

HIOS Portal Overview

February 25, 2013

Agenda

- ☐ Self Registration
- ☐ Entity Creation
- ☐ User Role Creation & Association

Self Registration

Login Page – Click “Register for New Account”

Health Insurance Oversight System

Sign-In

* Indicates required fields.

*User Name:

*Password:

[Forgot Password?](#)

[Register for New Account](#)

Type the letters you see in the image into the Word Verification field below. If you are unable to read the image pictured below, please select the Play Audio Code link for audio verification

*Word Verification: Please enter the letters you see in the image. If you use the Audio Verification, type the pronounced numbers and the first letter of each word.



[Can't read it?](#)
[Generate New Image](#)

 [Play Audio Code](#)

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New HIOS Users - Self Registration Page

Health Insurance Oversight System

SIGN-IN

Welcome

Request HIOS Account

Please note that you are applying for access to the Health Insurance Oversight System (HIOS). If you have any questions, please contact the HIOS Helpdesk at Phone: 1-877-343-6507 or **Email:** insuranceoversight@hhs.gov.

(*) Indicates a required field

Title (Name):	
*First Name:	
Middle Name:	
*Last Name:	
Suffix:	
*Job Title:	
*Organization Name:	
*Email Address:	
Phone Type:	
*Phone: (Format: 123-456-7890)	
Phone Ext:	
Address Type:	
Address Line 1:	
Address Line 2:	
City:	
State:	
ZIP code:	-

Reset

Submit

User Registration Approval Process

Once the user fills in the required information and clicks 'Submit', the request will be submitted for approval.

The users will receive an email notification when their user account has been approved.

Once the user has a HIOS user account, they can register organizations and request user roles.

Register an Organization

Register an Organization

Health Insurance Oversight System

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Welcome

HIOS Portal Home Page

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

Announcements

Step 1

Step 1: Search for company by FEIN.

Search by FEIN

Health Insurance Oversight System

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Welcome

Organization Registration

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

Federal EIN: [Search](#)

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Company Search Results – None

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Welcome

Organization Registration

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

Federal EIN:

[Search](#)

Company

No Company Found

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

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

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Step 2

Step 2: If no results are returned, the user will click on the 'Create Company' button and be navigated to the 'Register New Company' page.

Register New HIOS Company

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Welcome

Register New Company

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

Note: (*) Indicates a required field.

*Company Legal Name:

*Incorporated State:

Federal EIN: **321321321**

NAIC Company Code:

NAIC Group Code:

Group Name:

AM Best Number:

Not For Profit: ☐

Co-Op: ☐

[Domiciliary Address](#)

*Address Line 1:

Address Line 2:

*City:

*State:

*ZIP code:

ZIP Plus 4:

[Review/Continue](#)

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Step 3

Step 3: The user can review the information and submit it for approval.

New HIOS Company Creation Review

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Welcome

Review Company Information

Company

Company Legal Name	Registered State	Federal EIN	NAIC Company Code	AM Best Number	Not For Profit	Co-Op	Address Line 1	Address Line 2	City	State	ZIP Code	ZIP Plus 4
Company 321321	MD	321321321	32111		Yes	Yes	321 Main Street		Fairfax	MD	22124	

Company Group

NAIC Group Code	Group Name

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

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Step 4

Step 4: The user will see confirmation that the information was submitted and have the ability to navigate back to the HIOS main page.

Note: Users must wait until the company creation is approved before they can go in and request any user roles for that company.

New HIOS Company Creation Confirmation

Health Insurance Oversight System

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Welcome

New Company Confirmation

Your request to register the Company below has been submitted for approval. Once approved, you shall receive a notification email.

Company

Company Legal Name	Registered State	Federal EIN	NAIC Company Code	AM Best Number	Not For Profit	Co-Op	Address Line 1	Address Line 2	City	State	ZIP Code	ZIP Plus 4
Company 3213 21	MD	3213213 21	32111		Yes	Yes	321 Main Street		Fairfax	MD	2212 4	

Company Group

NAIC Group Code	Group Name

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Adding a New Issuer

Step 1

Step 1: Search for company by FEIN.

Note: Users are required to have an approved company in HIOS before they are able to create a new issuer.

Search by FEIN

Health Insurance Oversight System

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Welcome

Organization Registration

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

Federal EIN:

[Search](#)

Company

Company Legal Name	Registered State	Federal EIN	NAIC Code	Address Line 1	Address Line 2	City	State	ZIP Code	ZIP Plus 4
Company 321321	MD	321321321	32111	321 Main Street		Fairfax	MD	22124	

Issuers

There are no Issuers currently registered in HIOS for your company

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Step 2

Step 2: If the company is approved, the user will be able to add new issuers by clicking on the 'Add Issuer' button and be navigated to the 'Register New Issuer' page.

Add New Issuer

Health Insurance Oversight System

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Welcome

Register New Issuer

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

Note: (*) Indicates a required field.

Issuer Legal Name: **Company 321321**

*Registered State:

Federal EIN: **321321321**

NAIC Company Code: **32111**

NAIC Group Code:

*Market Coverage:

Domiciliary Address

*Address Line 1:

Address Line 2:

*City:

*State:

*ZIP code:

ZIP Plus 4:

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

Step 3

Step 3: Users have the ability to add up to ten issuers in a single session. Once they have completed the form, they will submit it for approval.

Add New Issuer

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Welcome

Register New Issuer

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

Note: (*) Indicates a required field.

Issuer Legal Name: **Company 321321**

*Registered State:

Federal EIN: **321321321**

NAIC Company Code: **32111**

NAIC Group Code:

*Market Coverage:

[Domiciliary Address](#)

*Address Line 1:

Address Line 2:

*City:

*State:

*ZIP code:

ZIP Plus 4:

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

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

Issuer Legal Name	Registered State	Federal EIN	NAIC Company Code	NAIC Group Code	Market Coverage	Address Line 1	Address Line 2	City	State	ZIP Code	ZIP Plus 4	Actions
Company 321321	VT	321321321	32111		Individual	123 Main Street		Fairfax	VA	22124		Delete

[Submit](#)

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[File Formats and Plug-Ins](#)

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Step 4

Step 4: The user will see confirmation that the information was submitted and have the ability to navigate back to the HIOS main page.

New Issuer Confirmation

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Welcome

New Issuer Confirmation

Your request to register the Issuers below has been submitted for approval. Once approved, you shall receive a notification email.

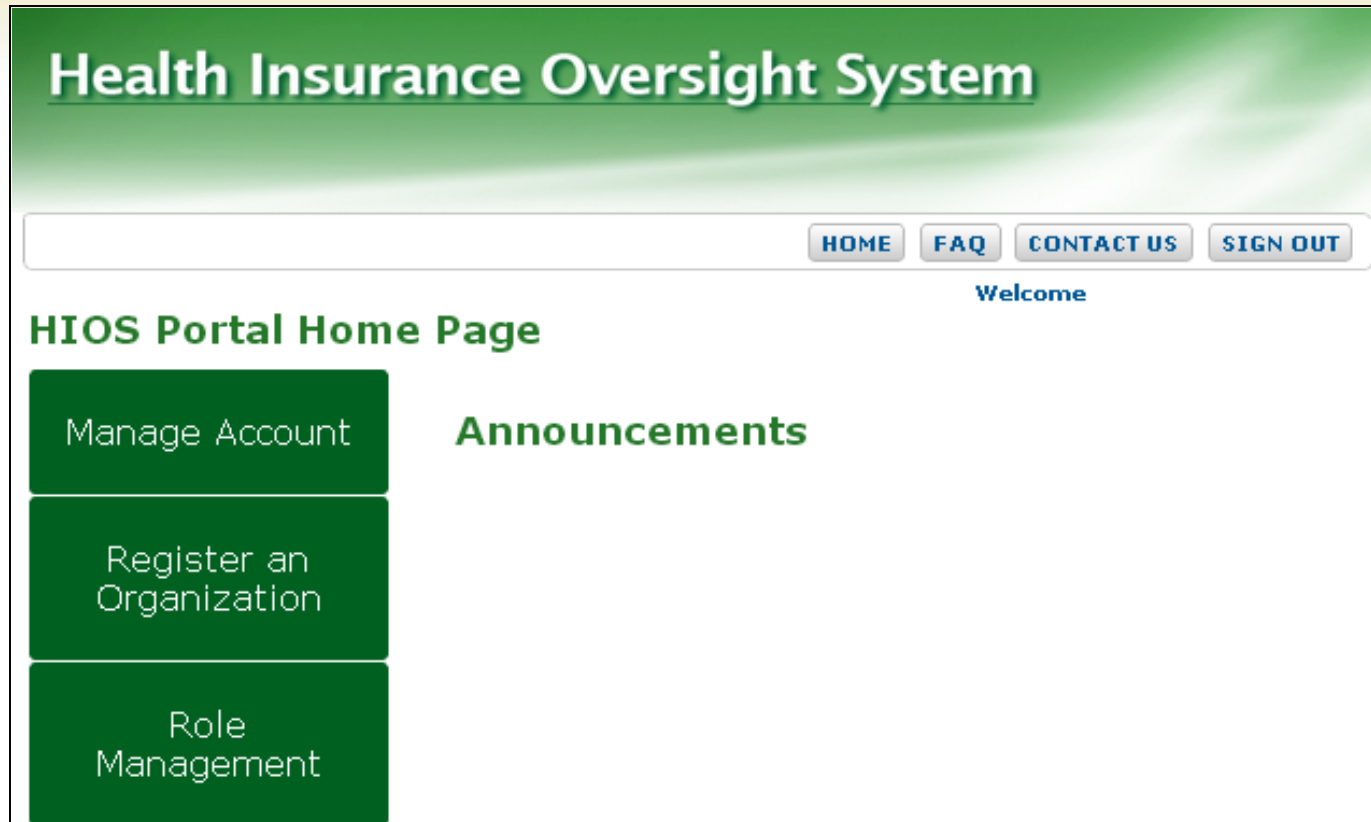
Issuer Legal Name	Registered State	Federal EIN	NAIC Company Code	NAIC Group Code	Market Coverage	Address Line 1	Address Line 2	City	State	ZIP Code	ZIP Plus 4
Company 3213 21	VT	321321321	32111		Individual	123 Main Street		Fairfax	VA	22124	

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

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User Role Request

HIOS Main Page - Role Management



The screenshot displays the HIOS Main Page. At the top, a green header bar contains the text "Health Insurance Oversight System". Below this, a white search bar is positioned on the left, and a row of four buttons—"HOME", "FAQ", "CONTACT US", and "SIGN OUT"—is on the right. A "Welcome" message is centered below the buttons. The main content area is titled "HIOS Portal Home Page" in green. On the left side of this area, there is a vertical stack of three green buttons labeled "Manage Account", "Register an Organization", and "Role Management". To the right of these buttons, the word "Announcements" is displayed in green.

Health Insurance Oversight System

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Welcome

HIOS Portal Home Page

Manage Account

Register an Organization

Role Management

Announcements

New and Existing Roles

- Users can view their existing roles under the View Existing Roles Tab.
- Users can request new roles for different Modules under the Request Role Tab.

View Existing Roles

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Welcome

View Existing Roles

[Request Role](#)

View Existing Roles

Username:

Health Plan and Other Entity Enumeration System (HPOES)

Role	Association Type	Association
Submitter	Company	Anthem Blue Cross Life & Health Ins Co
Submitter	Company	Celtic Insurance Company
Submitter	Company	Company 123

HIOS Portal

Role

HIOS Request
Approver

Medical Loss Ratio Data Collection System (MLR)

Role

Reviewer

Rate & Benefits Information System (RBIS)

Role

Administrator

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Role Request Process

Step 1: Select a Module from the drop down list.

Note: For first time users, who are not sure which module to select, a PDF document hyperlink ([Module Descriptions](#)) is available, which explains the purpose of each module.

Request Role-Select Module

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Welcome

[View Existing Roles](#) [Request Role](#)

Request Role

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

Module:

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Role Request Process

Step 2: Select the Requested Role from the drop down.

Note: The User Type and User Sub-type drop downs will only be displayed for Modules with User Roles that require them.

Request Role- Select Role, Type, Subtype

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Welcome

[View Existing Roles](#) [Request Role](#)

Request Role

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

Module:

Requested Role:

User Type:

User Sub-Type:

[Continue](#)

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Role Request Process

Step 3: Click Continue and a User Association section will be displayed.

Note: The Association section displayed will be based on the Module selected.

Example:

Plan Finder is an issuer based Module (Input: Issuer ID).

MLR is a Company based module (Input: FEIN).

Role-Issuer Association

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Welcome

[View Existing Roles](#)[Request Role](#)

Request Role

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

Module:

Requested Role:

User Type:

User Sub-Type:

Issuer Association

Please enter the HIOS Issuer ID below

Issuer ID:

Search Result: **38191 - Company 321321 - VT**

[Review/Continue](#)

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Role Request Process

Step 4: Click Review/Continue to be navigated to the Information Review Page.

Request Role-Information Review

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[View Existing Roles](#)[Request Role](#)

Request Role

Please review your selections below, and select 'Submit' to submit the new role request for approval, or select 'Back' to make changes.

Module: **Plan Finder Module (PF)**
Requested Role: **Issuer**
User Type: **Small Group Market Submitter**
User Sub-Type: **Primary Contact**
Selected Issuer: **38191 - Company 321321 - VT**

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

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Role Request Process

Step 5: Click Submit and user will be navigated to the Confirmation Page with the text “Your Role Request has been Submitted.”

Request Role- Confirmation

Health Insurance Oversight System

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[View Existing Roles](#) [Request Role](#)

Request Role

Confirmation:

- Your role request has been submitted for approval. Once approved, you shall receive a notification email.

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

Module:

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HIOS Plan Finder Product Data Collection Updates

February 25, 2013

Agenda

- ❑ Requesting Standard Component IDs
- ❑ Template Q4 Changes

Standard Component Identification (SCID)

Standard Component ID (SCID)

- A Component ID is the base identification of an insurance plan prior to it being submitted to a system.
 - Component IDs are equivalent to Plan IDs from RBIS.
 - Component IDs are required for submitting plans to the exchanges.
- Component IDs can be requested through the HIOS Plan Finder Product Data Collection Module.
 - All component IDs must be assigned to a product.
 - The product must be created in HIOS before users can request a Component ID.
- Existing Component IDs can be viewed through HIOS Plan Finder.
- RBIS users can continue to use the Plan IDs generated by the RBIS system.

Standard Component ID (SCID) Format

- Component IDs will be generated in the appropriate format by the SCIS system upon user request.
- Component IDs will be 14 characters in length.

Example:

Issuer ID ----- 10020
Product ID----10020DC003

Component ID's will be :
10020DC0030001
10020DC0030002

Login to HIOS, Click on Plan Finder



View Component ID's (in Plan Finder)

Health Insurance Oversight System

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Welcome

[View Issuer Submitted Data](#)[Download Data Submission Tools](#)[Upload Finalized Data Template](#)[Component IDs](#)[View Component IDs](#)[Request Component IDs](#)

View Component IDs

Note: (*) Indicates a required field.

*Issuer: 98934 - Health Insurance Company A

98934VA001 - HMO Product 1
98934VA002 - PPO Product 2

*Product(s): Note: Hold down the 'Ctrl' key to select multiple Products

[View Results](#)

Component IDs for the Selected Product are:

Component ID
98934VA001 - HMO Product 1
98934VA0010001
98934VA0010002
98934VA0010003
98934VA0010004
98934VA0010005
98934VA0010006

Request Component ID's

Health Insurance Oversight System

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Welcome

[View Issuer
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Request Component IDs

Note: (*) Indicates a required field.

***Issuer:** 98934 - Health Insurance Company A

***Product:** 98934VA001 - HMO Product 1

***Number of IDs:** 10 Maximum 50 IDs per request

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

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Confirmation Page

Health Insurance Oversight System

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Welcome

[View State
Submitted Data](#)[View Issuer
Submitted Data](#)[Download Data
Submission Tools](#)[Upload Finalized
Data Template](#)[Issuer Aggregate
Reports](#)[Component IDs](#)[View Component IDs](#)[Request Component IDs](#)

Request Component IDs

Confirmation:

- Your Request for 10 Additional Component ID's has been received and once they are processed, you will be able to view them under the View Component ID's tab.

Note: (*) Indicates a required field.

*Issuer:

Q4-Issuer Template Changes

Q4 Template Updates

Q4 Plan Finder template will have the following updates:

Dental Product Type – HIOS will capture the Dental Product Type. A new drop down value for DENTAL will be added as a Product Type option.

Cross Reference	Product ID	Product Name	Enrollment Code/Group Number	Product Type	Other Product Type Description	Association Product?	Product Enrollment	Individual or Small Group	Website Address (Benefit at a Glance)	Website Address (Formulary)	Website Address (Provider URL) Enter "indemnity" if none	Covers Whole State?	Number of Applications Received
1				Dental									
2													

Q4 Template Updates

Q4 Plan Finder template will have the following updates:

Approved Product: HIOS will allow for the collection of non-approved products . As part of the collection effort, a new column is added to the issuer template for Approved Product (Yes/No).

Website Address (Provider URL)	Covers Whole	Number of Applications Received	Number of Applications Denied	Number of Up-Rated Offers	Number of Administrative Disqualifiers	SERFF-Number	Open or Closed?	Closed Reason	Other Closed Reason	Grandfathered Product?	Effective Start Date	Effective End Date	Approved Product?
Enter "indemnity" if none	State?												Yes
													Required Select "Yes"