Goal of the Portal

including an internet website, through which a resident of, or small business in, any State may identify affordable health insurance coverage options in

Statutory Basis

The Patient Protection and Affordable Care Act (P.L. 111-148), (Affordable Care Act) enacted on March 23, 2010. Section 1103(a), as amended by section 10102(b)

Health Care Reform Insurance Web Portal Requirements, 45 CFR Part 159, 75 FR 24470

Today's Training

Explain the data request

Provide Technical Training on Data Entry

Answer questions

Nature of Request

Trying to Minimize the Burden

- Medicaid, CHIP from CMS
- High Risk Pools through agreement with NASCHIP
- Details from Issuers

Major Medical Product Filings

Information on how consumers can reach the state

Request for July 1ˢᵗ Release: General Information

Contact Information and Guidance

Does State Use Community Rating or Medical Underwriting

Does your state have an online comparison tool where we should direct consumers

If not is there another online site where we should direct consumers for health insurance information

Contact Information for data submission

Contact information for data validation

Request for July 1st Release: Issuer & Product Information

Issuer Name

Type of product by market (individual / small group)

Who is your contact with the Issuer

Number of products offered by type:

- Fee for Service
- HMO
- PPO
- EPO
- POS
- Other

Dates

Training: Today, May 7, 2010

Send Log-In information: May 6

Start data entry: May 6

Help Desk Opens: May 7

Deadline for Submissions: May 21

Open for Validation: May 21

Release: July 1

Issuer Requirements

For July 1 Release

◦ Contact information

◦ List of All products from state form filings

◦ Market type and product type

◦ Whether they are open for enrollment / number enrolled

◦ Link to benefit summaries

For October Release

◦ All open plans

◦ Benefits

◦ Pricing

◦ Plan contact Information

Support

If you need additional assistance, please call the HIOS Help Desk at 1-877-343-6507

or email them at
insuranceoversight@hhs.gov.

Initial Submission
State Data Submission Template

You will receive an Excel template and technical instructions on how to complete the data entry.

Once completed and prior to May 21, 2010, you should email your template to hios_submissions@hhs.gov

Towards the middle of May, we will begin to process the templates. You will receive an email that either indicates a successful submission or highlights errors with your submission.

◦ If there are errors with your submission, you will need to correct the file, and submit the entire corrected file to the same email address.

System Requirements

Excel 2003 or greater

We recommend the following for your macro settings:

◦ Excel 2003   Security set to Medium.

file

◦ Excel 2007

the content prior to opening the file

State Data Submission Template
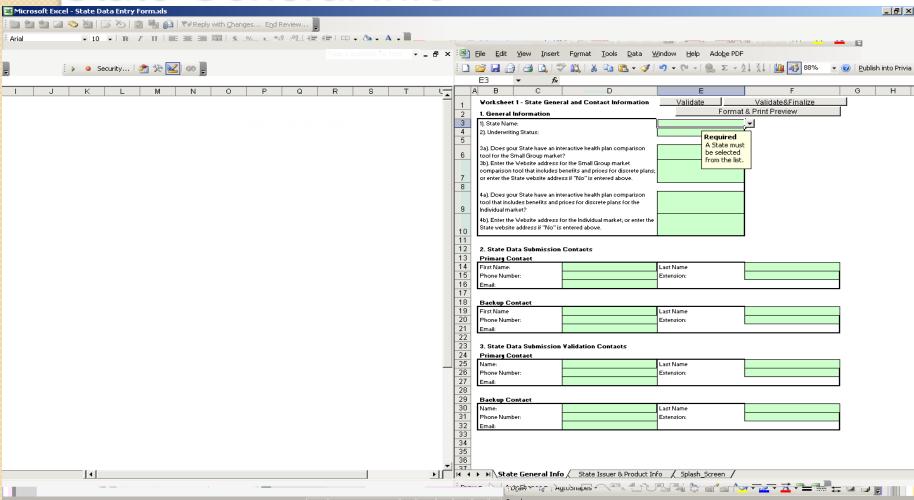
The state template has 2 tabs:

- General State Info

    Gather data about the submitting state and contact information.

- Issuer & Product Info

    Gather data about the different issuers in the corresponding state and quantify their offerings within the state.

Data Entry
State General Info

Data Entry
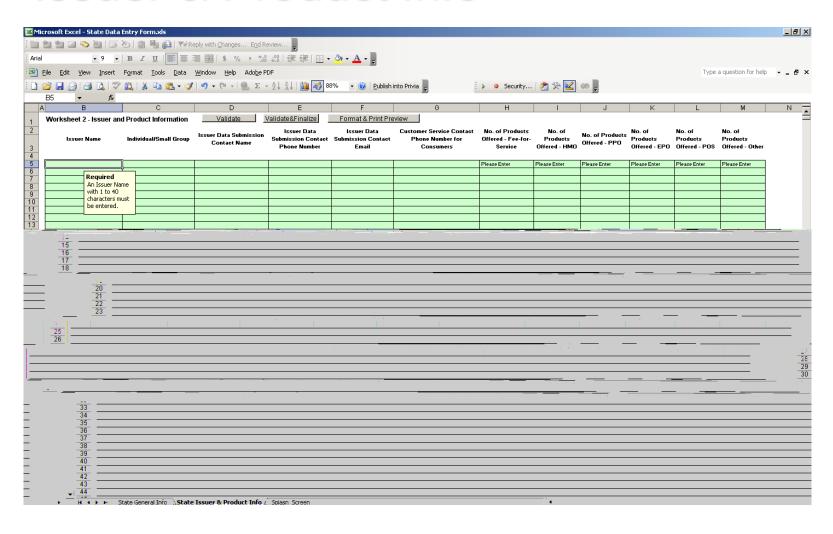## State General Info Data Entry Tips

All fields are required with the exception of the back up contacts.

◦ Even though not systematically required, we encourage the data entry of back up contacts.

If your state does not currently offer comparative online tools, please enter No into cells E6 and E8 and enter your state website address into cells E7 and E9.

If your state offers interactive online tools, this data will be made public on the web portal.

Data Entry
Issuer & Product Info

Data Entry
Issuer & Product Info Tab

One row per combination of Issuer/Market type.

If an Issuer covers both the Individual and Small Market group, you will need to enter 2 rows for that issuer.

Columns H   M are required; If the issuer does not have any offerings for that product type, enter 0.
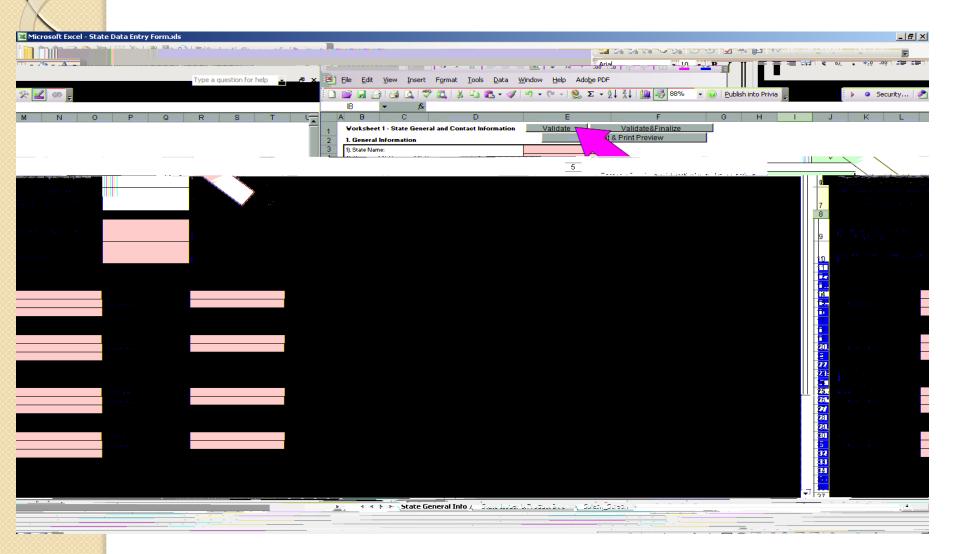
Validating your Data

The State Data Entry workbook has validations built in to help you validate the correctness and accuracy of your data prior to submission.

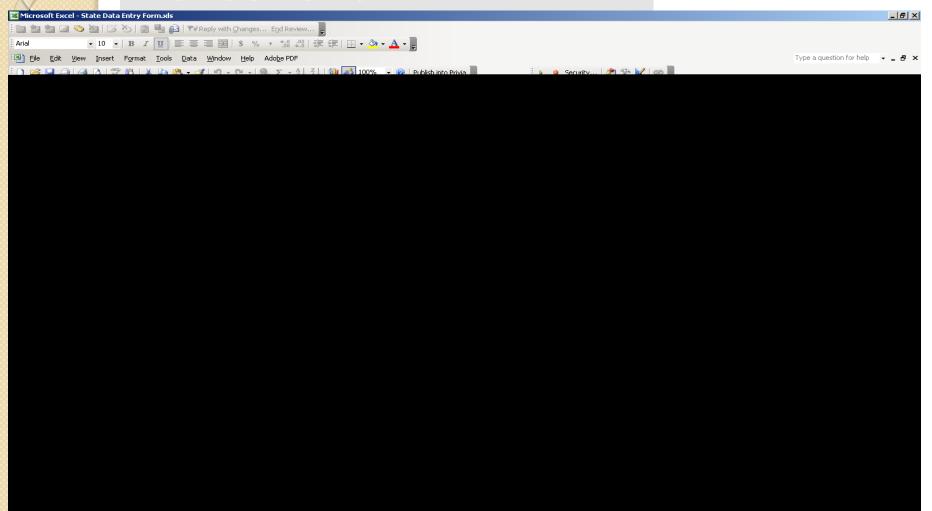It is strongly recommended that you validate your data throughout the data entry

or by clicking CTRL+SHIFT+V.

Red circles will appear surrounding the cells that require your attention. A message box will also describe these errors.

Validating your Data

Validating your Data
Red Circle Validations

Correcting your Data

In some cases, the red circle will disappear upon correcting the data. In other cases, you will need to click

circle is no longer valid.

Once you have no red circles, you are ready for the finalization process.
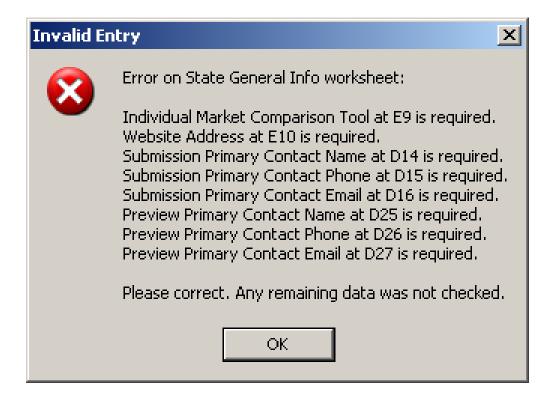
Finalizing your File

Once all the data is entered and

click CTRL+SHIFT+S.

If there are critical validations that fail, the file will not finalize and an error message will appear.

Finalization – Critical Errors

Invalid Entry

Error on State General Info worksheet:

Individual Market Comparison Tool at E9 is required.
Website Address at E10 is required.
Submission Primary Contact Name at D14 is required.
Submission Primary Contact Phone at D15 is required.
Submission Primary Contact Email at D16 is required.
Preview Primary Contact Name at D25 is required.
Preview Primary Contact Phone at D26 is required.
Preview Primary Contact Email at D27 is required.

Please correct. Any remaining data was not checked.

OK

Finalizing your File

Once all critical errors have been checked, the finalization process will continue:

- A new READ ONLY file will be created in the same location as your working file.
- This file will be generated based on a special naming convention.
  - If you modify the name of the finalized file, it will not be processed.
  - You may name your working file as you wish.
- **YOU MUST SUBMIT YOUR FINALIZED FILE. DO NOT SUBMIT YOUR WORKING FILE; IT WILL NOT BE PROCESSED**.

Next Steps

Once your file is processed, you will either need to correct the data and resubmit, or verify your data online.

Online verification of data will be available on 5/21/10. Website information will be made available prior to that date.

In the near future, you will be able to upload your files directly to the website, as well as edit online.

Access to the Website

The data submission and validation contacts contained in your submitted templates will be granted access to the Health Insurance Oversight System.

Questions?

Please contact the HIOS Help Desk at insuranceoversight@hhs.gov