

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

The screenshot displays the CMS.gov Enterprise Portal login and registration interface. At the top, the header includes the CMS.gov logo and 'Enterprise Portal' text, along with links for Applications, Help, and About. The main content area has a dark blue overlay with a login form. The form includes a 'Login' link, a 'Login with PIV Card' button, and a 'CMS.gov Enterprise Portal' logo. Below the logo are two input fields: 'User ID is a required field' and 'Password is a required field'. A checkbox labeled 'I agree to the Terms & Conditions' is checked. A green 'Login' button is positioned below the checkbox. At the bottom of the form, there are links for 'Forgot your User ID or your Password?' and 'Need to unlock your account?'. A blue button labeled 'New User Registration' is located below the login form and is highlighted with a yellow border. In the bottom right corner, there is a blue button labeled 'How can I help you?'.

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

Figure 2: Select HIOS Application

The screenshot shows the 'Step #1: Select Your Application' page on the CMS.gov Enterprise Portal. The header includes the CMS.gov logo and 'Enterprise Portal' text, along with links for Applications, Help, and About. The main content area has a white background with a title 'Step #1: Select Your Application' and a subtitle 'Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.' Below the subtitle is a dropdown menu titled 'Select Your Application'. The dropdown menu is open, showing a list of applications: 'HETS Collaboration Tools (JIRA/Confluence)', 'HICS', 'HIOS', 'Host Access Transformation Services (HATS)', 'IC-Innovation Center', and 'IDM Reports'. The 'HIOS' application is highlighted with a yellow border.

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

Figure 3: Agree to Terms & Conditions

CMS.gov | Enterprise Portal Applications Help About

Step #1: Select Your Application

Step 1 of 3 - Select your application from the dropdown. You will then need to agree to the terms & conditions.

HIOS

Application Description: Health Insurance Oversight System. The Health Insurance Oversight System is the federal government's primary data collection vehicle for regulated health insurance companies. It is used to register companies and their products, obtain identification numbers and report medical loss ratio and other company data. Additionally, HIOS is used for reporting by States and assister organizations for PPACA grant activities.

Terms & Conditions
 OMB No.0938-1236 | Expiration Date: 08/31/2025 | Paperwork Reduction Act
Consent to Monitoring
 By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We encourage you to read the [HHS Rules of Behavior](#).
[Protecting Your Privacy](#)

☒ I agree to the Terms and Conditions

Next

How can I help you?

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

Figure 4: Register Your Information

CMS.gov | Enterprise Portal Applications Help About

Step #2: Register Your Information

Step 2 of 3 - Please enter your personal and contact information.

All fields are required unless marked (optional).

Enter First Name Enter Middle Name (optional) Enter Last Name Suffix (optional)

Select Birth Month Select Birth Date Select Birth Year

Is Your Home Address U.S. Based?
☒ Yes ☐ No

Enter Home Address Line 1 Enter Home Address 2 (optional)

Enter City Select State Enter ZIP Code Enter ZIP+4 Code (optional)

Enter Email Address Confirm Email Address

Enter Phone Number

Back Next Cancel

How can I help you?

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

Figure 5: Create User ID & Password

Step #3: Create User ID, Password & Security Question/Answer

Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer.

Enter User ID

Enter Password  Confirm Password 

Security answer to be used in case you forget your password or you need to unlock your account.

Select Your Security Question 

Enter Security Answer

[Back](#) [Next](#) [Cancel](#)

7. Review the Registration Summary Page and **ensure all the information is correct**. 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

CMS.gov Enterprise Portal [Applications](#) [Help](#) [About](#) [E-Mail Alerts](#)

Registration Summary

Please review your information and make any necessary changes before submitting.

HIOS/TPE: Health Insurance Oversight System 

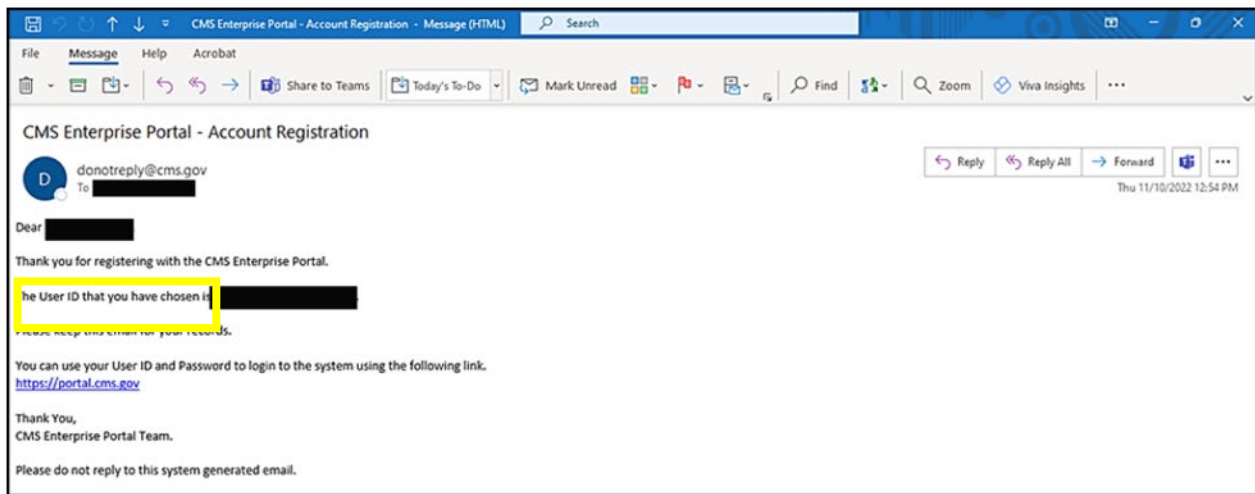
All fields are required unless marked 'Optional'.

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

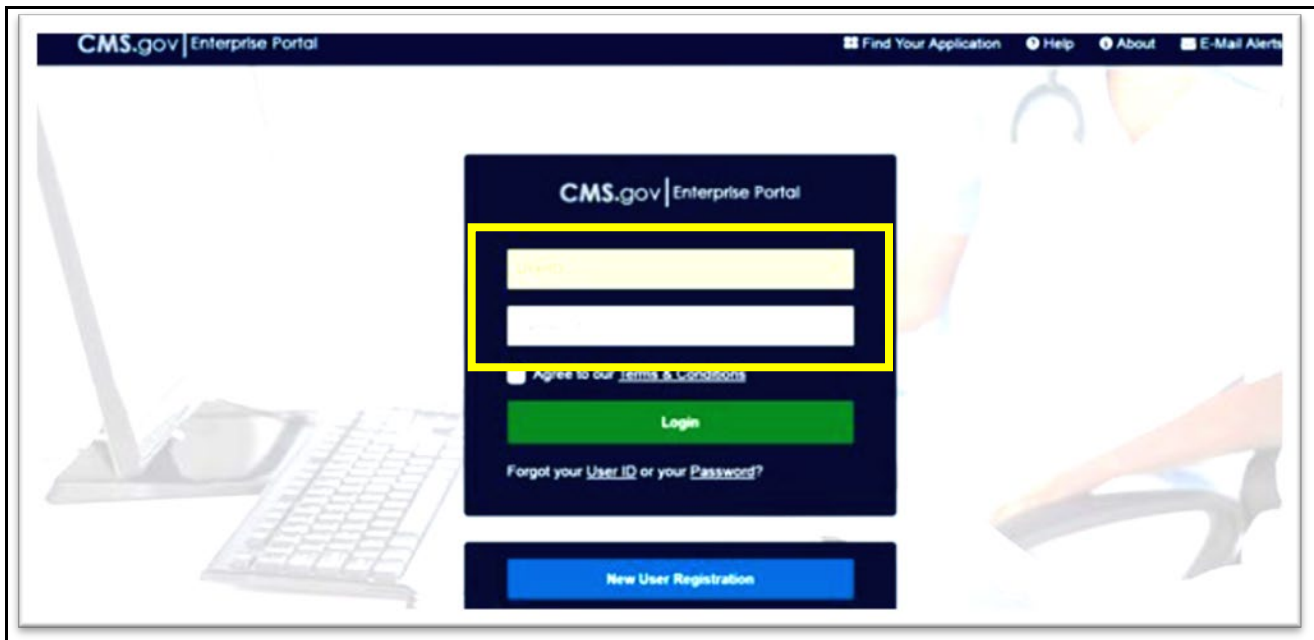
Figure 7: Account Registration Email



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

Register Multi-Factor Authentication (MFA) Device

Adding a MFA Code to your login, also known as Multi-Factor Authentication (MFA), can make your login more secure by providing an extra layer of protection to your User ID and Password.

Select the MFA device type that you want to use to login

Please note that you are only allowed two attempts to register your MFA device. If you are unable to register your MFA device within two attempts please log out, then log back in to try again.

Text Message (SMS)

Text Message (SMS)

The SMS option will send your MFA Code directly to your mobile device via a text message. This option requires you to provide a ten (10) digits U.S. phone number for a mobile device that is capable of receiving text messages. Carrier service charges may apply for this option.

Enter Phone Number

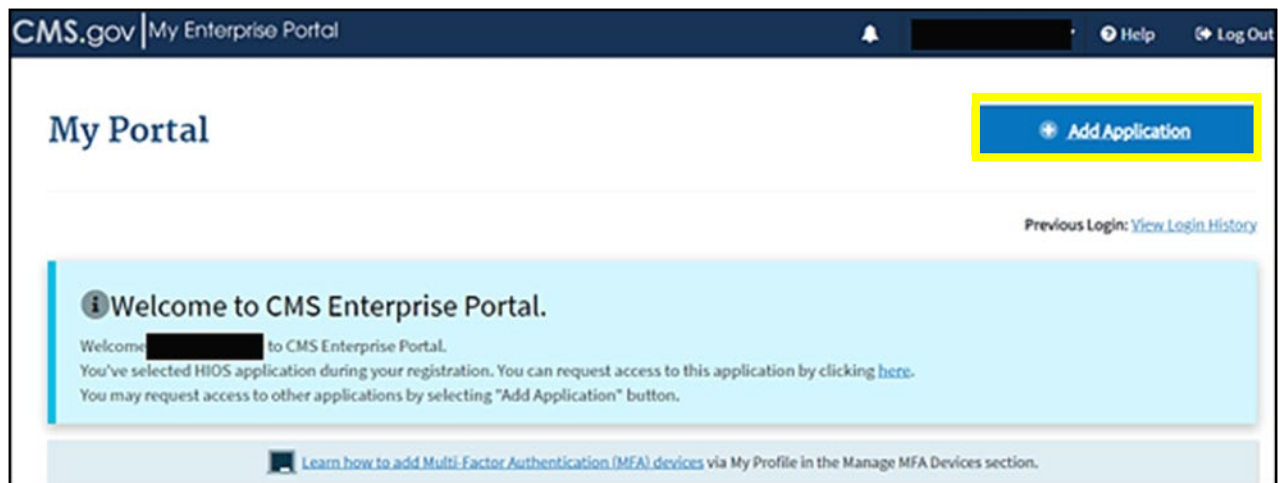
Send MFA Code Cancel

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

CMS.gov | My Enterprise Portal

My Apps

Help Log Out

Request Application Access

The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access.

You can review your current roles and pending role requests in [My Access](#).

1 Select an Application

Application

HIOS

Application Description: Health Insurance Oversight System. The Health Insurance Oversight System is the federal government's primary data collection vehicle for regulated health insurance companies. It is used to register companies and their products, obtain Identification numbers and report medical loss ratio and other company data. Additionally, HIOS is used for reporting by States and assister organizations for PPACA grant activities.

[Help Desk Information](#)

Next

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

Figure 12: Select the HIOS User Role

CMS.gov | My Enterprise Portal

My Apps

Help Log Out

Request Application Access

The following is the step-by-step process for requesting a role in a CMS Enterprise Portal application. A summary of each step taken will be shown after each step. You will be presented with all your role related information to review at the last step. Please note that the number of steps and the questions asked will vary depending on the role that you are requesting and your current level of access.

You can review your current roles and pending role requests in [My Access](#).

1 Select an Application ✓ Completed

✓ HIOS Edit

2 Select a Role

Role

HIOS User

Role Description: HIOS User

Next

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

Figure 13: Begin Identity Verification

The screenshot shows the CMS.gov My Enterprise Portal interface. At the top, there's a navigation bar with 'CMS.gov | My Enterprise Portal', 'My Apps', a user profile for 'Anna Coppedge', and links for 'Help' and 'Log Out'. The main content area displays a progress bar with five steps: 1. HIOS (checked), 2. Select a Role (checked), 3. Complete Identity Verification (active), 4. Enter Role Details, and 5. Enter Reason for Request. Under step 3, there's a section titled 'Identity Verification' with a message: 'This role requires an additional level of verification. You will be asked to provide additional information to verify your identity. Please select "Launch" to begin the identity verification process. You will return to the next step below when identity verification is complete.' A blue 'Launch' button is highlighted with a yellow border. To the right of the progress bar, there's a 'Completed' status and an 'Edit' link. A 'Top' button is located at the bottom right of the main content area.

4 Identity Verification

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

Figure 14: Step # 1 - Identity Verification Overview

The screenshot shows the 'Step #1: Identity Verification Overview' page. The title is 'Step #1: Identity Verification Overview'. Below the title, there's a paragraph: 'To protect your privacy, you will need to complete Identity Verification successfully, before requesting access to the selected role. Below are a few items to keep in mind.' This is followed by a numbered list of three items: 1. Ensure that you have entered your legal name, current home address, primary phone number, date of birth and email address correctly. We will only collect personal information to verify your identity with Experian, an external Identity Verification provider. 2. Identity Verification involves Experian using information from your credit report to help confirm your identity. As a result, you may see an entry called a "soft inquiry" on your Experian credit report. Soft inquiries do not affect your credit score and you do not incur any charges related to them. 3. You may need to have access to your personal and credit report information, as the Experian application will pose questions to you, based on data in their files. For additional information, please see the Experian Consumer Assistance website - <http://www.experian.com/help/>. Below the list, there's a paragraph: 'If you elect to proceed now, you will be prompted with a Terms and Conditions statement that explains how your Personal Identifiable Information (PII) is used to confirm your identity. To continue this process, select "Next".' At the bottom, there are two buttons: a green 'Next' button and a blue 'Cancel' button. The 'Next' button is highlighted with a yellow border.

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

MS.gov | My Enterprise Portal

My Apps

Help Log Out

Step #2: Accept Terms & Conditions

OMB No. 0938-1236 | Expiration Date: 08/31/2025 | [Paperwork Reduction Act](#)

Protecting Your Privacy

Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the [CMS Privacy Act Statement](#), which describes how we use the information you provide.

Personal information is described as data that is unique to an individual, such as a name, address, telephone number, Social Security Number, and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal information to verify your identity. Your information will be disclosed to Experian, an external authentication service provider, to help us verify your identity. If collected, we will validate your Social Security Number with Experian only for the purposes of verifying your identity. Experian verifies the information you give us against their records. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password.

HHS Rules of Behavior

We encourage you to read the [HHS Rules of Behavior](#), which provides the appropriate use of all HHS information technology resources for Department users, including Federal employees, contractors, and other system users.

☒ I agree to the Terms & Conditions

Back Next Cancel

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

CMS.gov | My Enterprise Portal

My Apps

Help Log Out

Step #3: Enter Your Information

Enter your legal first name and last name, as it may be required for Identity Verification.
All fields are required unless marked (optional).

First Name [Redacted] Middle Name (optional) [Redacted] Last Name [Redacted] Suffix (optional) [Redacted]

Enter Social Security Number [Redacted] Birth Month [Redacted] Birth Date [Redacted] Birth Year [Redacted]

Required field.

Is Your Address US Based?
☒ Yes ☐ No

Home Address Line 1 [Redacted] Home Address Line 2 (optional) [Redacted]

City [Redacted] State [Redacted] ZIP Code [Redacted] ZIP+4 Code (optional) [Redacted]

Phone Number [Redacted]

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

The screenshot shows the CMS.gov My Enterprise Portal interface. At the top, there's a navigation bar with 'CMS.gov My Enterprise Portal', 'My Apps', a notification bell, a user profile icon, 'Help', and 'Log Out'. The main content area shows a progress indicator with three steps: '2 Select a Role' (Completed), '3 Complete Identity Verification' (Completed), and '4 Enter Role Details' (Current step). Below the progress indicator, the 'Enter Role Details' section is shown. It includes a note 'All fields are required unless marked (optional).'. There are two input fields: a dropdown menu labeled 'Select Address location type' and a text input field labeled 'Address location type'. The dropdown menu is highlighted with a yellow border. A green 'Next' button is located at the bottom right and is highlighted with a yellow border.

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

Figure 19: Role Details Address Information

The screenshot shows the CMS.gov My Enterprise Portal interface. The header includes the CMS.gov logo, 'My Enterprise Portal', a 'My Apps' menu, a notification bell, a user profile icon, 'Help', and 'Log Out'. The main content area contains a form for address information with the following fields: 'Enter Email Address', 'Enter Address 1', 'Address 2 (optional)', 'Enter City', 'Enter State/Territory', 'Enter Zip Code', 'Zip Code Extension (optional)', 'Select Title (optional)' (dropdown), 'Select Suffix (optional)' (dropdown), 'Enter Phone Number', and 'Phone Ext (optional)'. A blue 'Next' button is highlighted at the bottom right, next to a 'Top' button.

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

The screenshot shows a form titled '5 Enter Reason for Request'. It features a large text area labeled 'Enter a Reason for Request' with a red border. Below the text area, it says 'Required field.' in red. At the bottom right, there is a green 'Submit' button (highlighted with a yellow box) and a 'Cancel' button. A 'Top' button is also visible.

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

Important Information

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

To Access the HIOS Home Page:

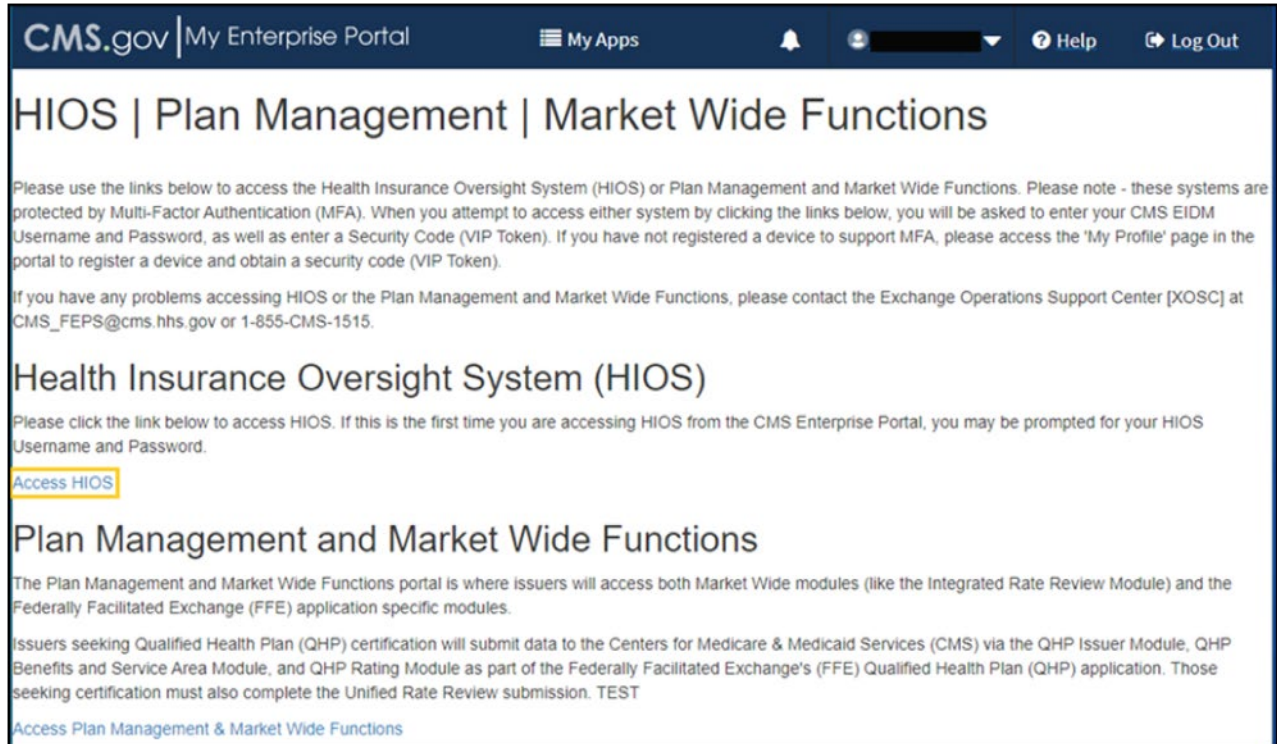
1. After requesting the HIOS application, **log-out of CMS Enterprise Portal and then login again**. On the My Portal homepage, the HIOS application will display. Select **HIOS**, then select **Overview** (Figure 21).

Figure 21: My Portal Page with HIOS Application



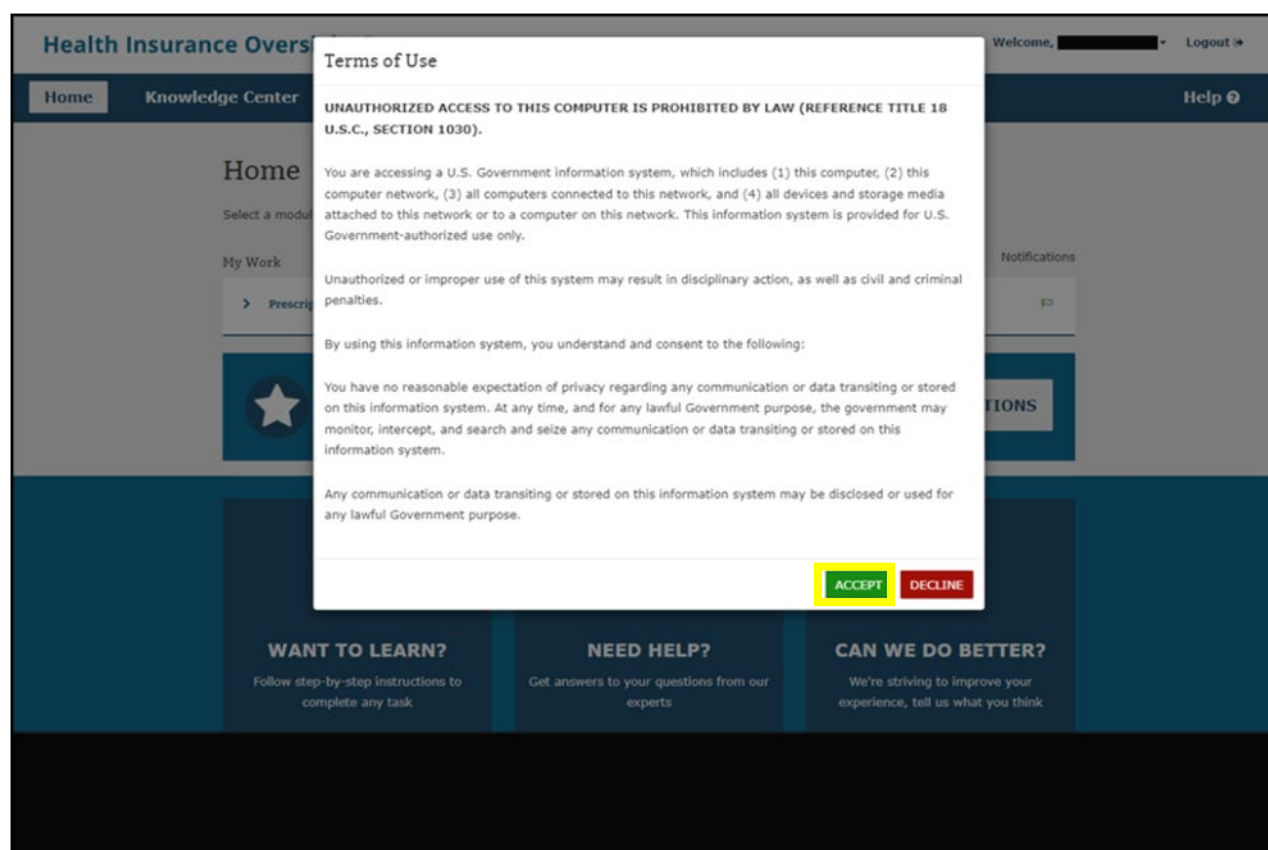
2. Select **Access HIOS** (Figure 22).

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

Users 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.

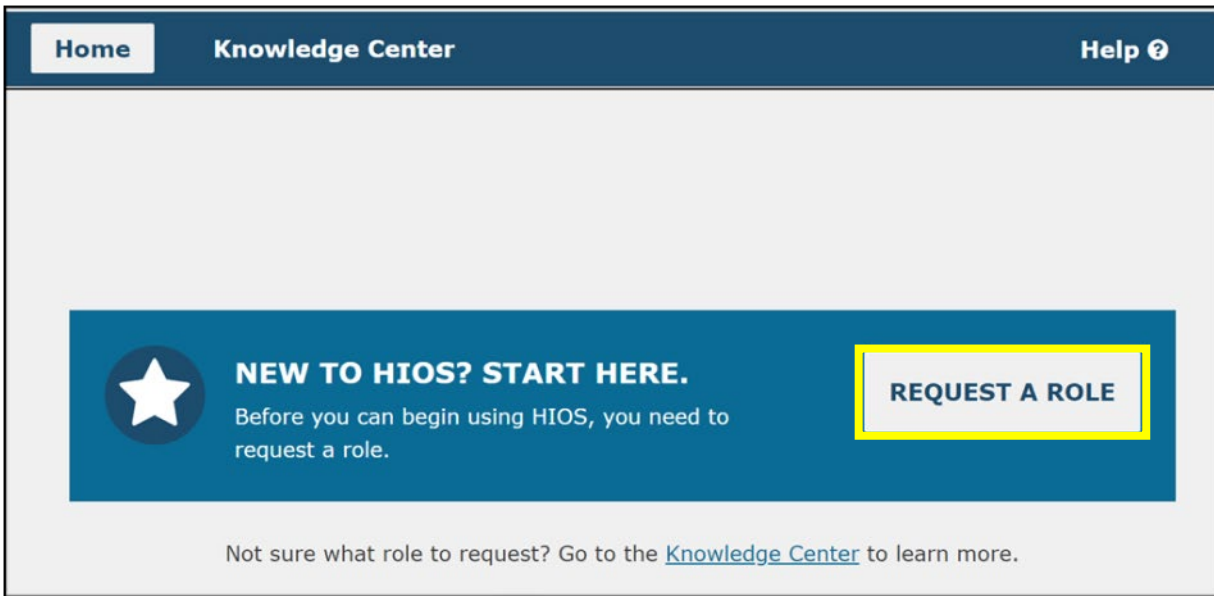
Important Information

- 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:

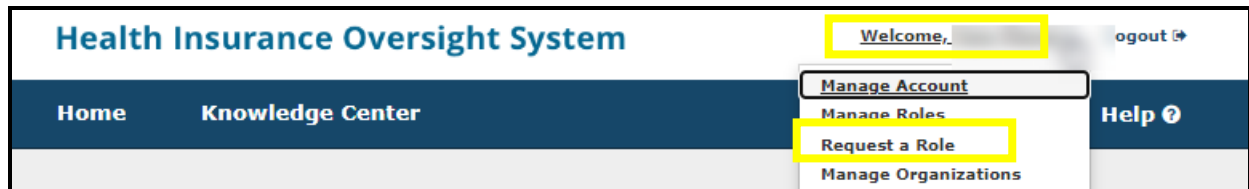
1. New users can select the **Request A Role** button on the page (Figure 24).

Figure 24: HIOS Homepage for New Users



- 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

1

Select a module

* Please select a module below:

HIOS Modules

☐ Agent Broker Compensation Data Collection	☐ Assister	☐ Enforcement and Consumer Protections	☐ External Review Election
☐ Form Filing	☐ HIOS Portal	☐ Market Conduct	☐ Marketplace Quality Module
☐ Medical Loss Ratio	☐ Minimum Essential Coverage	☐ Navigator Resources	☐ Non-Federal Governmental Plans
☐ Pharmacy Benefit Manager	☐ Plan Finder Product Data Collection	☐ Prescription Drug Data Collection (RxDC)	☐ Rate Review Grants
☐ Rate Review Justification	☐ Rates & Benefits Information System	☐ State Document Collection	☐ State Flexibility Grant

Plan Management & Market Wide Functions

☐ EDGE Server Management	☐ Financial Management	☐ Plan Management and Market Wide Functions	☐ Plan Validation
☐ QHP Benefits and Service Area Module	☐ QHP Issuer Module	☐ QHP Rating Module	☐ State Evaluation
☐ Unified Rate Review System			

NEXT

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

The screenshot shows the 'Request a Role' form in the 'Knowledge Center'. The header has 'Home', 'Knowledge Center', and 'Help ?' links. The main heading is 'Request a Role'. Below it, there are two paragraphs of instructions. The first paragraph says: '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.' The second paragraph says: 'Please note, you must first have an organization registered in HIOS in order to request access to a module.' The form is divided into two steps. Step 1 is 'Select a module' with the text 'Prescription Drug Data Collection (RxDC)' and a 'Revisit this step' button. Step 2 is 'Select a role' with the text '* Please select the role below:'. Under this, there is a radio button labeled 'RxDC Submitter'. A green 'NEXT' button is highlighted with a yellow box.

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

Figure 28: Add Association

The screenshot shows the 'Request a Role' form in the 'Knowledge Center'. The header has 'Home', 'Knowledge Center', and 'Help ?' links. The main heading is 'Request a Role'. Below it, there are two paragraphs of instructions. The first paragraph says: '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.' The second paragraph says: 'Please note, you must first have an organization registered in HIOS in order to request access to a module.' The form is divided into three steps. Step 1 is 'Select a module' with the text 'Prescription Drug Data Collection (RxDC)' and a 'Revisit this step' button. Step 2 is 'Select a role' with the text 'RxDC Submitter' and a 'Revisit this step' button. Step 3 is 'Add association' with the text 'To add an Association to this role request, you must search for it in the system.' Under this, there is a radio button labeled '* Association Type'. Below this, there are three radio buttons: 'HIOS Issuer ID' (highlighted with a yellow box), 'Organization with FEIN', and 'Organization without FEIN (Other Organization)'. A green 'NEXT' button is highlighted with a yellow box.

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 Section 8 below. After the organization has been approved, you will need to revisit section 7 to request the role.

Figure 29: Search for Association

The screenshot shows a three-step process for adding an association. Step 1 is 'Select a module' with 'Prescription Drug Data Collection (RxDC)' selected. Step 2 is 'Select a role' with 'RxDC Submitter' selected. Step 3 is 'Add association'. Under 'Add association', there are three radio button options for 'Association Type': 'HIOS Issuer ID' (highlighted with a yellow box), 'Organization with FEIN', and 'Organization without FEIN (Other Organization)'. Below these is a search section titled 'Search for association' with instructions to enter a 9-digit Federal EIN/TIN. A text input field and a 'SEARCH' button are present, both highlighted with a yellow box. A green 'NEXT' button is at the bottom.

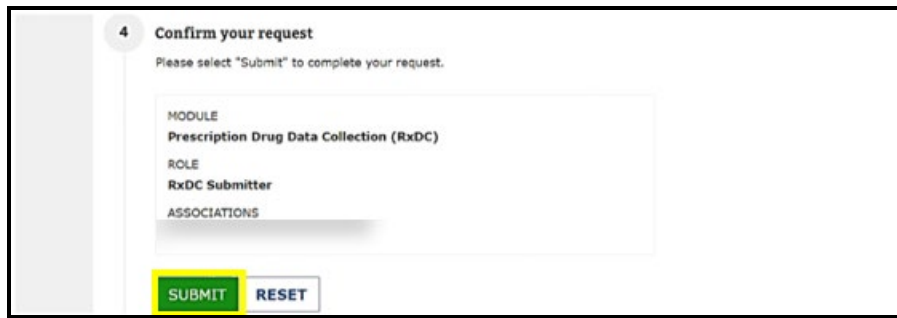
7. Select your Issuer ID from the results and select **Next** (Figure 30).

Figure 30: Association Search Results

The screenshot shows the results of the search. The 'HIOS Issuer ID' radio button is selected and highlighted with a yellow box. Below the search section, a box labeled 'Showing results for' contains a list of results. The first result is highlighted with a yellow box and shows a blue selection icon. A green 'NEXT' button is at the bottom.

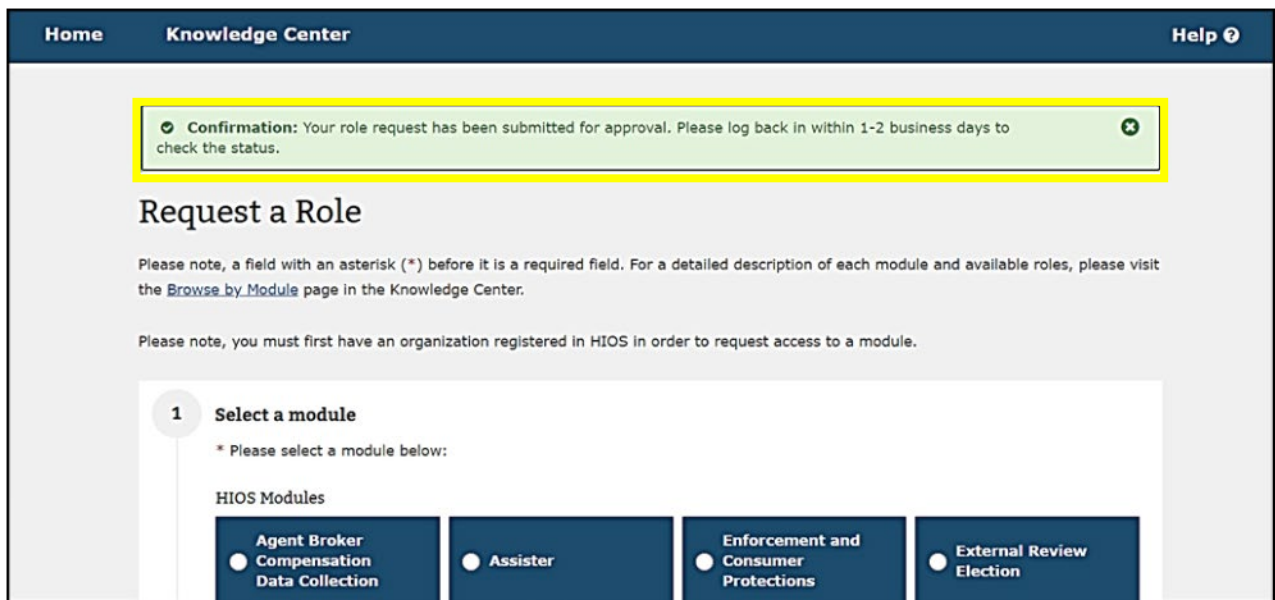
8. Review the information in the Confirm your request section and select **Submit** (Figure 31).
 - If the information is not correct, return to the step where the incorrect information was entered and make the necessary correction.

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

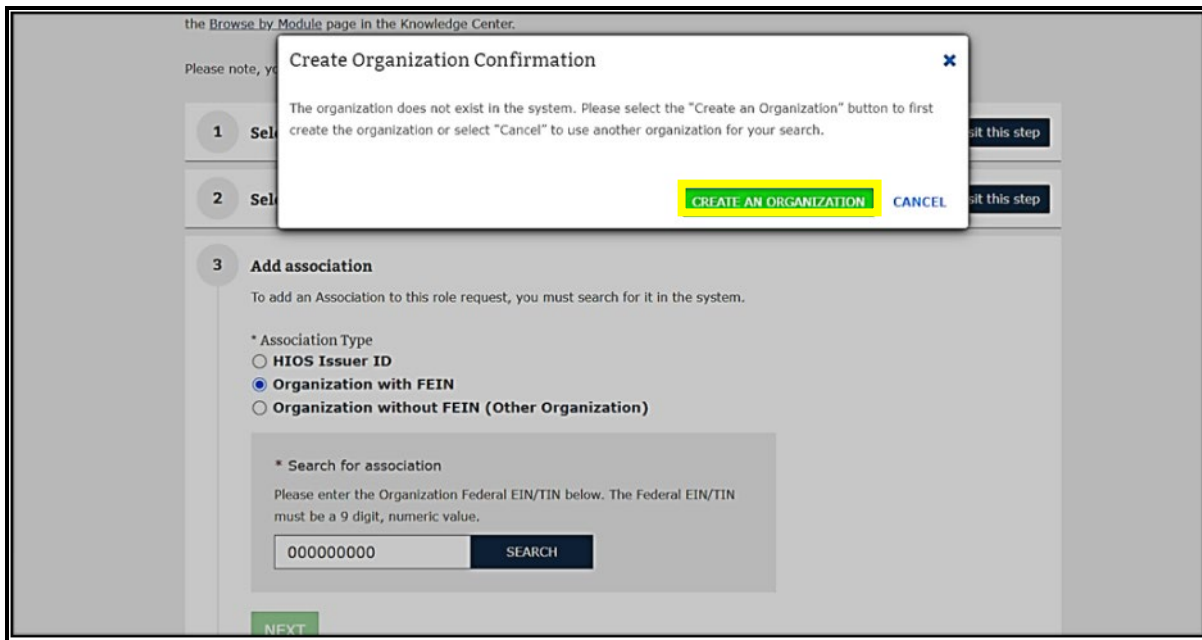
Important Information

- 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.

To create a new organization in HIOS:

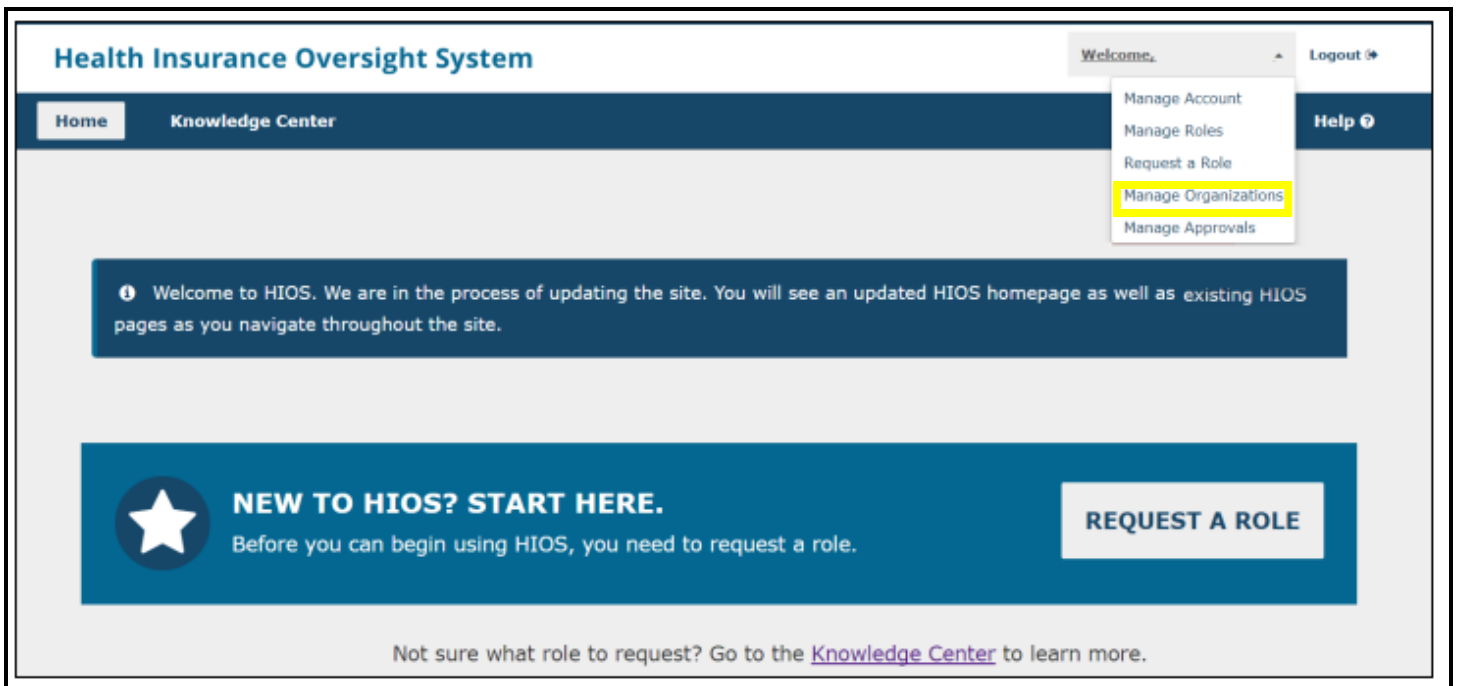
1. If your organization does not currently exist in HIOS, you will receive a message “The organization does not exist...” when attempting to Add association during the role request process. Select **Create an Organization** (Figure 33).

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) .

Organization Primary Function Notes:

- 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

Manage Organizations

My Organizations

Create an Organization

Add an Issue

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 issue for the organization, provide or monitor 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 of cost or external system 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

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

Figure 36: Finalize Selection

☐ **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

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

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.

444666444 **SEARCH**

Confirmation: The FEIN/TIN you entered does not already exist in the system. Please select next below to enter your organization's details.

NEXT

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

Figure 38: Create an Organization: Organization Details

The screenshot shows a web form titled '3 Organization Details'. Below the title is a prompt: 'Please enter your organization details below.' The form contains several input fields and a dropdown menu. The first section is for 'Organization Legal Name' with a text input field. Below that is 'Incorporated State' with a dropdown menu. The next section is 'Domiciliary Address' with a help icon. It includes 'Address Line 1' and 'Address Line 2' as text input fields. Below these are 'City' and 'State' fields, with 'City' as a text input and 'State' as a dropdown. At the bottom are 'ZIP Code (5 digits)' and 'ZIP Plus 4 (4 digits)' as text input fields.

3 Organization Details

Please enter your organization details below.

* Organization Legal Name

* Incorporated State

Domiciliary Address ?

* Address Line 1

Address Line 2

* City

* State

* ZIP Code (5 digits)

ZIP Plus 4 (4 digits)

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

The screenshot shows a web form titled "4 Confirm Your Request". Below the title is a message: "Please select 'Submit' to complete your request." There is a text input field labeled "ORGANIZATION". At the bottom of the form are two buttons: a green "SUBMIT" button with a hand cursor icon over it, and a blue "RESET" button.

9 Create an Issuer

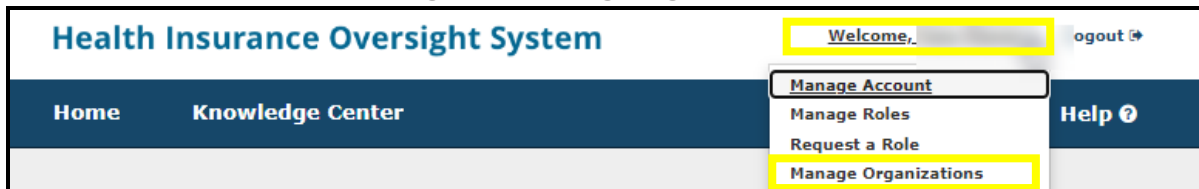
Important Information

- 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

Manage Organizations

What would you like to work on today?

[My Organizations](#)

My Organizations is where users with an administrative role can view or edit an organization's information.

[Create an Organization](#)

Users can register their organizations within HIOS. Organizations must exist in HIOS before users can request a user role for the organization.

[Add an Issuer](#)

Users can add an issuer for an insurance company within HIOS. Organizations must have been registered as a Company in order to add issuers.

[Data Change Request](#)

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.

[Add a Relationship](#)

Users can submit a request to establish a relationship between an organization and an issuer within HIOS.

[Organization Search](#)

Users can search and view details for organizations registered in HIOS.

Administrator Roles

Certain functionality such as My Organizations or Data Change Requests require users to have at least one of the following administrator roles:

Company Administrator
Representative who is solely responsible for editing Company and associated issuer level data, including relationship information.

Issuer Administrator
Representative who can edit Issuer level data only, including relationship information.

Organization Administrator
Representative of a Non-Federal Governmental Plan or Other Organization who is responsible for editing their organization data.

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

Add an Issuer

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

- 1 Search for an Organization** [Revisit this step](#)
817202871 - JN Test Company Edit 2 on 11-21-14
- 2 Issuer Registered State** [Revisit this step](#)
Texas (TX)
- 3 Issuer Details**
 Issuer Marketing Name:
 Please note, users must select "Yes" for at least one of the following market type coverage:
 * Does this issuer offer coverage in the Individual Market?
☐ Yes
☐ No
 * Does this issuer offer coverage in the Small Group Market?
☐ Yes
☐ No
 * Does this issuer offer coverage in the Large Group Market?
☐ Yes
☐ No
 Domestic Address:
 The domestic 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:
 NEXT
- 4 Confirm Your Request**

- 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.

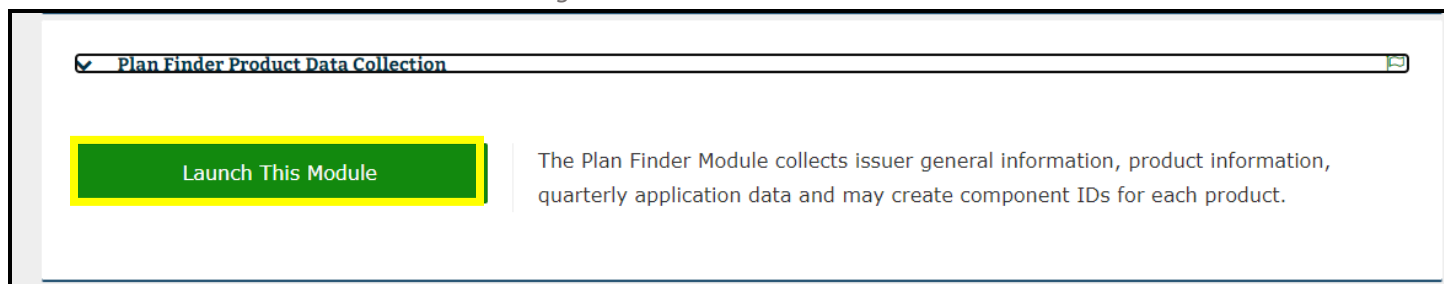
Important Information

- Must be assigned to an issuer that already exists in HIOS with the Issuer Submitter Role to complete the functions of editing Issuer Information, 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.

Access Plan Finder Data Collection Module (PF):

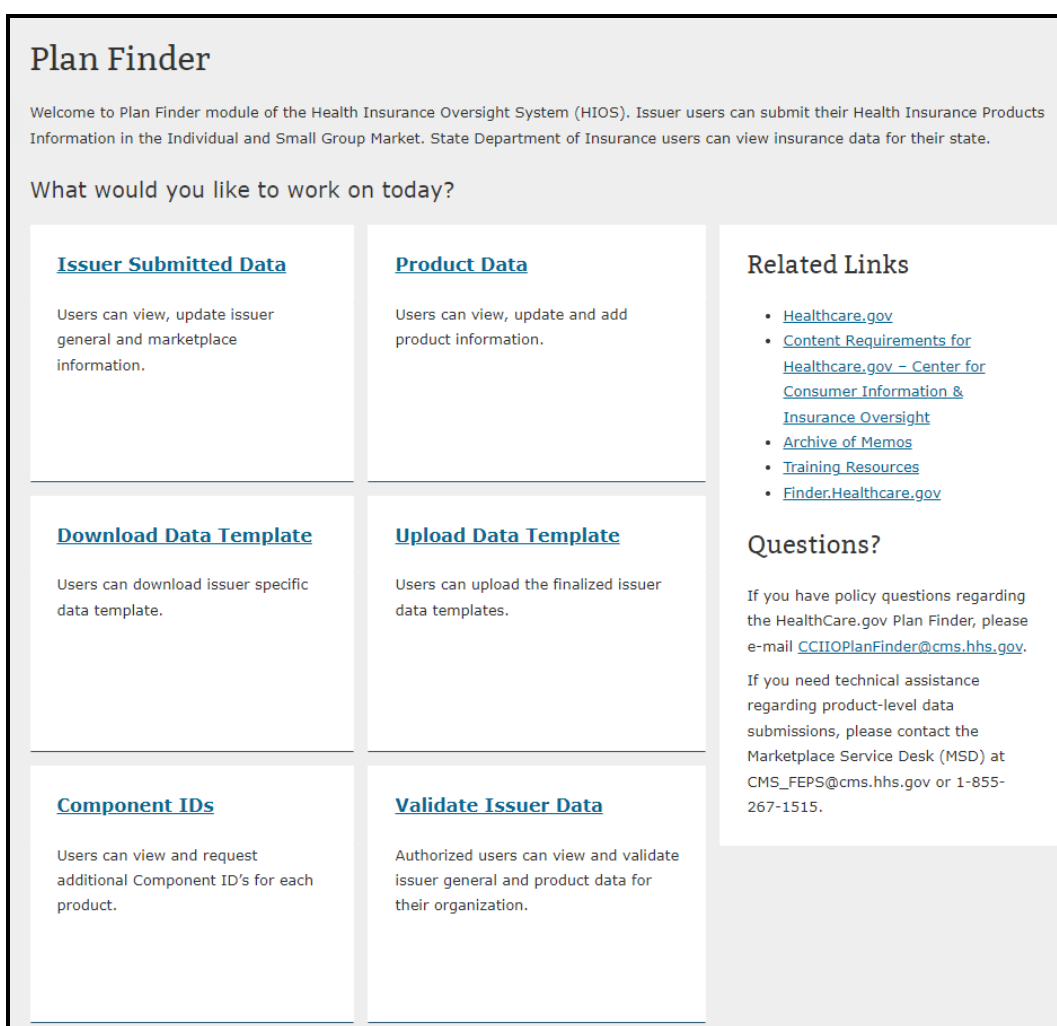
1. Login to the CMS Enterprise Portal (Refer to Section 6 if needed).
2. Select the Plan Finder Product Data Collection (PF) Accordion and then Select Launch Button (Figure 43).

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

Issuer Submitted Data

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

Select an Issuer

Please select an Issuer from the Issuer Name dropdown menu below and then activate the "**Get Issuer Information**" button to view the Issuer General and Issuer Marketplace Information.

* Issuer Name

Select an Issuer ▼

Get Issuer Information

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

Issuer Submitted Data

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

Select an Issuer

Please select an Issuer from the Issuer Name dropdown menu below and then activate the "Get Issuer Information" button to view the Issuer General and Issuer Marketplace Information.

* Issuer Name

Get Issuer Information

Submission Uploaded Date
07/14/2021 04:02:10 PM

Product Data for Quarter
Q1, 2021 [Jan. 1 - Mar. 31]

Data Last Validated By
01/19/2022 01:41:35 PM as "Data displayed is accurate and needs no change."

Issuer General Information

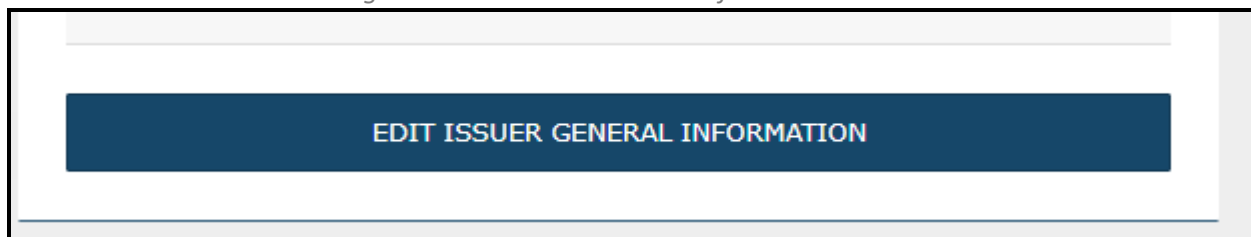
Issuer Marketplace Information

Corporate Information

Issuer Legal Name [Redacted]	Issuer ID [Redacted]
State [Redacted]	Issuer Marketing Name [Redacted]
Market Coverage Both	Federal EIN [Redacted]
NAIC Company Code [Redacted]	NAIC Group Code [Redacted]

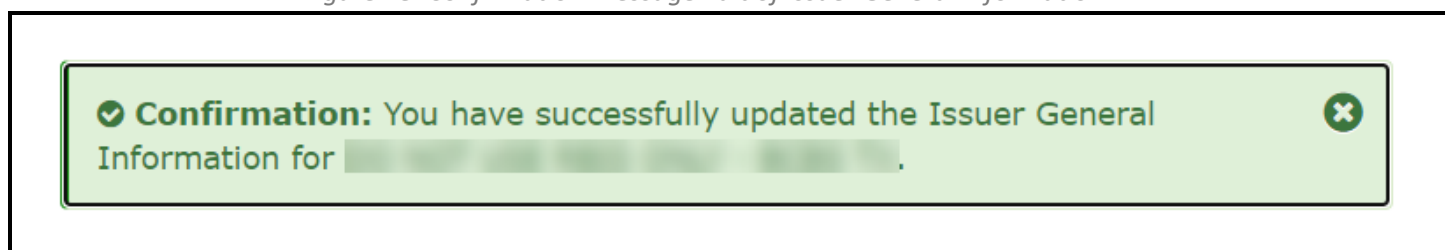
5. If the data needs to be edited, scroll to the bottom of the page and Select the **Edit Issuer General Information** Button (Figure 47).

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

Issuer Submitted Data

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

Select an Issuer

Please select an Issuer from the Issuer Name dropdown menu below and then activate the **"Get Issuer Information"** button to view the Issuer General and Issuer Marketplace Information.

* Issuer Name

Select an Issuer

Get Issuer Information

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

Issuer Submitted Data

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

Select an Issuer

Please select an Issuer from the Issuer Name dropdown menu below and then activate the "Get Issuer Information" button to view the Issuer General and Issuer Marketplace Information.

* Issuer Name

Get Issuer Information

Submission Uploaded Date

07/14/2021 04:02:10 PM

Product Data for Quarter

Q1, 2021 [Jan. 1 - Mar. 31]

Data Last Validated By

01/19/2022 01:41:35 PM as "Data displayed is accurate and needs no change."

Issuer General Information

Issuer Marketplace Information

Corporate Information

Issuer Legal Name

Issuer ID

State

Issuer Marketing Name

Market Coverage

Both

Federal EIN

NAIC Company Code

NAIC Group Code

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

Figure 51: Issuer Marketplace Information

*** Issuer Name**

[Redacted] ▼

Get Issuer Information

Submission Uploaded Date
07/14/2021 04:02:10 PM

Product Data for Quarter
Q1, 2021 [Jan. 1 - Mar. 31]

Data Last Validated By
[Redacted] on 01/19/2022 01:41:35 PM as "Data displayed is accurate and needs no change."

Issuer General Information **Issuer Marketplace Information**

Corporate Information

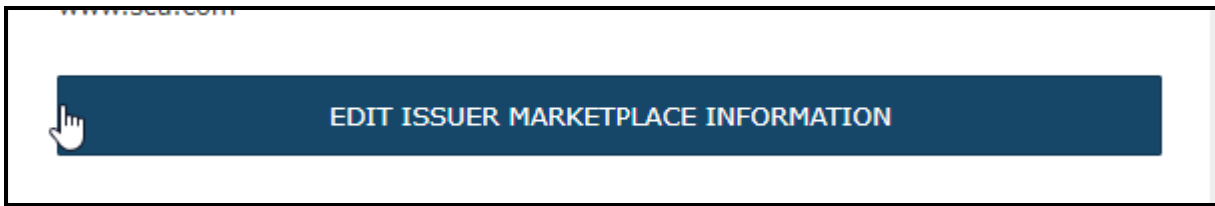
Issuer Legal Name [Redacted]	Issuer Marketplace Marketing Name [Redacted]
Market Coverage Both	State [Redacted]

Marketplace Billing Information

Marketplace Billing Name [Redacted]	Marketplace Address Line 1 [Redacted]
Marketplace Address Line 2 [Redacted]	Marketplace City [Redacted]
Marketplace State [Redacted]	Marketplace Zip [Redacted]
Marketplace Zip Extension [Redacted]	

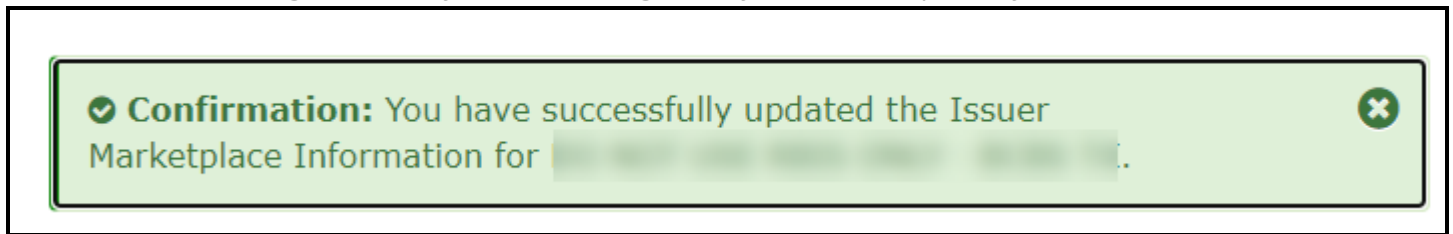
6. If the date needs to be updated, scroll to the bottom of the page and select the Edit Issuer Marketplace Information Button (Figure 52).

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

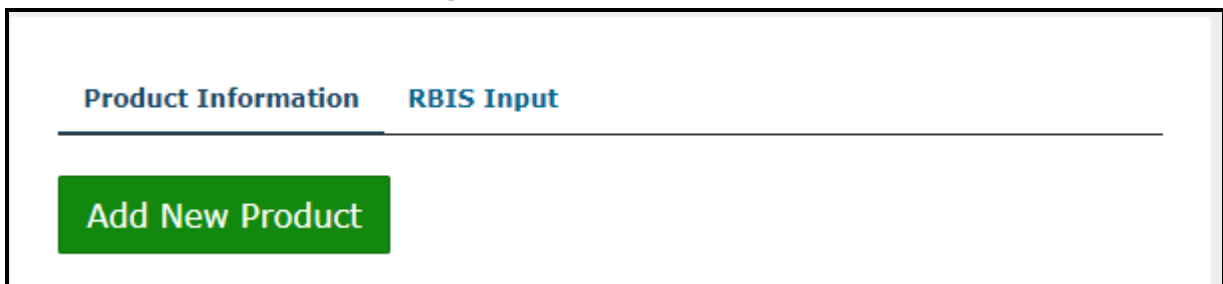
Important Information:

- 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

Add New Product

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

Product ID Not assigned yet	* Product Name
* Product Enrollment (Less than 8 digit number)	Enrollment Code/Group Number (Maximum 30 characters allowed)
* Approved Product 	SERFF Number (4 letters - 9 Alphanumeric)
* Product Type 	* Open or Closed
* Association Product 	* Individual/Small Group Market
* Website Address (Benefit at a Glance) 	* Effective Start Date (MMDDYYYY)
* Website Address (Provider) 	Effective End Date (MMDDYYYY)
Website Address (Formulary) 	

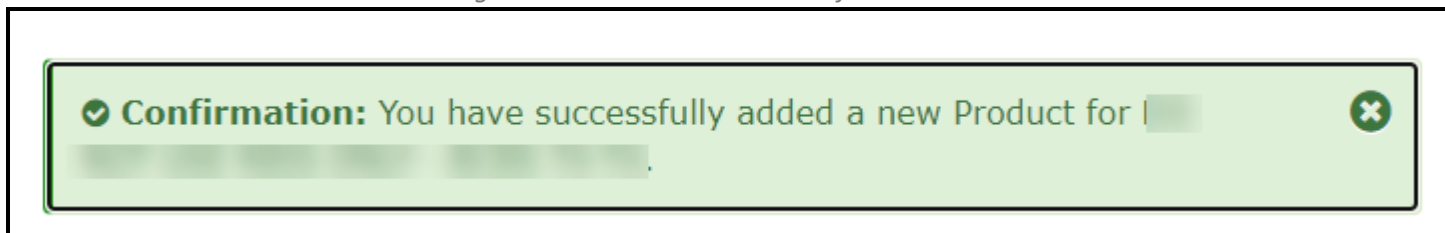
SUBMIT

RESET

[← BACK TO PRODUCT DATA](#)

- 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.

To View and Edit Products:

- From the PF Homepage Select **Product Data** Card.
- 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.
- Select **View Data** Button next to a Product ID (Figure 57).

Figure 57: View Data

Product ID ▲	Product Name ◆	Product Type ◆	Individual/ Small Group Market ◆	Open/ Closed? ◆	Action
[redacted]	[redacted]	[redacted]	Individual	Open	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

View Product Information

To edit the data elements of the current product, please select "Edit Product Information" button below.

Product ID 33602TX031	Product Name PPO Select Saver - Series IV
Product Enrollment 44497	Enrollment Code/Group Number 6
Approved Product? Yes	Product Type PPO
SERFF Number HCTE-126629475	Other Product Type Description N/A
Association Product? No	Open or Closed? Open
Individual/Small Group Market Individual	Closed Reason N/A
Website Address (Benefit at a Glance) http://www.bcbstx.com/coverage/individual/series4.html	Other Closed Reason N/A
Website Address (Formulary) N/A	Effective Start Date 01/01/2018
Website Address (Provider) http://www.bcbstx.com/online/directory/index.htm	Effective End Date N/A

EDIT PRODUCT INFORMATION

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/onlineirectory	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 be selected by default) and then Select **Product(s)** from the Product List.
3. Select View Results Button (Figure 61).

Figure 61: View Component IDs

Component IDs

View Component IDs

Request Component IDs

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

* Issuer Name

* Product(s)

Note: Hold down the "ctrl" key to select multiple products.

VIEW RESULTS

Component IDs for the Selected Product are:

Showing 1-1 of 1 records Records per page 10

Component ID

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

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Component IDs

View Component IDs

Request Component IDs

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

* Issuer Name

* Product

* Number of IDs

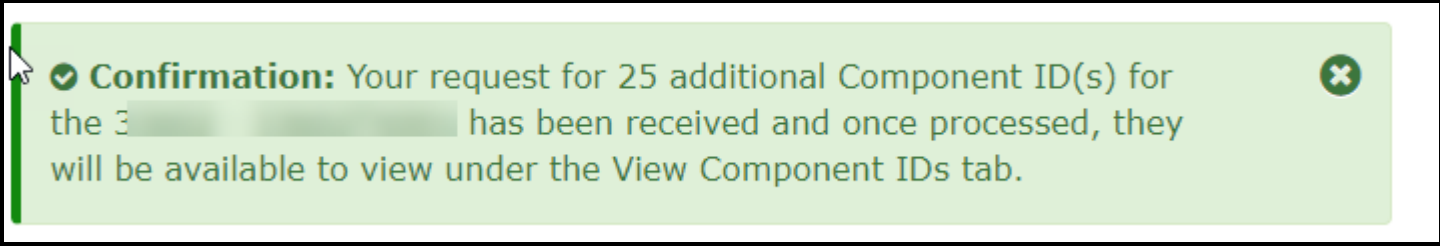
25

(Maximum 50 IDs per request, enter a value within 1 to 50)

SUBMIT

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.

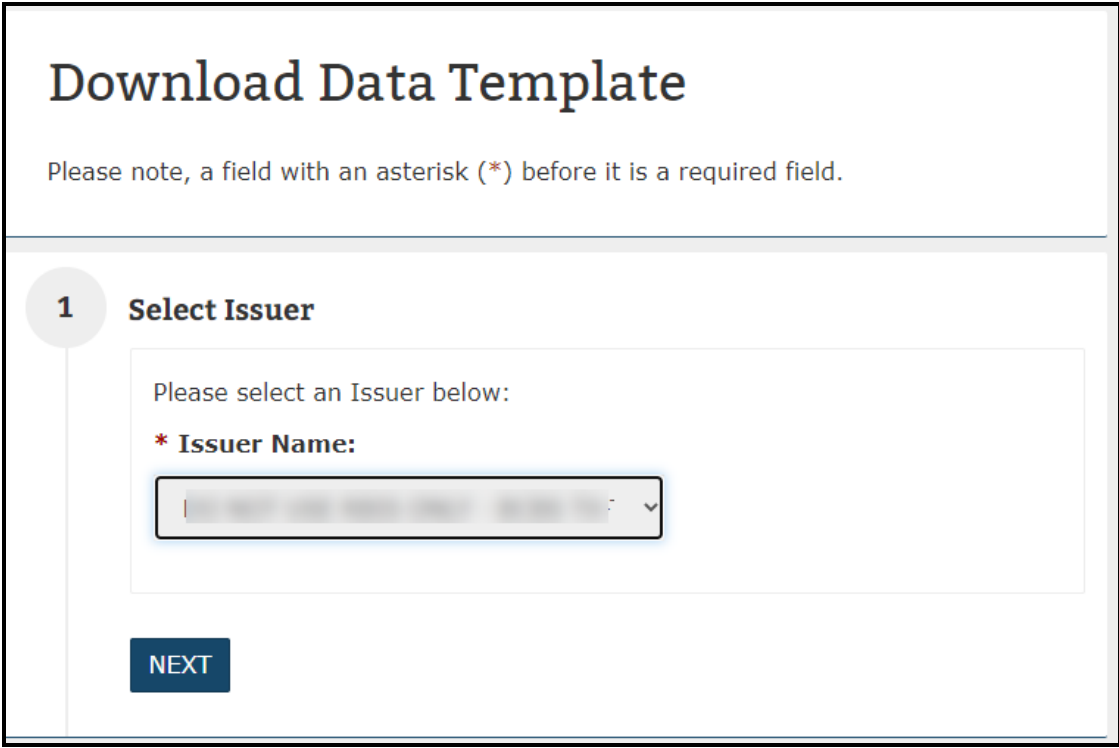
Important Information:

- 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 be selected by default) and then Select **Next** button (Figure 64).

Figure 64: Step 1 Download Data Template



The screenshot shows a web form titled "Download Data Template". Below the title is a note: "Please note, a field with an asterisk (*) before it is a required field." The form is divided into a sidebar and a main content area. The sidebar on the left contains a large number "1" and the text "Select Issuer". The main content area contains the text "Please select an Issuer below:" followed by a required field label "* Issuer Name:" and a dropdown menu. Below the dropdown menu is a blue button labeled "NEXT".

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

Figure 65: Step 2 Download Data Template

2 Download Data Options

If you are submitting Issuer data, please select "Issuer Technical Instructions" to be redirected to the CCIIO Resources page. On the landing page, please select "Content Requirements for Plan Finder" to access the "Plan Finder Issuer User Manual" which provides details on filling the Excel template and XML file for submission. Please select "Issuer Data XSD File" to download the XSD file.

Note: In order to register a new Issuer, please do so through HIOS Portal.

- [Issuer Data XSD File \(20KB, ZIP\)](#)
- [Issuer Technical Instructions](#)

*** Do you want to download a prepopulated Issuer Data Template?**

☒ **Yes**

☐ **No Issuer Data updates required**

NEXT

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

3 Generate File

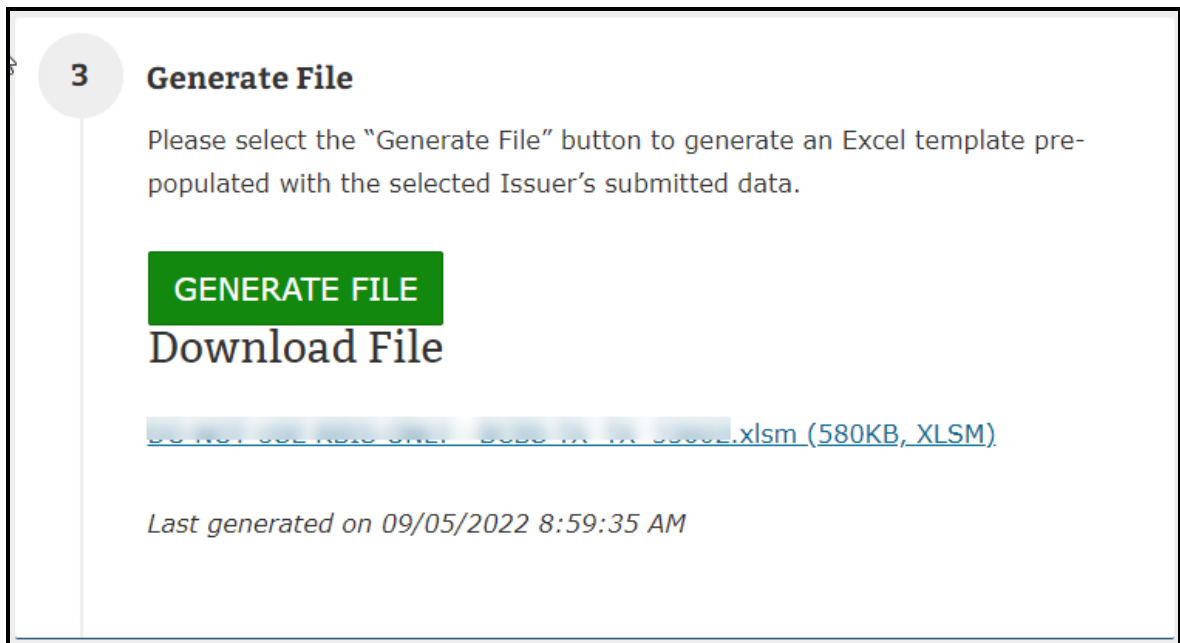
Confirmation: Template generation started on 02/13/2023 7:02:06 AM. This process could take up to 15 minutes and will not be interrupted if you navigate to a different page. If you continue to stay on the current page, the download link will be displayed once the file generation process is completed. 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.

Please select the "Generate File" button to generate an Excel template pre-populated with the selected Issuer's submitted data.

GENERATE FILE

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



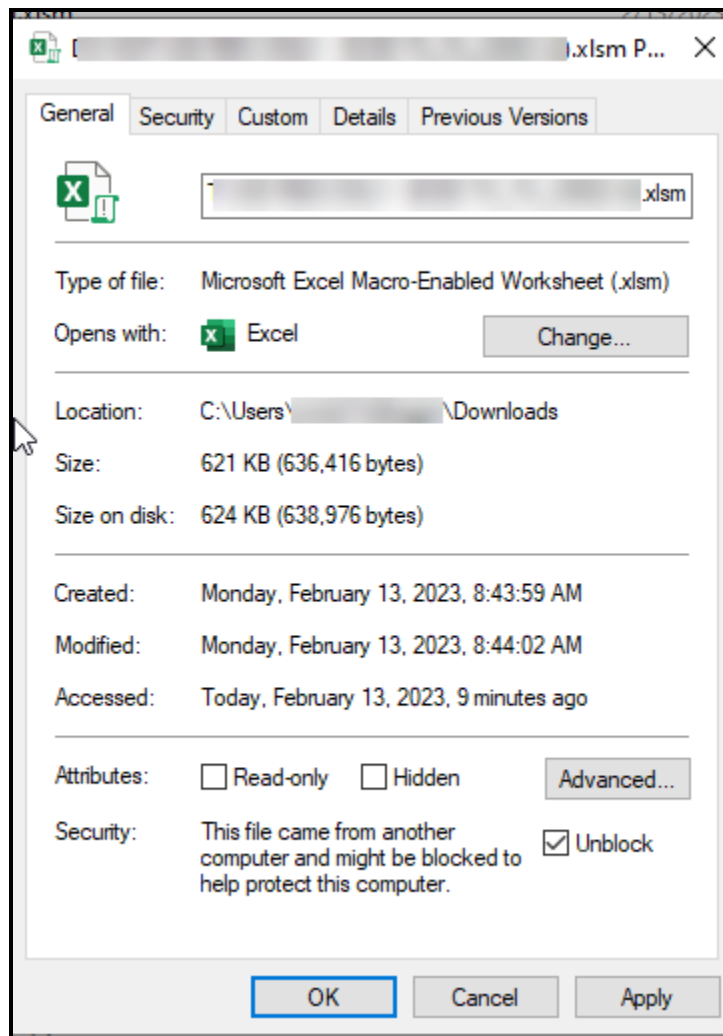
17 File Macro Settings

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

Upload Data Template

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

Select a File

Please select a finalized data template XML data file (.xml) or a zip file containing multiple xml templates.

Please note that the file cannot exceed 30 MB.

*** Browse (Select .xml/.zip file)**

BROWSE

Add

SUBMIT

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

Figure 70: Upload Data Template Page Submit Button Enabled

Upload Data Template

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

Select a File

Please select a finalized data template XML data file (.xml) or a zip file containing multiple xml templates.

Please note that the file cannot exceed 30 MB.

*** Browse (Select .xml/.zip file)**

BROWSE

Add

File(s) to Upload

Final_I _20230213_110910.xml
REMOVE

SUBMIT

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

✓
Confirmation: Thank you for your submission. The file, Final_I _20230213_110910.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 customData will not be available for validation in the HIOS system until the file is successfully processed. Please contact the Marketplace Service Desk (MSD) at CMS_FEPS@cms.hhs.gov or 1-855-267-1515 for further assistance. The uploaded file size is 63.9814453125 kilobytes (KB).
✕

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.

Access QHP Modules:

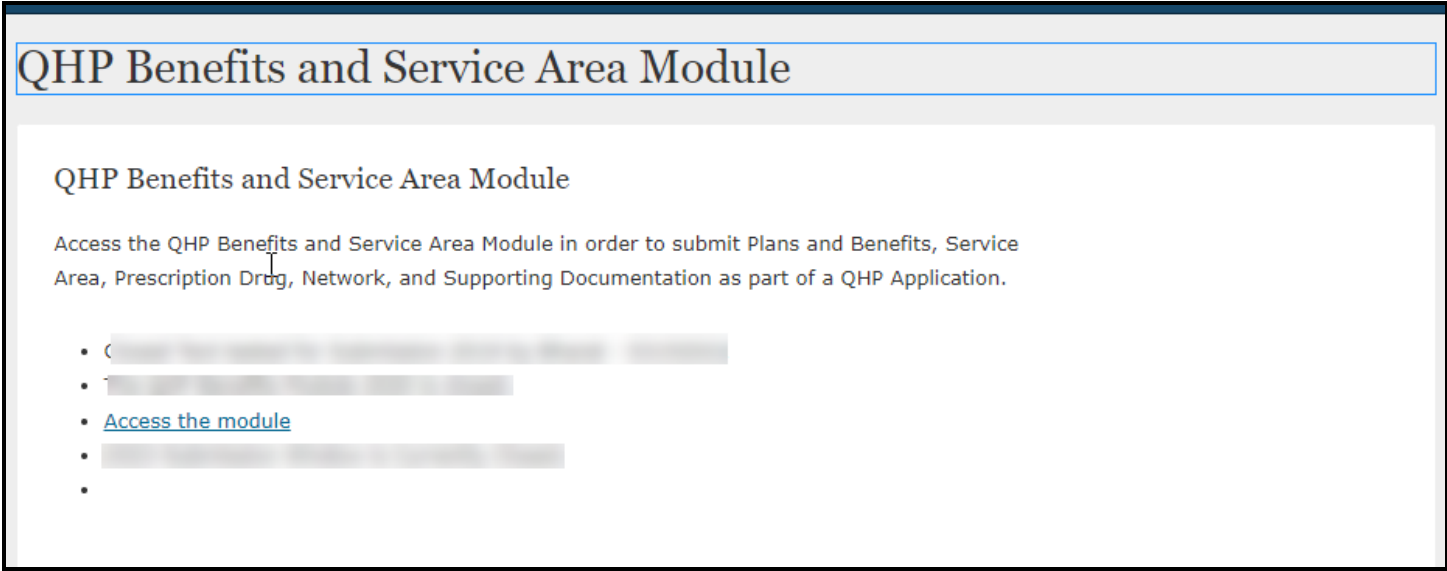
1. Login to the CMS Enterprise Portal (Refer to Section 6 if needed).
2. Select one of the of following accordions: QHIP Benefits and Service Area Module, QHP Issuer Module, or QHP Rating Module and then Select **Launch** Button (Figure 72).

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/ccio/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.