Plan Management QHP Modules
Health Insurance Oversight User
Quick Reference Guide

Issuers participating in the Federally-facilitated Marketplace (FFM) must certify their plans as Qualified Health Plans (QHPs). QHP certification includes a collection and review of Issuer licensure and good standing, accreditation, network adequacy, Essential Community Provider (ECP), essential health benefits, service area, and ratings data. Insurers must register for a CMS IDM account and a Health Insurance Oversight System (HIOS) account to submit data to the Centers for Medicare and Medicaid Services (CMS) via the QHP Issuer Module, QHP Benefits and Service Area Module, and the QHP Rating Module as part of the FFM QHP Application. QHP certification, monitoring, oversight, and management are done through the Plan Management system. This guide provides instructions for user registration for a CMS IDM account and a HIOS account, how to request roles for the QHP modules, and the Plan Management functions performed in HIOS

New users are required to complete the Remote Identity Proofing (RIDP) process as well as Multi-Factor Authentication (MFA). As part of the RIDP process, users will be required to answer questions related to their personal information. Users will also be prompted to complete the MFA registration process, which requires users to provide more than one form of verification in order to access the CMS Enterprise Portal. Once an MFA device is registered for their account, users must use this device to log into the CMS Enterprise Portal.

NOTE: If you encounter any issues with your account or MFA device registration, please contact the Marketplace Service Desk at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.

1 Create a CMS Enterprise Portal Account (For New Users)

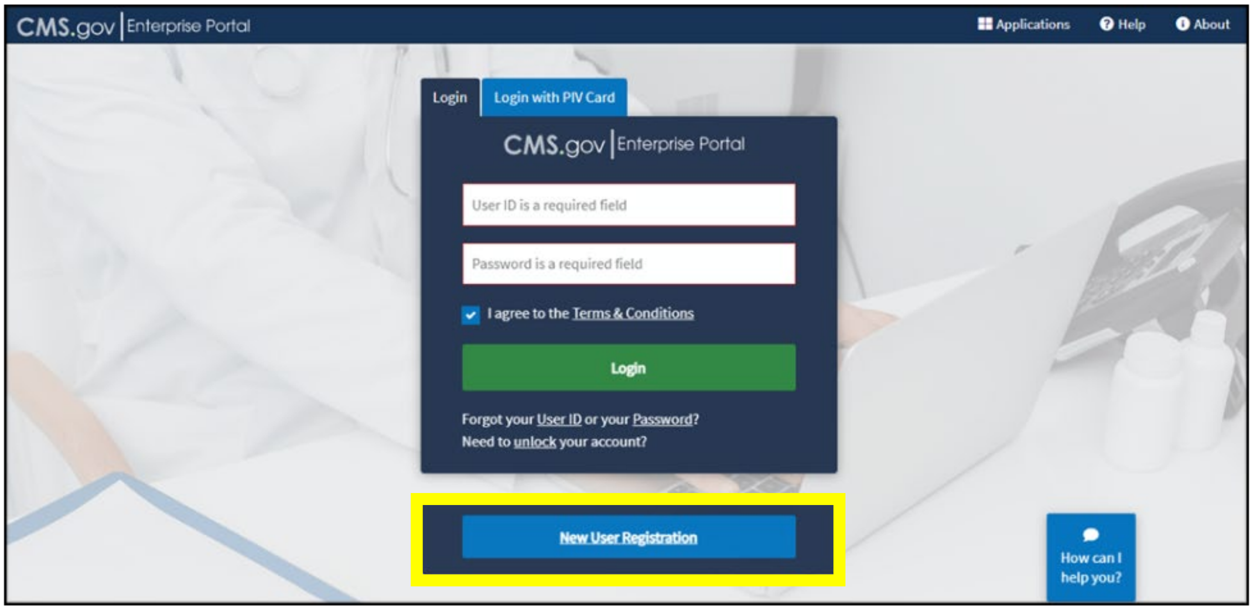
Important Information

- If you are an existing HIOS user with a CMS Enterprise Portal Account skip to section 6.
- Users that are not registered in HIOS will need to create an Enterprise Portal account by completing sections 1-5.

To create a CMS Enterprise Portal Account:

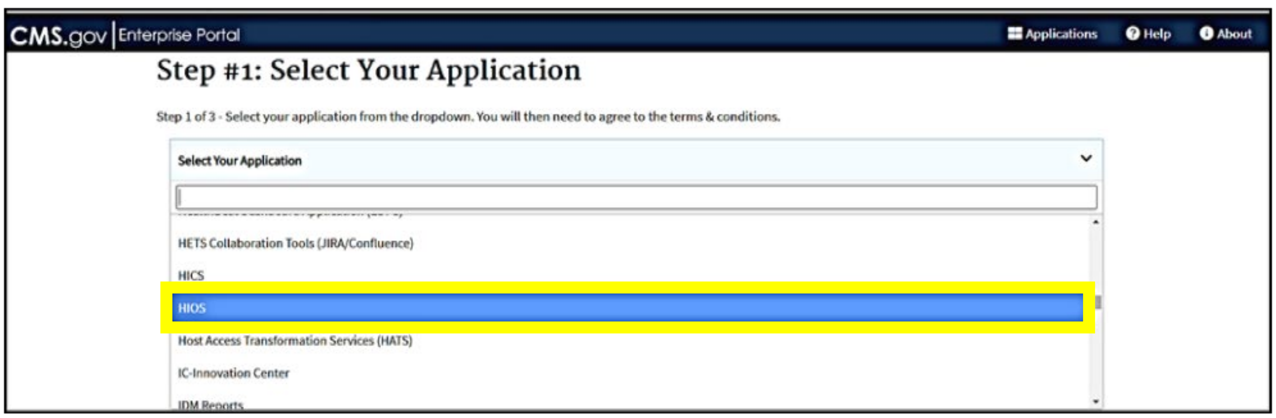
1. Navigate to CMS Enterprise Portal at https://portal.cms.gov.
2. Select the **New User Registration** button located at the bottom of the screen (Figure 1).

Figure 1: CMS Enterprise Portal New User Registration



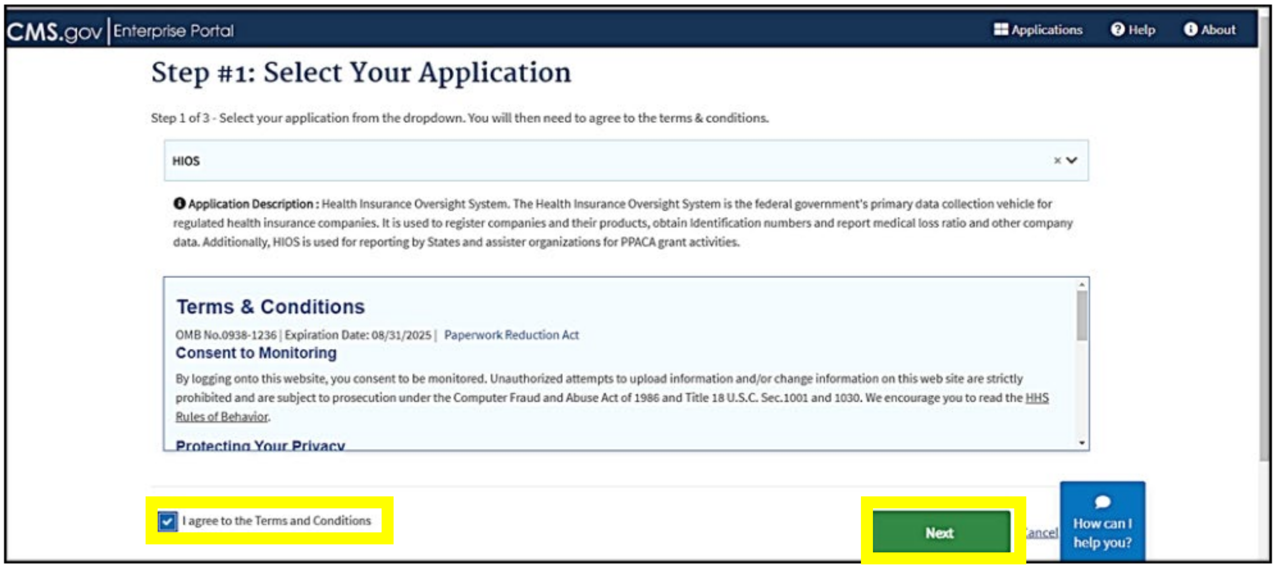
3. Step #1: Select Your Application - Select **HIOS** from the drop-down menu on (Figure 2).

Figure 2: Select HIOS Application



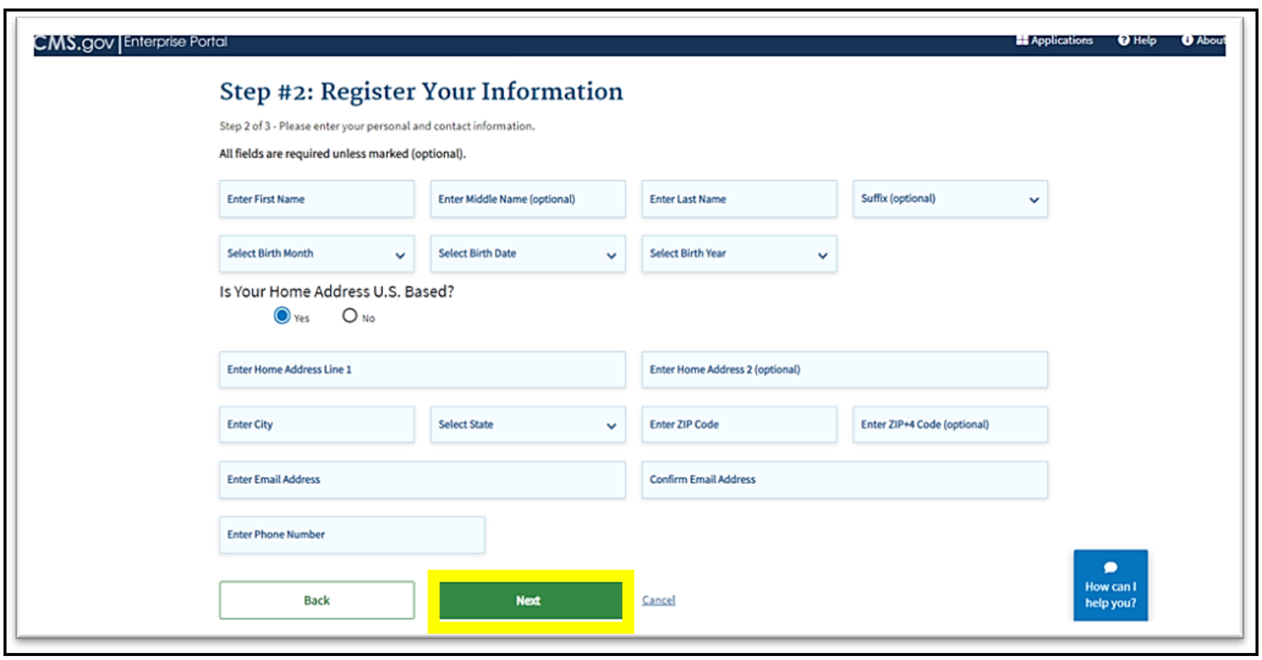
4. Select **I agree to the Terms and Conditions** check box, then select Next (Figure 3).

Figure 3: Agree to Terms & Conditions



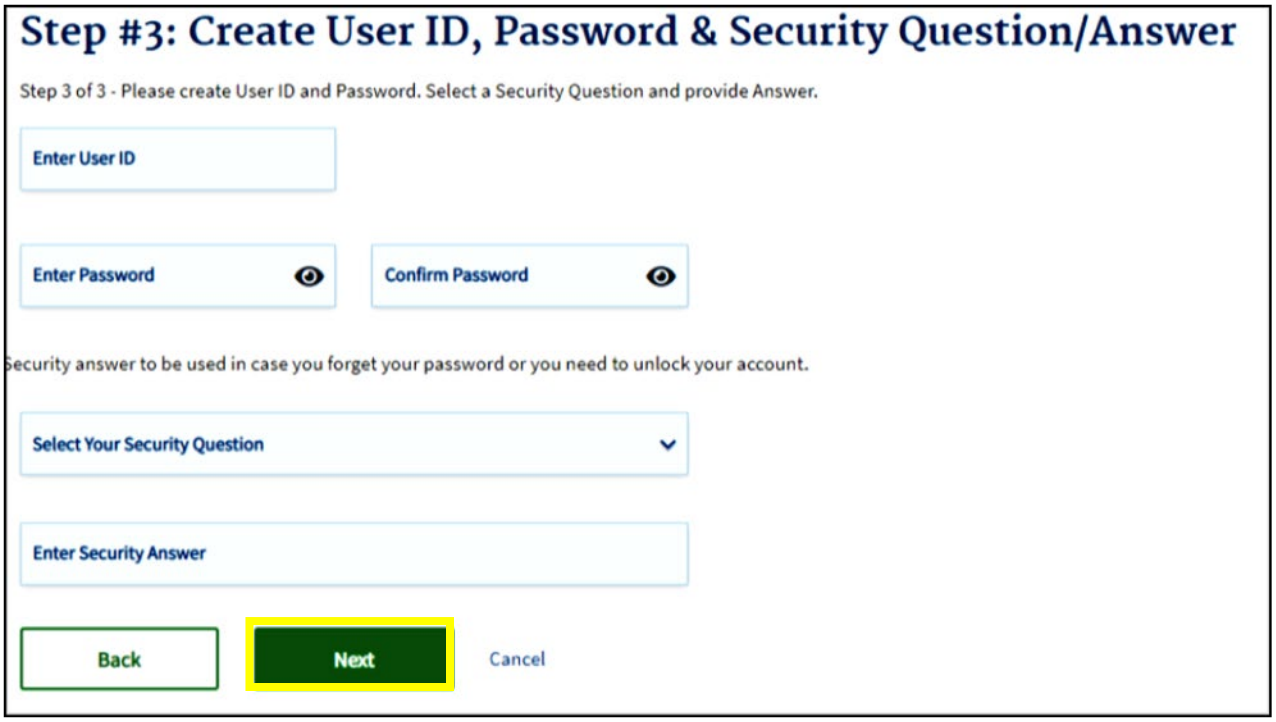
5. Step #2: Register Your Information – **Complete the form** with your personal information and select **Next** (Figure 4).

Figure 4: Register Your Information



6. Step #3: Create User ID, Password & Security Question/Answer- **Complete the user information** and select **Next** (Figure 5).

Figure 5: Create User ID & Password



7. Review the Registration Summary Page and **<u>ensure all the information is correct</u>**. Select **Submit User** (Figure 6).
    - An email will be sent from donotreply@cms.gov acknowledging successful registration. This email will contain your Identity Management System (IDM) **User ID** necessary for Multi-Factor Authentication (Figure 7).

Figure 6: Registration Summary

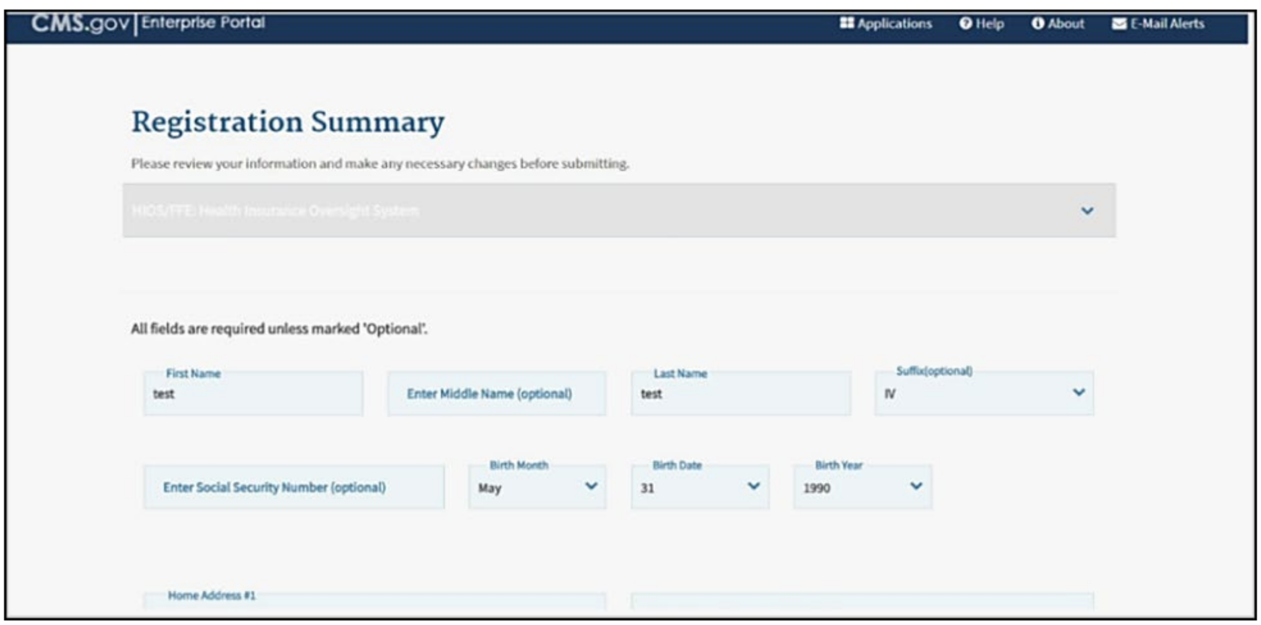
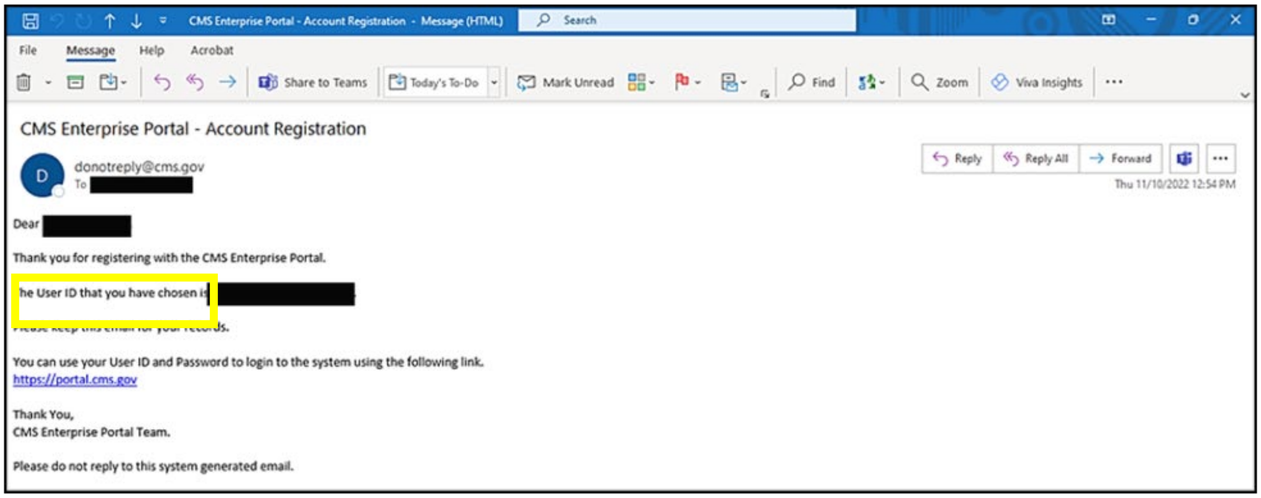


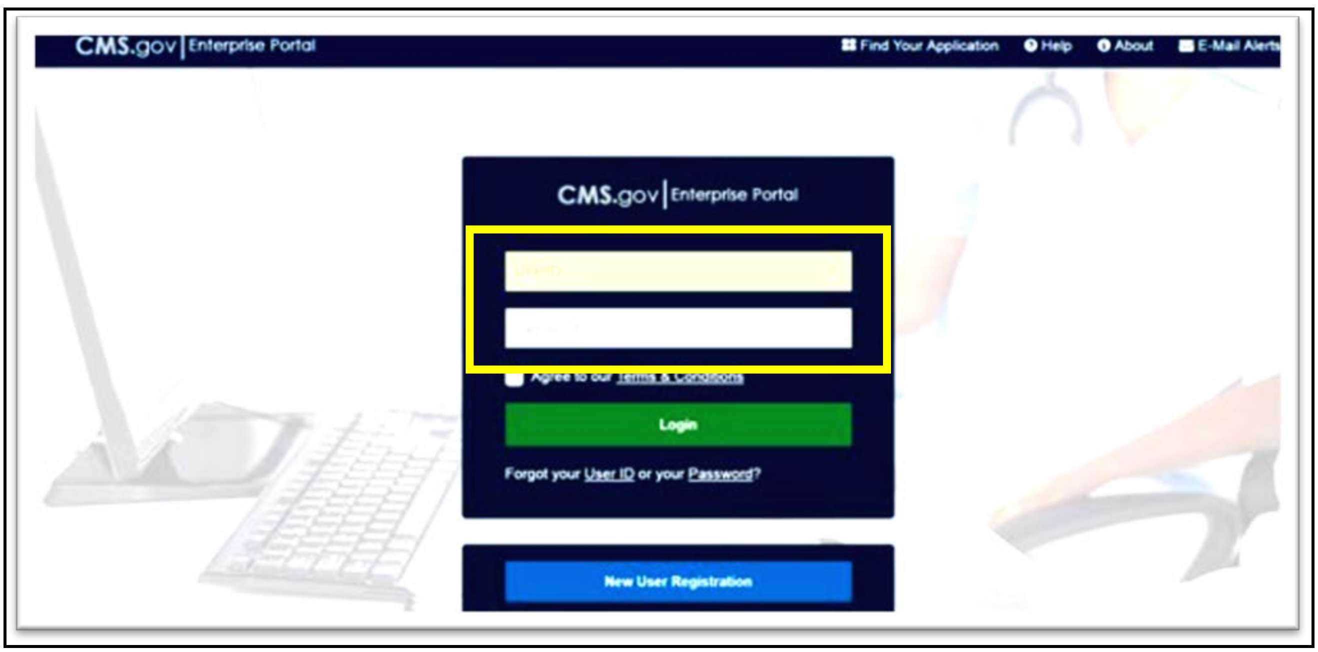
Figure 7: Account Registration Email



2 Register a Multi-Factor Authentication Device (For New Users)

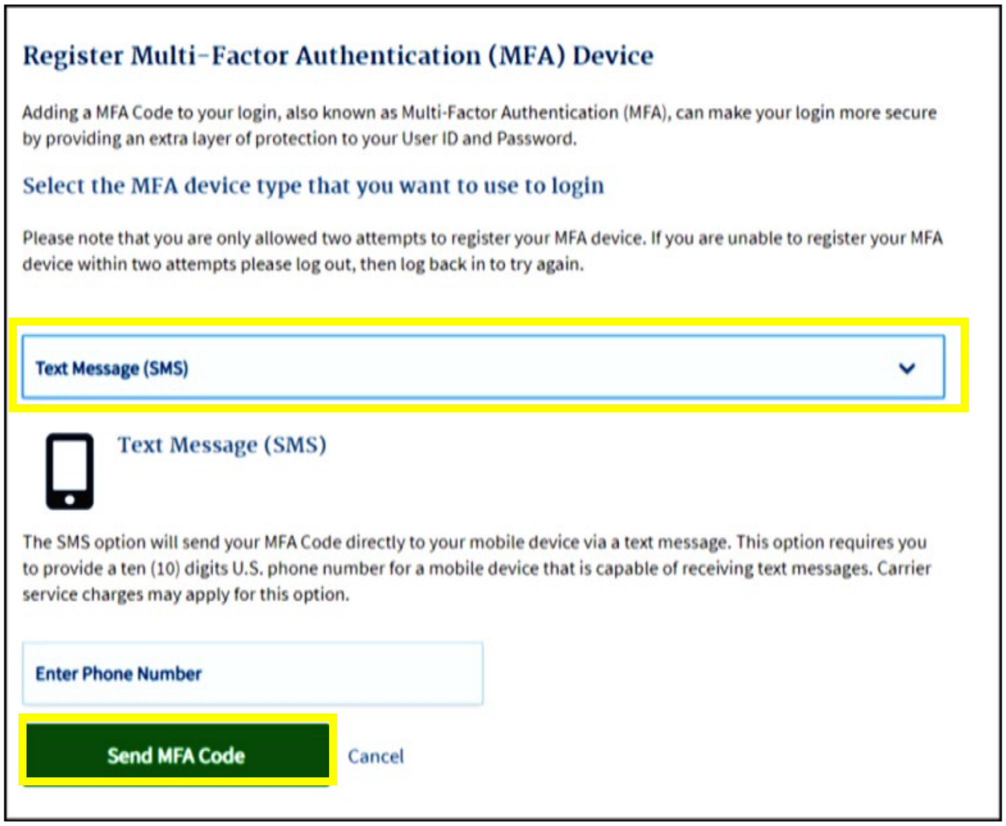
1. After you receive the email with your User ID, return to the CMS Enterprise Portal at https://portal.cms.gov/ and login with your User ID and password (Figure 8).

Figure 8: CMS Enterprise Portal Login Page



2. First-time users will be prompted to register a multi-factor authentication (MFA) device. Select an option from the drop-down menu. **Enter your preferred option and select Send MFA Code** (Figure 9).
   - The preferred option would be text or email. You may revisit this step in the future to register multiple devices.
   - The code should be sent to your device within a couple of minutes.
   - For further details about setting up your MFA device, consult the **Enterprise Portal User Guide.**

Figure 9: Register a Multi-Factor Device

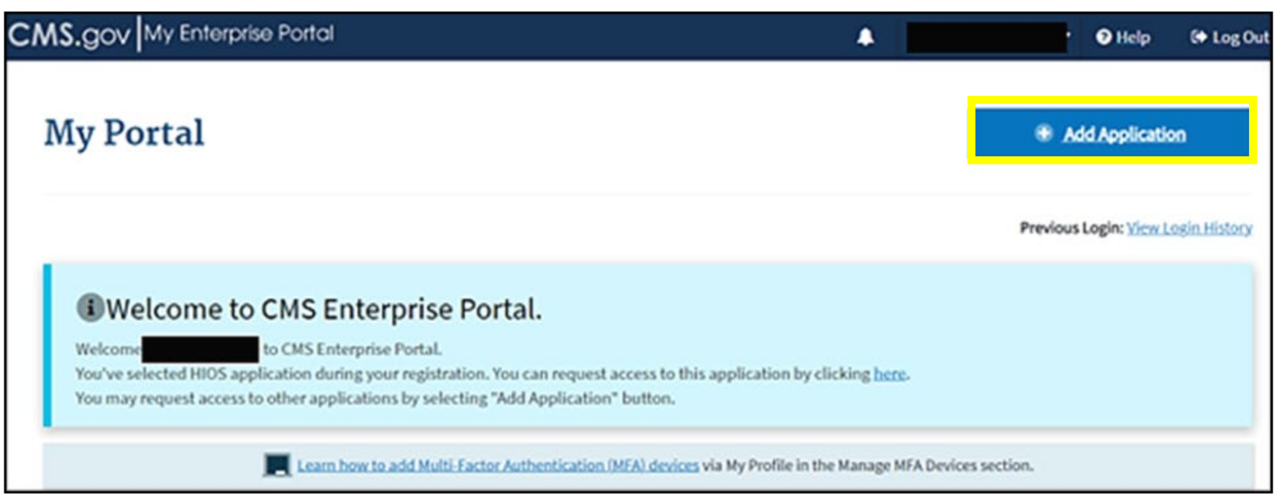


For more details about setting up your MFA device, consult the **Enterprise Portal User Guide**.

3 HIOS Access

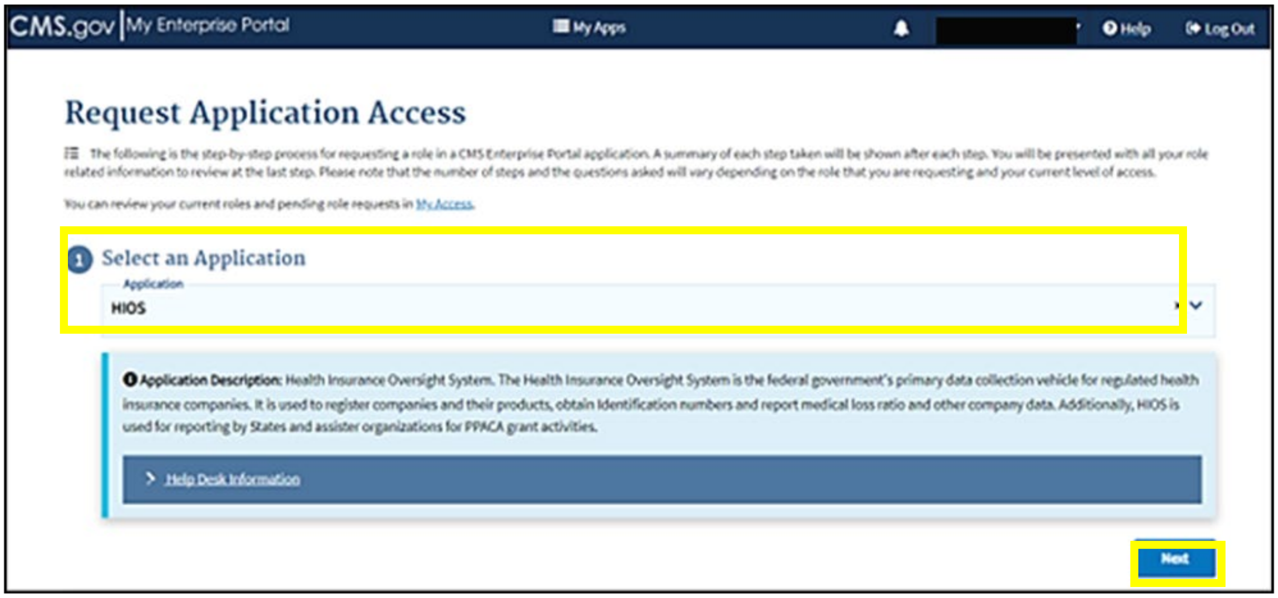
1. After you create your CMS Enterprise Portal Account and set-up your MFA device, return to https://portal.cms.gov/. Upon login, you will see your My Portal homepage. Select **Add Application** in the upper right corner (Figure 10).

Figure 10: My Portal Home Page – Add Application



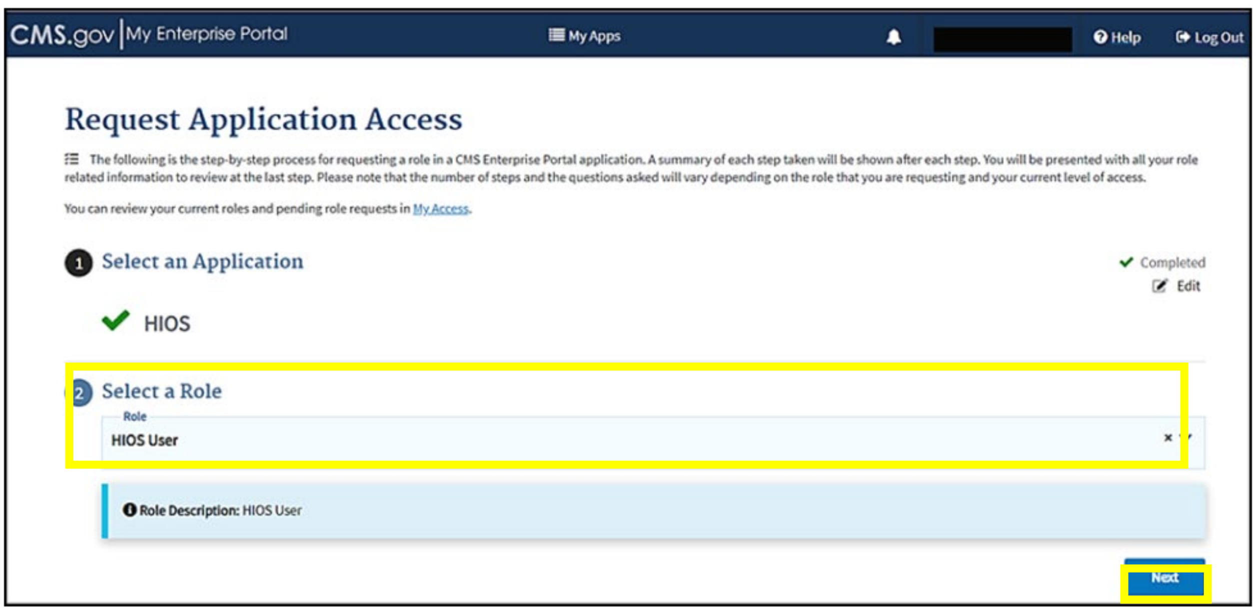
2. On the Request Application Access screen, select **HIOS** from the **Select an Application** drop-down, then select **Next** (Figure 11).

Figure 11: HIOS Application Access



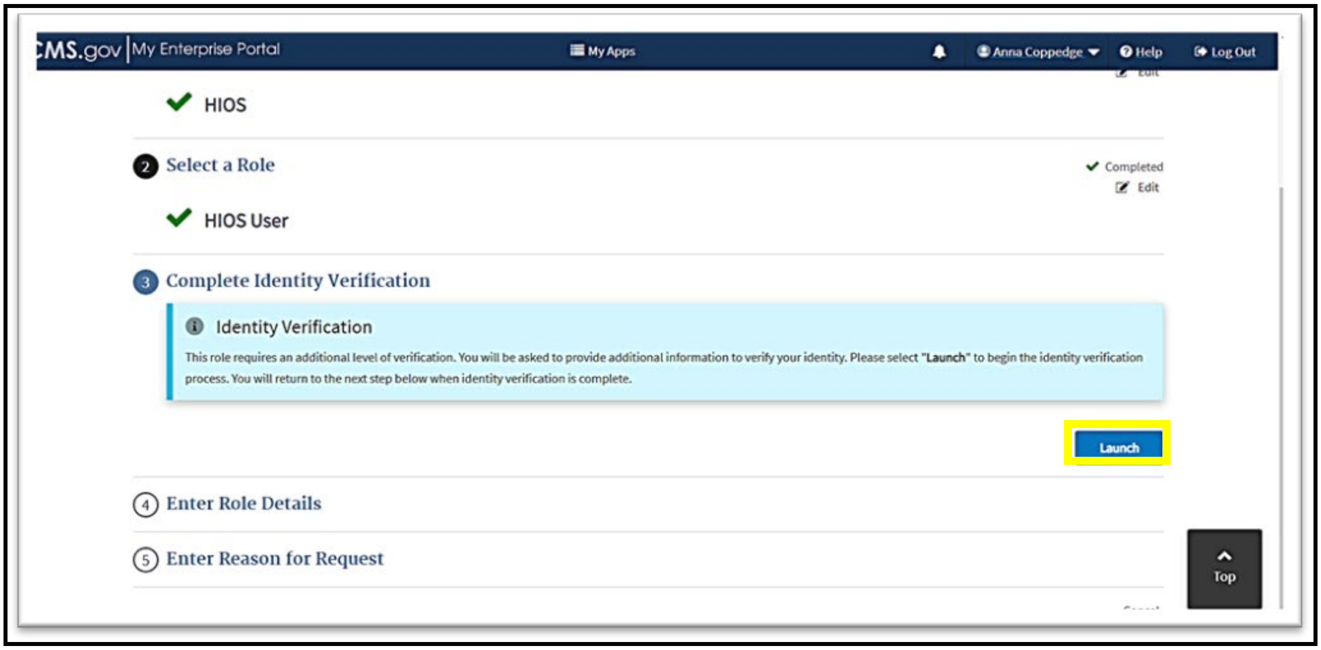
3. Select **HIOS User** in the **Select a Role** drop-down, then select **Next** (Figure 12).

Figure 12: Select the HIOS User Role



4. Select **Launch** to begin the process of completing identity verification (Figure 13).

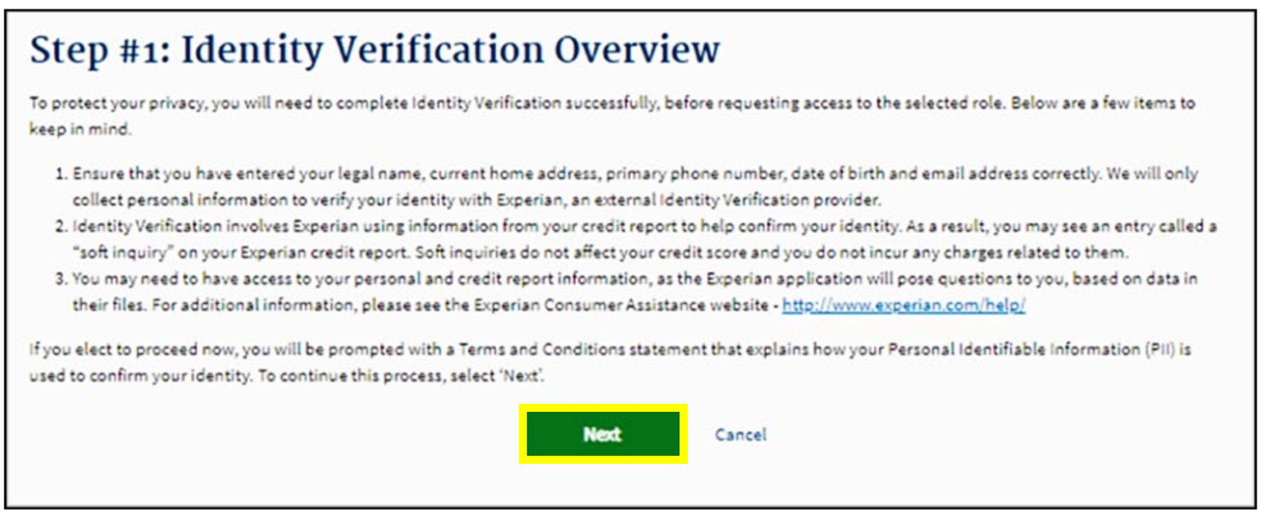
Figure 13: Begin Identity Verification



4 Identity Verification

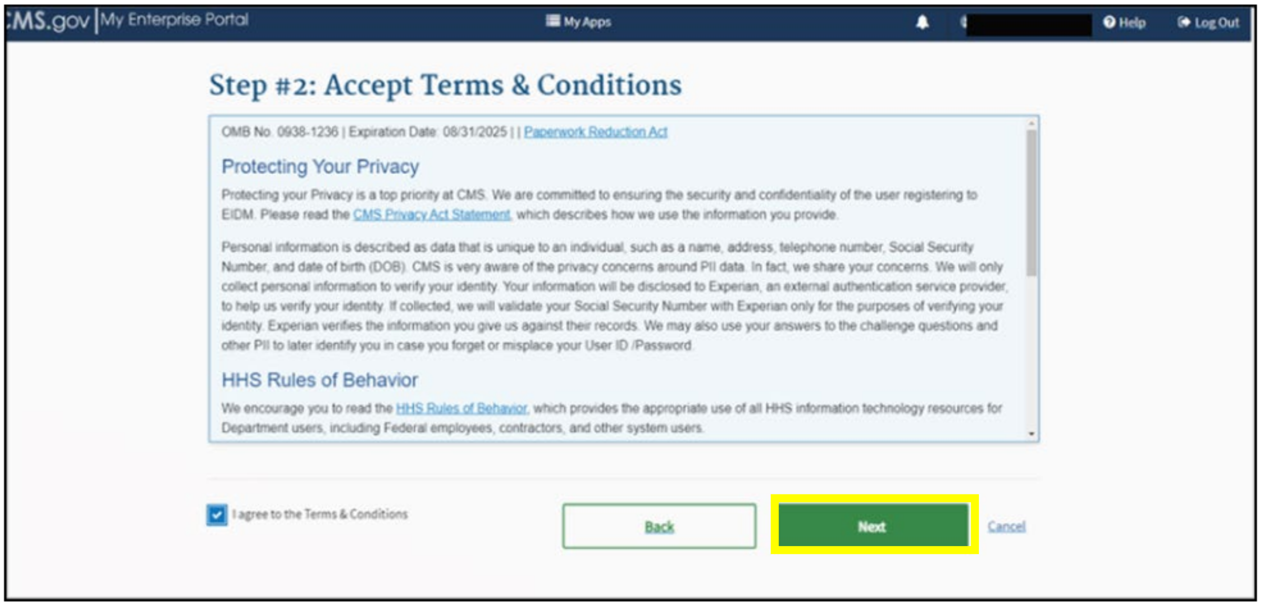
1. Step #1: Identity Verification Overview - After you select Launch, select **Next** (Figure 14).

Figure 14: Step # 1 - Identity Verification Overview



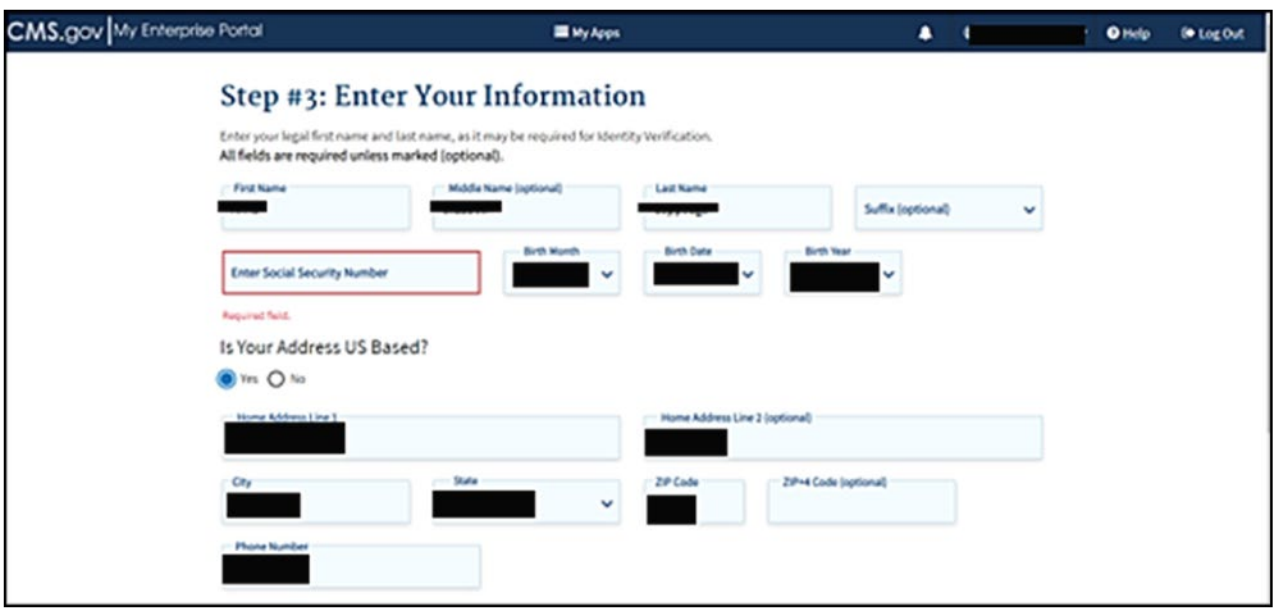
2. Step #2: Accept Terms and Conditions - Check **I agree to Terms & Conditions** box and select **Next** (Figure 15).

Figure 15: Step #2 - Accept Terms & Conditions



3. **Complete the form** to verify your identity and then select **Next** (Figure 16).
   - The Social Security Number (SSN) is the primary piece of information that is required.

Figure 16: Step #3 - Enter Your Information



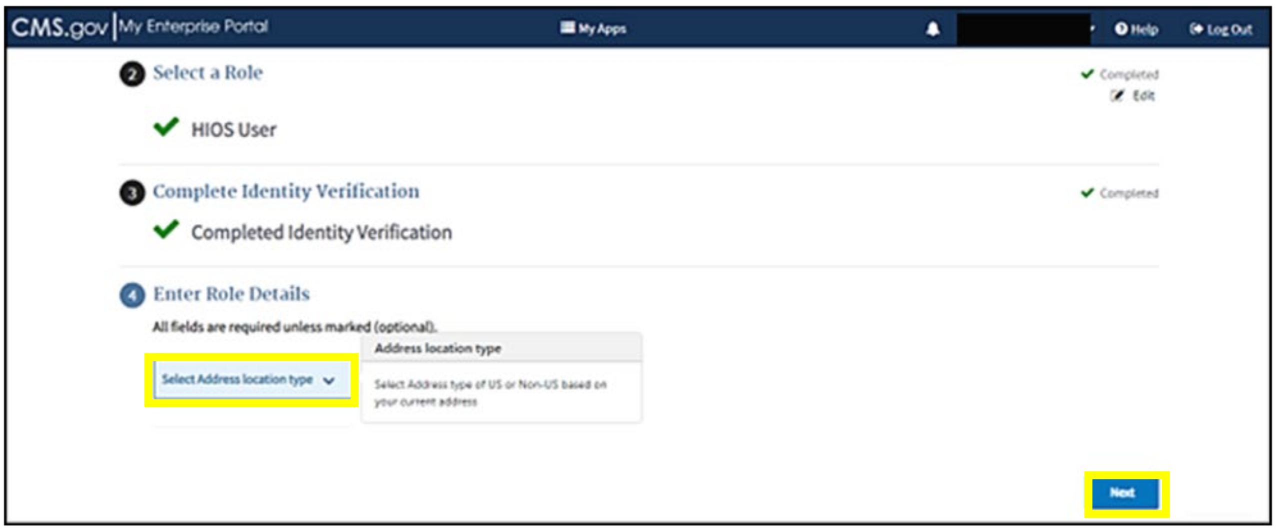
4. Step #4: Verify Your Identity - Complete **the identity verification questions** and select **Next**. Select **Next** on the Confirmation screen (Figure 17).
   - Examples of the identity verification questions include the dates you lived at an address, worked at a job, or opened a credit card.
   - **Entering this information will not impact your credit score.**

Figure 17: Identity Verification Confirmation

5 Enter Role Details

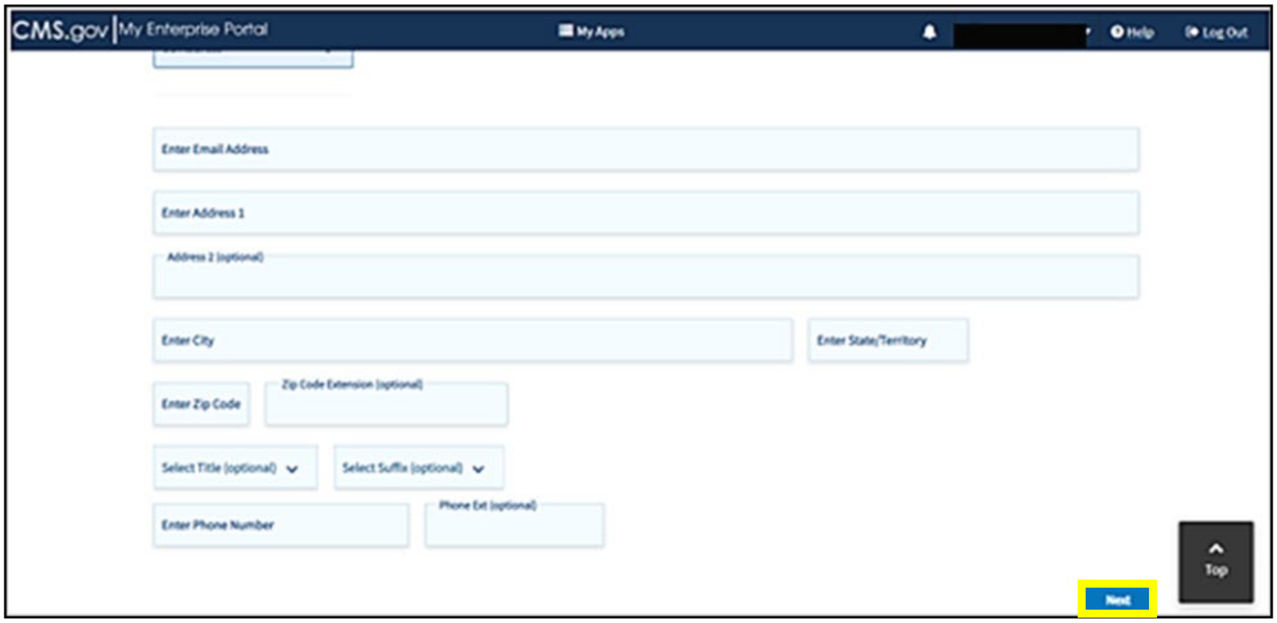
1. Upon completion of the identity verification, you will be returned to the Request Application Access screen. In the Enter Role Details section, **select Address location type** from the drop-down menu (Figure 18).

Figure 18: Enter Role Details



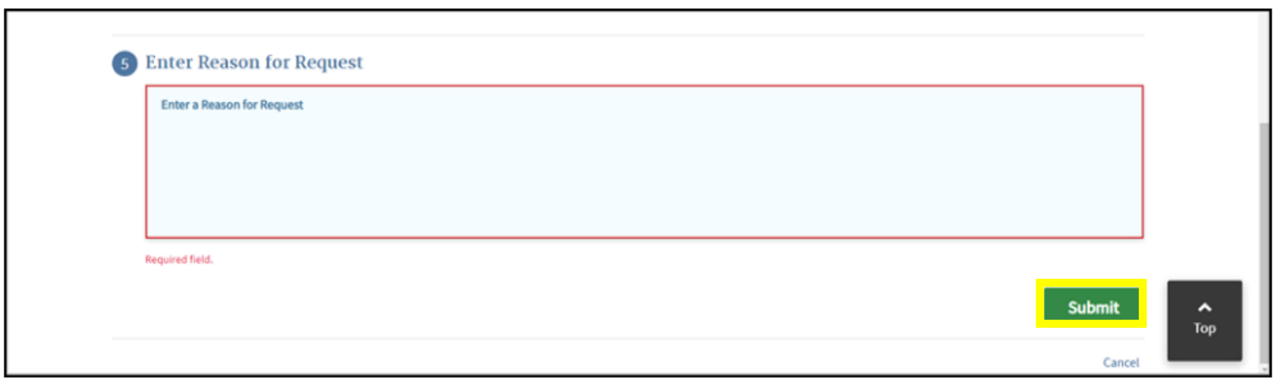
2. **Complete the form** and select **Next** (Figure 19).

Figure 19: Role Details Address Information



3. Fill-in the reason you need access within the **Enter Reason for Request box** and select **Submit** (Figure 20).
   - For example, "I need to submit my data in the RxDC HIOS module."

Figure 20: Enter Reason for Request



4. When the pop-up confirmation message appears, select **OK**.
5. When the Request New Application Access Acknowledgement message appears, select **OK** again.

6 HIOS Home Page

<u>Important Information</u>

- Both new and existing HIOS users will follow the steps in this section to access HIOS once they have a CMS Enterprise Portal account.

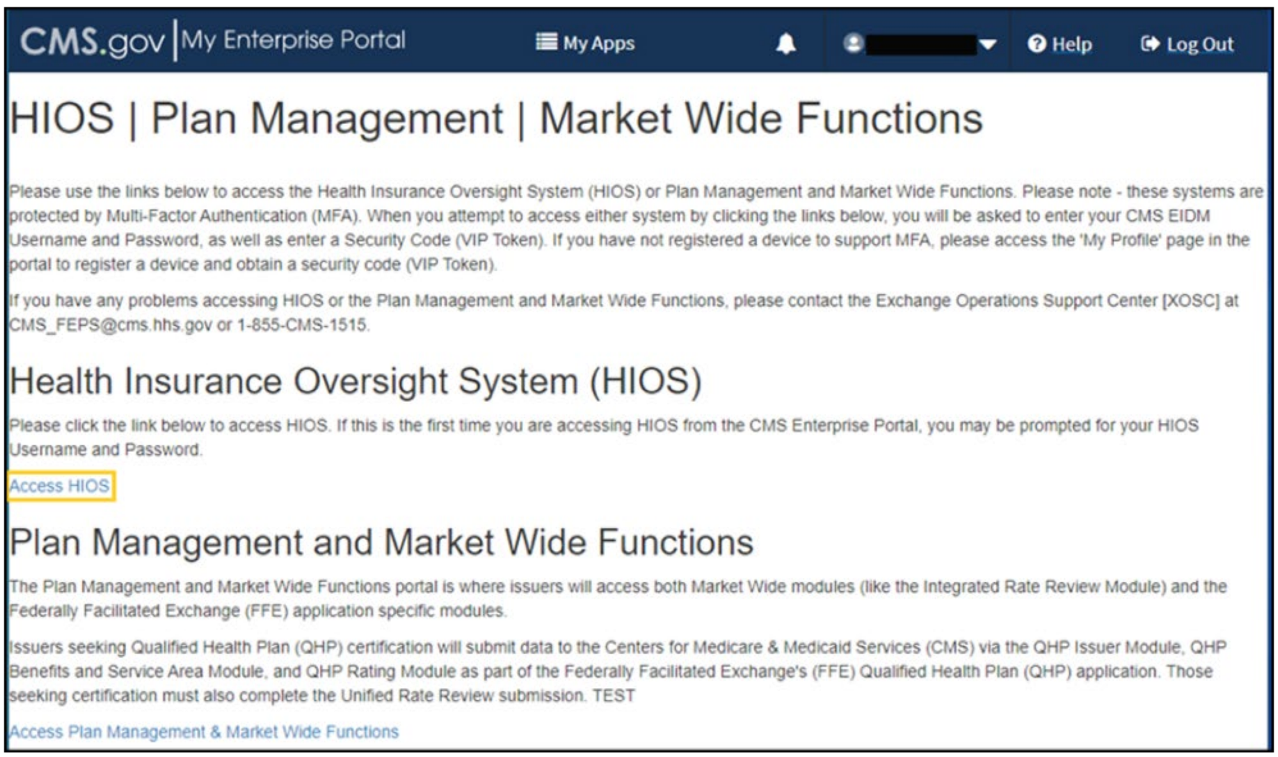
<u>To Access the HIOS Home Page:</u>

1. After requesting the HIOS application, **log-out of CMS Enterprise Portal and then login again**. On the My Portal homepage, the HIOS application will display. Select **HIOS**, then select **Overview** (Figure 21).

Figure 21: My Portal Page with HIOS Application

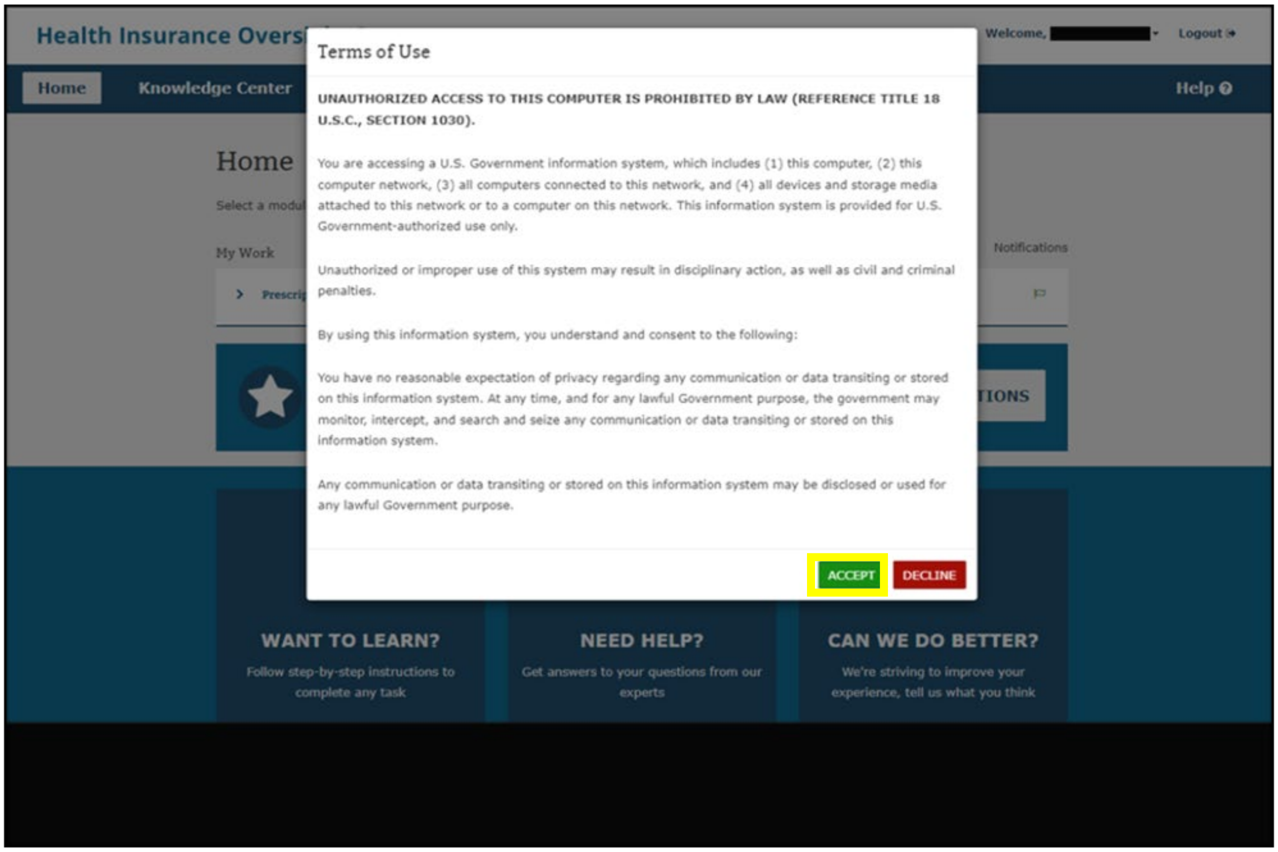
2. Select **Access HIOS** (Figure 22).

Figure 22: Access HIOS Page



3. Read the Terms of Use and select **Accept** (Figure 23).

Figure 23: HIOS Terms of Use



7 Request HIOS Module Roles

Uses will need an Issuer ID to submit role requests for the QHP modules. Users also need to request the Issuer Submitter role for the Plan Finder module in order to create Product IDs.

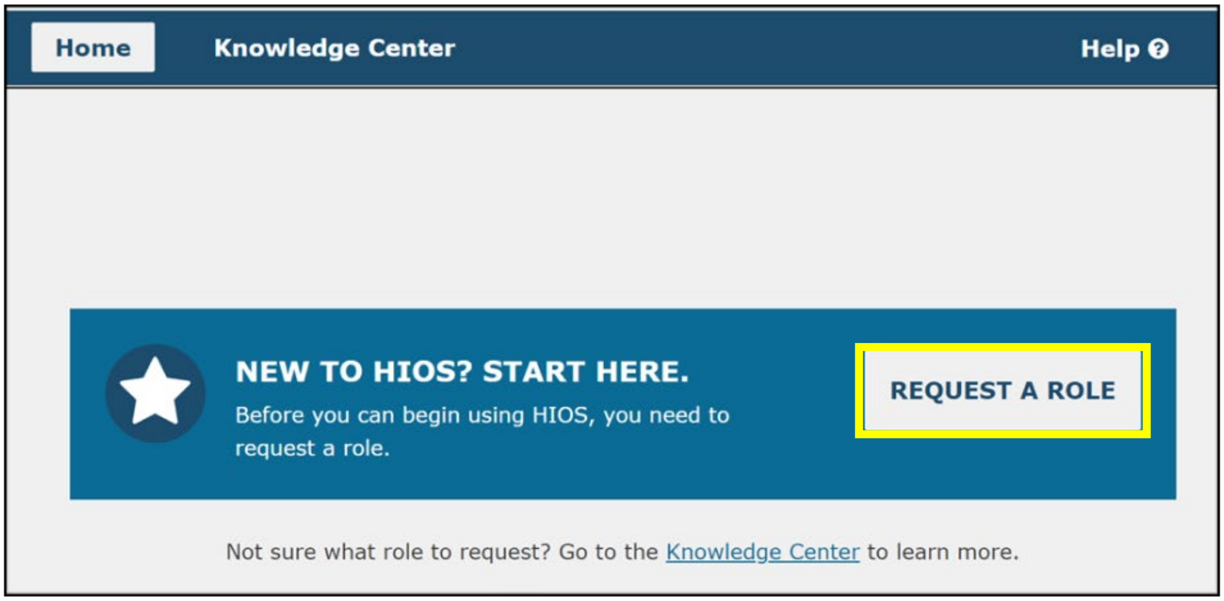
Important Information

- If your organization does not exist in HIOS, skip to section 8 to create the organization. Once the organization has been created and approved in HIOS, you will need to revisit this section to request the role. The organization must exist in HIOS before a role can be requested.
- If you require an issuer role and your issuer does not exist in HIOS, skip to section 9 to create the issuer. Once the issuer has been created and approved in HIOS, you will need to revisit this section to request the role. The organization must exist in HIOS before a role can be requested.

To request the HIOS roles:

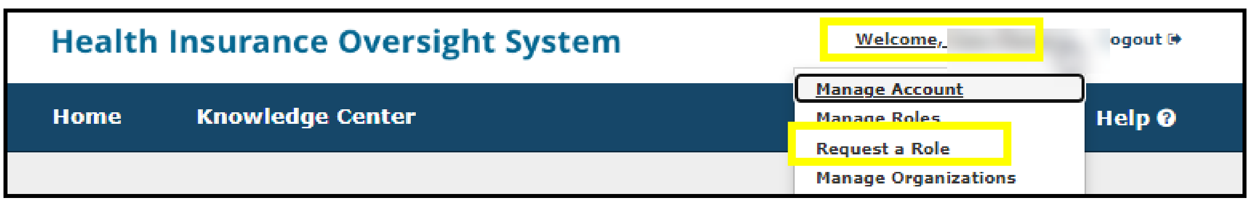
1. New users can select the **Request A Role** button on the page (Figure 24).

Figure 24: HIOS Homepage for New Users



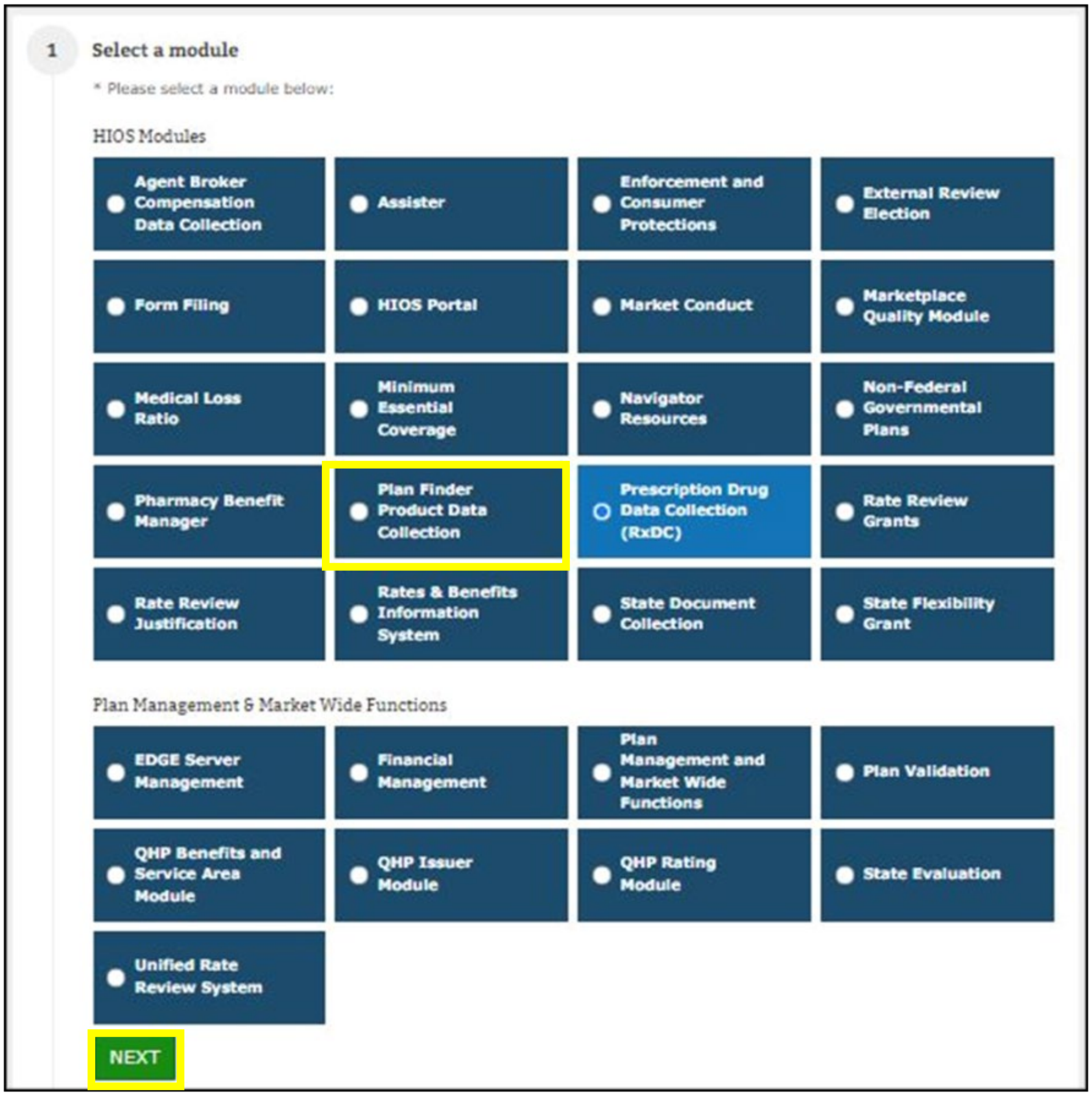
2. Existing HIOS users will need to select the **Welcome** drop-down and then select **Request A Role** (Figure 25).

Figure 25: Request a Role Drop-Down



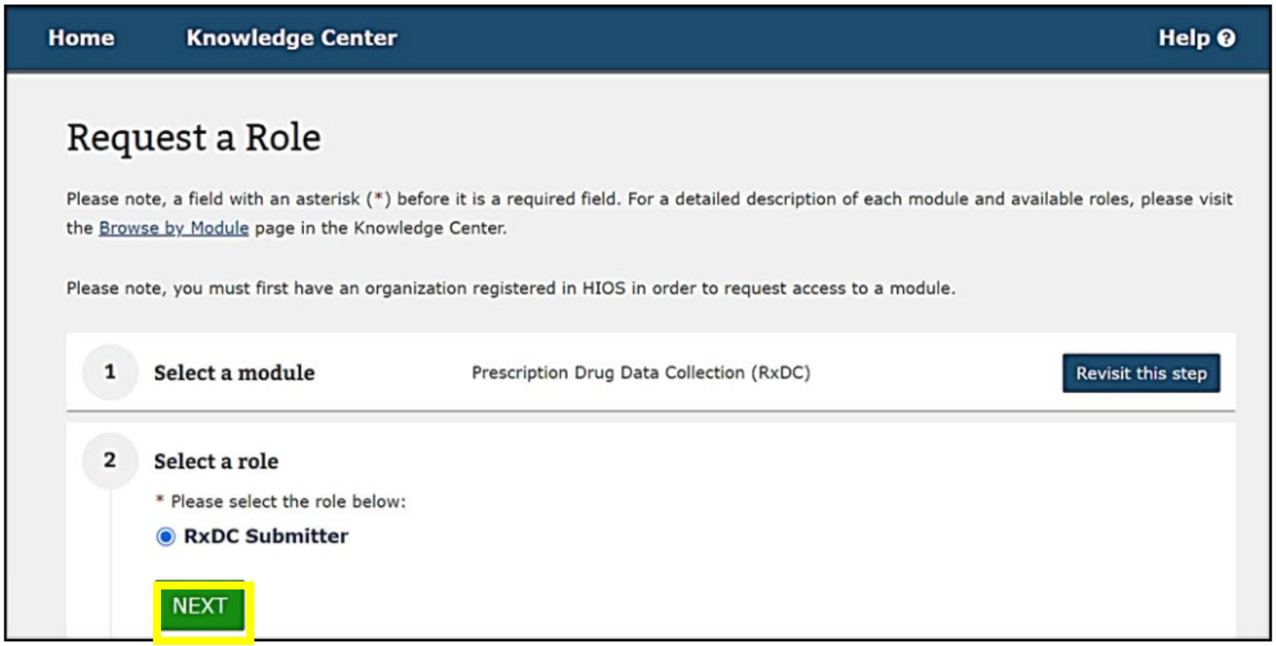
3. Select a **Module** and select **Next** (Figure 26).

Figure 26: Request a Role - Select a Module



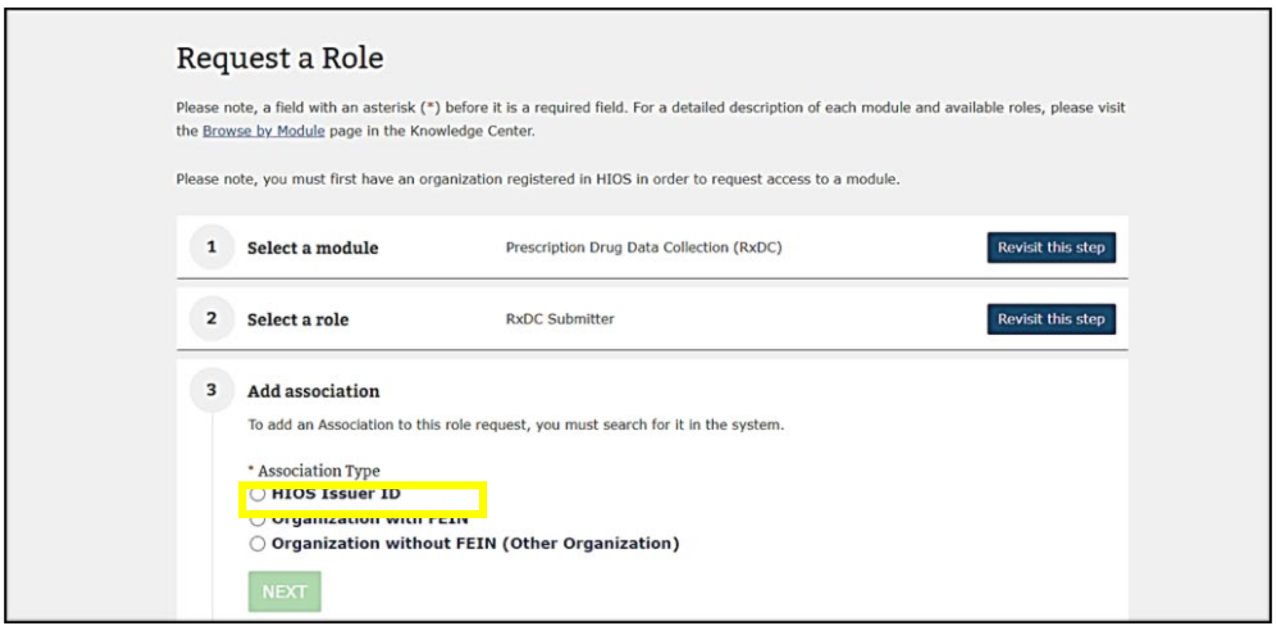
4. Select a **Role, Role Type and Contact Type** (if applicable to the module) from step 2 and select **Next** (Figure 27).

Figure 27: Select a Role



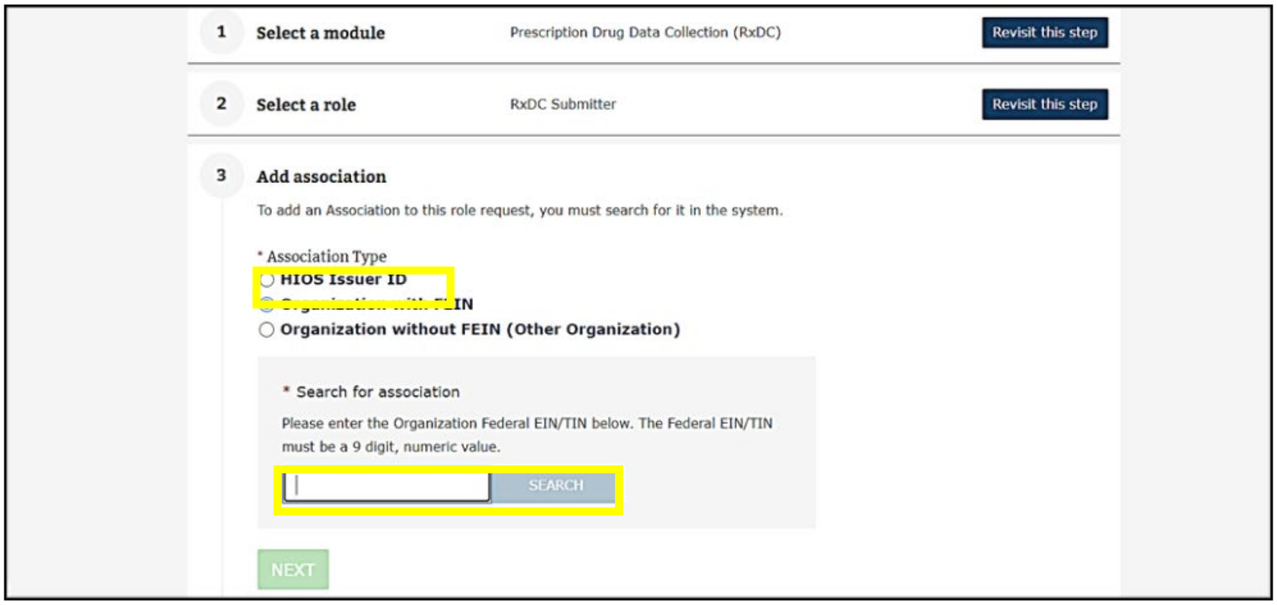
5. Select your **Association Type** and then select the **Search** button (Figure 28).

Figure 28: Add Association



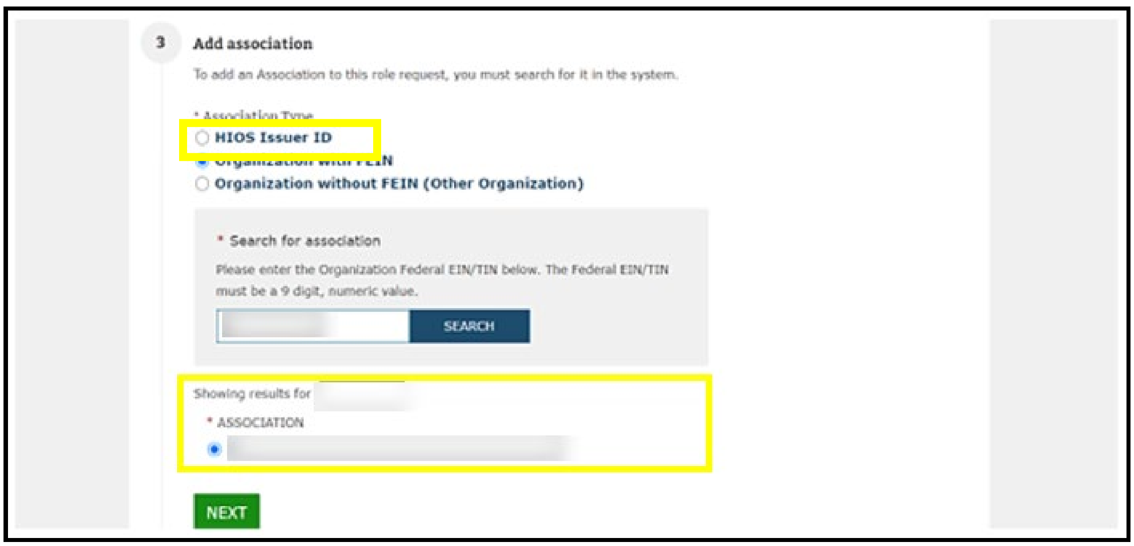
6. Within the Search for Association box, enter **Issuer ID** and select **Search** (Figure 29).
   - NOTE: If your company is not already registered in HIOS, you will receive the message “The organization does not exist...” select **Create an Organization** and then skip to the instructions in Section8 below. After the organization has been approved, you will need to revisit section 7 to request the role.

Figure 29: Search for Association



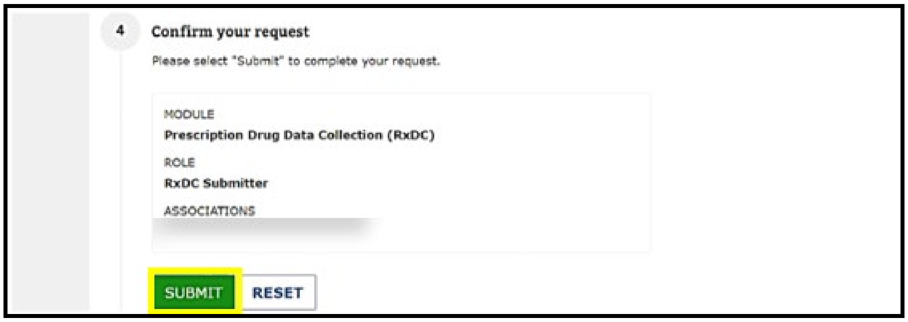
7. **Select your Issuer ID** from the results and select **Next** (Figure 30).

Figure 30: Association Search Results



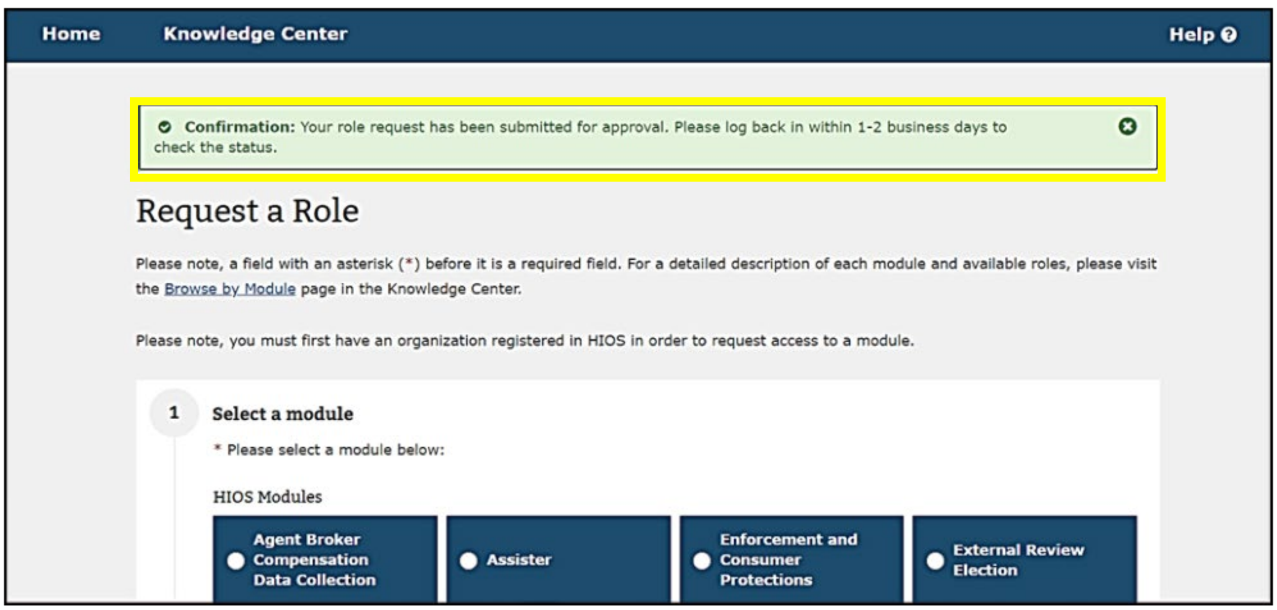
8. Review the information in the Confirm your request section and select **Submit** (Figure 31).
   - If the information is not correct, return to the step where the incorrect information was entered and make the necessary correction.

Figure 31: Confirm Your Request



9. After you select Submit, a confirmation box will show noting that your role request has been submitted for approval (Figure 32).
    - You will see a confirmation message notifying you to log back into HIOS within 1-2 business days to check the status of your request. To see your user role(s) and access permissions, select the Manage Roles link from the username drop down menu.

Figure 32: Role Request Confirmation



8 Create an Organization

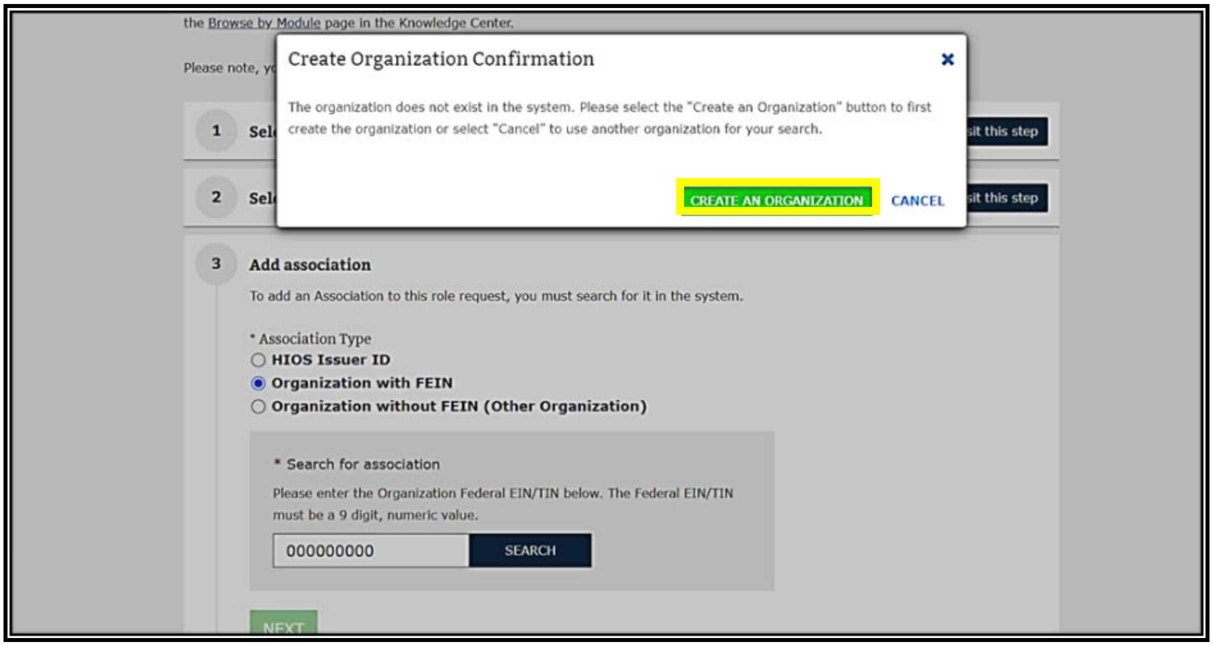
<u>Important Information</u>

- You may skip this section if your organization already exists in HIOS. (Please Note - If you have previously submitted data within HIOS, then your organization is already registered within HIOS.)
- If your organization does not currently exist in HIOS, please complete this section to register your organization in HIOS.

<u>To create a new organization in HIOS:</u>

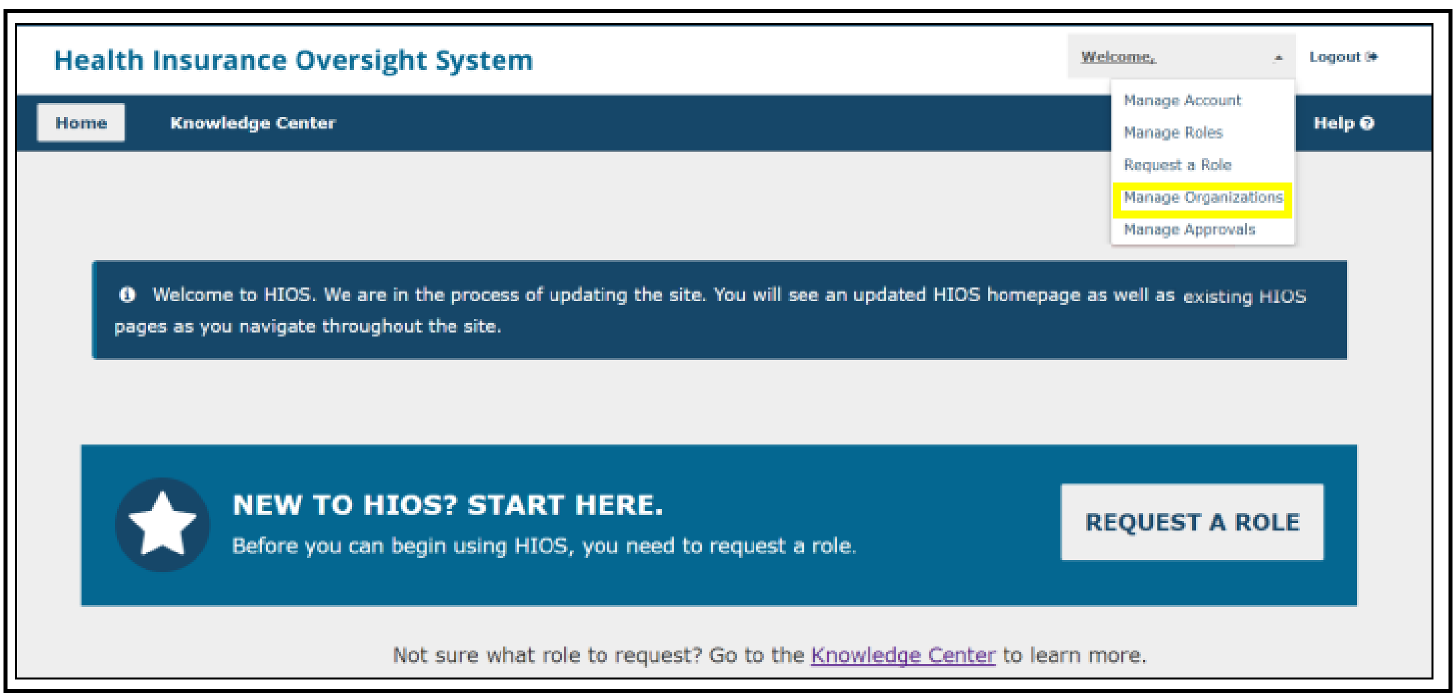
1. If your organization does not currently exist in HIOS, you will receive a message "The organization does not exist…" when attempting to Add association during the role request process. Select **Create an Organization** (Figure 33).

Figure 33: Create Organization Button



Alternatively, you can create an organization directly from the HIOS home page by selecting **Manage Organizations** from the Welcome drop-down (Figure 34). Either action will take you to the 'Create an Organization' page when you can then complete the steps to register your organization in HIOS.

Figure 34: Manage Organizations

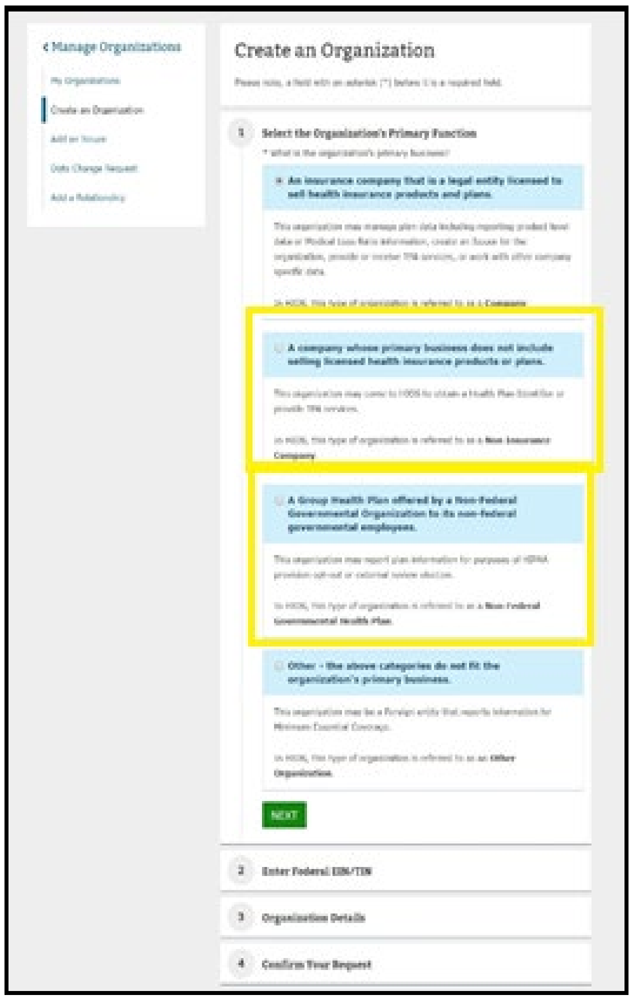


2. On the Create an Organization page, **Select the Organization's Primary Function** according to the instructions below. After selecting your organization's primary function, select **NEXT** (Figure 35) .

   <u>Organization Primary Function Notes:</u>

- Organizations that are considered an Insurance Company and are coming into HIOS to submit Plan/Product information should select **Company**.
- TPAs, PBMs, third-party vendors, and other group health plans, should select **Non-Insurance Company**.
- Non-federal governmental health plans (such as school districts and state and local governments) should select **Non-Federal Governmental Health Plans**.
- Foreign entities that are coming into HIOS to report information for Minimum Essential Coverage should select **Other Organization**.

Figure 35: Select the Organization's Primary Function

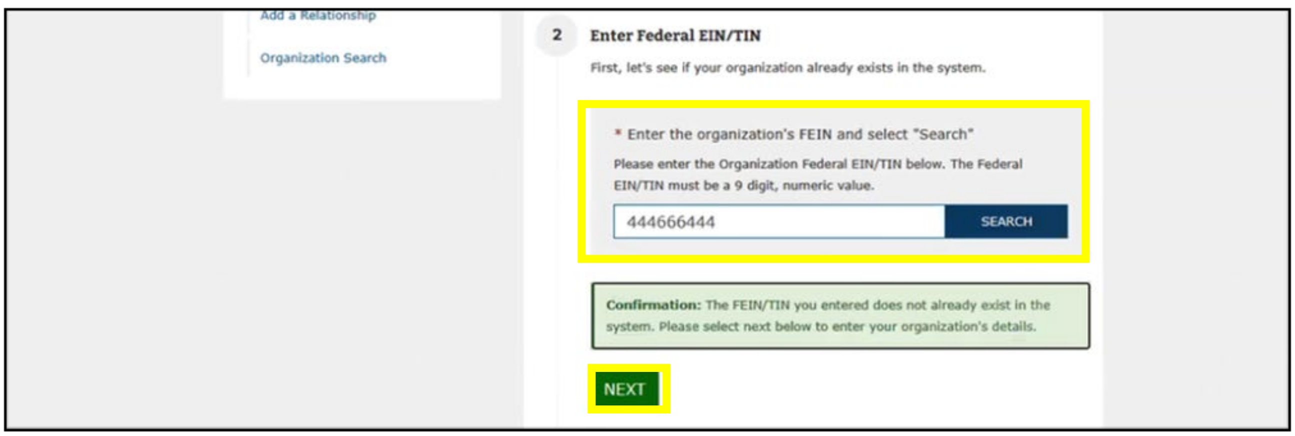


3. After selecting your organization’s primary function, select **NEXT** (Figure 36).

Figure 36: Finalize Selection

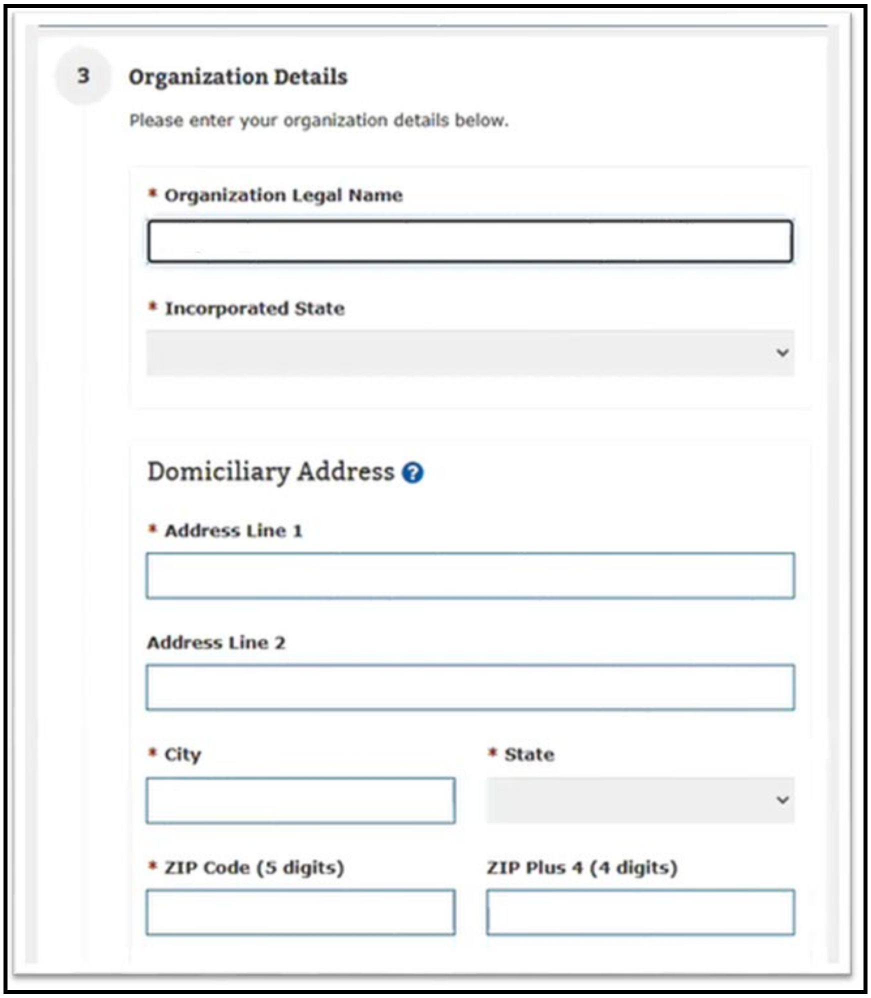
4. Enter **your company's EIN** in the search box and select **Search**. If the number is not in the system, a confirmation message will appear, stating that the number does not already exist in the system. Select **NEXT** (Figure 37).

Figure 37: Create an Organization: Enter Federal EIN/TIN



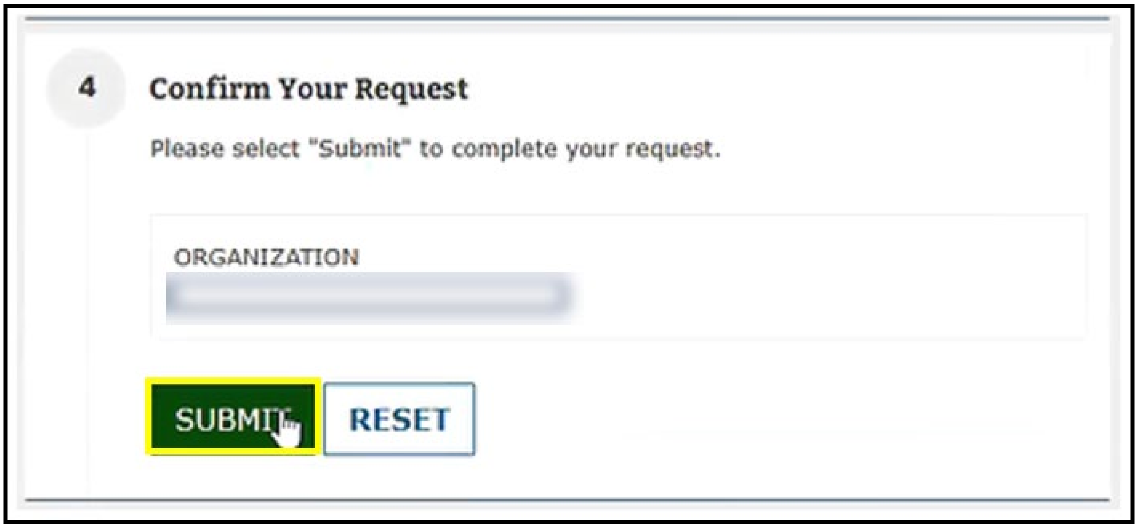
5. **Scroll down** to Organization Details and complete the form for your organization (Figure 38).

Figure 38: Create an Organization: Organization Details



6. Review the organization's information and scroll down to the Confirm Your Request section and select **SUBMIT** (Figure 39).
   - You may revisit any previous steps to make changes prior to confirming your request.
   - It takes 1-2 business days for an organization to be approved. After the organization has been approved, it will then be available for users to submit role requests.

Figure 39: Confirm Your Request



9 Create an Issuer

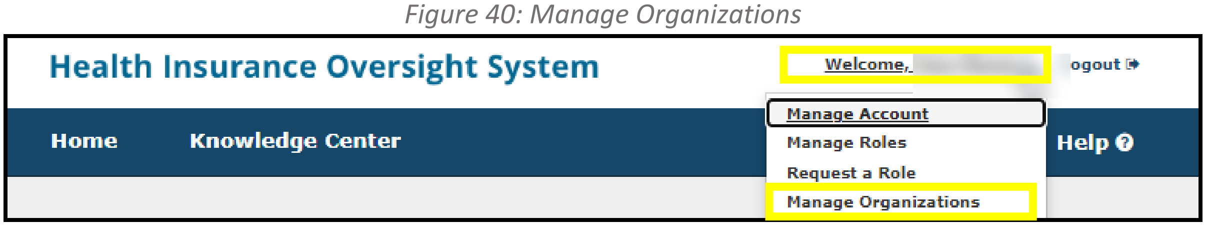
Important Information

- You may skip this section if your issuer already exists in HIOS. (Please Note - If you have previously submitted data within HIOS, then your organization is already registered within HIOS.)
- If your issuer does not currently exist in HIOS, please complete this section to register your organization in HIOS.
- **Please Note** – The parent organization must be registered in HIOS as a **Company** before an issuer can be added. If the parent organization is not registered in HIOS, refer to section 8.
- **Please note-** An Issuer will only be required for certain modules. (Example: Plan Finder, RBIS)

If an organization exists in HIOS, users can add an Issuer(s) to that organization by following the below steps:

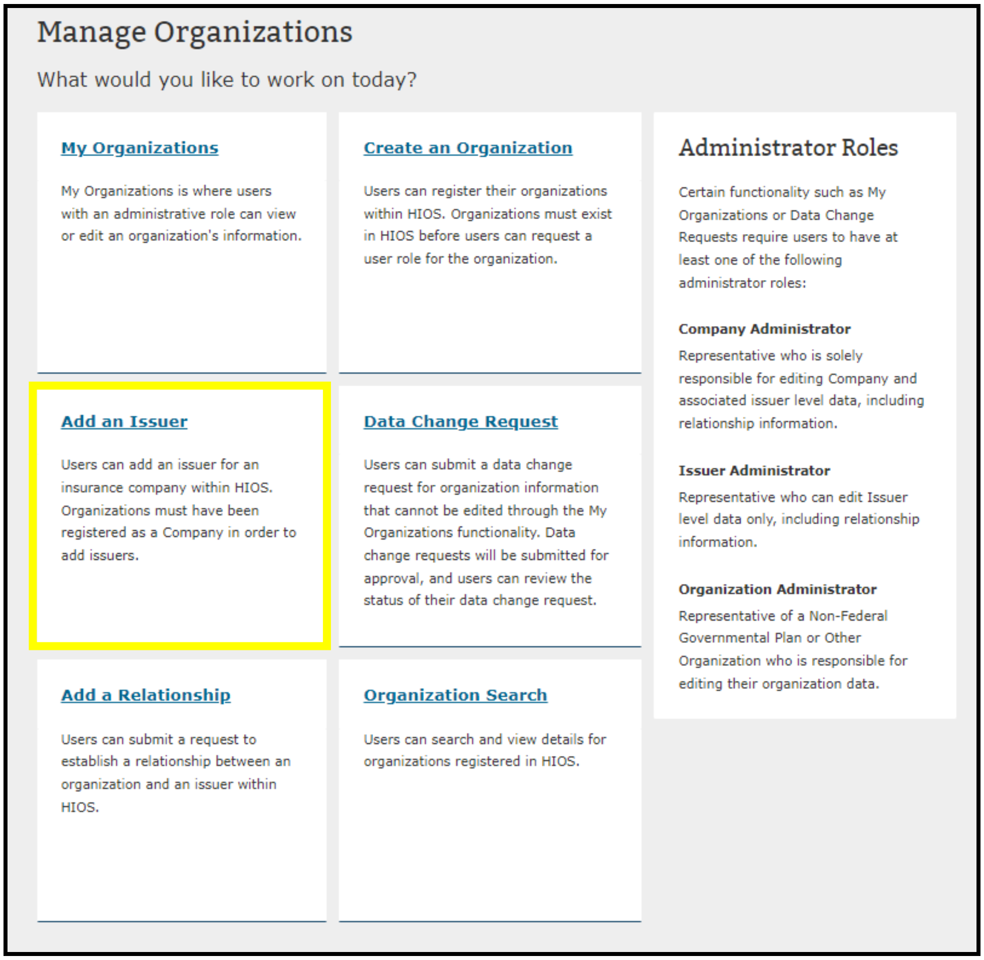
1. Select the **Manage Organizations link** on the HIOS Home Page (Figure 40).

Figure 40: Manage Organizations



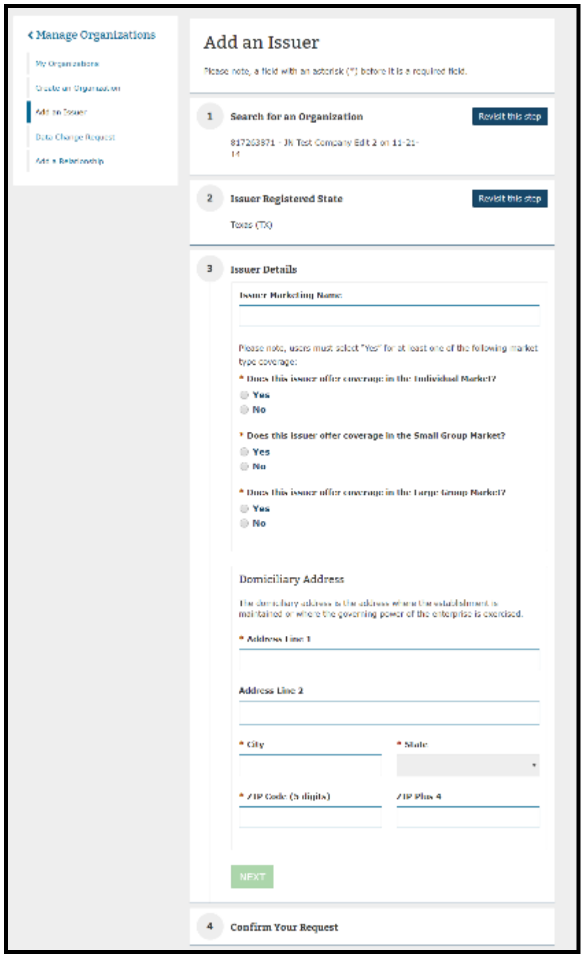
2. On the Manage Organizations page, select **Add an Issuer** (Figure 41).

Figure 41: Add an Issuer



3. Search for the organization you would like to add an issuer to by entering the **Federal EIN/TIN** and select **Search**.
4. Select the **Issuer Registered State** and proceed forward to enter the Issuer Details.
5. In Step 3, enter the **Issuer Details** and select **NEXT** (Figure 42).

Figure 42: Issuer Details



6. Review the organization's information and scroll down to the Confirm Your Request section and select **SUBMIT**.
    - You may revisit any previous steps to make changes prior to confirming your request.
    - It takes 1-2 business days for an issuer to be approved. After the issuer has been approved, it will then be available for users to submit role requests.

10 Access the HIOS Plan Finder Product Data Collection Module

Functions such as viewing and editing Marketplace admin data, creating products, and requesting Standard Component IDs (SCIDs) are done in the Plan Finder Product Data Collection Module.

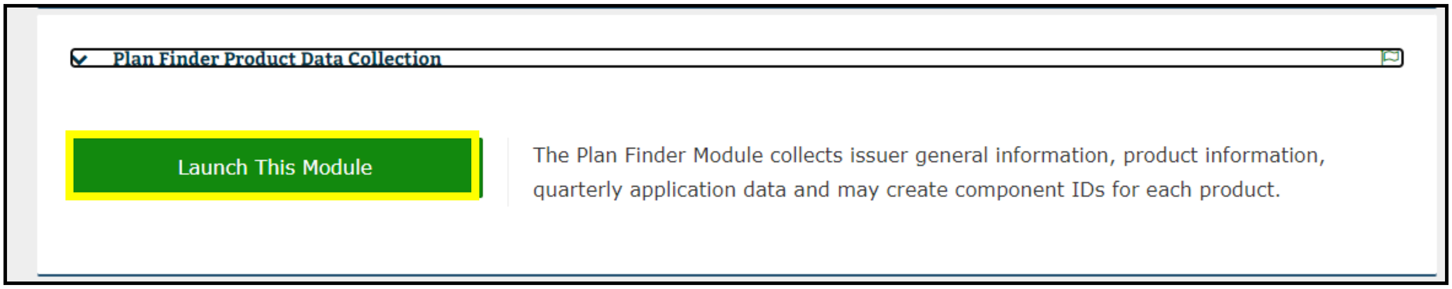
<u>Important Information</u>

- Must be assigned to an issuer that already exists in HIOS with the Issuer Submitter Role to complete the functions of editing Issuer Information, Marketplace Information, Existing Products, and to add new products or request new SCIDs.
- If your issuer does not currently exist in HIOS, please complete section 9 to register your issuer in HIOS.
- **Please Note** – The parent organization must be registered in HIOS as a **Company** before an issuer can be added. If the parent organization is not registered in HIOS, refer to section 8.

<u>Access Plan Finder Data Collection Module (PF):</u>

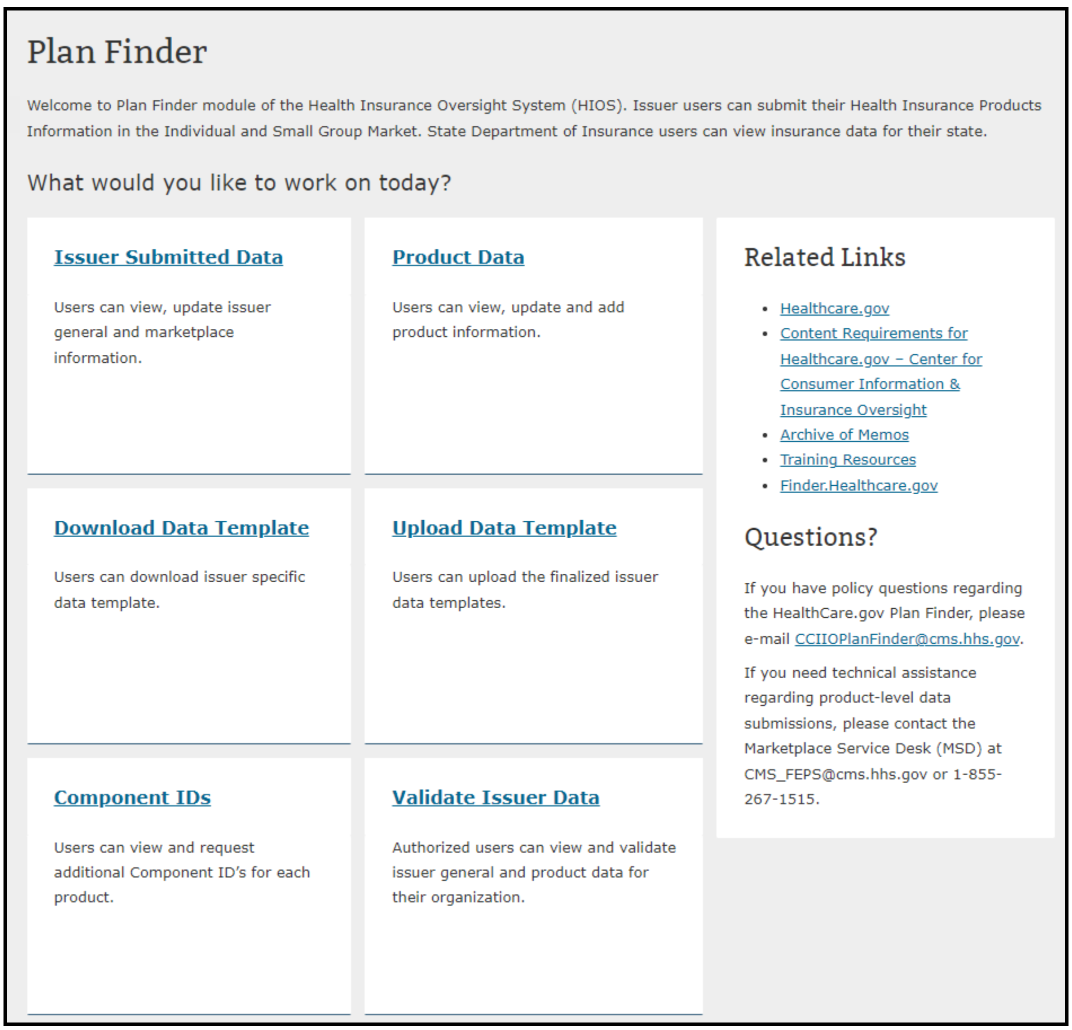
1. Login to the CMS Enterprise Portal (Refer to Section 6 if needed).
2. Select the Plan Finder Product Data Collection (PF) Accordion and then Select Launch Button (Figure 43).

Figure 43: Plan Finder Accordion



3. PF Homepage is displayed (Figure 44).

Figure 44: Plan Finder Homepage



11 View and Edit Issuer General Information

The Issuer General Information page displays the data entered for the Issuer's corporate information, contacts, customer service contact details, and Individual and Small Group Market Ratings

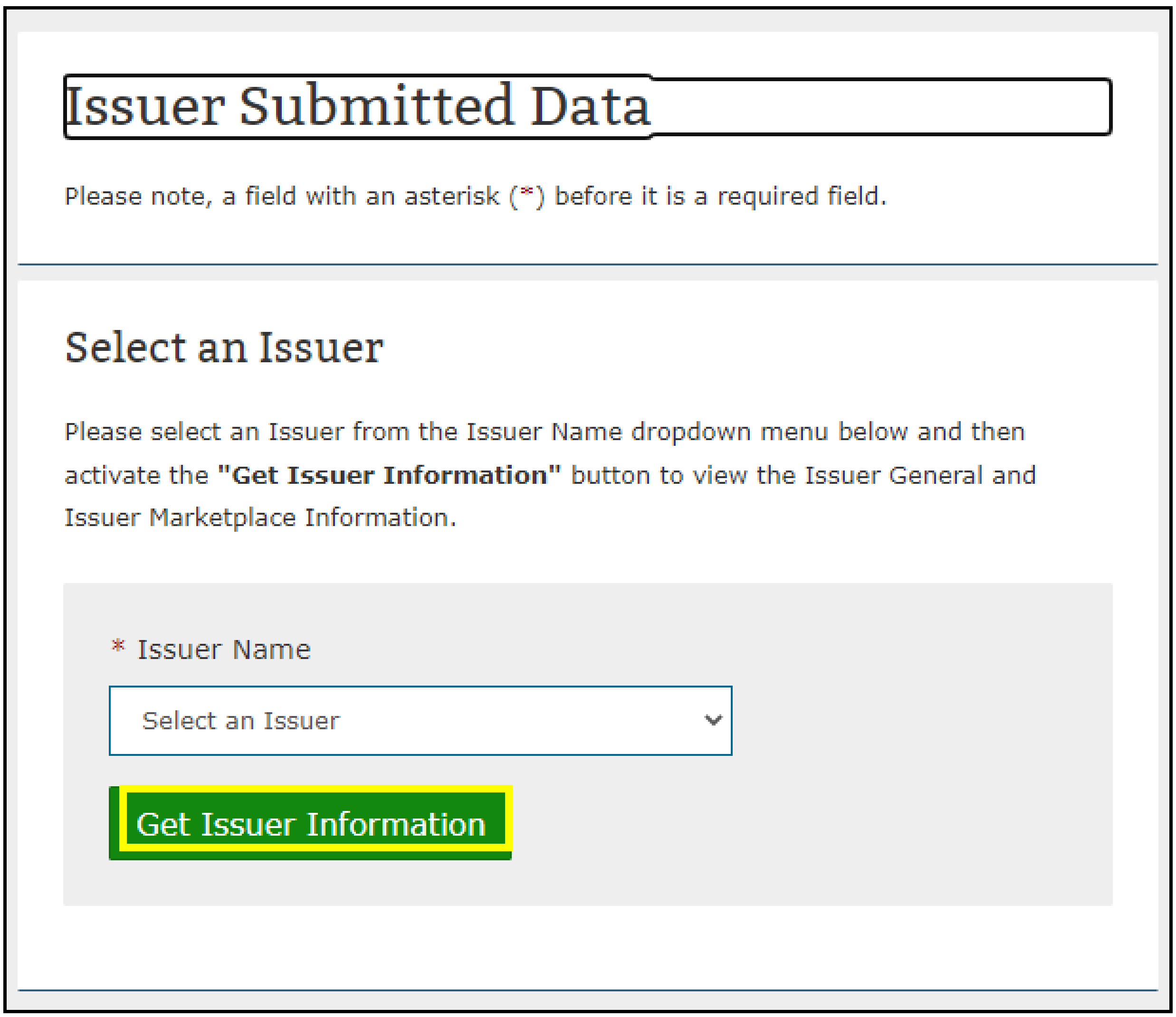
Important Information:

- Must be assigned to an issuer that already exists in HIOS with the Issuer Submitter Role to complete the functions of editing Issuer Information.
- Only certain data can be edited under the PF module all other items would require a Data Change Request (DCR).
- If an issuer is only in Individual Market (IFP) then only IFP data will display.
- If an issuer is only in Small Group/SHOP Market (SMG) then only SMG data will display.
- If an issuer is in both markets, then data for both IFP and SMG will display.

To View and/or edit Issuer Marketplace Data:

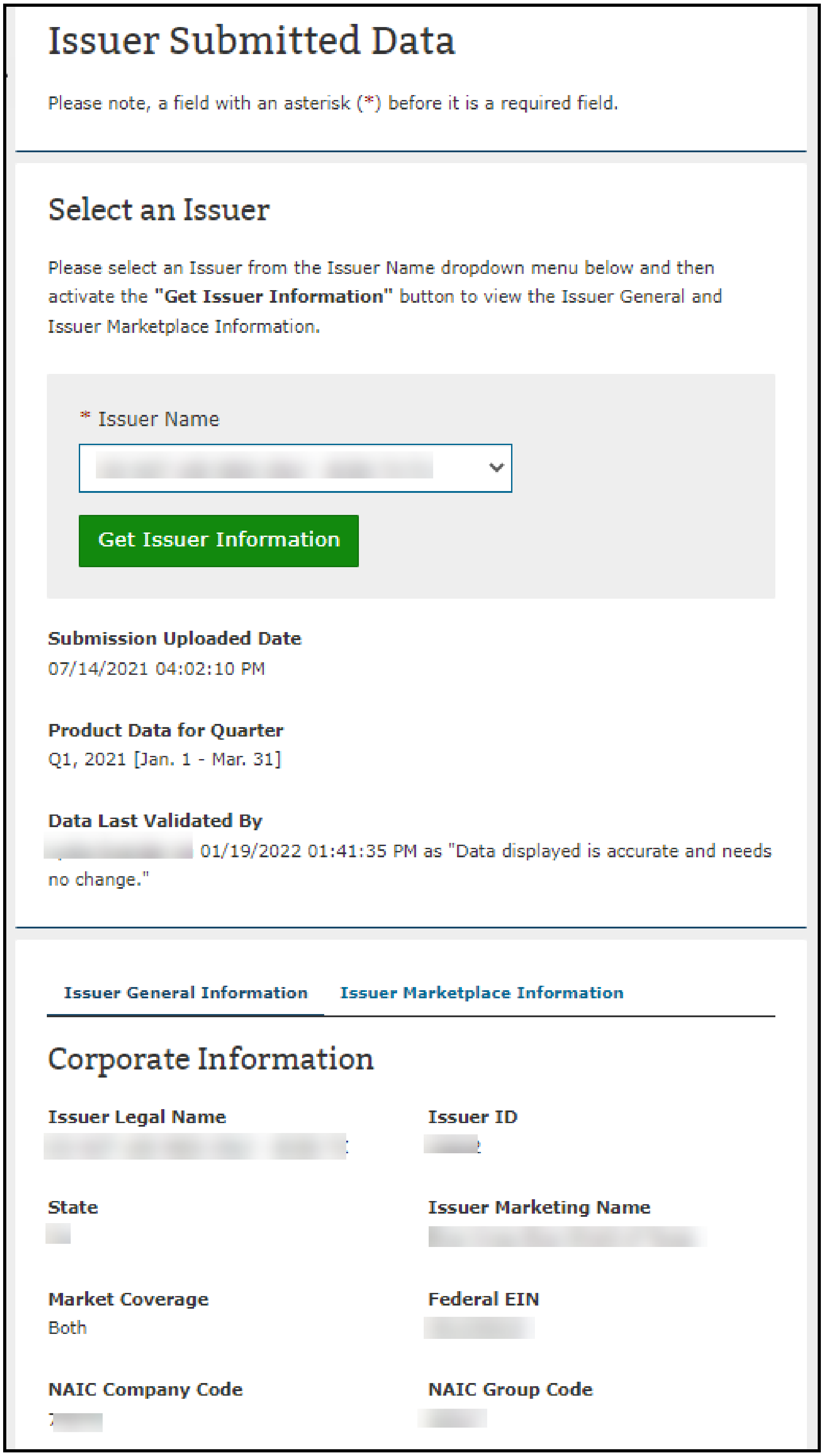
1. From the PF Homepage Select **Issuer Submitted Data** Card.
2. Select **Issuer Name** from Drop-Down Menu (Note if only assigned to one issuer it will be by default be selected).
3. Select **Get Issuer Information** Button (Figure 45).

Figure 45: Issuer Submitted Data



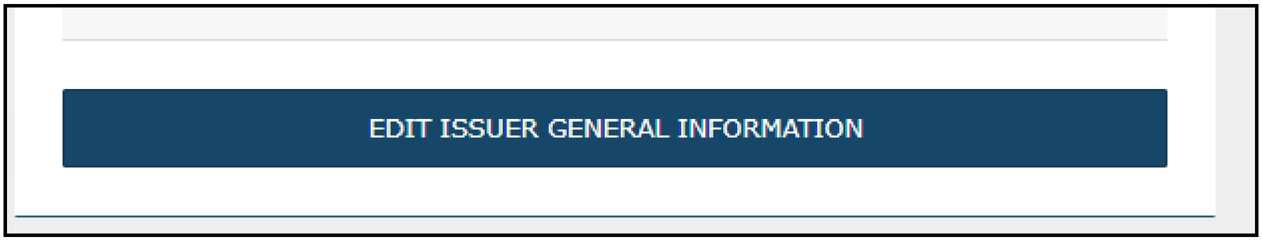
4. The Issuer General Information Page is displayed, and user is able to view the Issuer Submitted Data (Figure 46).

Figure 46: Issuer Submitted Data



5. If the data needs to be edited, scroll to the bottom of the page and Select the **Edit Issuer General Informatio**n Button (Figure 47).

Figure 47: Edit Issuer General Information Button



6. Update the fields that need to be updated and then Select the **Submit** Button at the bottom of the page.
7. Confirmation message will appear at the top of the page that says: Confirmation: You have successfully Updated the Issuer General Information for <insert Issuer Name and State> (Figure 48).

Figure 48: Confirmation Message Edit of Issuer General Information

12 View and Edit Issuer Marketplace Information

The Issuer General Information page displays all the Marketplace related data.

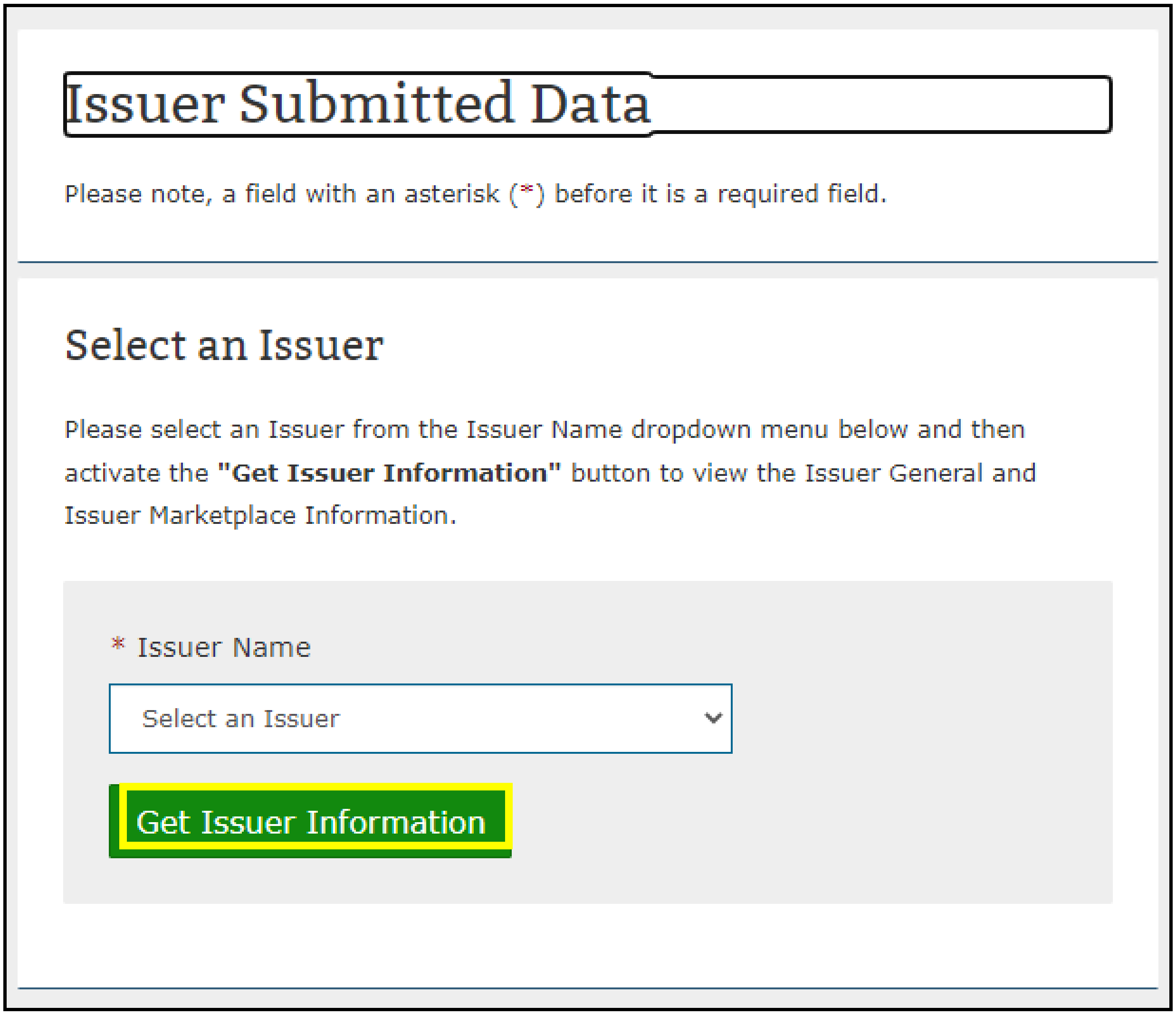
Important Information:

- Must be assigned to an issuer that already exists in HIOS with the Issuer Submitter Role to complete the functions of editing Issuer Information.
- Only certain data can be edited under the PF module all other items would require a Data Change Request (DCR).
- If an issuer is only in Individual Market (IFP) then only IFP data will display.
- If an issuer is only in Small Group/SHOP Market (SMG) then only SMG data will display.
- If an issuer is in both markets, then data for both IFP and SMG will display.

To View and/or edit Issuer Marketplace Data:

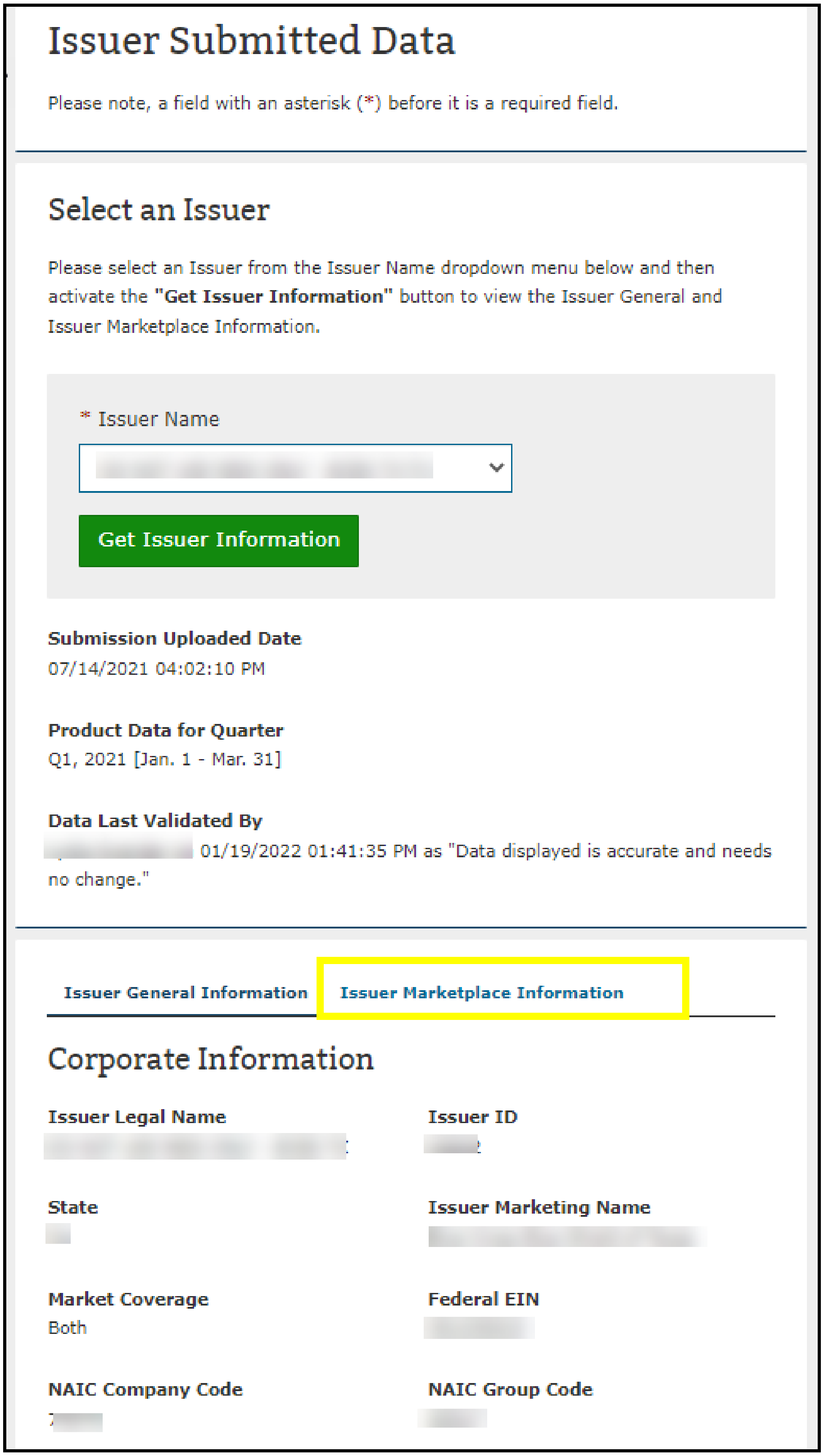
1. From the PF Homepage Select **Issuer Submitted Data** Card.
2. Select **Issuer Name** from Drop-Down Menu (Note if only assigned to one issuer it will be by default be selected).
3. Select **Get Issuer Information** Button (Figure 49).

Figure 49: Issuer Submitted Data



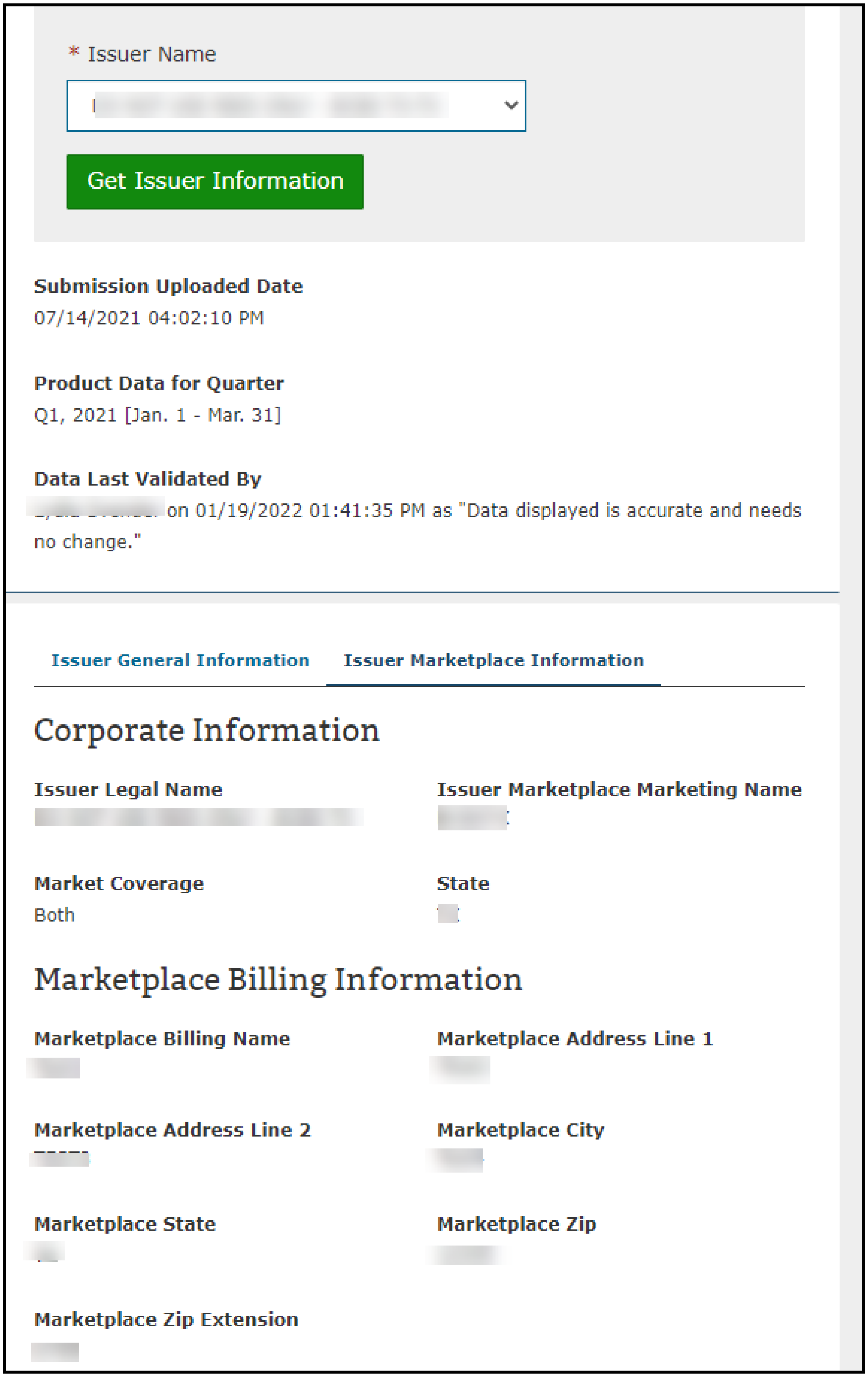
4. The Issuer General Information Page is displayed, and user is able to select **Issuer Marketplace Information** Tab (Figure 50).

Figure 50: Issuer Submitted Data



5. The Issuer Marketplace Page is displayed, and user is able to view the Issuer Marketplace data. (Figure 51).

Figure 51: Issuer Marketplace Information



6. If the date needs to be updated, scroll to the bottom of the page and select the Edit Issuer Marketplace Information Button (Figure 52).

Figure 52: Edit Issuer Marketplace Information Button

7. Update the fields that need to be updated and then Select the **Submit** Button at the bottom of the page.
8. Confirmation message will appear at the top of the page that says: Confirmation: You have successfully Updated the Issuer Marketplace Information for <insert Issuer Name and State> (Figure 53).

Figure 53: Confirmation Message Edit of Issuer Marketplace Information

13 Create Products

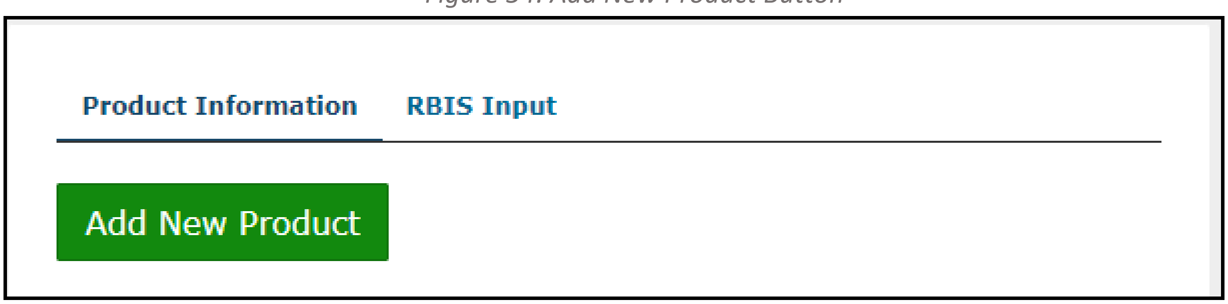
Important Information:

- Must be assigned to an issuer that already exists in HIOS with the Issuer Submitter Role to add new Product(s).
- All Products must be associated to an Issuer ID.
- Can only add IFP Products if Issuer is IFP only.
- Can only add SMG Products if Issuer is SMG only.
- Will be able to select IFP or SMG when adding new product(s) if Issuer is in both market types.

To Create New Products:

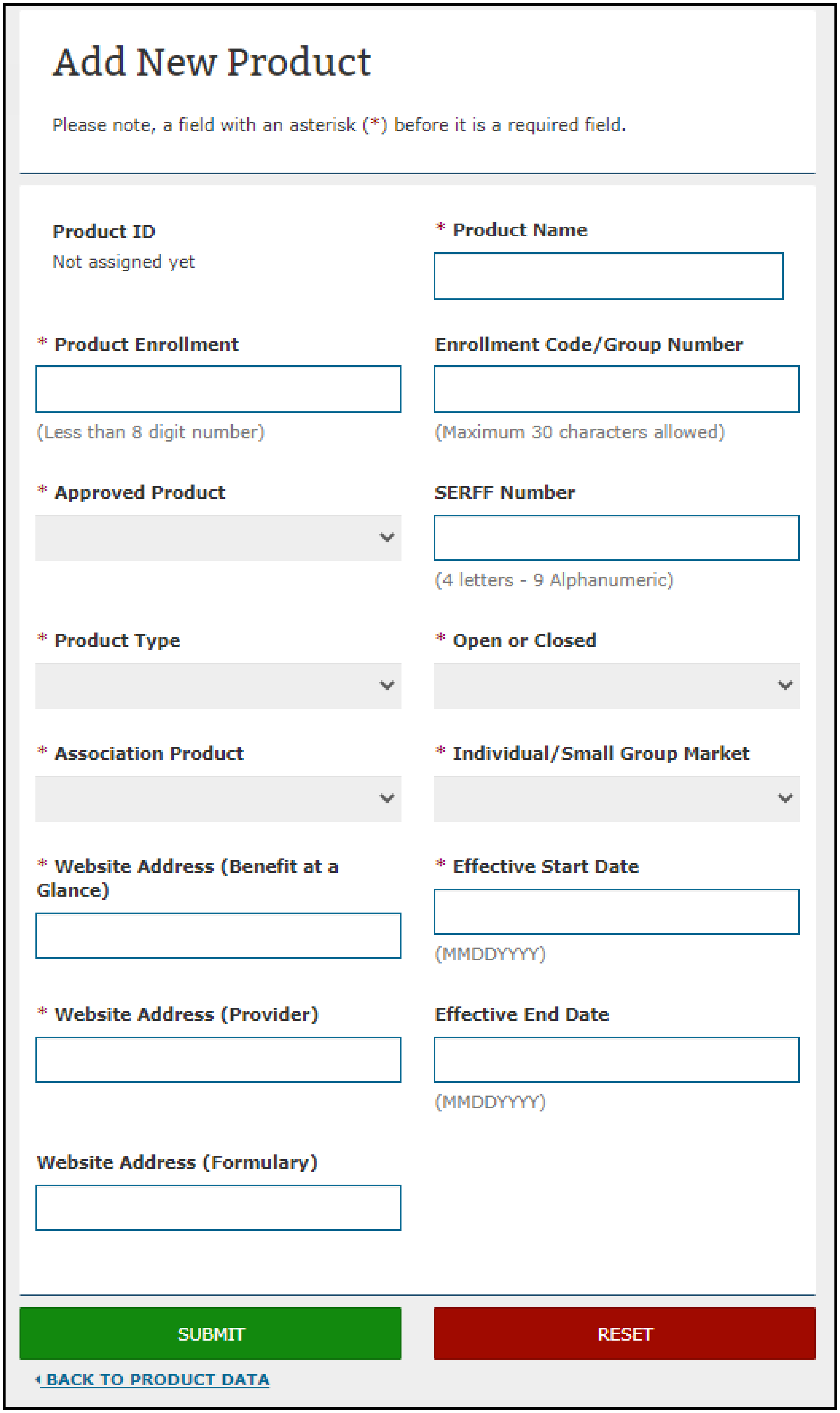
1. From the PF Homepage Select **Product Data** Card.
2. Select **Issuer Name** from Drop-Down Menu (Note if only assigned to one issuer it will be by default be selected) and then Select **Get Issuer Information** Button.
3. Select **Add New Product** Button (Figure 54).

Figure 54: Add New Product Button



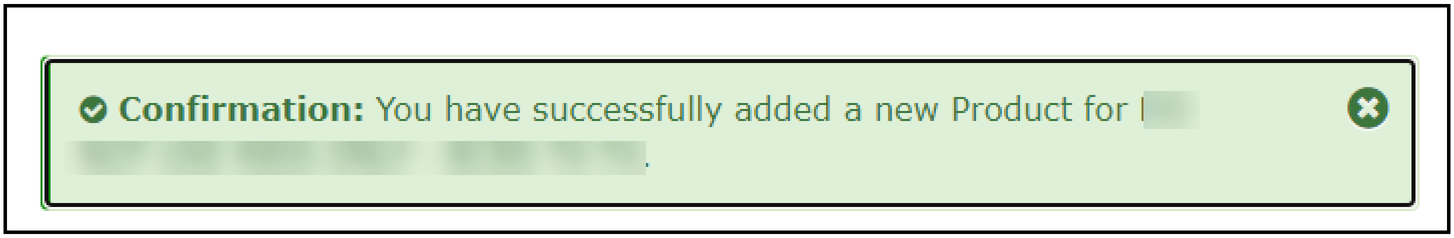
4. The Add New Product Page is displayed, and user is able to fill in the required and optional data fields as needed. Once fields have the required and optional data fields needed, Select **Submit** Button (Figure 55).

Figure 55: Add New Product



5. Confirmation Message is displayed at top of page that says Confirmation: You have successfully added a new product for <insert issuer name and state>. (Figure 56).

Figure 56: Add New Product Confirmation



14 View and Edit Products

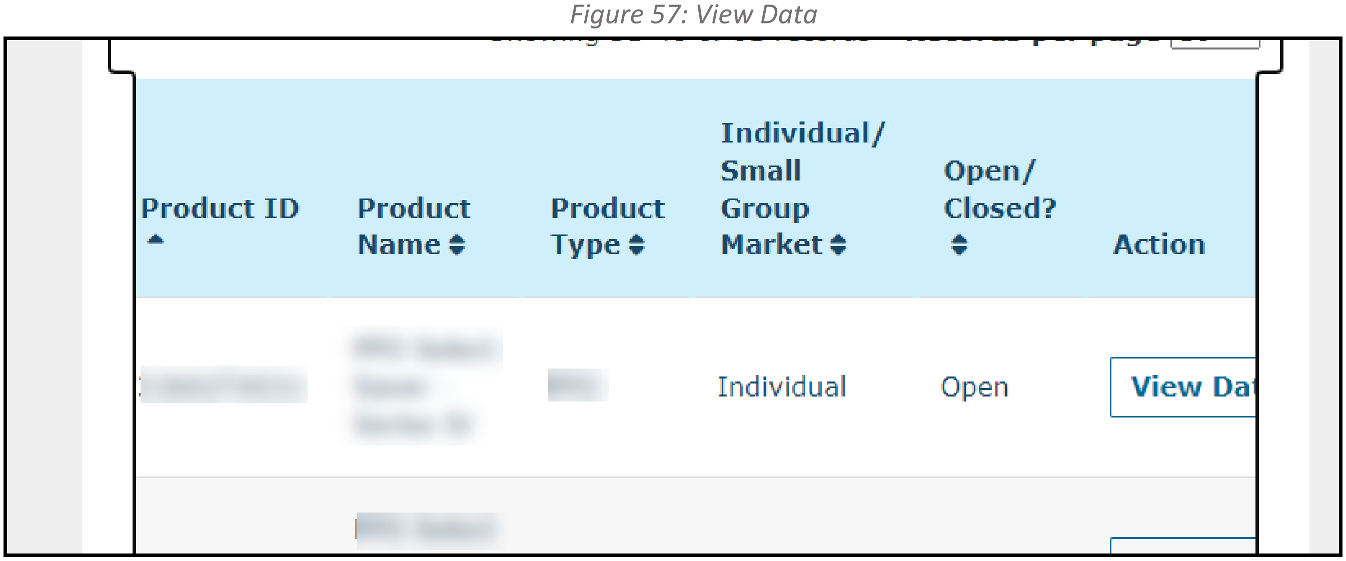
Important Information:

- Must be assigned to an issuer that already exists in HIOS with the Issuer Submitter Role to edit Product(s).
- Product Name, Product Market, and Product Type are not editable from the PF module. If changes are needed to these then a new product must be created.

<u>To View and Edit Products:</u>

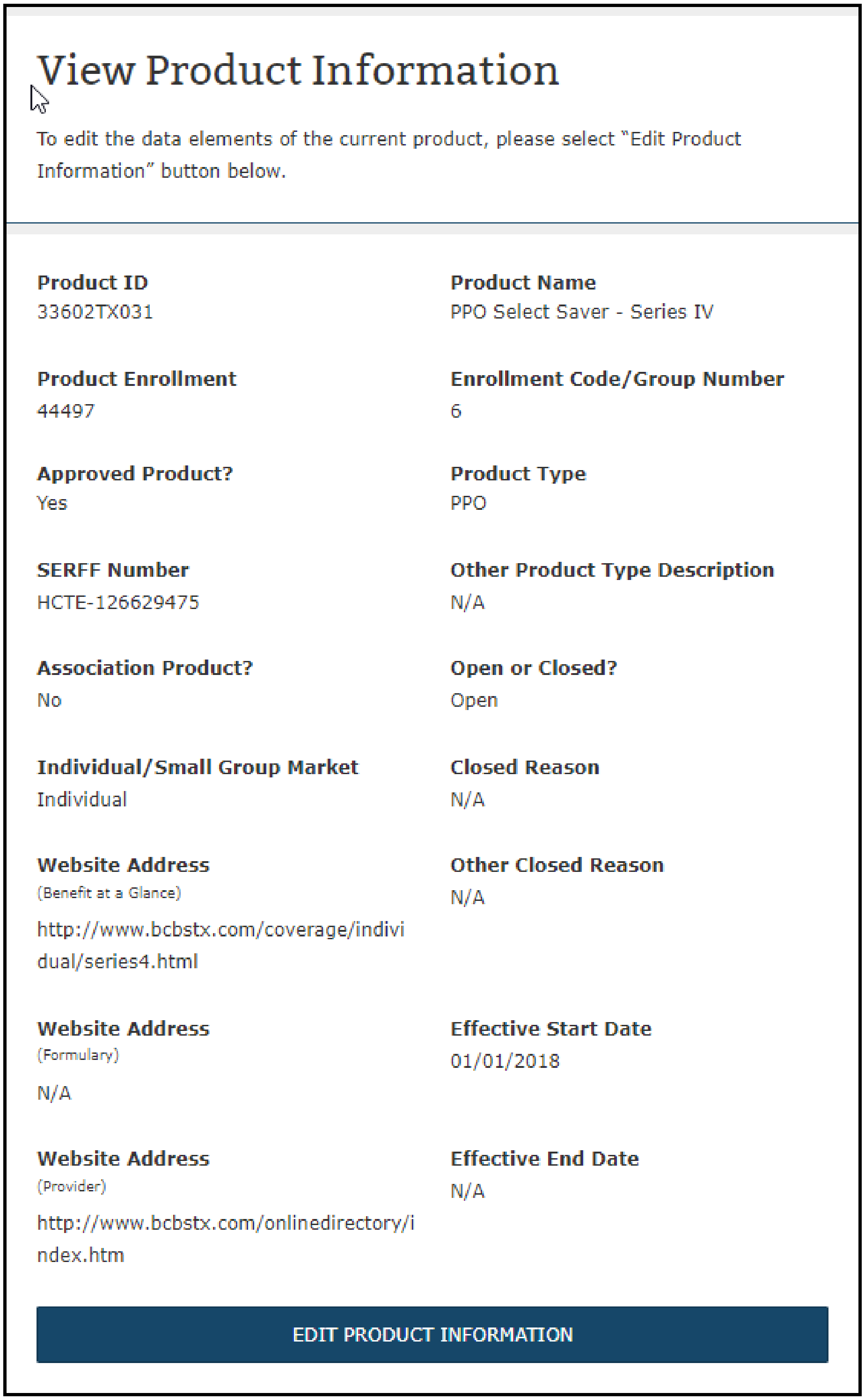
1. From the PF Homepage Select **Product Data** Card.
2. Select **Issuer Name** from Drop-Down Menu (Note if only assigned to one issuer it will be by default be selected) and then Select **Get Issuer Information** Button.
3. Select **View Data** Button next to a Product ID (Figure 57).

Figure 57: View Data



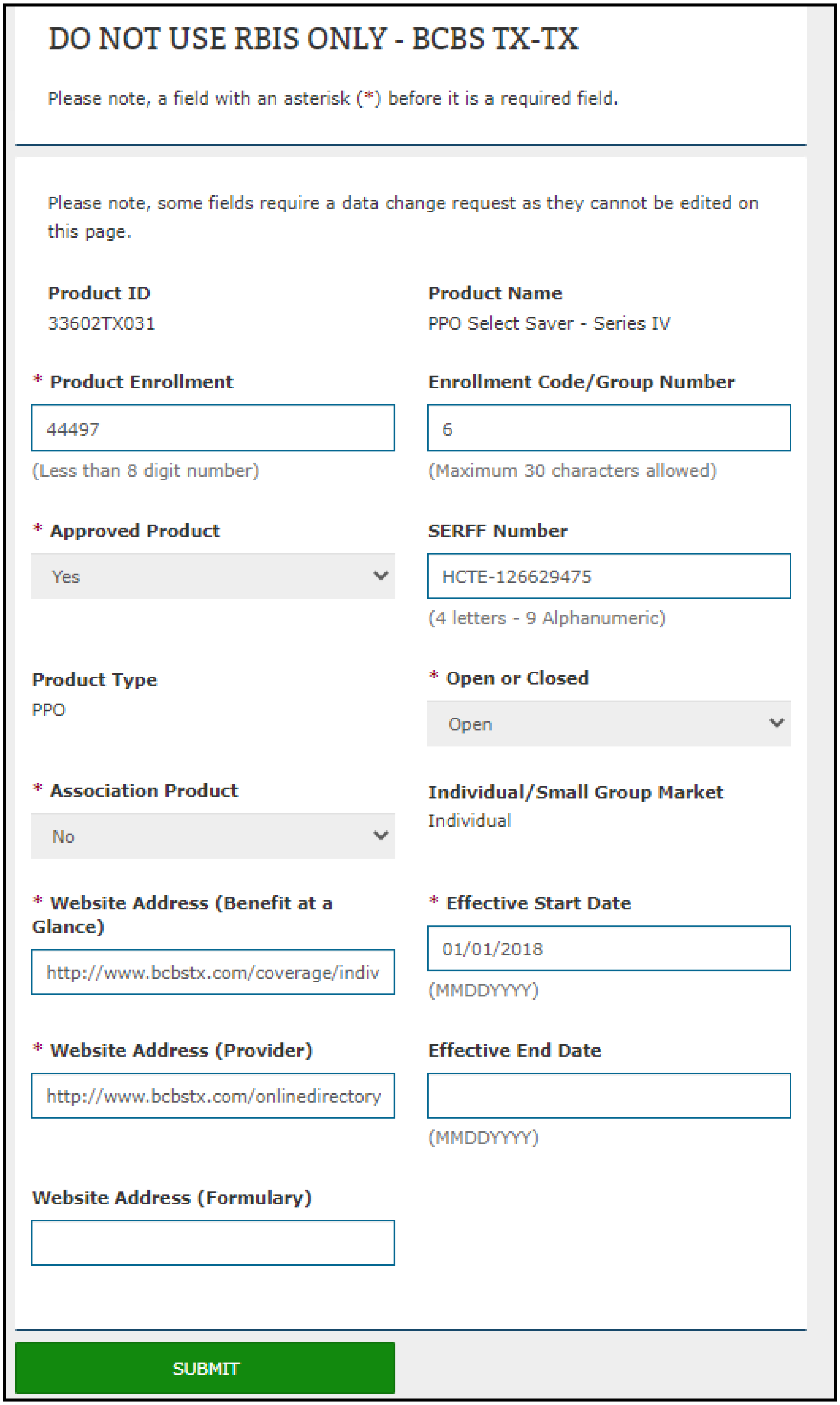
4. The View Product Data field is displayed. If data needs to be changed scroll to bottom of page and select **Edit Product Information** Button (Figure 58).

Figure 58: View Product Data Page



5. Edit Product Information Page is displayed, and user can edit the fields. Once the edits have been completed, Select the Submit Button (Figure 59).

Figure 59: Edit Product Information Page



DO NOT USE RBIS ONLY - BCBS TX-TX

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

Please note, some fields require a data change request as they cannot be edited on this page.

Product ID
33602TX031

Product Name
PPO Select Saver - Series IV

* **Product Enrollment**
44497
(Less than 8 digit number)

Enrollment Code/Group Number
6
(Maximum 30 characters allowed)

* **Approved Product**
Yes

SERFF Number
HCTE-126629475
(4 letters - 9 Alphanumeric)

Product Type
PPO

* **Open or Closed**
Open

* **Association Product**
No

Individual/Small Group Market
Individual

* **Website Address (Benefit at a Glance)**
http://www.bcbstx.com/coverage/indiv

* **Effective Start Date**
01/01/2018
(MMDDYYYY)

* **Website Address (Provider)**
http://www.bcbstx.com/onlinedirectory

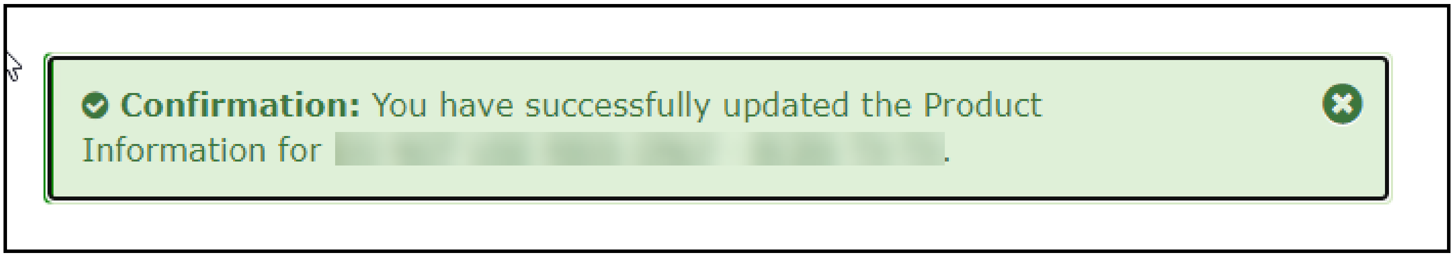
Effective End Date
(MMDDYYYY)

Website Address (Formulary)

SUBMIT

6. Confirmation Message is displayed at top of page that says Confirmation: You have successfully updated the product information for <insert issuer name and state> (Figure 60).

Figure 60: Edit Product Confirmation



15 View and Request Component IDs

Users can request a Standard Component ID (SCID) used to identify an insurance plan prior to it being submitted as an On exchange, Off exchange, or both Plan.

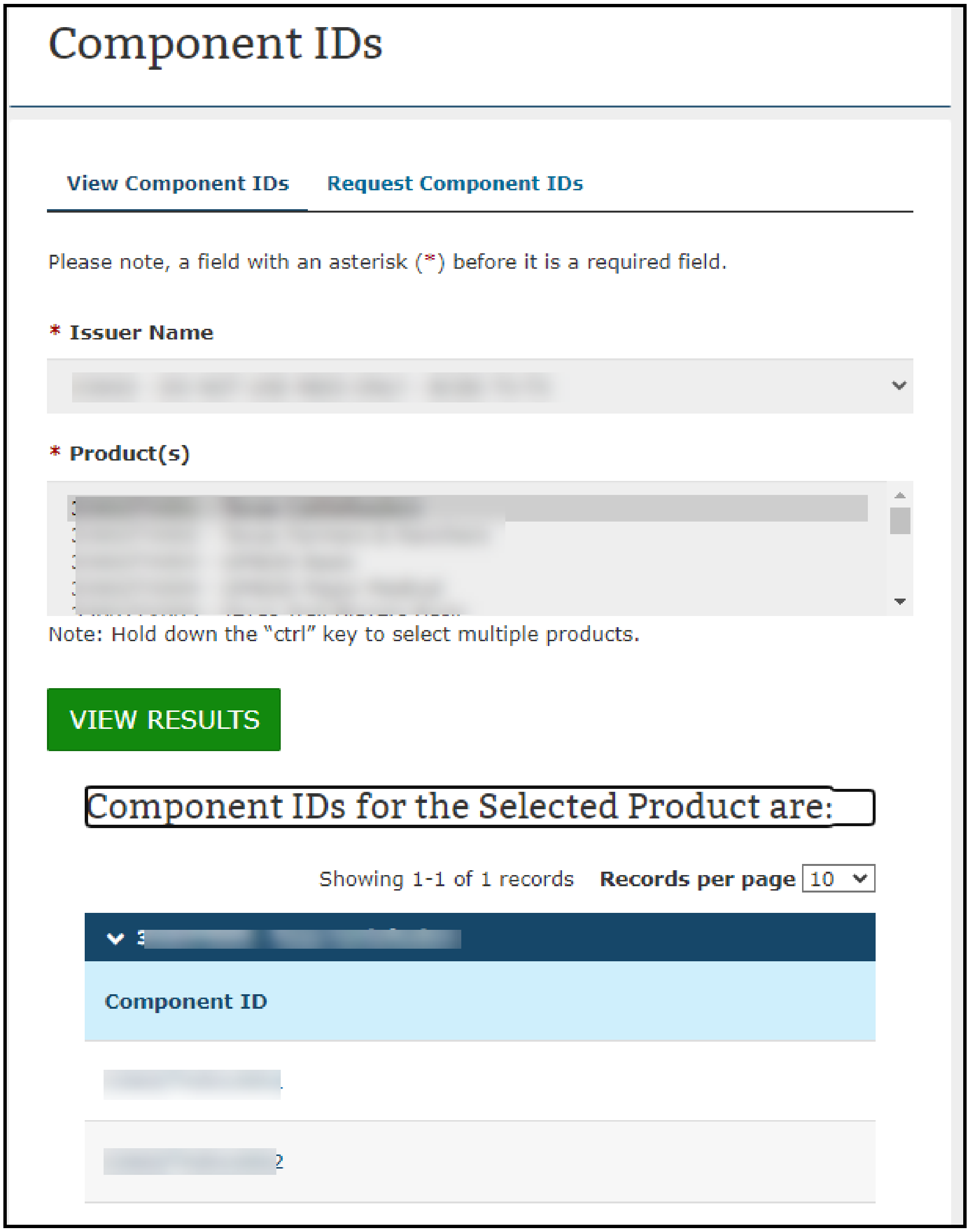
Important Information:

- Must be assigned to an issuer that already exists in HIOS with the Issuer Submitter Role to request Component IDs.
- The Numbers are auto generated.

To View and Request Component IDs:

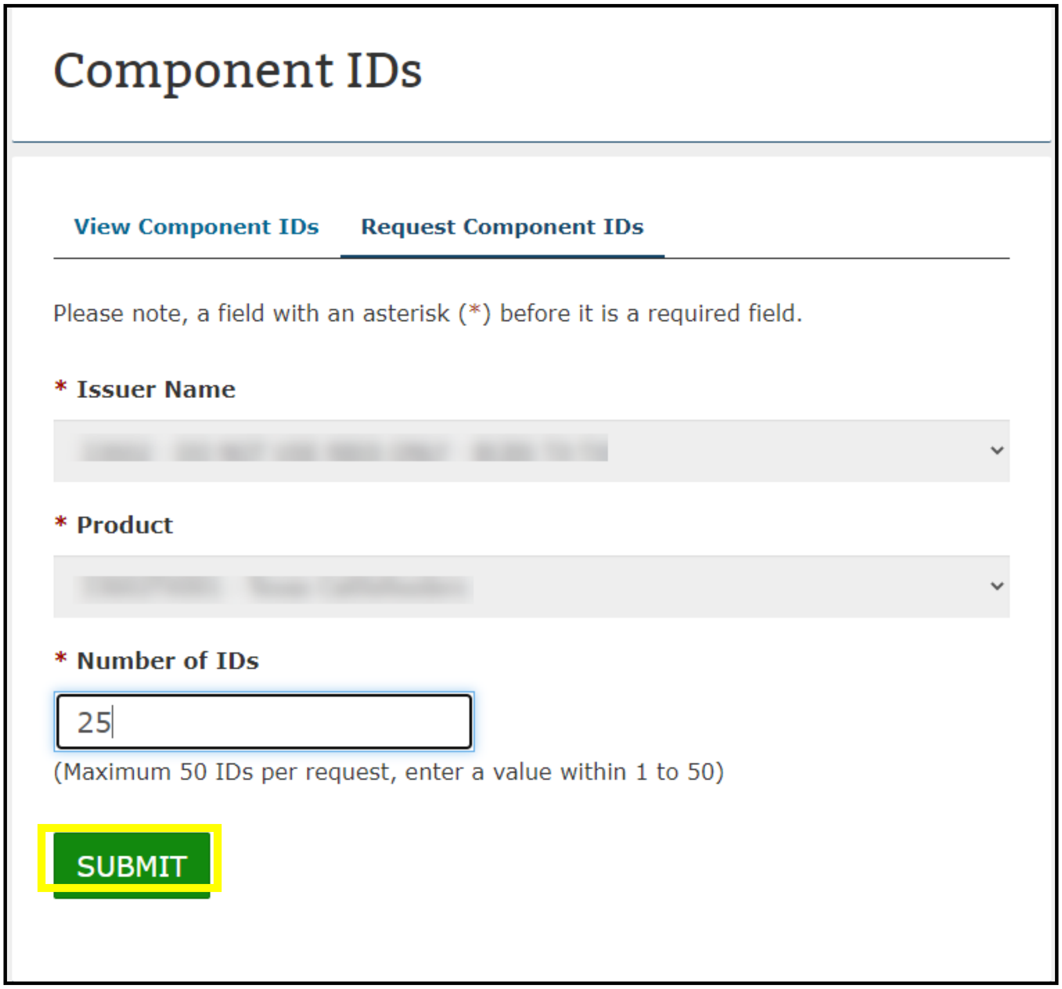
1. From the PF Homepage Select **Component IDs** Card.
2. Select Issuer from Issuer Name Drop-Down (Note if only assigned to one issuer it will selected by default) and then Select **Product(s)** from the Product List.
3. Select View Results Button (Figure 61).

Figure 61: View Component IDs



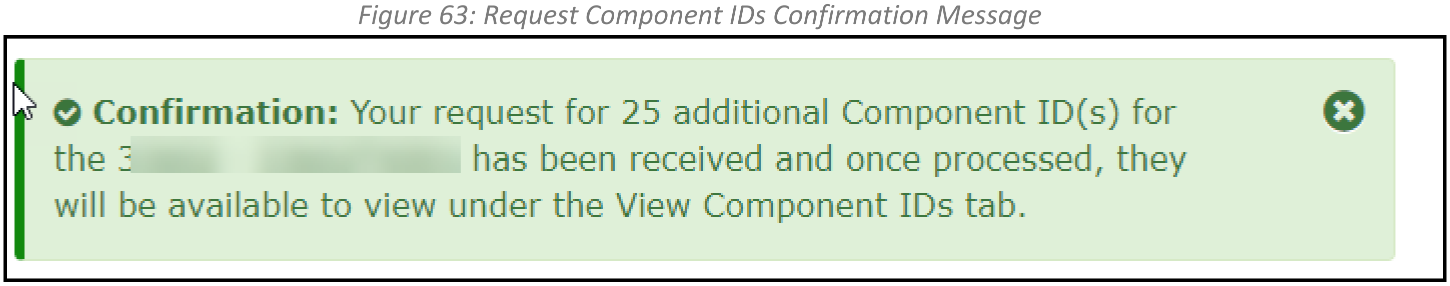
4. Select **Request Component IDs** Tab.
5. Select **Issuer** from Issuer Name Drop-Down and then Select **Product** from Product Drop-Down.
6. Input number of IDs being requested (maximum of 50 at a time).
7. Select **Submit** Button (Figure 62).

Figure 62: Request Component IDs



8. Confirmation is displayed at top of page that says: Confirmation: Your Request for <insert number> additional Component ID(s) for the <insert Issuer ID – product name> has been received and once processed, they will be available for view under the View Component IDs tab (Figure 63).

Figure 63: Request Component IDs Confirmation Message



16 Download Pre-Populated Template

Product Information in Plan Finder is updated every quarter. There are three available mechanisms for Issuers to submit product: Pre-populated (Excel) Template, XSD templates for XML Submissions, and web-entry updates.

Users are able to download a pre-populated Excel Template with the selected Issuer's latest submitted data and save the file.

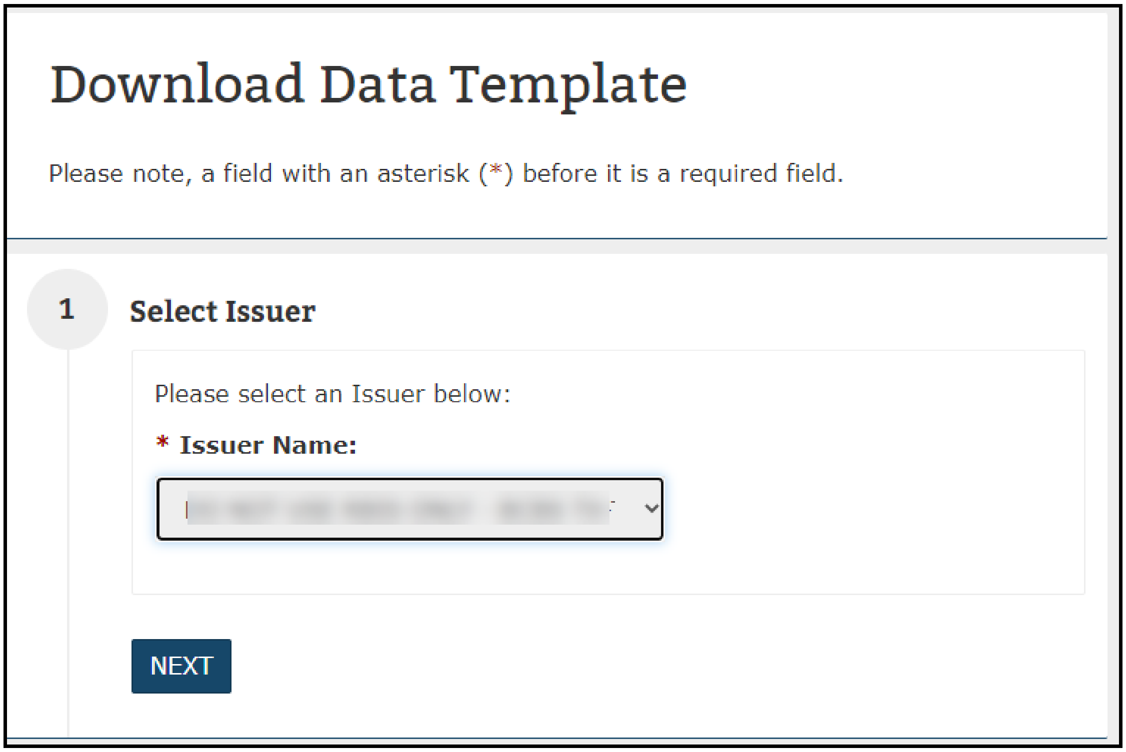
Important Information:

- Must be assigned to an issuer that already exists in HIOS with the Issuer Submitter to download the template.

To Download the Template:

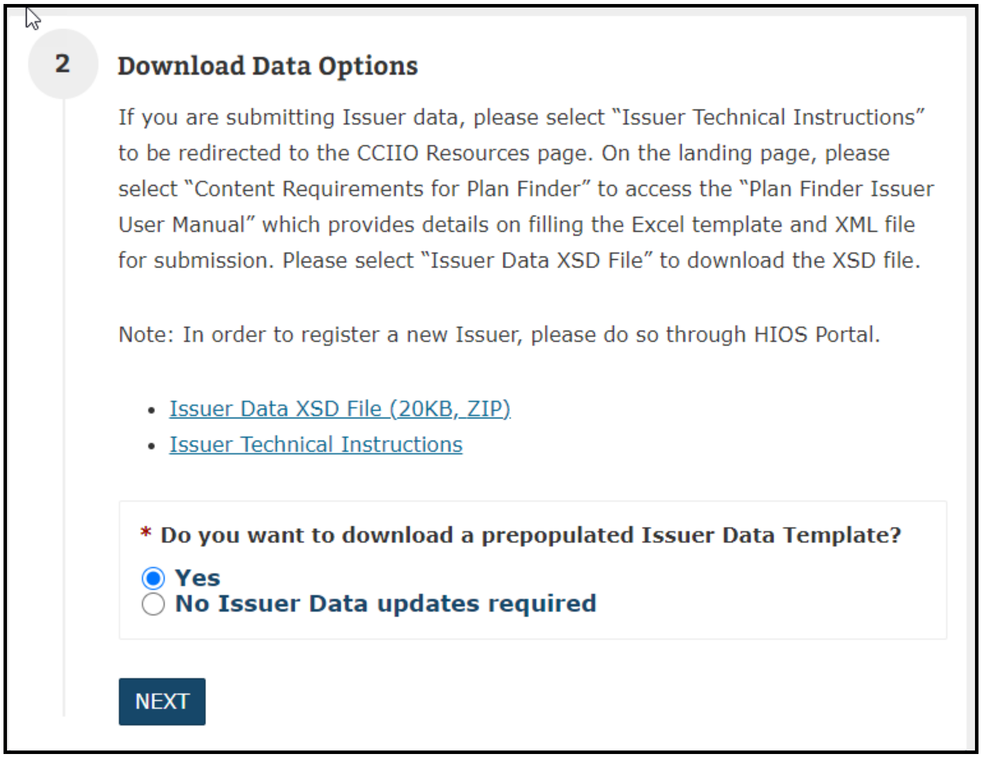
1. From the PF Homepage Select **Download Data Template** Card.
2. Select Issuer from Issuer Name Drop-Down (Note if only assigned to one issuer it will selected by default) and then Select **Next** button (Figure 64).

Figure 64: Step 1 Download Data Template



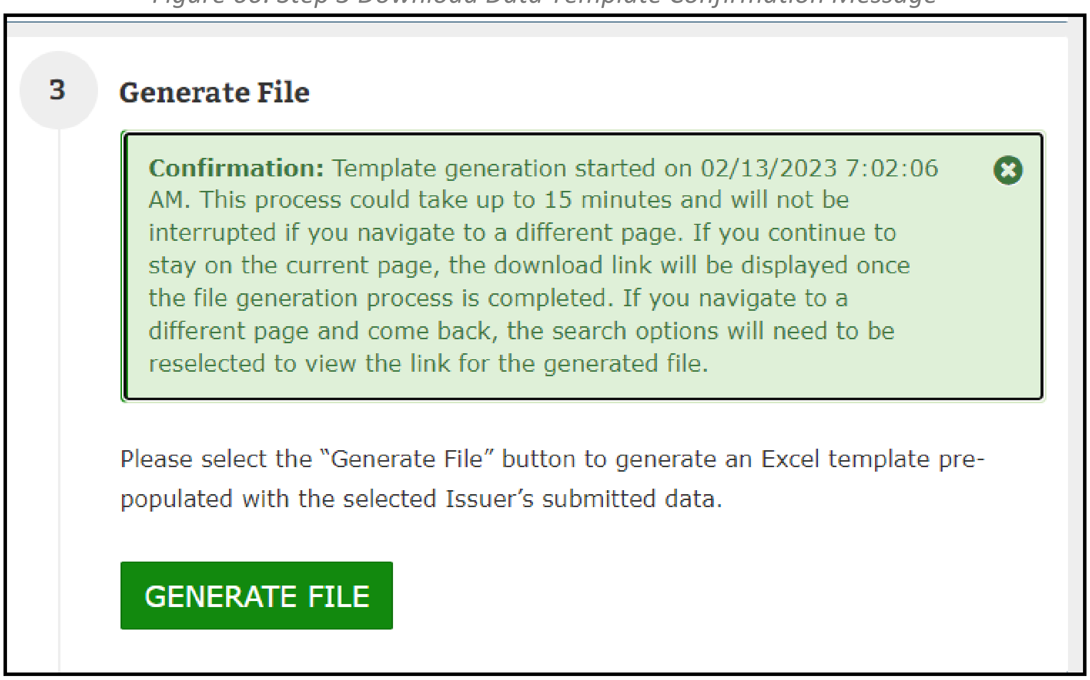
3. Select **Yes** Radio Button and then Select Next (Figure 65).

Figure 65: Step 2 Download Data Template



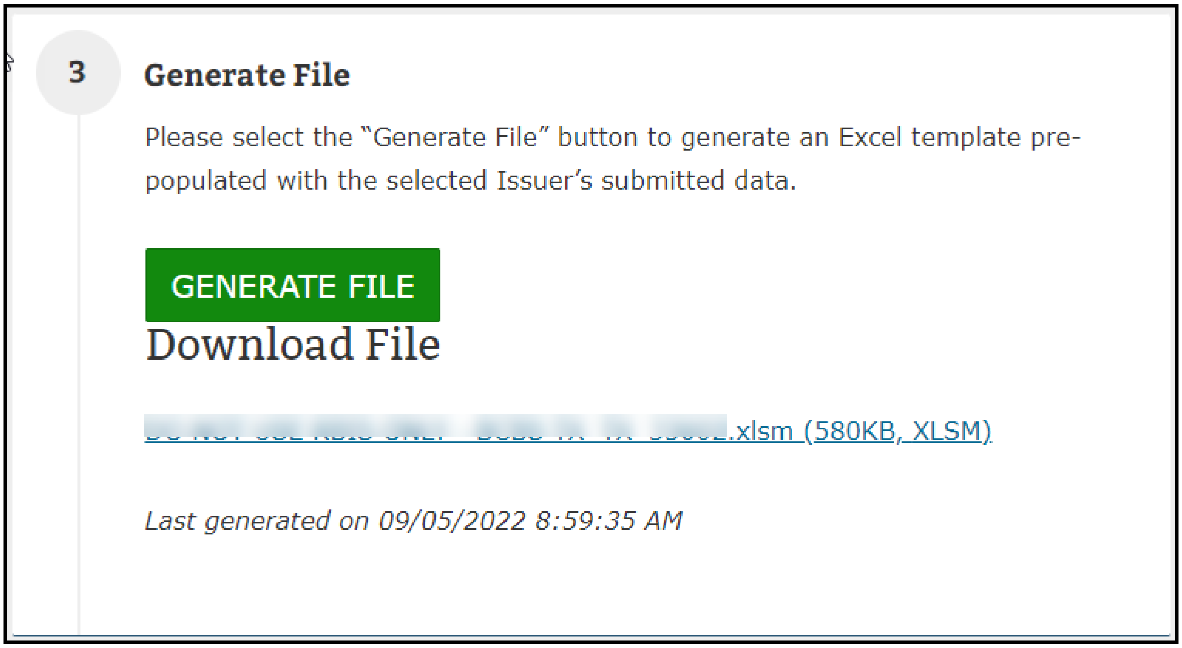
4. Select **Generate File** Button. Confirmation Message is received that says: Confirmation: Template generation started on <Insert date and time>. This process could take up to 15 minutes and will not be interrupted if you navigate to a different page. If you continue to stay on the current page, the download link will be displayed once the file generation process is completed. If you navigate to a different page and come back, the search options will need to be reselected to view the link for the generated file (Figure 66).

Figure 66: Step 3 Download Data Template Confirmation Message



5. Select **Hyperlink** that contains Issuer Name, State, and Issuer ID (Figure 66). Follow the file download instructions to save to local computer (Figure 67).

Figure 67: Step 3 Download Data Template Hyperlink



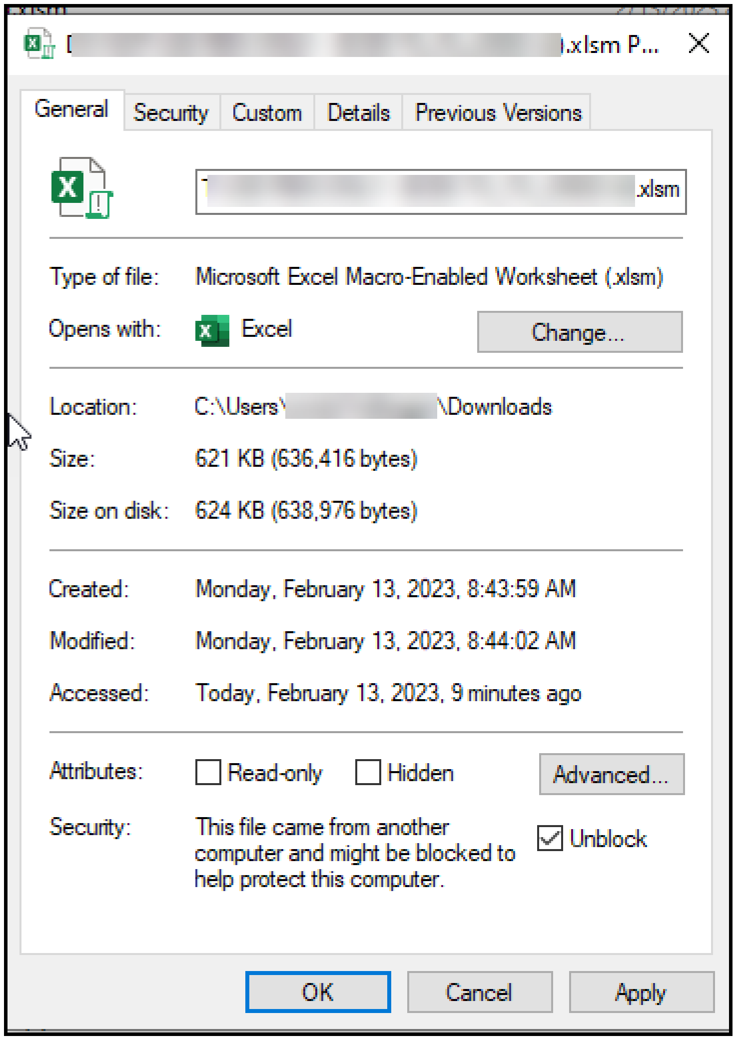
17 File Macro Settings

The Pre-populated Issuer Template will need to have macros enabled after download prior to opening the file and making the edits to existing data and/or creating new products.

Enable Macros:

1. Browse to location where file from Section 16 was saved, Right-Click and Select **Properties** and then Select the Check-box next to the word Unblock (Figure 68).

Figure 68: Properties Menu



2. Select **Apply** Button and Close the Properties Menu.

18 Validate, Finalize, and Upload Template

The Validate and Finalize macros are built into the template. The Validate functions performs the critical validations and will display red circles for cells that do not pass validation rules along with an error message pop-up. Once the validations are corrected, the red circles will disappear. When the workbook is complete and ready for submission, users will need to use the Validate and Finalize function to perform the critical validations and created the read-only finalized data file.

Important Information:

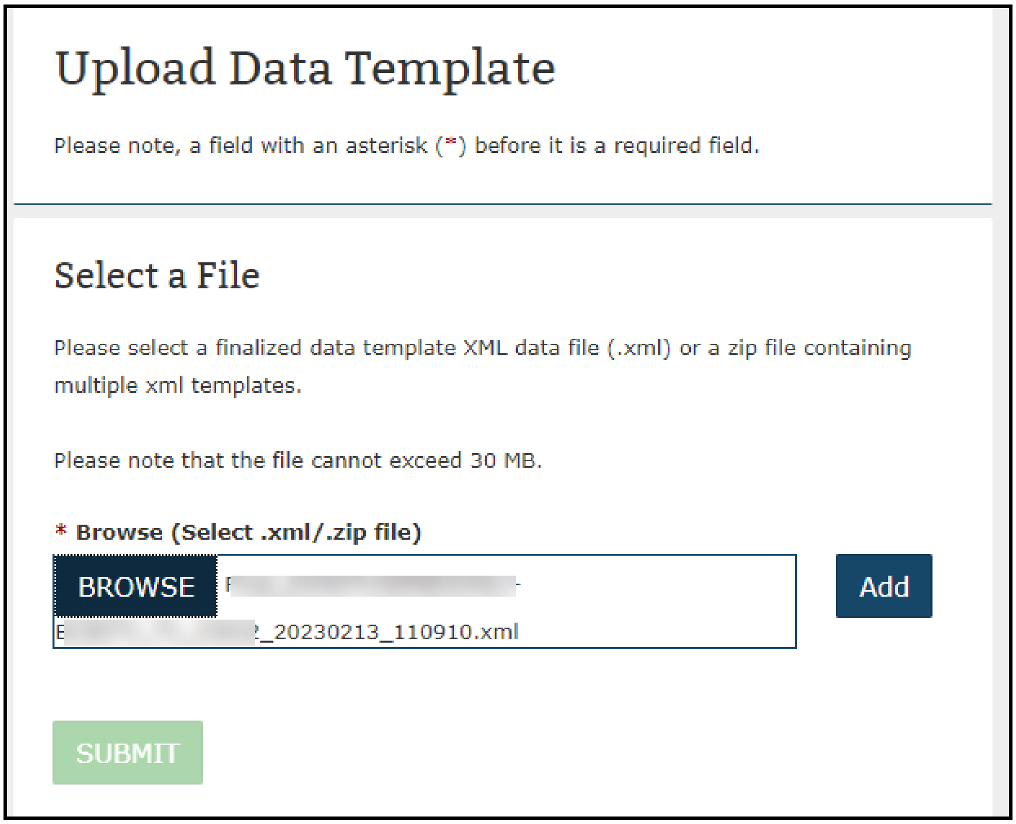
- Users need to submit the finalized data file in the following format: Final__<IssuerNameWithNoSpaces><StateAbbreviation>_<FiveDigitIssuerID>_<year><month><Day>_<HHMMSS>.xml Use of this naming convention is a requirement for a successful submission. If the name of the finalized file is modified, it will not be processed. (For Example: Final_TestIssuerTX_00000_20230104_110810.xml)

Edit Template and Upload xml:

1. Browse to location where file from Section 16 was saved and open it.
2. Select Enable Content.

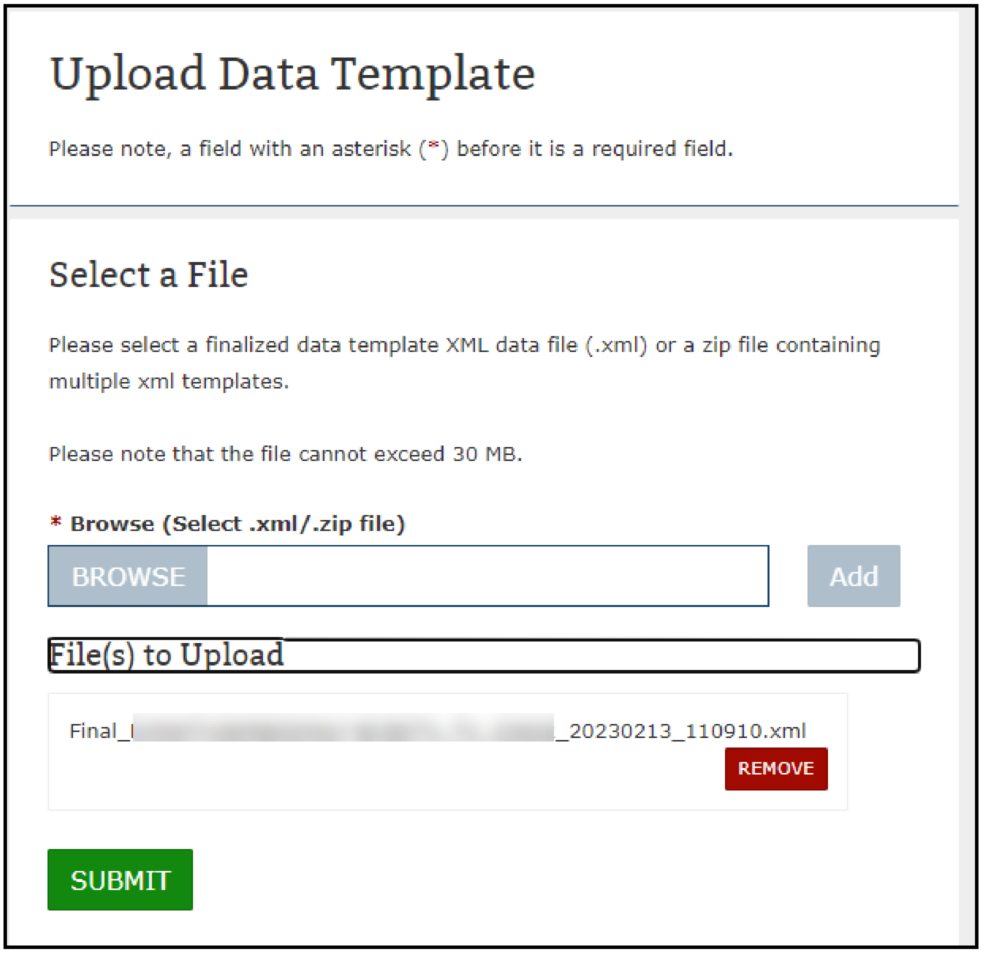
3. Make changes as needed to the Issuer General Info Sheet.
4. Make changes as needed to existing products on the Product Info Sheet.
5. Add new products as needed on the Product Info Sheet.
6. Select **Validate** Button.
7. Correct any errors if needed.
8. Select **Validate and Finalize** Button.
9. Login to the CMS Enterprise Portal (Refer to Section 6 if needed).
10. Select the **Plan Finder Product Data Collection (PF) Accordion** and then Select **Launch** Button.
11. Select the **Upload Data Template** Card.
12. Browse to the location of the xml file saved and select it.
13. Select **Add** Button (Figure 69).

Figure 69: Upload Data Template Page



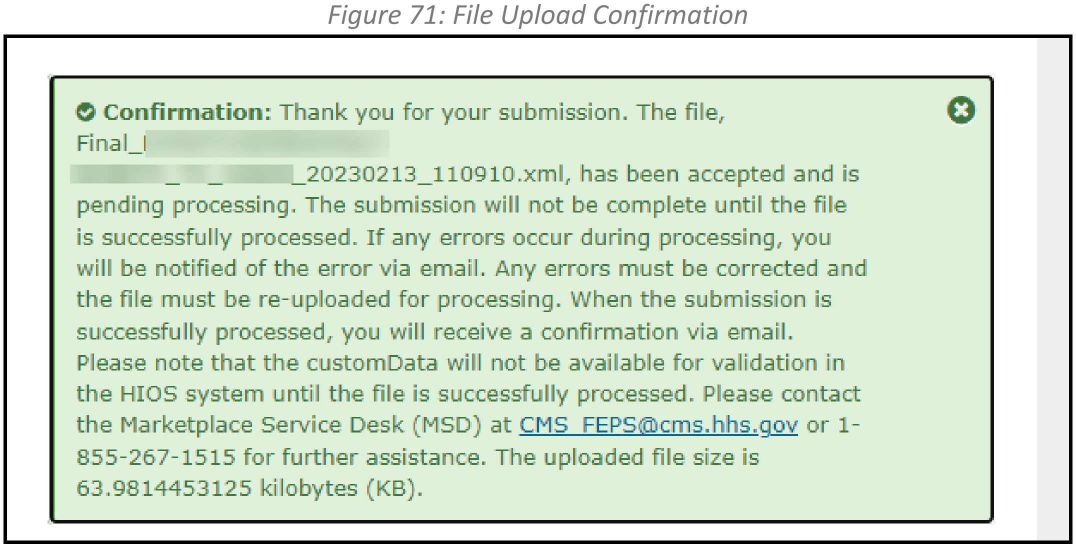
14. Select **Submit** button (Figure 70).

Figure 70: Upload Data Template Page Submit Button Enabled



15. Confirmation Message is displayed at top of page that says: Confirmation: Thank you for your submission. The file, Final_<IssuerName><StateAbbreviation>_<IssuerID>_<Year><Month><Day>_<HHMMSS>.xml, has been accepted and is pending processing. The submission will not be complete until the file is successfully processed. If any errors occur during processing, you will be notified of the error via email. Any errors must be corrected, and the file must be re-uploaded for processing. When the submission is successfully processed you will receive a confirmation via email. Please note that the custom Data will not be available for validation in the HIOS system until the file is successfully processed. Please contact the Marketplace Service (MSD) at CMS_FEPS@cms.hhs.gov or 1-855-267-1515 for further assistance. The uploaded file size is <insert number> kilobytes (KB) (Figure 71).

Figure 71: File Upload Confirmation



19 Access the QHP Modules for Plan Management Functions

To submit QHP templates to the Plan Management system user must have a role assigned for QHP Benefits and Service Area Module, QHP Issuer Module and/or QHP Rating Module.

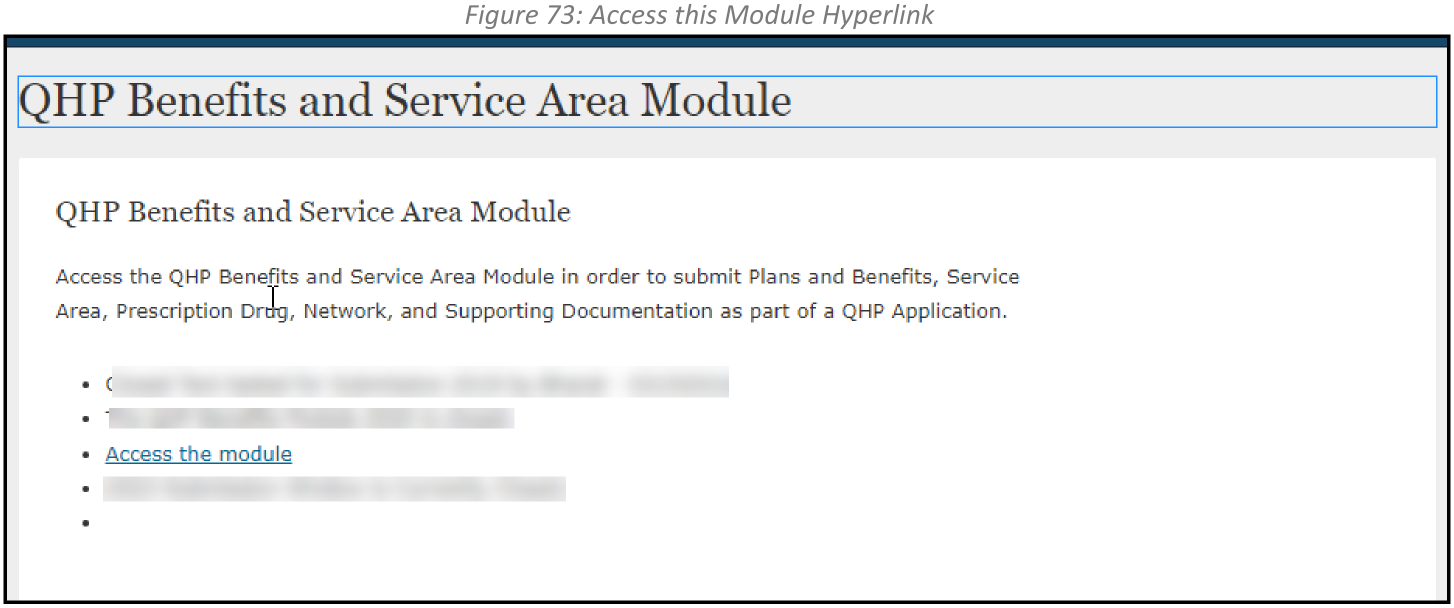
<u>Access QHP Modules:</u>

1. Login to the CMS Enterprise Portal (Refer to Section 6 if needed).
2. Select one of the of following accordions: QHIP Benefits and Service Area Module, QHP Issuer Module, or QHP Rating Module and then Select **Launch** Button (Figure 72).

Figure 72: QHP Modules

3. Select the **Access This Module** hyperlink (Figure 73).

Figure 73: Access this Module Hyperlink



20 Help Desk Information

Contact the CMS help desk at CMS_FEPS@cms.hhs.gov or 1-855-267-1515 if you have questions about setting up your account. You can typically expect a confirmation email on the same day and a full resolution within 1-2 weeks.

21 Frequently Asked Questions

Table 1: Frequently Asked Questions

Questions	Answers
Who can users contact for system support?	For Production system support, users can call the Marketplace Service Desk at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.
What contact information should users enter for the Plan Management, QHP submission?	Users must enter data in the Plan Finder Marketplace admin fields for this to be pulled into the Plan Management system. Refer to the **View and Edit Issuer Marketplace Information** section.
Why can't users have a Submitter and Validator role for an Issuer organization?	Users can have either a Submitter or Validator role for one Issuer organization. Data submission and validation contacts cannot be the same ONE person. There must be at least two contacts for the Issuer organization. The combination of Issuer Name, State, and Market Type is unique. **NOTE**: Attestation contacts cannot be any type of submission or validation contact for the same Issuer. The Plan Finder data template submission will fail and generate an email with an error.
Where can users find data templates for QHP submission?	Information about the QHP Application and requirements for data template submissions is available on the CMS website: https://www.cms.gov/cciio/programs-and-initiatives/health-insurance-marketplaces/qhp.html.
What are the system requirements for data submission?	Users must have Microsoft Excel installed on their computer and enable macro security settings.
Why do users see a red circle(s) on the submission template?	When users select the **Validate and Finalize** button, the file template will indicate missing required fields. The template will not allow users to **Validate and Finalize** until all field validation errors have been addressed.
Why can't users edit the Issuer ID?	The Issuer ID cannot be changed since it is a primary key to other HIOS modules.
Why can't users update Product data such as Product Type and Market Type?	Product data such as Product Type and Market Type cannot be updated via the Plan Finder user interface. If a change to this information is needed, a new product needs to be created.

Questions	Answers
Can users delete a product?	Users cannot edit the Product Name or the Product ID. Deletion of a product must be submitted to CMS for approval.