

# Manage Data Changes for the Health Insurance Oversight System Quick Reference Guide

The Manage Data Changes functionality is available to users with the Company Administrator, Issuer Administrator, and Organization Administrator roles. This guide provides instructions for administrators to create and submit data change requests in HIOS. Once a data change request is submitted, it will be reviewed, and the status updated accordingly. To access the Manage Data Changes functionality in the Health Insurance Oversight System (HIOS), users will need to go through the CMS Enterprise Portal and register for a CMS IDM account. For instructions on how to register for an IDM and HIOS account, refer to the “CMS Enterprise Portal and Health Insurance Oversight System User Quick Reference Guide”.

## 1 Request HIOS User Role

Users must have one of the following roles in HIOS to create and submit a request for a data change. For instructions on how to request user roles, please refer to the “CMS Enterprise Portal and Health Insurance Oversight System User Quick Reference Guide”.

**Company Administrator:** A representative of a Company or Non-Insurance Company can request this role to edit their organization information. The Company Administrator can also edit the information for the associated Issuers. A company can have any number of Company Administrators.

**Issuer Administrator:** A representative of the Issuer who will be solely responsible for editing of the Issuer level information. Each Issuer can have multiple administrators.

**Organization Administrator:** A representative of a Non-Federal Governmental Plans organization or Other Organization Type that will be responsible for editing the organization information. Each organization can have multiple administrators.

## 2 Access the Manage Data Changes Function

Once users have the Company, Issuer, or Organization Administrator role, follow the steps below to access the Data Change Request function.

1. On the HIOS Home Page <https://portal.cms.gov>, select the “Manage Organizations” link (See Figure 1).
2. Select the “Data Change Request” card on “Manage Organizations” page and navigate to the page.

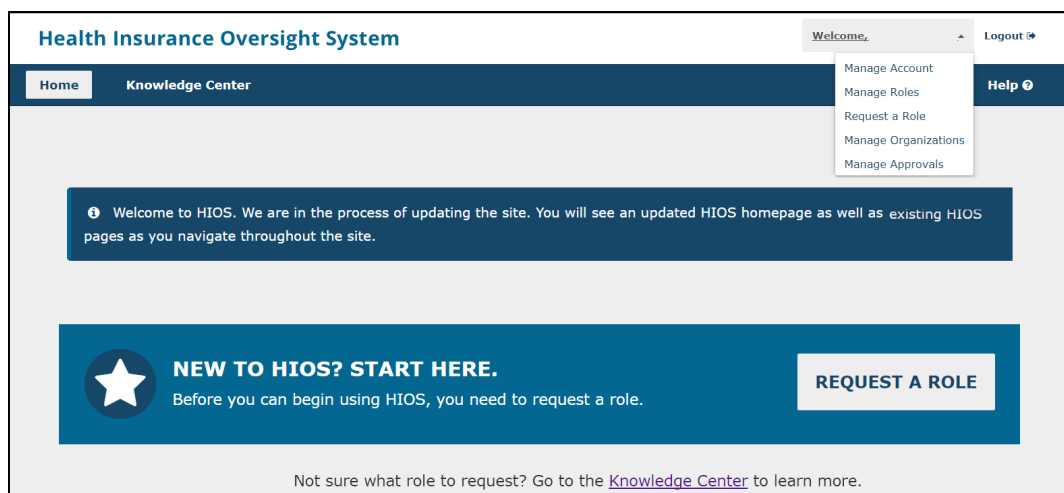


Figure 1 : HIOS – Manage Organizations

### 3 Create Data Change Requests

Updates to certain data elements that are not editable on the HIOS user interface can be requested on the Manage Data Changes page. Company, Issuer, and Organization Administrators can create a data change request by clicking the “Create Request for Data Change” button on the Manage Data Changes page (See Figure 2).

## Manage Data Changes

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

Create Request for Data Change

Request Status

Completed

Search by Request ID

REQUEST ID SEARCH

Figure 2: Manage Data Changes – Create Request for Data Change

### Company Administrators

1. Select the value to change from the “What values would you like to change?” drop-down menu (See Figure 3). Company Administrators are able to select the values for the Organization, Issuer, and Product.
2. Company Administrators of multiple organizations will see a list of companies displayed in the drop-down menu. Select the company for which you are making the data 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?

-Please Select Organization Field-

FEIN/TIN  
Organization Legal Name  
Incorporated State  
Organization Type  
Organization Status  
Issuer Registered State  
Issuer Status  
Product Name  
Product Type  
Product Status  
Product Market Type  
Issuer Legal Name  
Organization Address  
Organization Address type

ACCESSIBILITY

RULES

FILE FORMATS AND PLUG-INS

CENTERS FOR MEDICARE & MEDICAID SERVICES

ernment website managed by the Centers for  
edicaid Services  
Boulevard, Baltimore, MD 21244



Figure 3: Create Data Change Request – Select Values

- 3. The current value of the selected field is displayed. You will need to enter the new value, or select from a predefined list of values, and a reason for change (maximum of 250 characters) and then click the ‘Submit’ button (See Figure 4).
- 4. If a change to the organization type from Company or Non-Insurance to a Non-Federal Governmental Plans is needed, you will need to select the ‘Self-Funded’ or ‘Fully Insured’ radio button before clicking the ‘Submit’ button.
- 5. You will see a confirmation message displayed on the screen. A Request ID will be assigned, along with a “Pending Approval” status. Click the “Continue” button to return to the Manage Data Changes page.

### Create Data Change Request

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

What values would you like to change?

FEIN/TIN

Choose the Organization

Coventry Health & Life Insurance Company - FEIN -751296086 - Company

| Current Value | *New Value | *Reason for change |
|---------------|------------|--------------------|
| 751296086     |            |                    |

Back

Submit

Figure 4: Create Data Change Request – New Value and Reason for Change

Issuer Administrators

- 1. Select the value to change from the “What values would you like to change?” drop-down menu (See Figure 8). Issuer Administrators are able to select the values for Issuer and Product only.
- 2. If the value you would like to change is for an Issuer, you will need to choose the Issuer from the drop-down menu. Select the Issuer Registered State and proceed forward to enter the Issuer Details.
- 3. If the value you would like to change is for a Product, you will need to select the Issuer and the Product associated to that Issuer (See Figure 5).
- 4. The current value of the selected field is displayed. You will need to enter the new value, or select from a predefined list of values, and a reason for change (maximum of 250 characters) and then click the ‘Submit’ button.
- 5. You will see a confirmation message displayed on the screen. A Request ID will be assigned, along with a “Pending Approval” status. Click the “Continue” button to return to the Manage Data Changes page.

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

**What values would you like to change?** Product Name

**Choose the Issuer** Coventry Health & Life Co. - 35670

**Choose the product** POS- 35670IL001

| Current Value | *New Value | *Reason for change |
|---------------|------------|--------------------|
| POS           |            |                    |

Back Submit

Figure 5: Create Data Change Request for a Product

## Organization Administrators

1. Select the value to change from the “What values would you like to change?” drop-down menu. Organization Administrators are able to select the values for the Organization only.
2. Organization Administrators of multiple organizations will see a list of organizations displayed in the drop-down menu. Select the organization for which you are making the data change. The current value of the selected field is displayed. You will need to enter the new value or select from a predefined list of values.
  - a. To change an Organization Type from Non-Federal Governmental Plans to a Company or Non-Insurance Company, you will need to select an incorporated state.
  - b. To change Other Organization Type to a Company, you will need to enter a FEIN and select an incorporated state.
3. Enter a reason for change (maximum of 250 characters) and then click the ‘Submit’ button.
4. You will see a confirmation message displayed on the screen. A Request ID will be assigned, along with a “Pending Approval” status. Click the “Continue” button to return to the Manage Data Changes page.

## 4 View Data Change Request

1. Company, Issuer, and Organization Administrators can view data change requests on the Manage Data Changes page (See Figure 6).
2. Select one of the following statuses from the “Request Status” drop-down menu: Pending Approval, Approved, Denied, Unable to Process, Completed.
3. You can sort the change requests by clicking the arrows in the column headers or enter a “Request ID” to search for a particular request.
4. Click the “View” link to review the change request details (See Figure 7).

## Manage Data Changes

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

Create Request for Data Change

Request Status

Completed

Search by Request ID

REQUEST ID SEARCH

« First « Prev **1** Next » Last »

Show Entries 10

Showing 1 to 1 of 1 entries

| <u>Request ID</u> | <u>Request Created Date</u> | <u>Status</u> | <u>Status Updated Date</u> | <u>NOTE</u>                          | <u>Action</u>        |
|-------------------|-----------------------------|---------------|----------------------------|--------------------------------------|----------------------|
| DCR31             | 02/23/2016 8:39 PM          | Completed     | 02/26/2016 3:16 PM         | testing complete by HIOS admin dcr31 | <a href="#">View</a> |

Figure 6: View Data Change Requests

## Data Change Details View

**Change Request ID**

DCR31

**Request Created Date**

02/23/2016 8:39 PM

**User Name**

Stumkur

**Federal EIN/TIN**

541984140

**Organization Legal Name**

Ashburn Insurance org - Name Change

**Organization Type**

Other Organization Type

**Current Value**

Other Organization Type

**New Value**

Company

**Supplement Attributes**

Incorporated State: LA

**Attribute**

Organization Type

**Note**

testing complete by HIOS admin dcr31

[Back](#)

Figure 7: Data Change Details View

## Email Notifications for Data Change Requests

Email notifications are sent to administrators based on the Request Status. The table below illustrates the HIOS users who receive emails for each applicable Request Status.

| Request Status    | Company, Issuer, or Organization Administrator |
|-------------------|------------------------------------------------|
| Pending Approval  | No                                             |
| Approved          | No                                             |
| Denied            | Yes                                            |
| Completed         | Yes                                            |
| Unable to Process | Yes                                            |