

Health Insurance Oversight System
Portal User Manual



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Portal User Manual Change History

December 2019 Revisions

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

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.

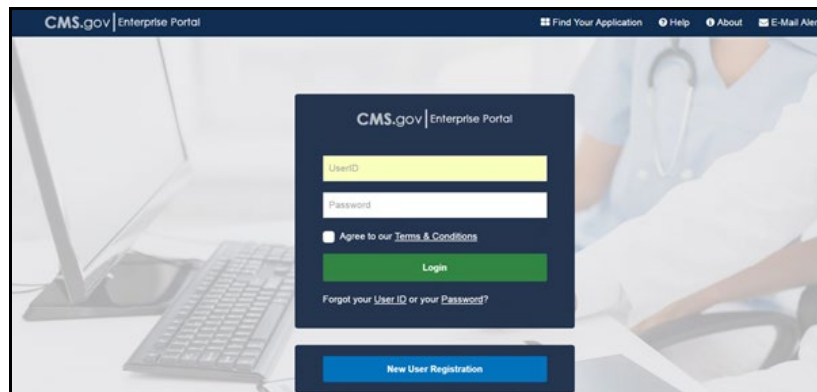
2 HIOS System Access

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

The screenshot shows the 'Step #1: Choose Your Application' page. At the top, the CMS.gov logo and 'Enterprise Portal' are visible. The page title is 'Step #1: Choose Your Application'. Below the title, it says 'Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms.' A dropdown menu is open, showing 'HIOS/FEE: Health Insurance Oversight System'. Below the dropdown is a 'Terms & Conditions' section with a 'Consent to Monitoring' checkbox that is checked. A green 'Next' button is visible at the bottom right.

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

The screenshot shows the 'Step #2: Register Your Information' page. At the top, the CMS.gov logo and 'Enterprise Portal' are visible. The page title is 'Step #2: Register Your Information'. Below the title, it says 'Step 2 of 3 - Please enter your personal and contact information. All fields are required unless marked 'Optional''. The form contains several input fields: '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 radio buttons), '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', and 'Enter Phone Number'. A green 'Next' button is visible at the bottom.

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 a web form titled "Step #3: Create User ID, Password & Challenge Questions". At the top, it says "Step 3 of 3 - Please create User ID and Password, Select Challenge questions and provide answers." The form contains the following elements:

- A text input field labeled "Enter User ID".
- Two text input fields: "Enter Password" and "Enter Confirm Password".
- Three challenge question sections. Each consists of a dropdown menu labeled "Select Challenge Question #1", "#2", and "#3" respectively, and a corresponding text input field for the answer.
- At the bottom, there are three buttons: "Back" (white), "Next" (green), and "Cancel" (white).

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 a web form titled "Registration Summary". At the top, it says "Please review your information and make any necessary changes before submitting." The form contains the following elements:

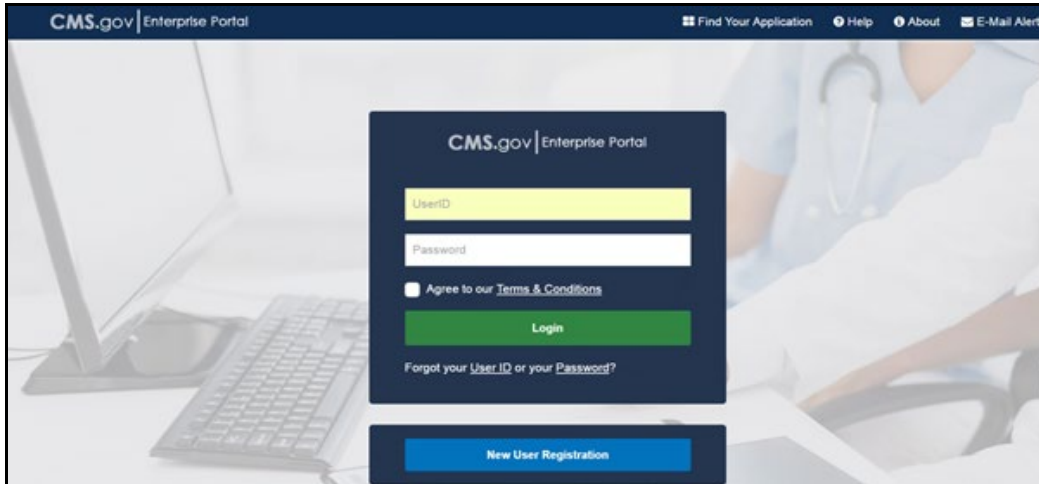
- A dropdown menu showing "HIOS/FFE: Health Insurance Oversight System".
- A note: "All fields are required unless marked 'Optional'.".
- Input fields for:
 - First Name: test
 - Enter Middle Name (optional)
 - Last Name: test
 - Suffix(optional): IV
 - Enter Social Security Number (optional)
 - Birth Month: May
 - Birth Date: 31
 - Birth Year: 1990
 - Home Address #1: test
 - Enter Home Address #2 (optional)

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.

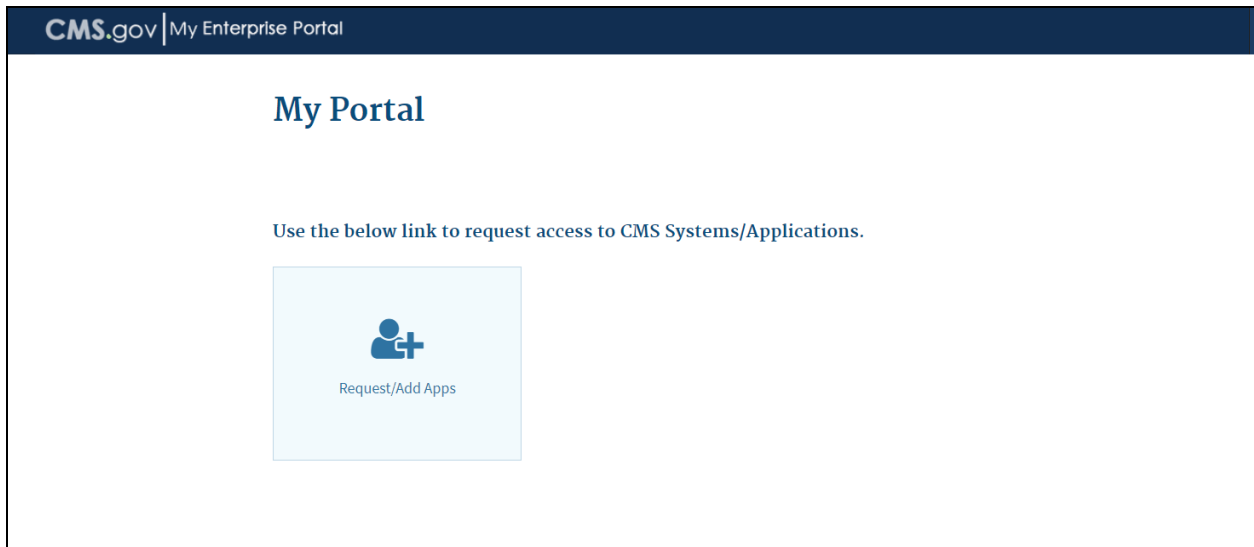
Figure 6 displays the CMS Enterprise Portal login screen:

Figure 6: CMS Enterprise Portal - Login



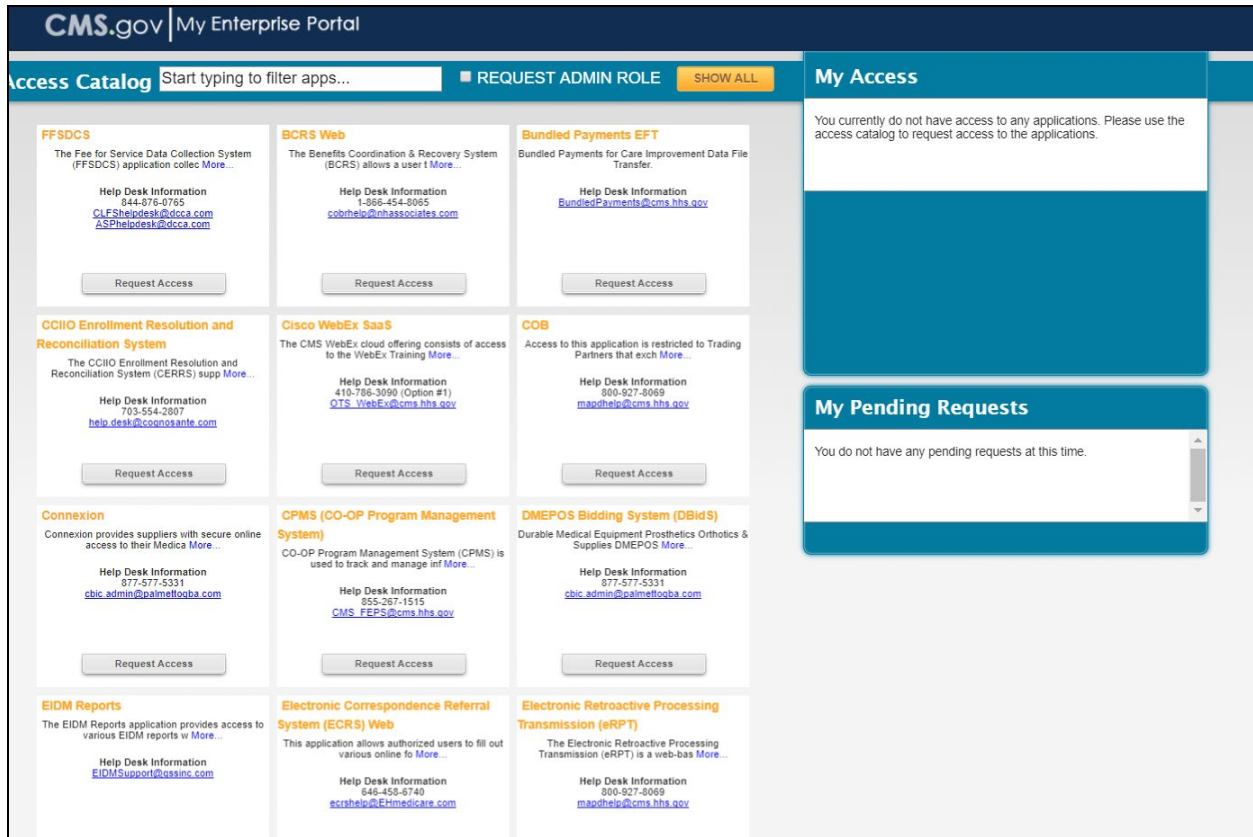
On the My Portal page, users must select Request/Add Apps (refer to Figure 7).

Figure 7: My Portal Page – Request/Add Apps



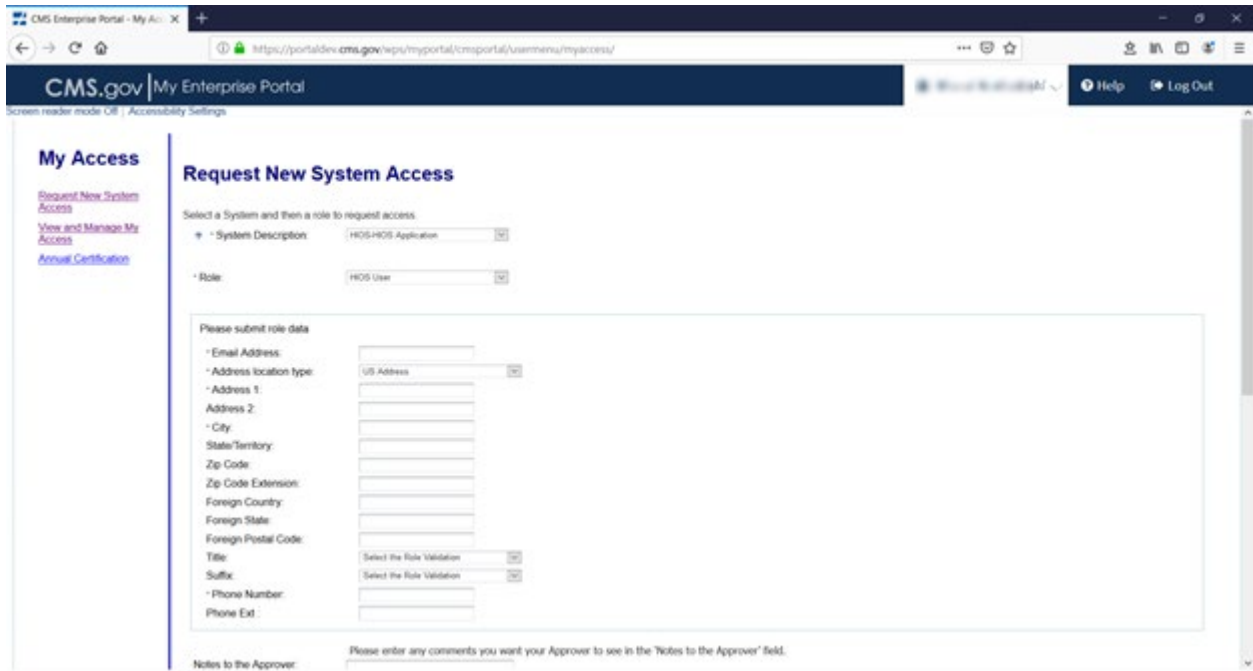
On the Access Catalog page, the user must select Request Access for the HIOS application (refer to Figure 8).

Figure 8: Access Catalog Page



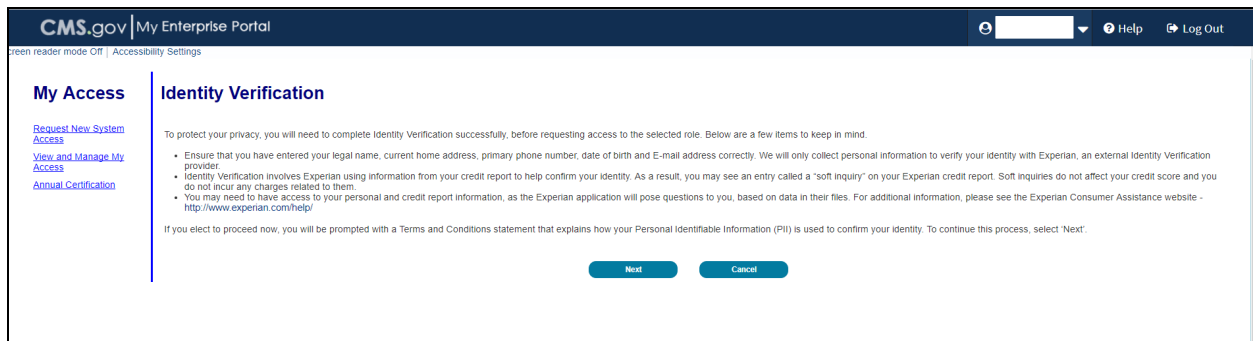
On the Request New System Access page, users must select HIOS-HIOS Application from the System Description drop-down menu and HIOS User for the Role. Do Not Select the HIOS Help Desk User. Once these selections have been made, the role data form will display (as shown in Figure 9). Complete the role data form and select Submit. Please note, fields indicated by an asterisk are required.

Figure 9: Request New System Access Page



Once approved, 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 10).

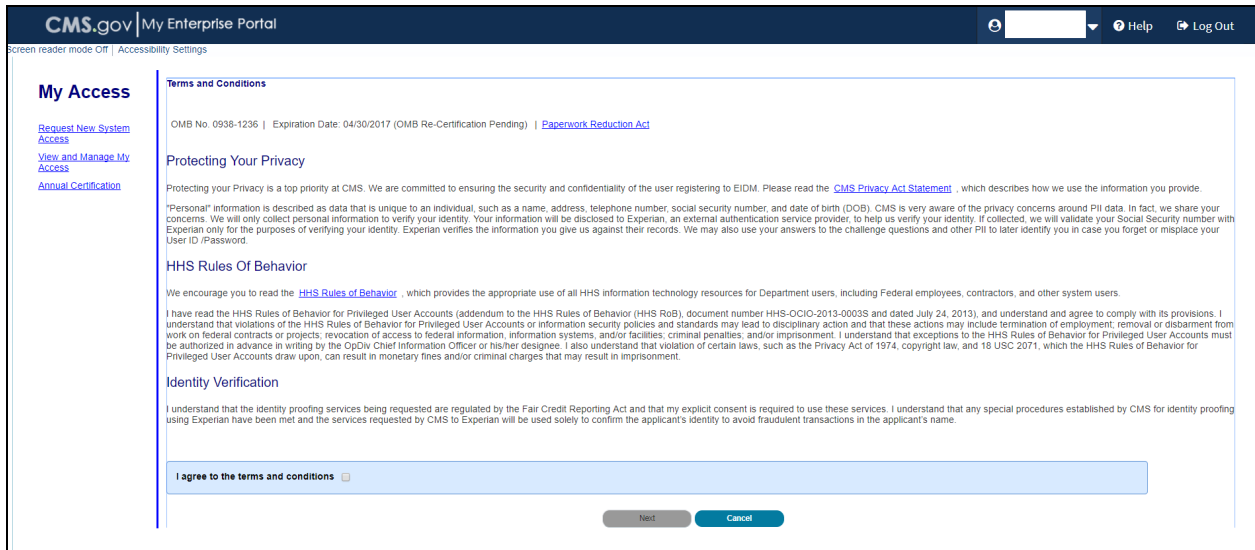
Figure 10: Identity Verification Screen



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.

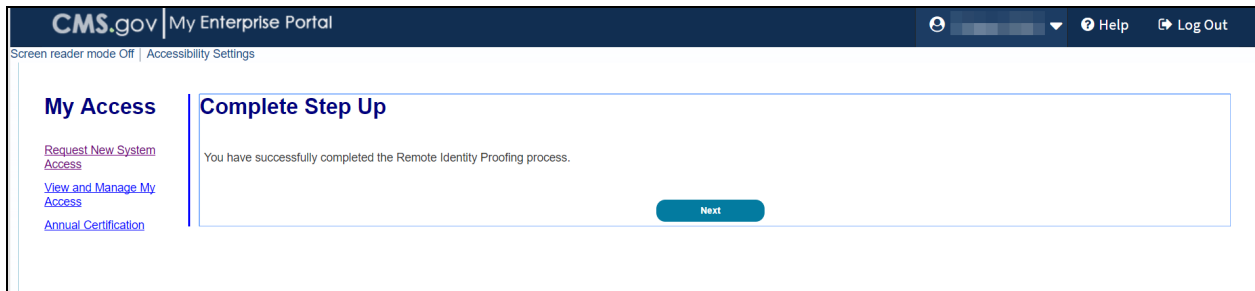
Figure 11 displays the Terms and Conditions page.

Figure 11: Terms and Conditions Page



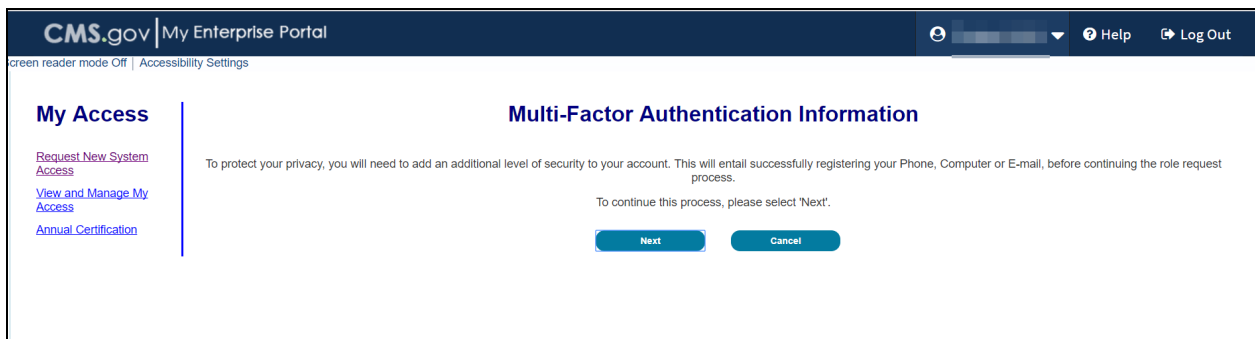
The user must review the information they have entered on the Your Information page, make any necessary updates, and select Next to continue. On the Verify Identity page, the user must answer questions to confirm their identity and select Next to continue. The user should receive the message displayed in Figure 12 once they have completed the Remote Identity Proofing process.

Figure 12: Complete Step Up Page



The user will be navigated to the Multi-Factor Authentication Information page (see Figure 13) and must select Next to continue with the process.

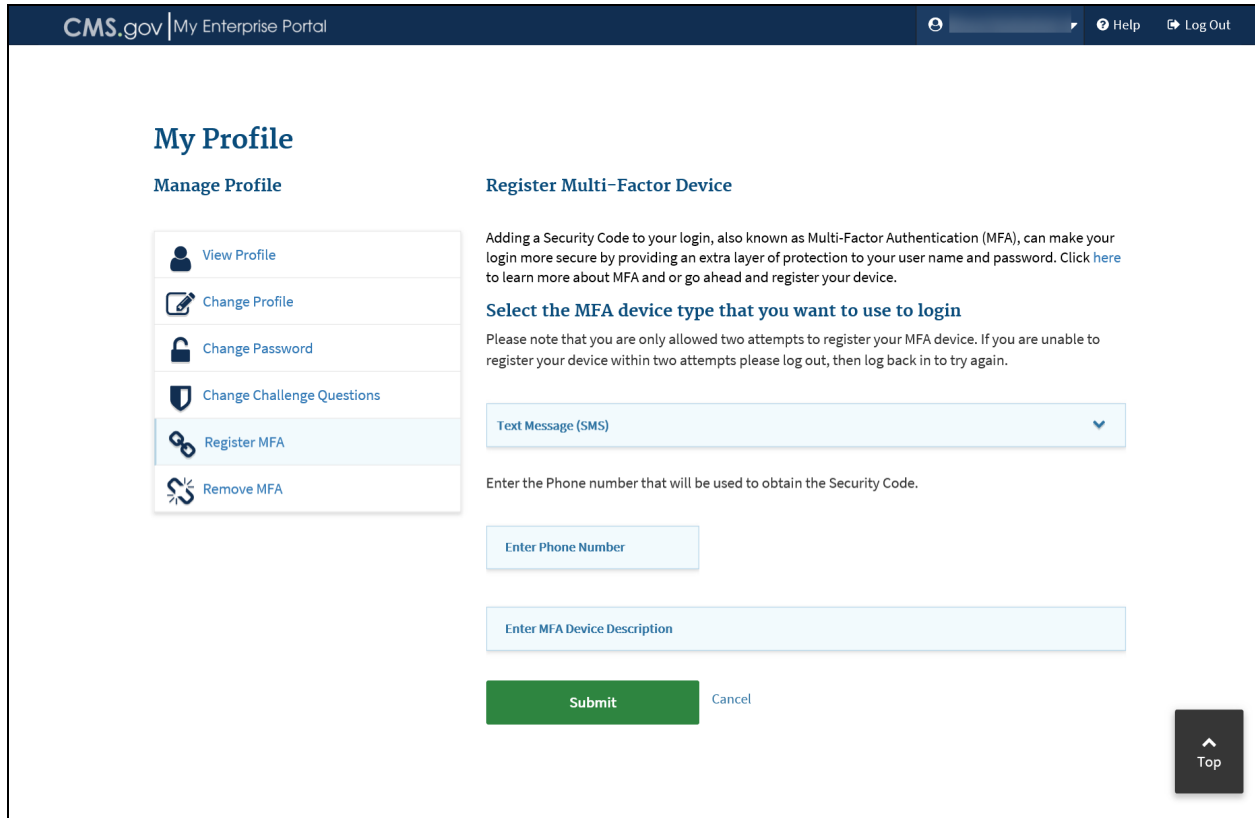
Figure 13: Multi-Factor Authentication Information Page



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.

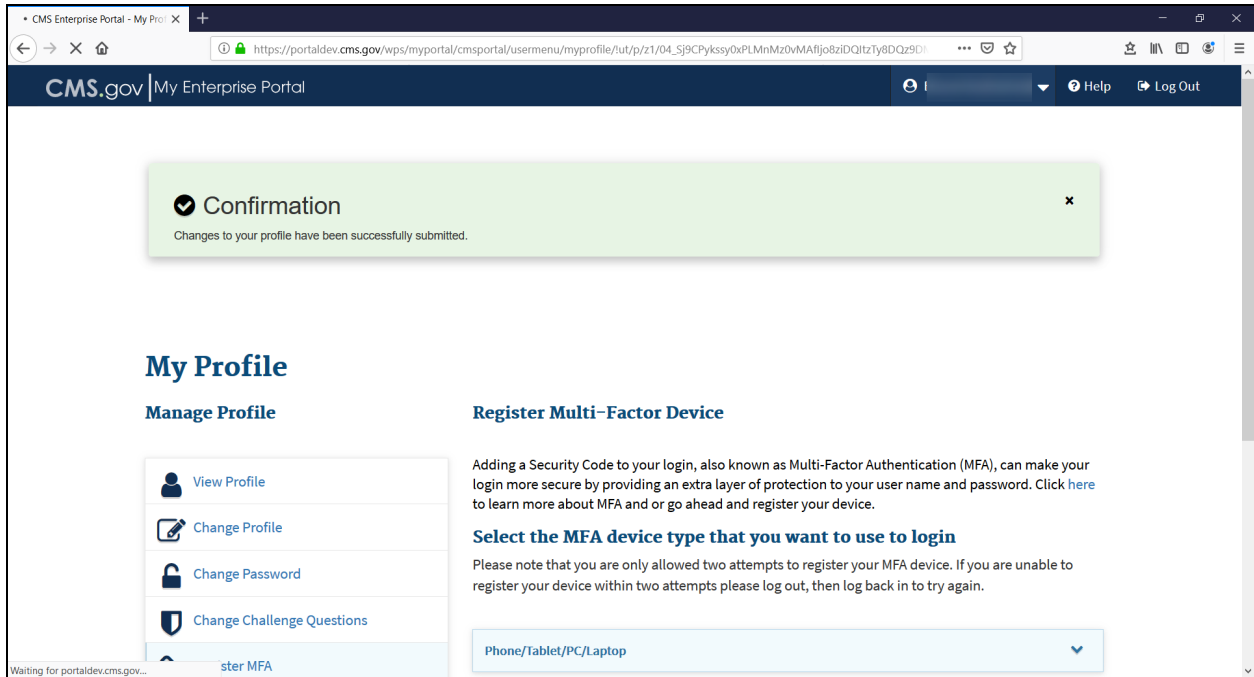
Figure 14 displays the Register Your Phone, Computer, or E-mail page:

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



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 15). The user must select OK again to continue.

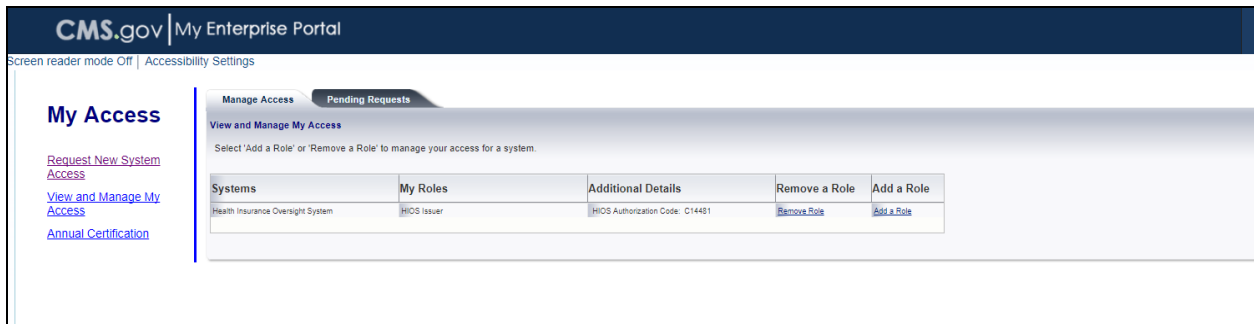
Figure 15: Successful Completion Page



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 16).

Figure 16 displays the View and Manage My Access page:

Figure 16: View and Manage My Access Page

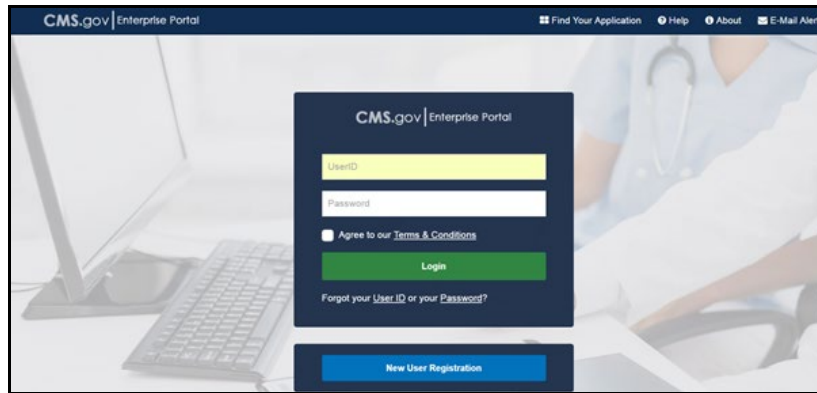


2.2 Existing HIOS Users

Existing HIOS Users will follow the steps below to access HIOS once they have completed the EIDM registration process. 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 17 displays the CMS Enterprise Portal Page.

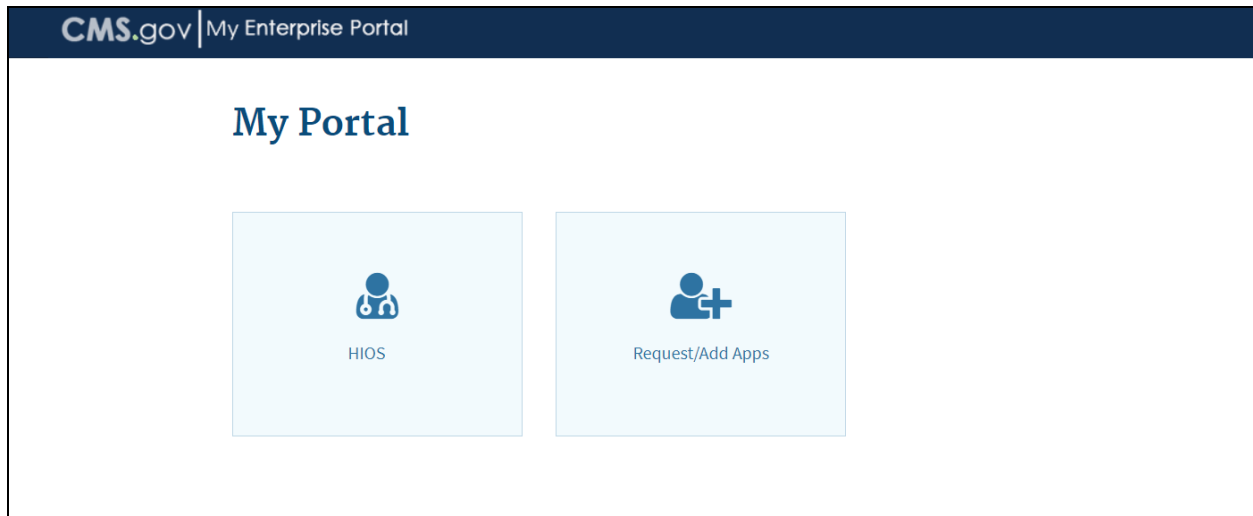
Figure 17: CMS Enterprise Portal Page - Login with EIDM Credentials



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

Figure 18 displays the My Portal page.

Figure 18: 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 19 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 19: Access HIOS, Plan Management Landing Page

CMS.gov | My Enterprise Portal My Apps

HIOS | Plan Management | Market Wide Functions

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

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

Health Insurance Oversight System (HIOS)

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

[Access HIOS](#)

Plan Management and Market Wide Functions

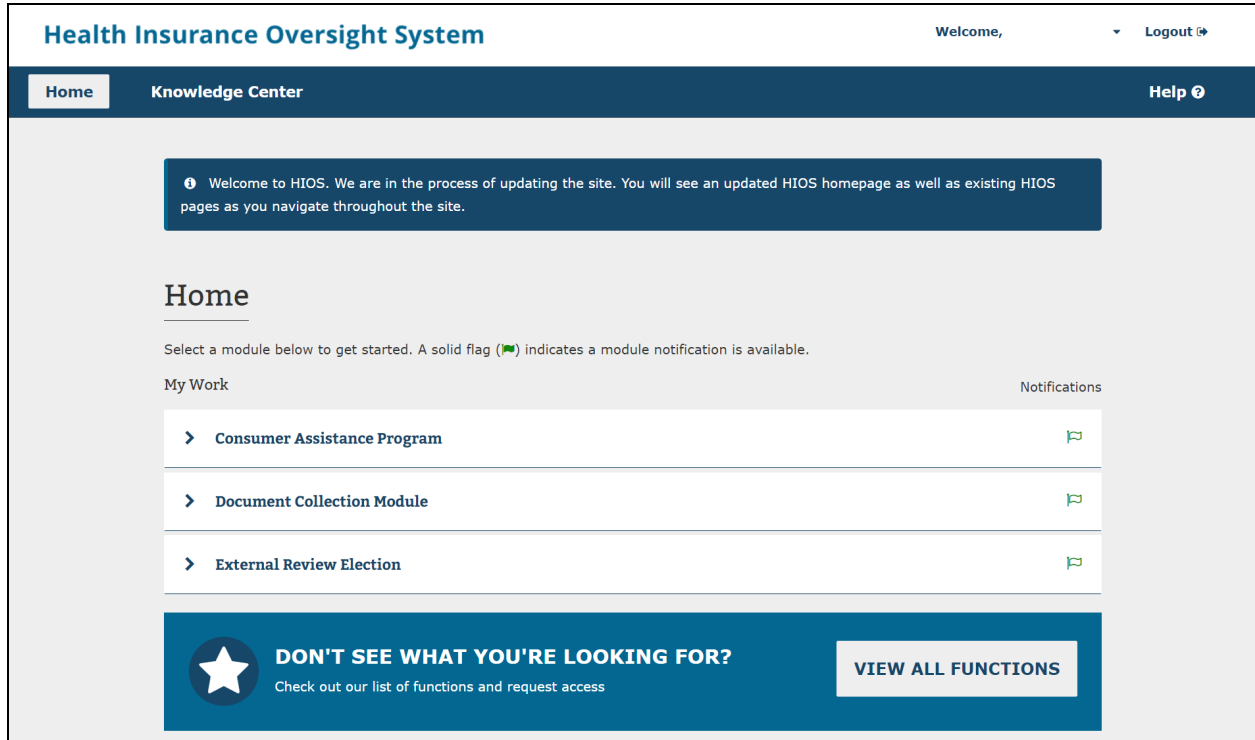
The Plan Management and Market Wide Functions portal is where issuers will access both Market Wide modules (like the Integrated Rate Review Module) and the Federally Facilitated Exchange's (FFE) Qualified Health Plan (QHP) application. Those seeking certification must also complete the Unified Rate Review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

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

3 HIOS Portal Home Page

Upon successful login, the users will arrive on the HIOS Portal Home Page as shown in Figure 20.

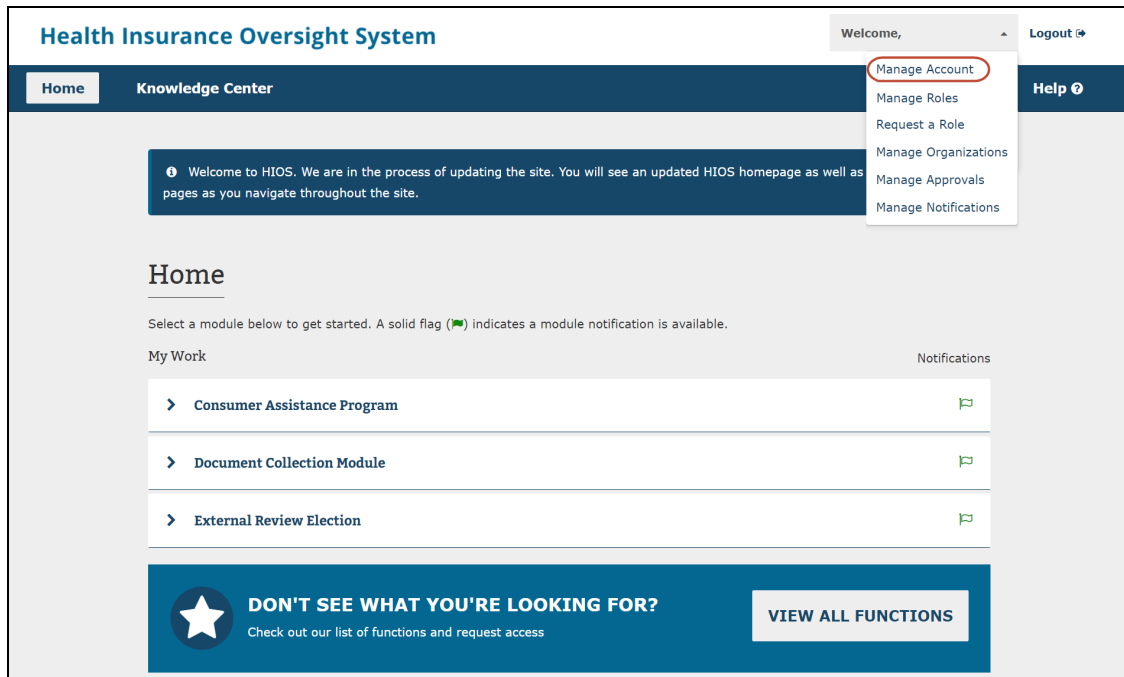
Figure 20: HIOS Portal Home Page



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

Figure 21: 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 22: 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)

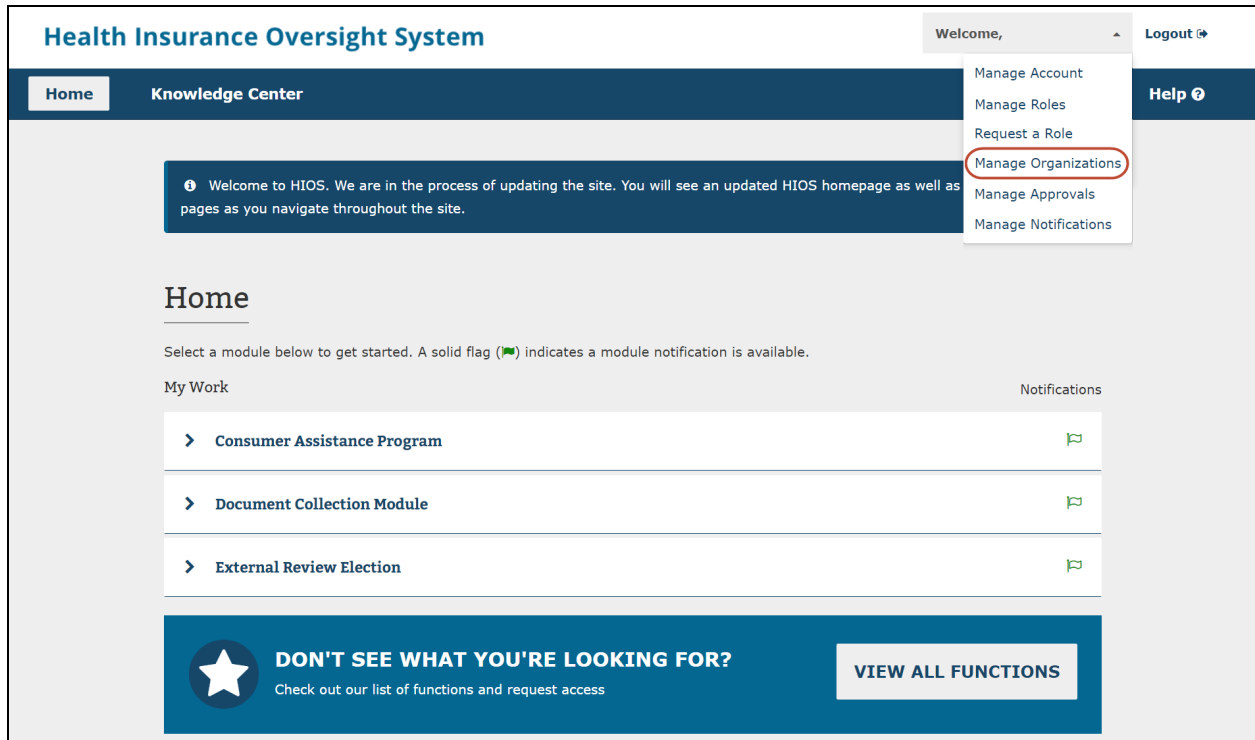
Phone Ext.

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 23 below.

Figure 23: 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, Add a Relationship, and Organization Search. 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 24 below.

Figure 24: Manage Organizations Landing Page

Manage Organizations

What would you like to work on today?

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

3.2.1 My Organizations

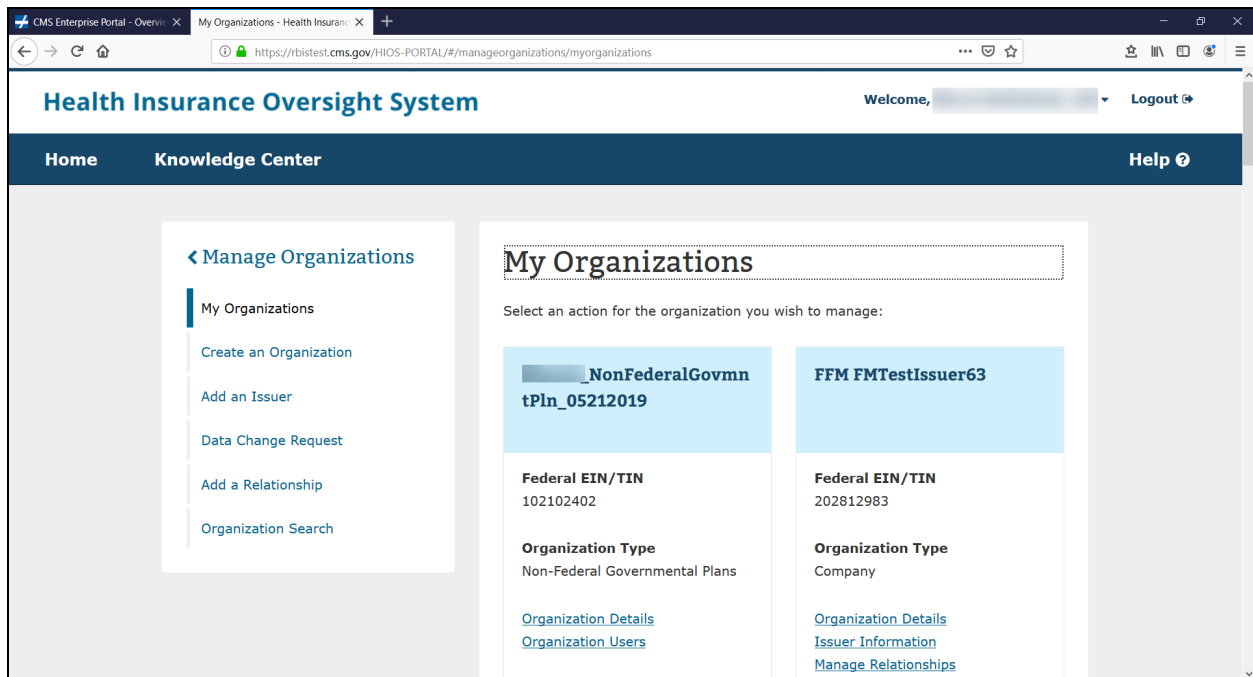
The My Organizations page allows Company, Issuer, and Organization administrator users to view information for the organizations for which they have an administrative role. Each organization that a user has an administrator role for will appear as its own card with specific links on the My Organizations page. There is also a left-hand navigation menu that can take 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 25.

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.

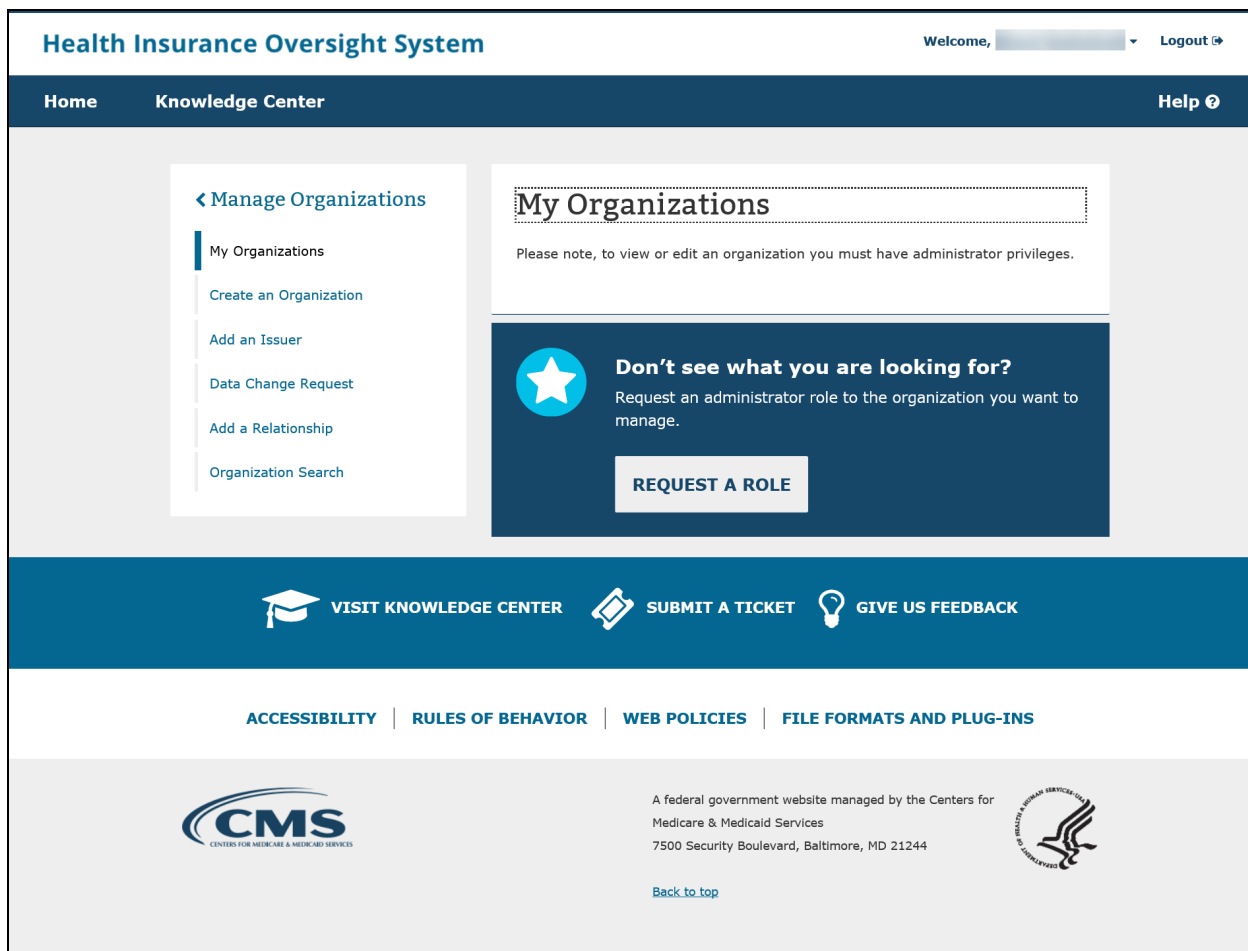
Figure 25: My Organizations Page for User with Administrator Role



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 26 below.

Figure 26: 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 27 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 27: Organization Details

Organization Details

Leah Test Company 4 2018

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

Organization Legal Information

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

Organization Type	Incorporated State
Company	Kentucky (KY)

*** Organization Legal Name**

Leah Test Company 4 2018

* Federal EIN/TIN (9 digits)	Validation Status
<div style="border: 1px solid #ccc; padding: 5px;">988798798</div>	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 28: Organization Details – TPA Information

* City: herndon

* State: Virginia (VA)

* ZIP Code (5 digits): 44444

ZIP Plus 4: 1234

Third Party Administrator (TPA) Information

TPA Type

EDGE Server

Enrollment

Please fill in the form below with your Company information.

Legal Business Address

* Address Line 1: 4108 11th Pl

Address Line 2:

* City: Herndon

* State: Virginia (VA)

* ZIP Code (5 digits): 20171

ZIP Plus 4:

Primary Contact Information

* Job Title: Consultant

* First Name: John

* Last Name: Smith

* Email Address: test@test.com

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

Phone Ext.:

Add Secondary Contact Information

SUBMIT

Once the TPA information has been entered, 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 29 below.

Figure 29: Organization Details Page - View



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 30 below. From the table, users also have access to the Issuer Details or the Issuer Users page.

Figure 30: Issuer Information Page

The screenshot shows the 'Issuer Information' page for 'test001 Email Test Update'. On the left is a navigation menu with 'My Organizations' and sub-items: 'Organization Details', 'Issuer Information' (selected), 'Organization Users', and 'Manage Relationships'. The main content area has the title 'Issuer Information' and subtitle 'test001 Email Test Update'. Below this is a text block: 'The following issuers are associated to test001 Email Test Update. To add another issuer, please navigate to the [Add an Issuer](#) page.' A pagination control shows 'Showing 1-8 of 8 records' and 'Records per page 10'. The main table lists 8 issuers with columns for Issuer ID, Issuer Name, Registered State, and Actions. The 'Actions' column contains links for 'Issuer Details' and 'Issuer Users' for each row. At the bottom is a pagination bar with buttons for 'First', 'Previous', '1' (selected), 'Next', and 'Last'.

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

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 31 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 32 below.

Figure 31: Issuer Details Page

[← Issuer Information](#)

- [Issuer Details](#)
- [Issuer Users](#)

Issuer Details

test001

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

Organization Legal Information

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

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

Additional Information

Issuer Marketing Name

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

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

Yes
 No

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

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

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

Yes
 No

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

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

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

Yes
 No

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

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

Domiciliary Address

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

*** Address Line 1**

4554 city street1

Address Line 2

*** City**

Durham

*** State**

North Carolina (NC)
▼

*** ZIP Code (5 digits)**

45678

ZIP Plus 4 (4 digits)

SUBMIT

Figure 32: Issuer Details Page - View

[← Issuer Information](#)

Issuer Details

Issuer Details

JN Test Company 12-12-17

Organization Legal Information

Issuer ID 80381	Incorporated State Arizona(AZ)
Issuer Legal Name JN Test Company 12-12-17	Federal EIN/TIN 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 33 below.

Figure 33: Issuer Users

The screenshot displays the 'Issuer Users' page for issuer '000000001-test'. The page includes a navigation menu with 'Home', 'Knowledge Center', and 'Help'. A sidebar on the left shows 'Issuer Information' with sub-links for 'Issuer Details' and 'Issuer Users'. The main content area features a table of users with the following data:

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

At the bottom of the table, there are pagination controls: 'First', 'Previous', '1' (selected), 'Next', and 'Last'. Above the table, it indicates 'Showing 1-3 of 3 records' and 'Records per page 10'.

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 34 below.

Figure 34: Organization Users

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 35 – 38.

Figure 35: Organization Users with View Details button

< My Organizations

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

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 36: 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 37: View User Details - Confirmation Pop-up

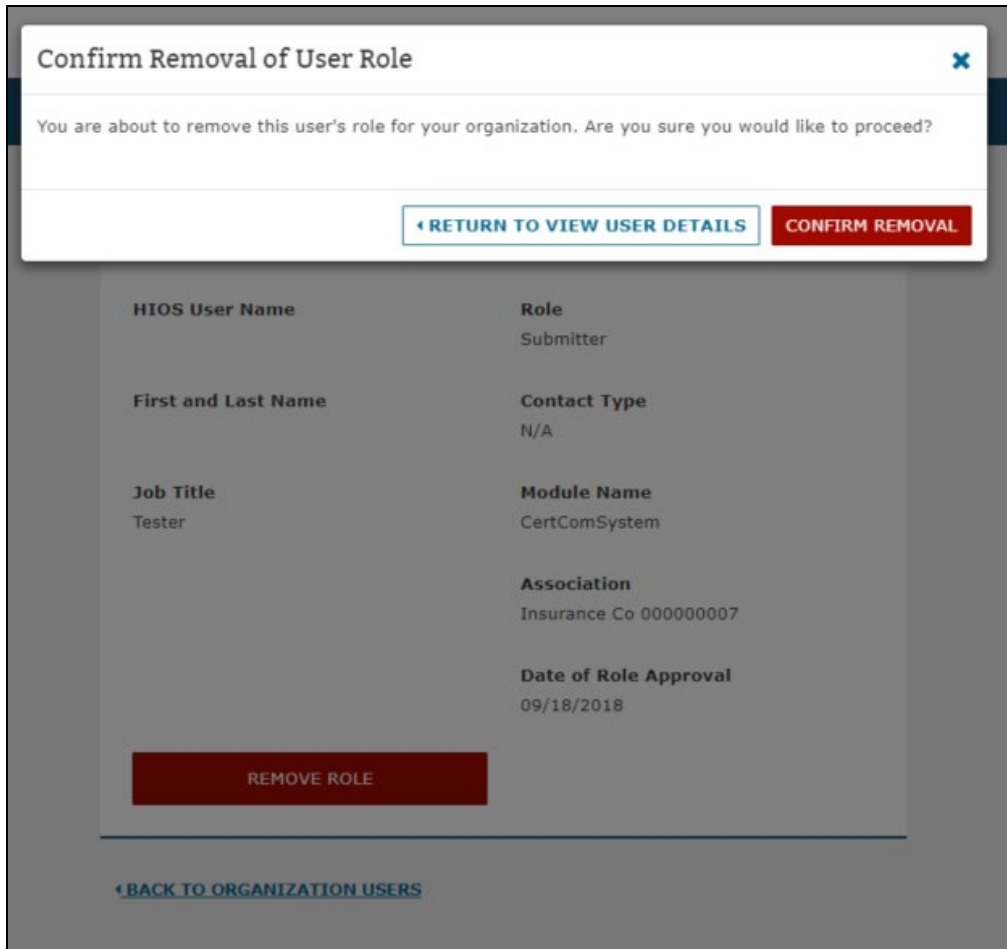


Figure 38: Organization Users - Confirmation message after removal is complete

The screenshot displays the 'Organization Users' page for 'Insurance Co 000000007'. A green confirmation message 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 10 users. The table has columns for Username, Module, Role, Approved Date, and Actions. Each row includes a 'View details' button.

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 39 below.

Figure 39: 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 40 and Figure 41 below.

Figure 40: 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	Effective Start Date
817263871 - JN Test Company Edit 3 on 3-6-18	04-01-2018
Service Receiver	Effective End Date
85586 - JN Test Company 11-13-17 Edit on 3-5 - AK	04-02-2018
Relationship Type	Status
TPA Enrollment	Approval Required

APPROVE RELATIONSHIP

DENY RELATIONSHIP

[← BACK TO MANAGE RELATIONSHIPS](#)

Figure 41: 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	Effective Start Date
817263871 - JN Test Company Edit 3 on 3-6-18	04-01-2018
Service Receiver	Effective End Date
85586 - JN Test Company 11-13-17 Edit on 3-5 - AK	04-02-2018
Relationship Type	Status
TPA Enrollment	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 42 below.

Figure 42: 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 43 below.

Figure 43: 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

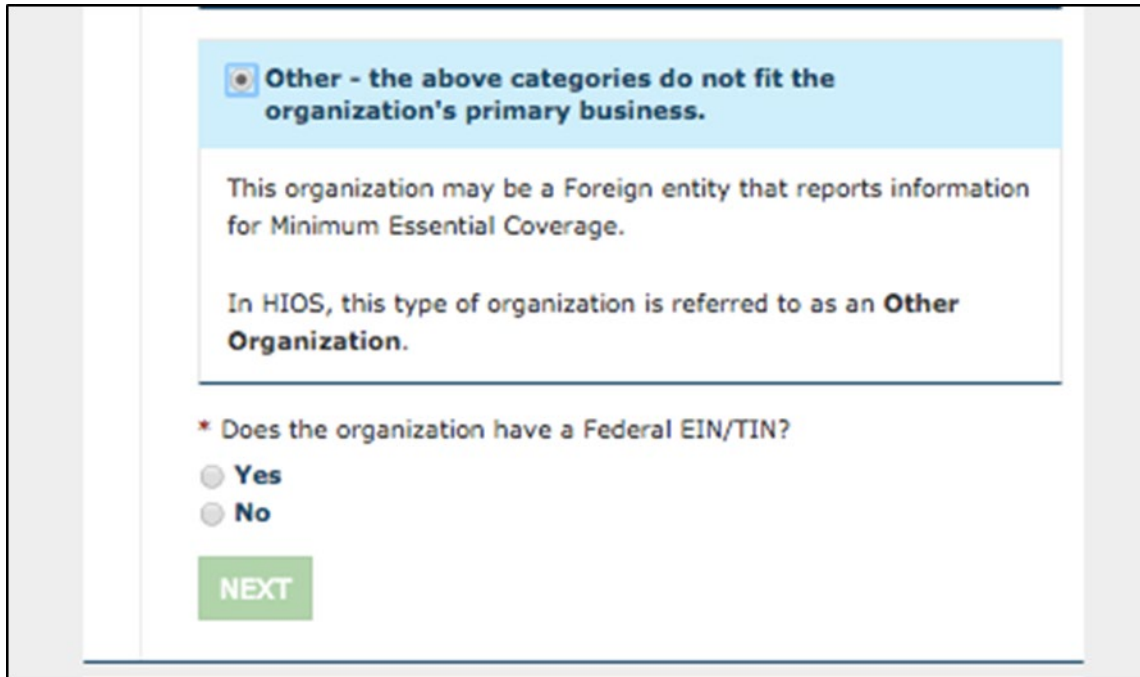
2 Enter Federal EIN/TIN

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 44 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 44: Create an Organization – Select Other



The screenshot shows a web form for creating an organization. At the top, a light blue header contains a selected radio button and 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 45.

Figure 45: 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
- 3 Organization Details**
- 4 Confirm Your Request**

NEXT

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 46 below.

Figure 46: Create an Organization – Company – Step 3

3 Organization Details

Please enter your organization details below.

*** Organization Legal Name**

*** Incorporated State**

Additional Information

NAIC Company Code (5 Digits)

NAIC Group Code (5 Digits)

Group Name

AM Best Number (6 digits)

Company Information

Not For Profit

Co-Op

Domiciliary Address

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

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 47. 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 47: Create an Organization – Company – Step 4

The screenshot displays a four-step process for creating a company organization. Step 1 is 'Select the Organization's Primary Function' with 'Company' selected and a 'Revisit this step' button. Step 2 is 'Enter Federal EIN/TIN' with '182736817' entered and a 'Revisit this step' button. Step 3 is 'Organization Details' with 'Organization Details Provided' and a 'Revisit this step' button. Step 4 is 'Confirm Your Request', which includes the instruction 'Please select "Submit" to complete your request.' Below this is a summary box containing 'ORGANIZATION' and '182736817 - JN Test Company'. At the bottom of Step 4 are two buttons: a green 'SUBMIT' button and a blue 'RESET' button.

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 48.

Figure 48: 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
- 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 49 below.

Figure 49: 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 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 – 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

SUBMITRESET

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 51.

Figure 51: 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.
- 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 52 below.

Figure 52: Create an Organization – Non-Federal Governmental Health Plan – Step 3

3

Organization Details

Please enter your organization details below.

*** Organization Legal Name**

*** Non-Fed Plan Type**

Self Funded

Fully Insured

Domiciliary Address

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

*** Address Line 1**

Address Line 2

*** City**

*** State**

*** ZIP Code (5 digits)**

ZIP Plus 4 (4 digits)

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-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 54 and Figure 55.

Figure 54: 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.
- 3 Organization Details**
- 4 Confirm Your Request**

Figure 55: 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 56 below.

Figure 56: 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".

SEARCH

Showing results for "Jackie"

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

NEXT

Please note if an organization name returns results larger than 10 records, an error message will appear instructing users to refine their search and enter a more unique organization name. Please refer to Figure 57 below.

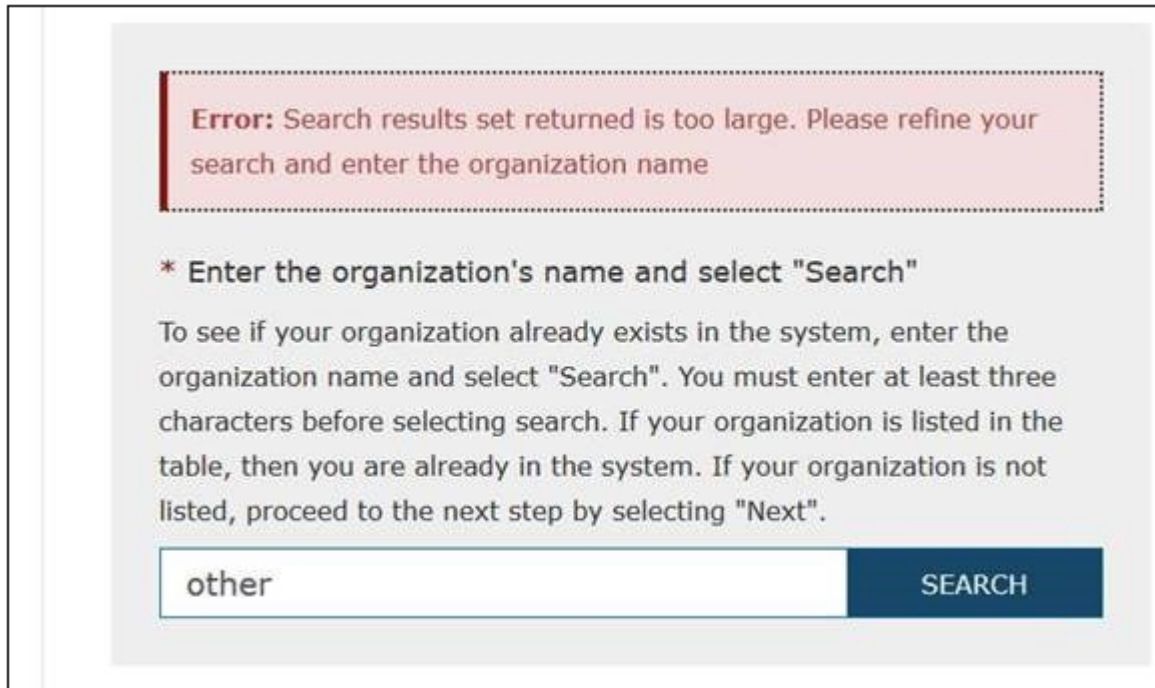
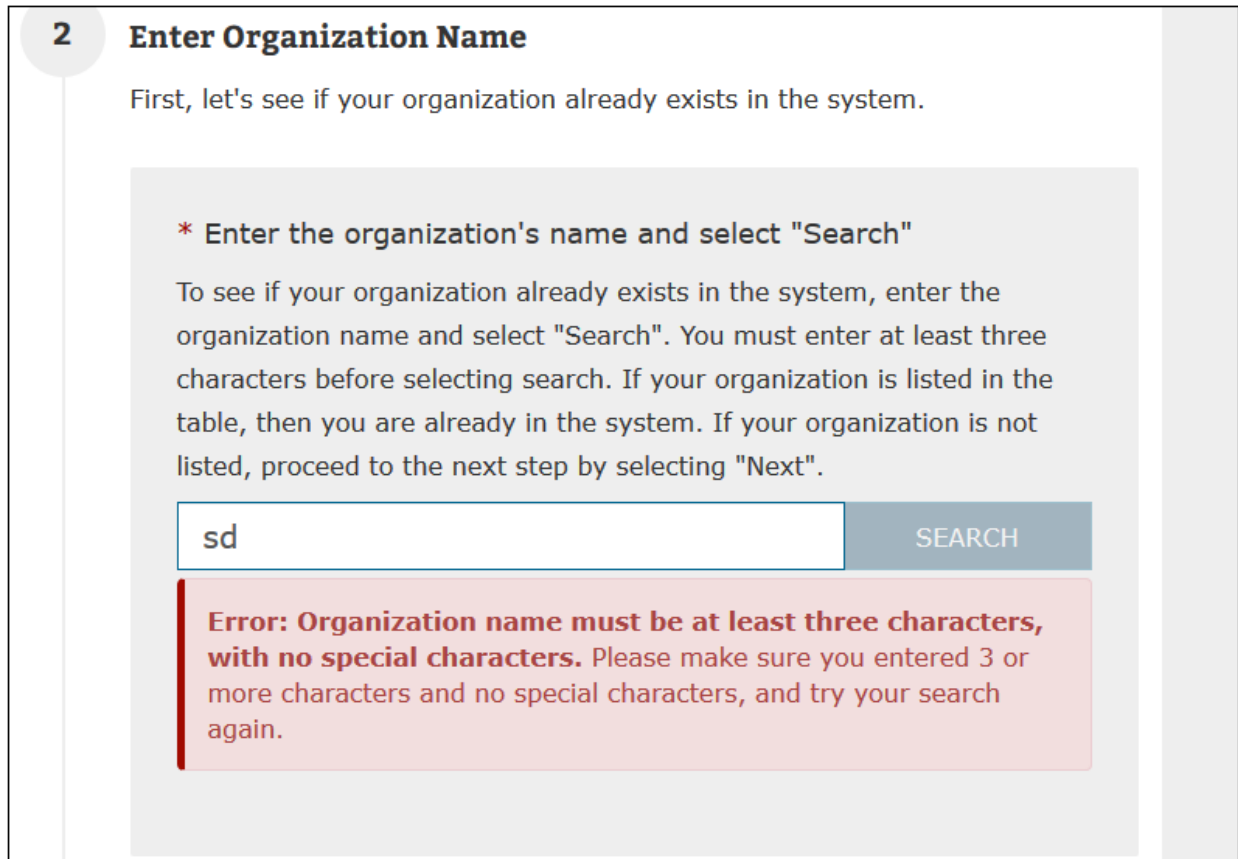


Figure 58: Create an Organization – Other Organization – Name Results Error Message

When creating an Other Organization, in order to successfully check if your organization already exists within Portal, you must enter at least 3 characters within the Search field before selecting the Search button. Please note, if less than 3 characters are entered in the Search field, an error message will display informing users that a minimum of 3 characters are required to be entered in the Search field. Please refer to Figure 59 below.



2 Enter Organization Name

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

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

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

sd SEARCH

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

Figure 60: Create an Organization – Other Organization – Organization Name Error Message

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 59 below.

Figure 61: 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 60. 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 62: 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

SUBMITRESET

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 61 below.

Figure 63: 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 62 below.

Figure 64: Add an Issuer – Step 2

The screenshot shows a multi-step form titled "Add an Issuer". At the top, a note states: "Please note, a field with an asterisk (*) before it is a required field." The form is divided into four steps, each in a separate horizontal panel:

- Step 1: Search for an Organization** - Includes a search input field containing "000000010 - 000000010-test" and a "Revisit this step" button.
- Step 2: Issuer Registered State** - Features a dropdown menu labeled "* Registered State" and a green "NEXT" button.
- Step 3: Issuer Details** - A panel with no visible input fields.
- Step 4: Confirm Your Request** - A panel with no visible input fields.

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 63 below.

Figure 65: 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 64 below.

Figure 66: 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)

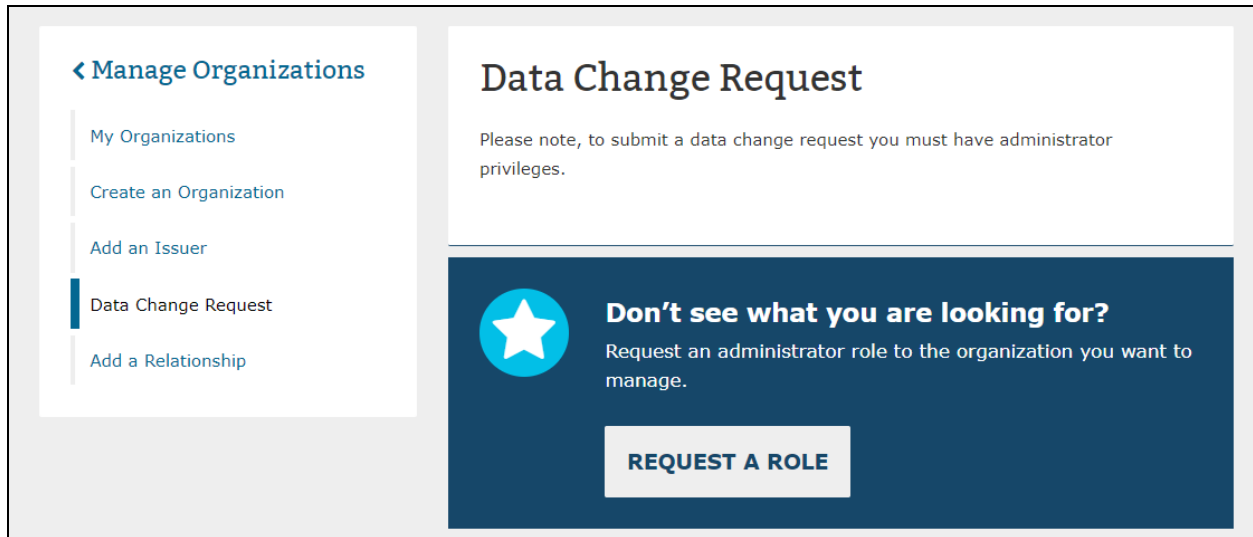
NOTE: The selected issuer's state is non-compliant with the State Review Process. Please access the External Review Election to enter your Appeals information.

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 65 below.

Figure 67: 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 66. 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 67 and Figure 68.

Figure 68: HIOS Portal – Manage Data Changes

Manage Data Changes

[Create Request for Data Change](#)

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

Request Status: Pending Approval v **(OR)** **Search By Request ID:** Enter

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

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

Figure 69: 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**

*** Federal EIN/TIN (9 digits)**

Validation Status
Validation in Process

Additional Information

NAIC Company Code (5 digits)	NAIC Group Code (5 digits)
-------------------------------------	-----------------------------------

Group Name

AM Best Number (6 digits)

Company Information

Not For Profit

Co-Op

Domiciliary Address

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
------------------------------	-------------------

Third Party Administrator (TPA) Information

TPA Type

EDGE Server

Enrollment

SUBMIT

Figure 70: 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

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 69.

Figure 71: Create Data Change Requests

Once the value for the data change is selected, Company Administrators of multiple organizations will see a list of companies displayed in the drop-down menu. Company Administrators will then select the Company for which they are making the data change (FEIN/TIN, Organization Legal Name, Organization Type) in the drop-down menu, and then select the Enter button. 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 70 and Figure 71.

Figure 72: Company Data Changes – Select the Company

Create Data Change Request

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

What values would you like to change?

Organization Type

Choose the Organization

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

- Mel Test - Company - FEIN -321456987 - Company
- MelTest IMPL 030719 - FEIN -753698412 - Company
- Test 112233445 - FEIN -112233445 - Company
- Mel Test - OtherOrg - Alexandria,

Figure 73: Company Data Changes – Select the Field to Change

Create Data Change Request

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

What values would you like to change?

Organization Type

Choose the Organization

Mel Test - Company - FEIN -321456987 - Company

Current Value	*New Value	*Reason for change
Company	-Select new value- <input type="text"/> <input type="button" value="Enter"/>	<input type="text"/>

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 72.

**Figure 74: Company or Non-Insurance to a Non-Federal Governmental Plan –
Select Self-Funded or Fully Insured Radio Button**

Create Data Change Request

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

What values would you like to change?

Organization Type

Choose the Organization

Mel Test - Company - FEIN - 321456987 - Company

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

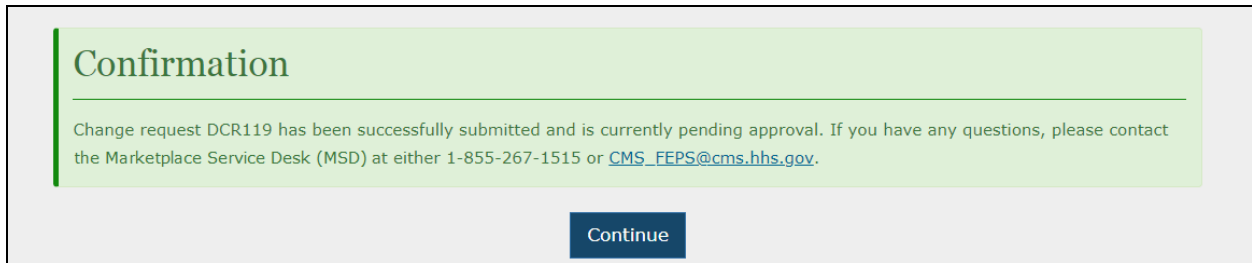
***Please select the type:**

Self Funded

Fully Insured

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 73.

Figure 75: Confirmation Page for Change Request

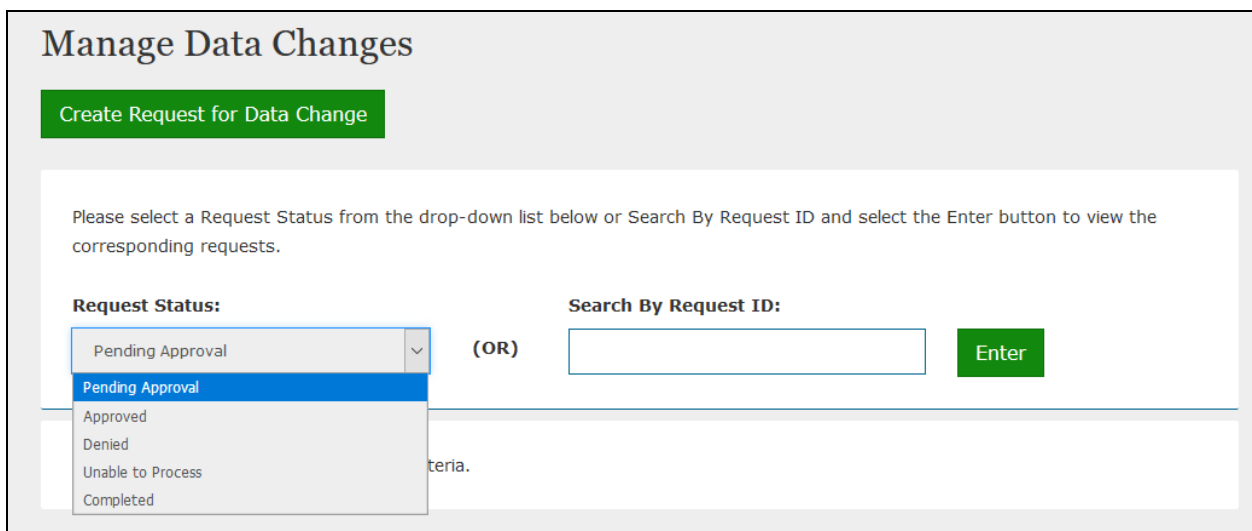


3.5.1.2 View Data Change Requests

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 74.

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

Figure 76: Change Request Statuses



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 75.

Figure 77: View a Change Request

Data Change Details View

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

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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 76.

Figure 78: Issuer Change Request

Create Data Change Request

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

What values would you like to change?

▼
Enter

Choose the Issuer

▼
Enter

Current Value	*New Value (9 digits)	*Reason for change
Test 112233445	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" 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 77. 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 79: Product Change Request

Create Data Change Request

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

What values would you like to change?

▼
Enter

Choose the Issuer

▼
Enter

Choose the product

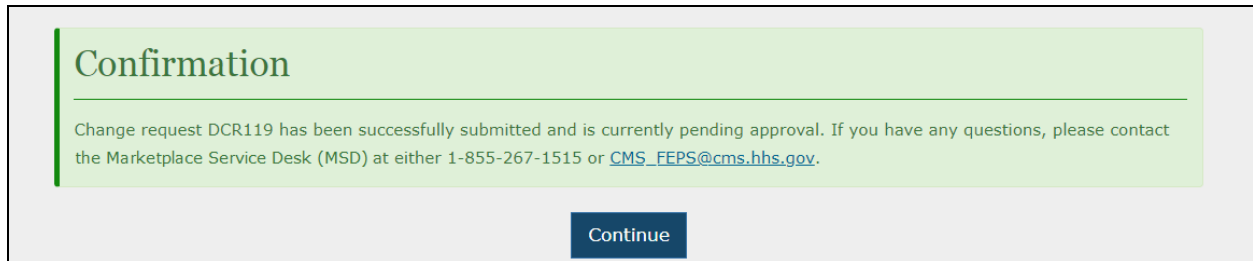
▼
Enter

Current Value	*New Value (9 digits)	*Reason for change
Mallory PPO IFP Test Prod1	<input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" 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 78.

Figure 80: Confirmation Page for Change Request



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

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

Figure 81: Change Request Statuses

Manage Data Changes

[Create Request for Data Change](#)

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

Request Status:

Pending Approval

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

Search By Request ID:

Enter

(OR)

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

Issuer Administrators can review the data of the change requests displayed through the 'View' link of the Action column as illustrated in Figure 80.

Figure 82: View Change Request

Data Change Details View

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

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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 81.

Figure 83: 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="button" value="Enter"/>	<input style="width: 100%;" type="text"/>

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

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 80. 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 84: 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 83.

Figure 85: Other Organization to a Company

Create Data Change Request

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

What values would you like to change?

Organization Type

▼

Enter

Choose the Organization

Mel Test - OtherOrg - Alexandria,

▼

Enter

Current Value	*New Value	*Reason for change
Other Organization Type	<div style="border: 1px solid #ccc; padding: 2px;">-Select new value-</div> <div style="text-align: right; margin-right: 5px;">▼</div>	<div style="background-color: #2e7d32; color: white; padding: 5px 10px; border-radius: 3px; display: inline-block; margin-right: 10px;">Enter</div> <div style="border: 1px solid #ccc; width: 150px; height: 25px; display: inline-block;"></div>

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 84.

Figure 86: 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 85. The following statuses can be filtered on the Manage Data Changes page.

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

Figure 87: Change Request Statuses

The screenshot shows the 'Manage Data Changes' page. At the top, there is a green button labeled 'Create Request for Data Change'. Below this, a text prompt asks the user to select a Request Status from a drop-down list or search by Request ID. The 'Request Status' drop-down menu is open, showing options: Pending Approval (selected), Approved, Denied, Unable to Process, and Completed. To the right, there is a search box labeled 'Search By Request ID:' with an 'Enter' button. Below the search area is a table with the following data:

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 86.

Figure 88: View Change Requests

Data Change Details View

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

[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 87 below.

Figure 89: 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.

NEXT

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 88 below.

Figure 90: 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.

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

	Issuer Details	Registered State
<input checked="" type="checkbox"/>	25880 - JN Test Company 11-13-17 Edit on 3-5	AL
<input type="checkbox"/>	85586 - JN Test Company 11-13-17 Edit on 3-5	AK

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 89 below.

Figure 91: Add a Relationship – Step 3

The screenshot displays the 'Add a Relationship' process in Step 3, 'Relationship Attributes'. 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). The main content area has a title 'Add a Relationship' and a note: 'Please note, a field with an asterisk (*) before it is a required field.' Below this is a progress indicator with four steps: 1. Relationship Type, 2. Relationship Details, 3. Relationship Attributes (current step), and 4. Confirm Your Request. Each step has a 'Revisit this step' button. Step 1 shows 'TPA Enrollment, Providing TPA Services, 817263871 - JN Test Company Edit 3 on 3-6-18'. Step 2 shows '1 Issuer'. 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 is currently empty.

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 90 and Figure 91 below.

Figure 92: 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** [Revisit this step](#)

TPA Enrollment, Providing TPA Services,
817263871 - JN Test Company Edit 3 on 3-6-18
- 2 Relationship Details** [Revisit this step](#)

1 Issuer
- 3 Relationship Attributes** [Revisit this step](#)

03/20/2018 to 03/21/2018
- 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

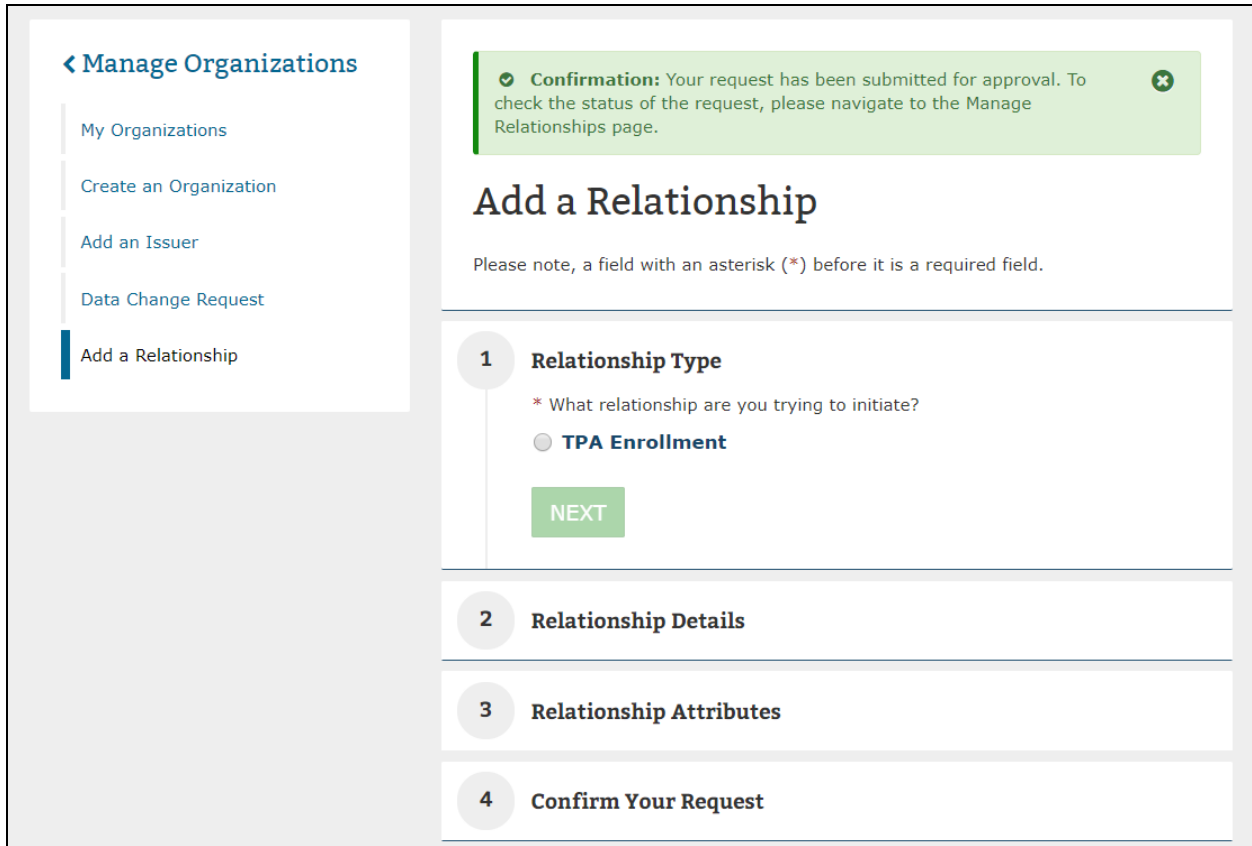
RELATIONSHIP DETAILS
85586 - JN Test Company 11-13-17 Edit on 3-5 (AK)

EFFECTIVE START DATE
03/20/2018

EFFECTIVE END DATE
03/21/2018

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

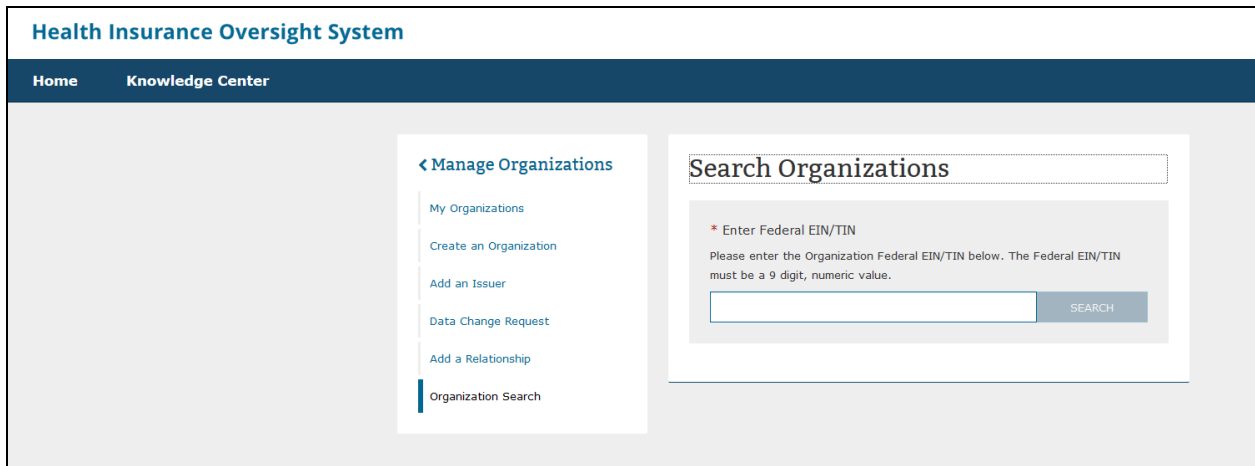
Figure 93: Add a Relationship – Confirmation Message



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.

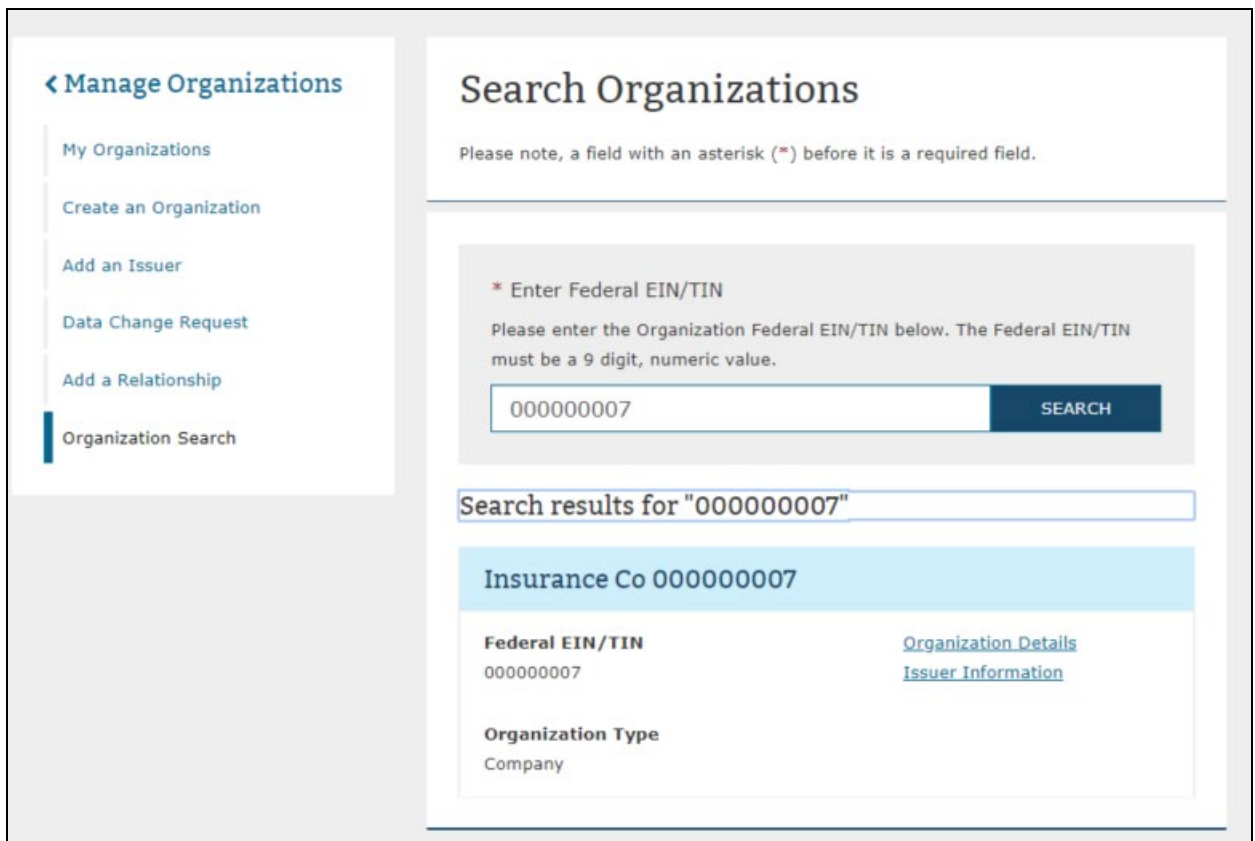
Figure 94: Organization Search



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 95: Organization Search Results



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 96: 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 97: Organization Search - Issuer Information for all HIOS users

The screenshot displays the 'Issuer Information' page for the organization 'FMLoadTest0139'. The page title is 'Issuer Information' and the organization name is 'FMLoadTest0139'. Below the title, it states 'The following issuers are associated to FMLoadTest0139.' The main content is a table with 12 records, showing 1-10 of them. The table has four columns: 'Issuer ID', 'Issuer Name', 'Registered State', and 'Actions'. Each row contains an Issuer ID, the name 'FMLoadTest0139', a state name, and a link for 'Issuer Details'. The states listed are Hawaii, Indiana, Kentucky, United States Virgin Islands, New Jersey, Mississippi, West Virginia, Texas, Alaska, and Connecticut. At the bottom of the table, there are navigation buttons: 'First', 'Previous', '1', '2', 'Next', and 'Last'. Below the table, there is a link: '+ BACK TO SEARCH ORGANIZATIONS'.

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

Figure 98: Organization Search - Issuer Details for all HIOS users

Issuer Details

FM-Company-IMPL0-087

Organization Legal Information

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

Additional Information

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

Market Type and Associated Line of Business

Small Group

Mini-Med

Domiciliary Address

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

Address
593 Herndon Pkwy
Herndon, Virginia 20170

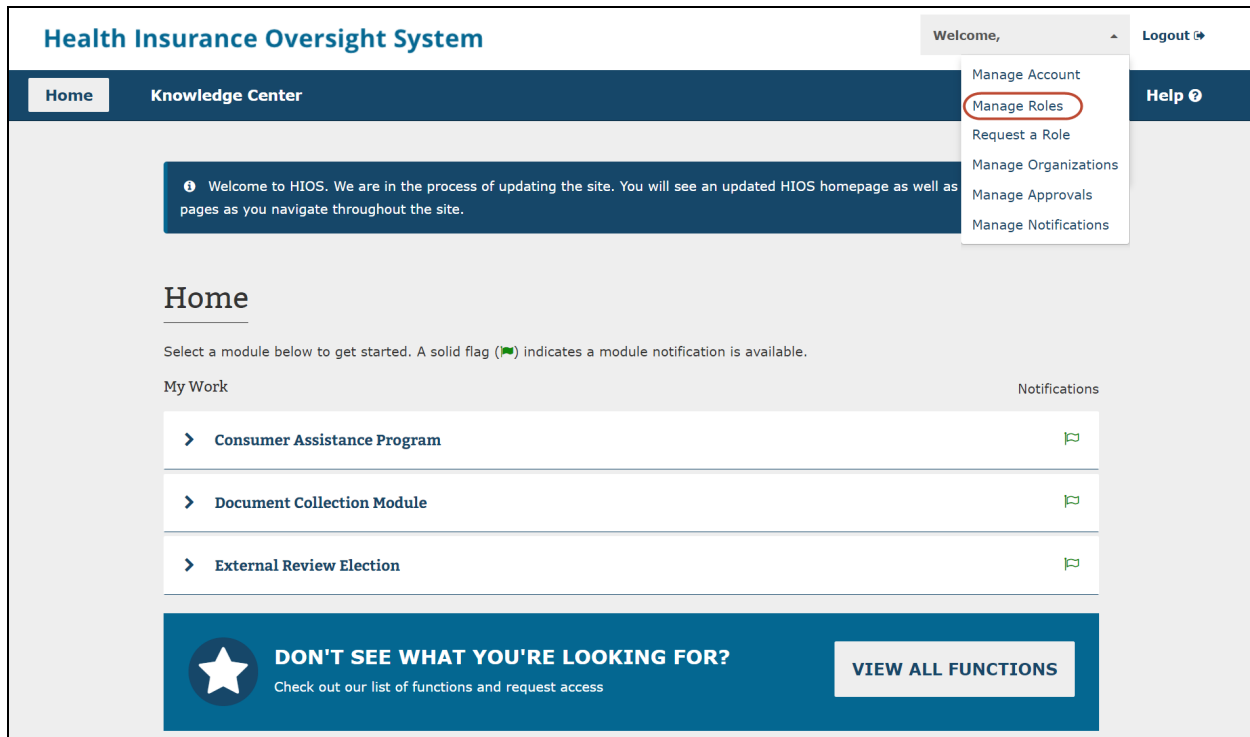
[• BACK TO ISSUER INFORMATION](#)

3.8 Role Management

All module access and role requests are to be completed in the Role Management section. 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 97 below.

Figure 99: 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 98 and Figure 100.

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

Figure 101: Manage Roles

Manage Roles

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

[Add a new role](#)

Showing 1-10 of 206 records **Records per page** 10

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

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 102: View Role Details – Pending Role Request

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

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

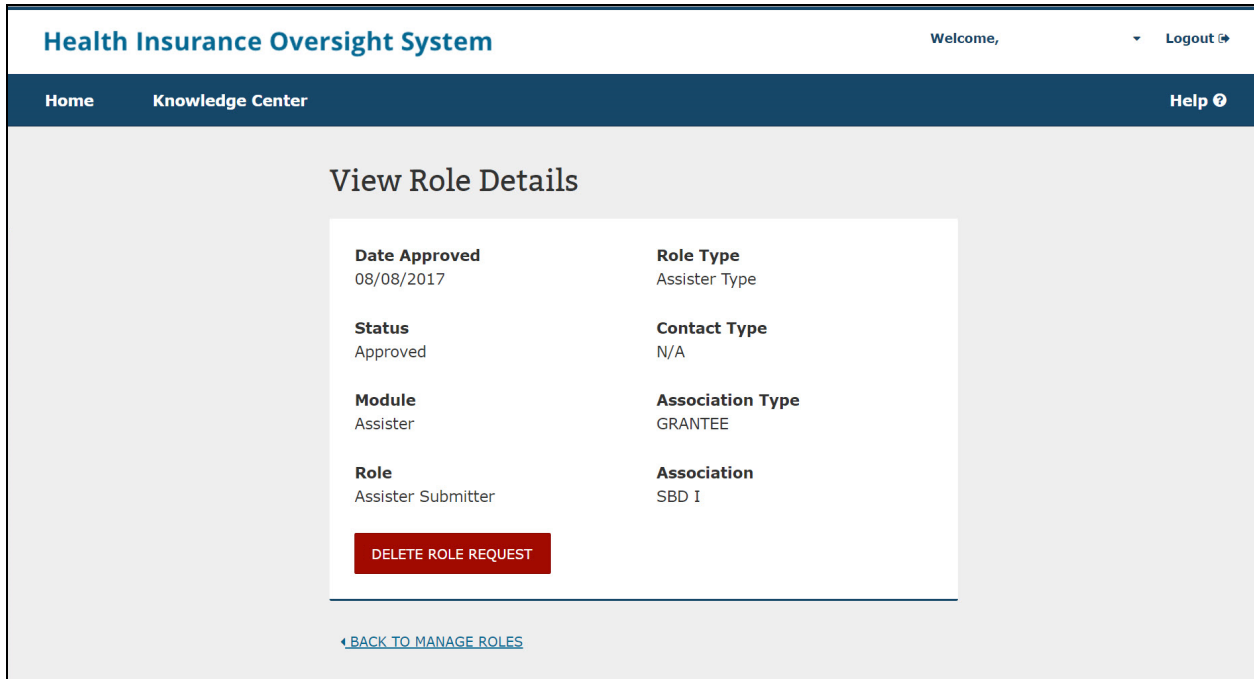
View Role Details

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

[CANCEL ROLE REQUEST](#)

[← BACK TO MANAGE ROLES](#)

Figure 103: View Role Details – Approved Role Request



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 104: Role Cancellation Confirmation

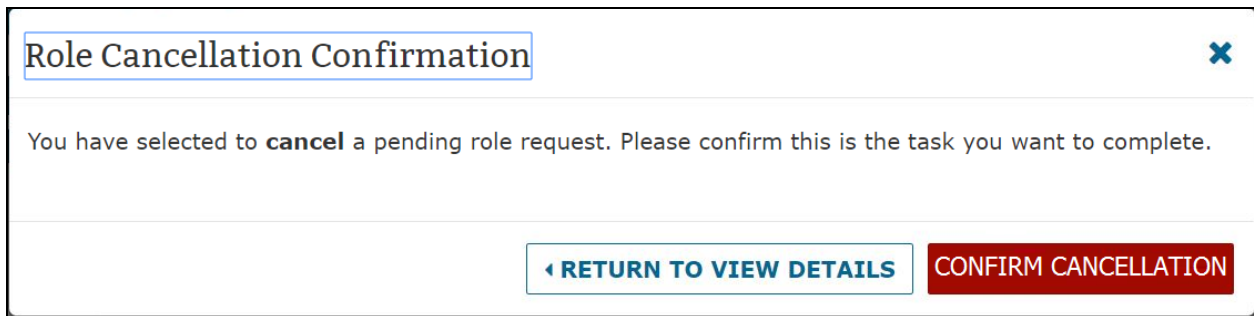


Figure 105: Role Deletion Confirmation



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 106: 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.

- Select a module** Marketplace Quality Module [Revisit this step](#)
- Select a role** Ratings/Reports Viewer [Revisit this step](#)
- 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.

69834 [SEARCH](#)

Showing results for "69834"

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

[NEXT](#)

4 ITEMS ADDED TO REQUEST

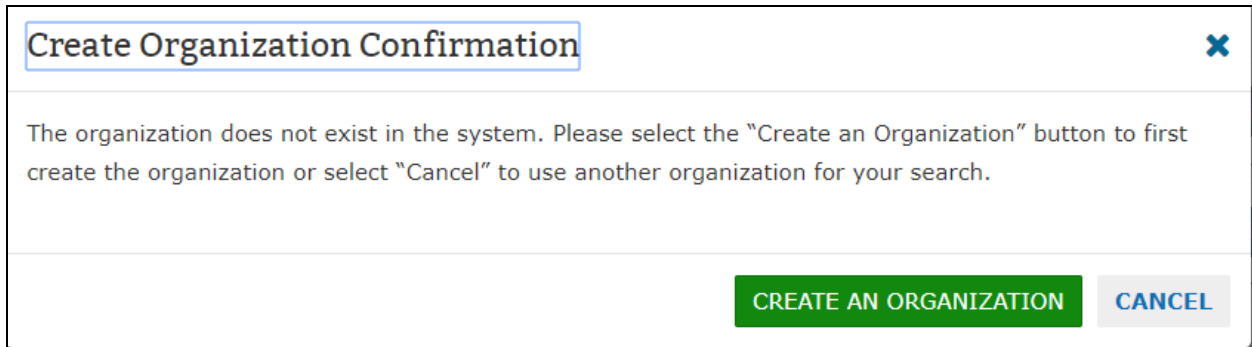
 - DE 53313 x
 - MI 55158 x
 - IL 67116 x
 - VA 69834 x
- Confirm your request**

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.

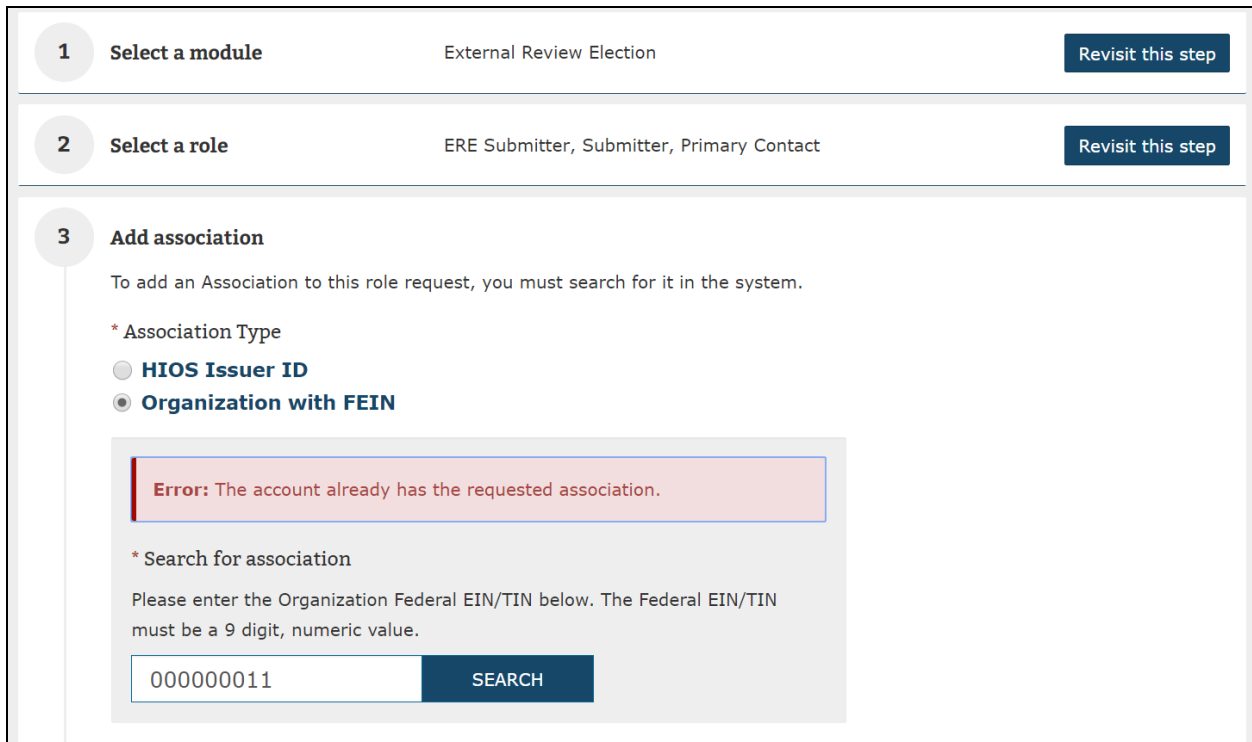
The system will check that the Issuer IDs entered exist within HIOS and that the users do not already have an existing association with the selected Organization. If an organization does not exist in the system, a pop-up message will display that allows users to first create the organization as displayed by Figure 105.

Figure 107: Organization Not Found – Navigate to Create an Organization



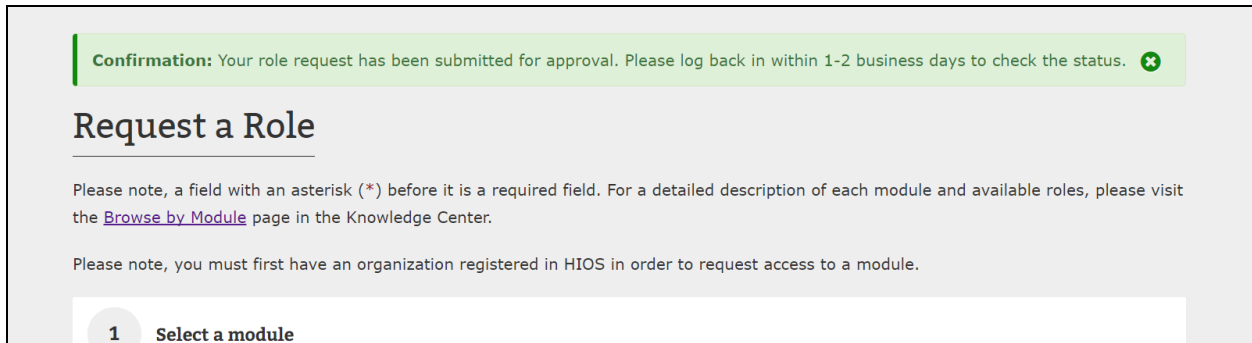
The system shall display the error message as in Figure 106 if the user already has a role associated with the ID entered.

Figure 108: Existing Association Error Message



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.

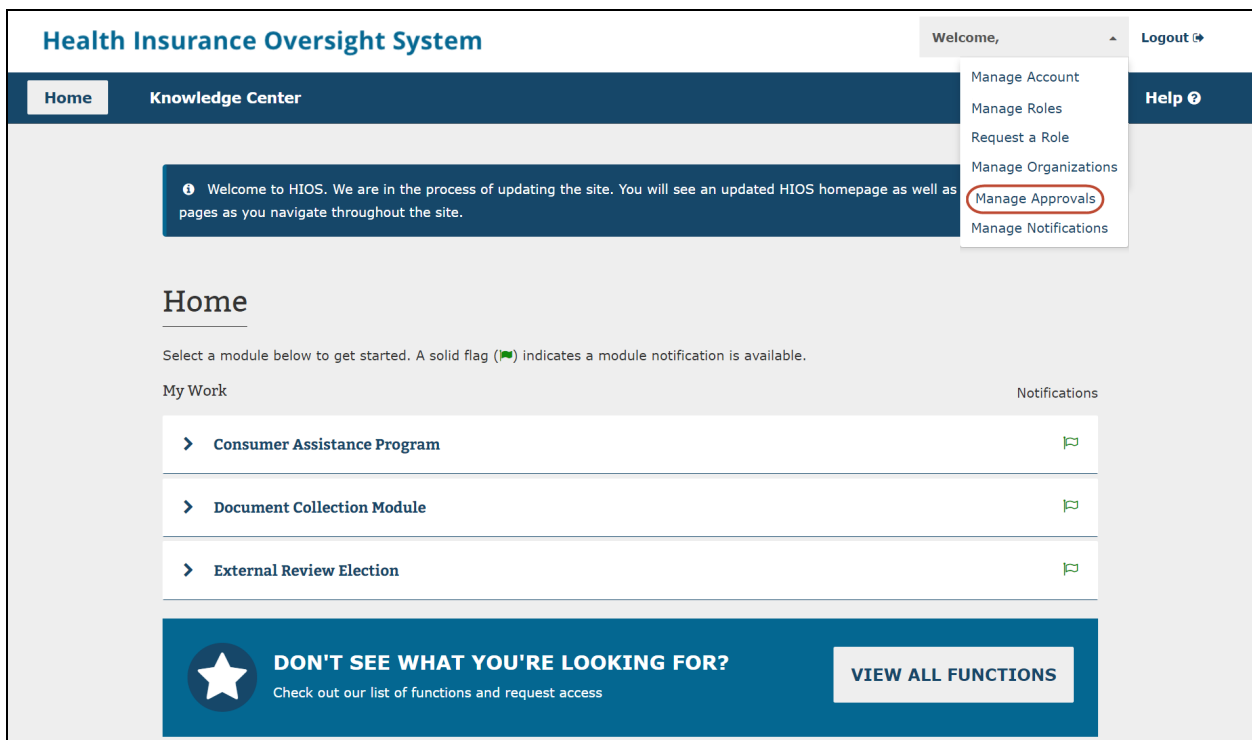
Figure 109: Role Request Confirmation Page



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 110: 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 111: Approval Tabs – Request Status

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:

HIOS Portal
v

Request Status:

Pending Approval
v

Enter

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** 2 3 4 5 Next » Last »
Show Entries
Showing 1 to 10 of 58 entries

Select	<u>Requestor Username</u> ⌵	<u>Email</u> ⌵	<u>Module</u> ⌵	<u>Role</u> ⌵	<u>Association Type</u> ⌵	<u>Associat</u>
<input type="checkbox"/>	bharat.budhathoki@cgi.com	bharat.budhathoki@cgi.com	HIOS Portal	Company Administrator	Company	Bharat_Ir

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 112: 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:

HIOS Portal
▼

Request Status:

Pending Approval
▼

Enter

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** 2 3 4 5 Next » Last »
Show Entries
Showing 1 to 10 of 58 entries

Select	<u>Requestor Username</u> ⌵	<u>Email</u> ⌵	<u>Module</u> ⌵	<u>Role</u> ⌵	<u>Association Type</u> ⌵	<u>Associat</u>
<input type="checkbox"/>	bharat.budhathoki@cgi.com	bharat.budhathoki@cgi.com	HIOS Portal	Company Administrator	Company	Bharat_Ir
<input type="checkbox"/>	bharat.budhathoki@cgi.com	bharat.budhathoki@cgi.com	HIOS Portal	Company Administrator	Company	Bharat_Ir

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 113: Organizational User Role Approvals

Organizational User Role Request Approvals

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

Module: External Review Election **Request Status:** Pending Approval Enter

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 3 of 3 entries

Select	Requestor Username	Job Title	Module	Role	Association Type	Association	User Sub-Type
<input type="checkbox"/>	bharat.budhathoki@cgi.com	Tester	External Review Election	ERE Submitter	Non-Federal Governmental Plans	Mel Test - NonFed GHP	Primary Contact
<input type="checkbox"/>	melissa.arellano@sbd2.com	Business Analyst	External Review Election	ERE Submitter	Non-Federal Governmental Plans	Mel Test - NonFed GHP	Primary Contact
<input type="checkbox"/>	bharat.budhathoki@cgi.com	Tester	External Review Election	ERE Submitter	Non-Federal Governmental Plans	George ERE 001	Primary Contact

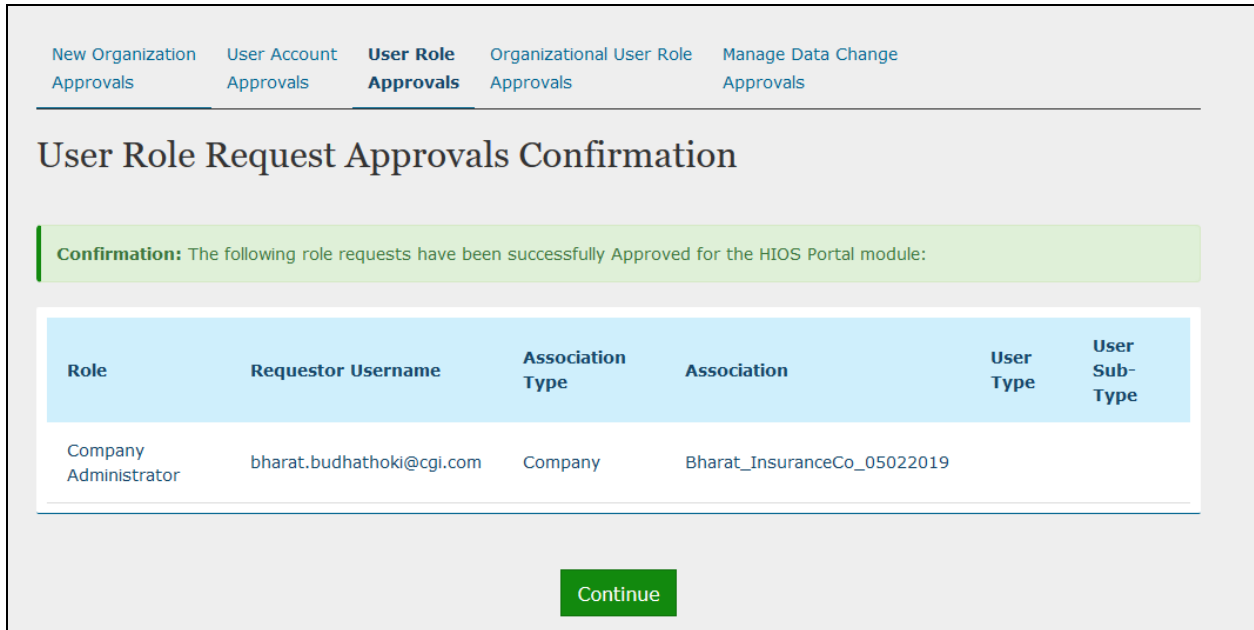
Approve
Deny

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 114: User Role Request Approvals Confirmation Page



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

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

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

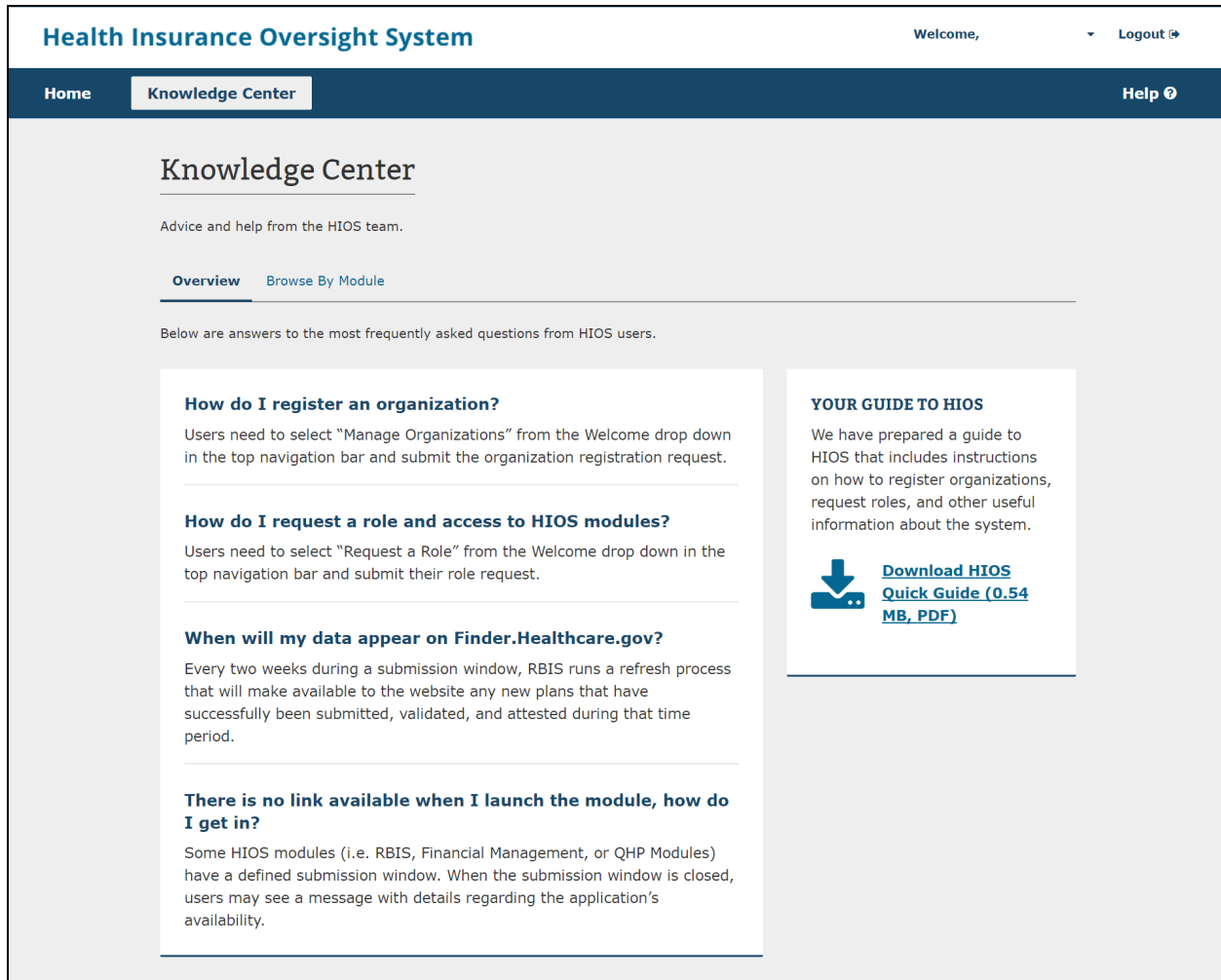
3.10 Knowledge Center

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

3.10.1 Overview Page

The Knowledge Center – Overview page displays some of the most frequently asked questions 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 115: 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 116: Knowledge Center – Browse by Module Page

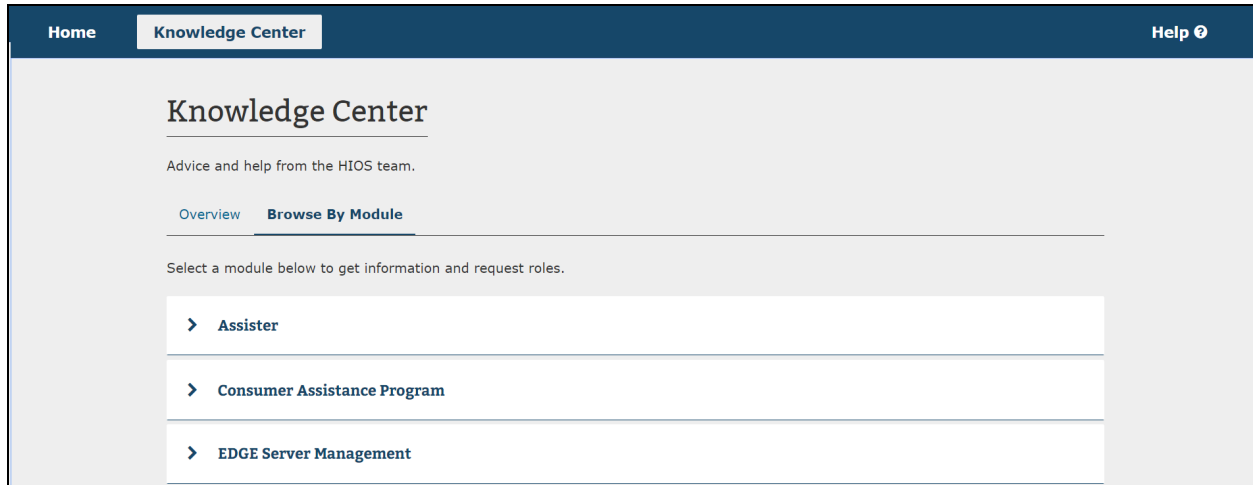
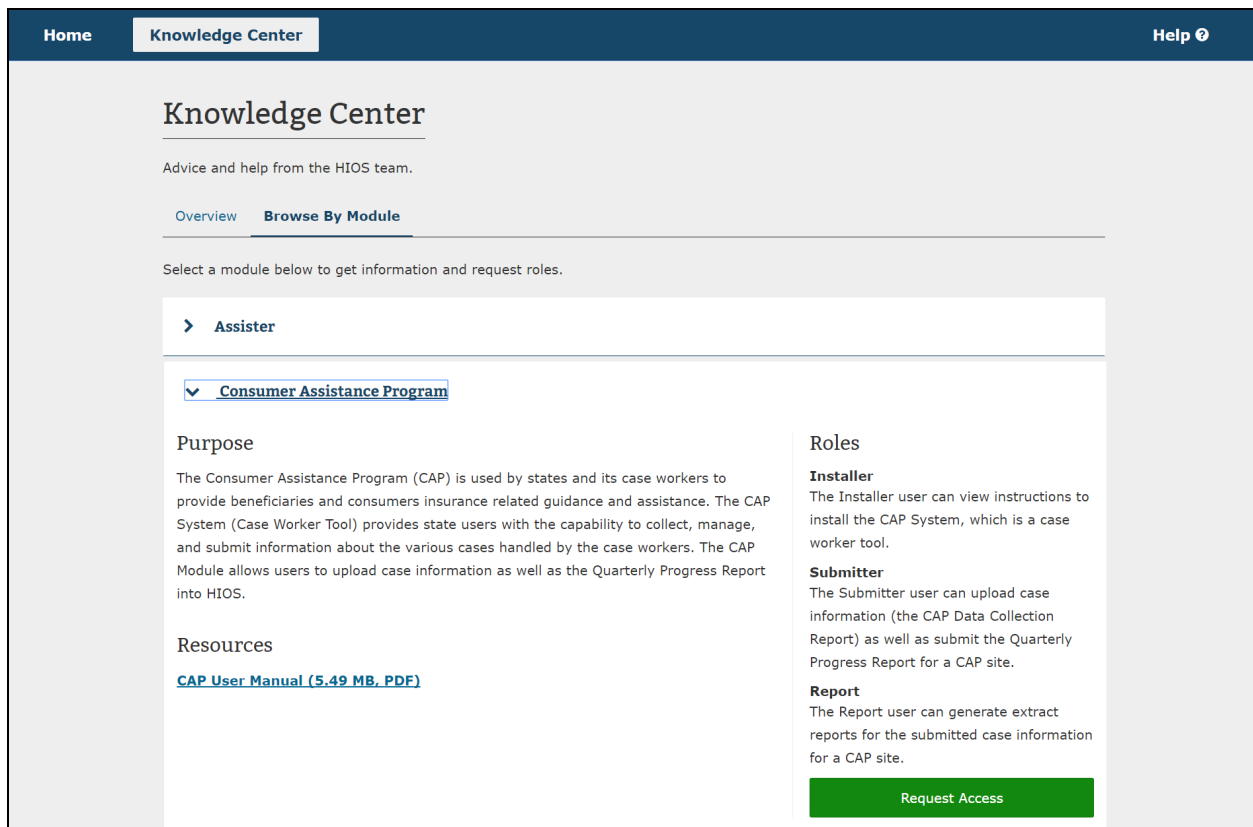


Figure 117: Knowledge Center – Browse by Module Expanded Accordion



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 page displays each of the HIOS terms with the definition underneath listed in alphabetical order.

Figure 118: Knowledge Center – Glossary

Knowledge Center

Advice and help from the HIOS team.

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

The below glossary includes key HIOS terms.

Association Product

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

Clinical Quality Measures

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

Company

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

Component ID

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

Domiciliary Address

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

4 Troubleshooting and 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.