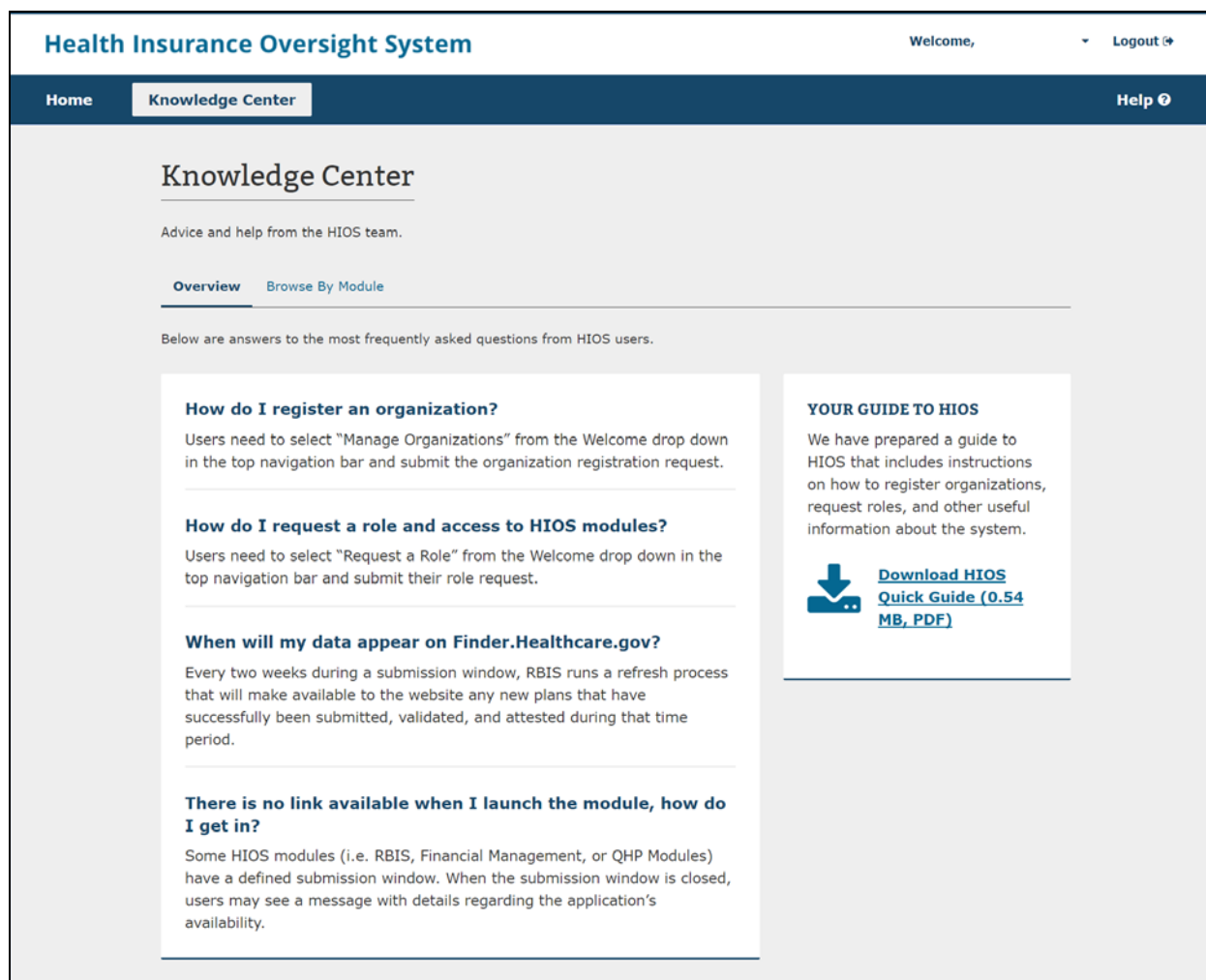
3.10 Knowledge Center

The following sections describe the two pages within the Knowledge Center.

3.10.1 Overview Page

The Knowledge Center – Overview page displays some of the most frequently asked questions from HIOS users. The page provides answer to these high-level questions. Additionally, users have the ability to download the HIOS Portal quick guide PDF document which provides more in-depth detail to the main Portal functionality. Please refer to Figure 113.

Figure 113: 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 a user expands a module accordion, users may read about the purpose of the module, the roles available to request in the module, and documents available for download if applicable. Figure 114 displays a portion of the Knowledge Center – Browse by Module page and Figure 115 displays one of the expanded accordions.

Figure 114: Knowledge Center – Browse by Module Page

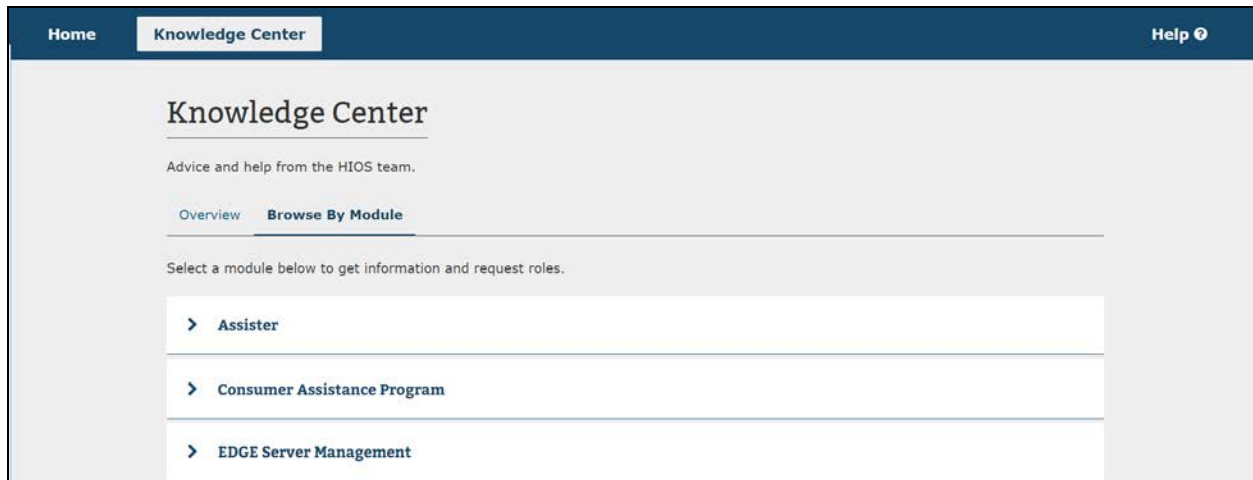
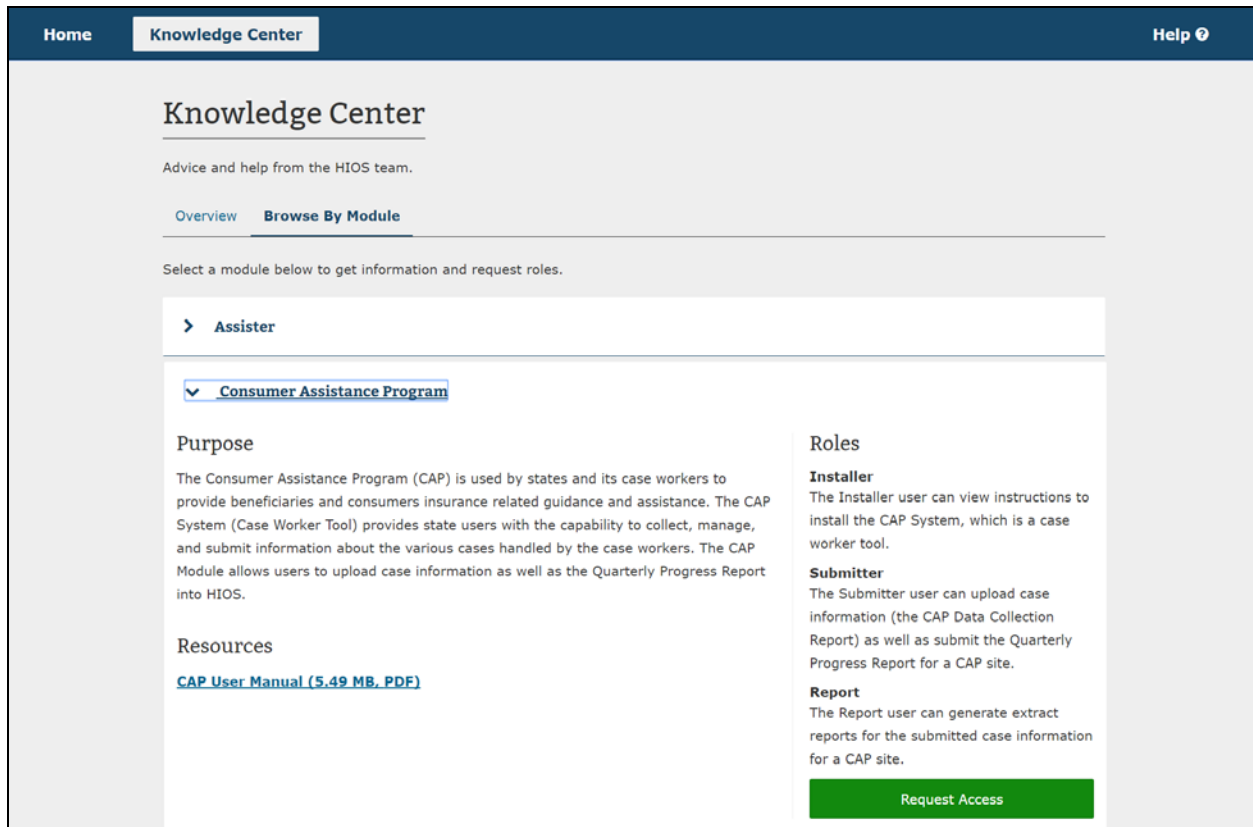


Figure 115: Knowledge Center – Browse by Module Expanded Accordion



3.10.3 Glossary Page

The Knowledge Center – Glossary page: A new tab has been added to the Knowledge Center called Glossary. When a user selects the Glossary tab, a static page displays each of the HIOS terms with the definition underneath listed in alphabetical order.

Figure 116: 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 Trouble Shooting and FAQ

4.1 FAQs

Table 1: Frequently Asked Questions

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 Marketplace Service Desk (MSD) at CMS_FEPS@cms.hhs.gov or at 1-855-267-1515. This is the CMS Help Desk.