

Health Insurance Oversight System

Health Insurance Oversight User

Quick Reference Guide

To access the Health Insurance Oversight System (HIOS), users will need to go through the CMS Enterprise Portal and register for a CMS IDM account. IDM is the acronym for CMS' Identity Management system which includes Identity Management, Access Management, Authorization Assistance Workflow Tools, and Identity Lifecycle Management functions (i.e., Password Reset, Forgot User ID, etc.). IDM handles the identity verification of users trying to request access to CMS systems. A CMS IDM account ensures that only authorized/registered users can access protected information and systems through the CMS Enterprise Portal. This guide provides detailed steps on how users register for a CMS IDM account and request access to 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 Accessing the 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.
- For assistance with creating a CMS Enterprise Portal Account, please refer to the **HIOS IDM Quick Guide**.

To Access the HIOS Home Page:

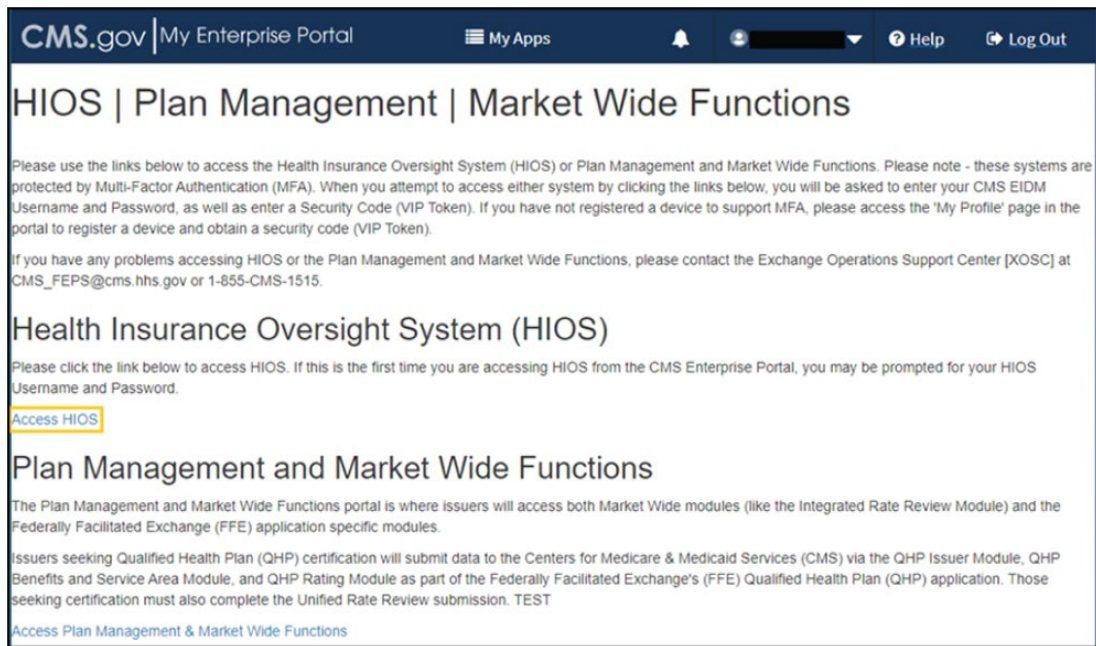
1. After the HIOS Role request has been approved, navigate to CMS Enterprise Portal at <https://portal.cms.gov>. On the My Portal homepage, the HIOS application will display. Select **HIOS**, then select **Overview** (Figure 1).

Figure 1: My Portal Page with HIOS Application



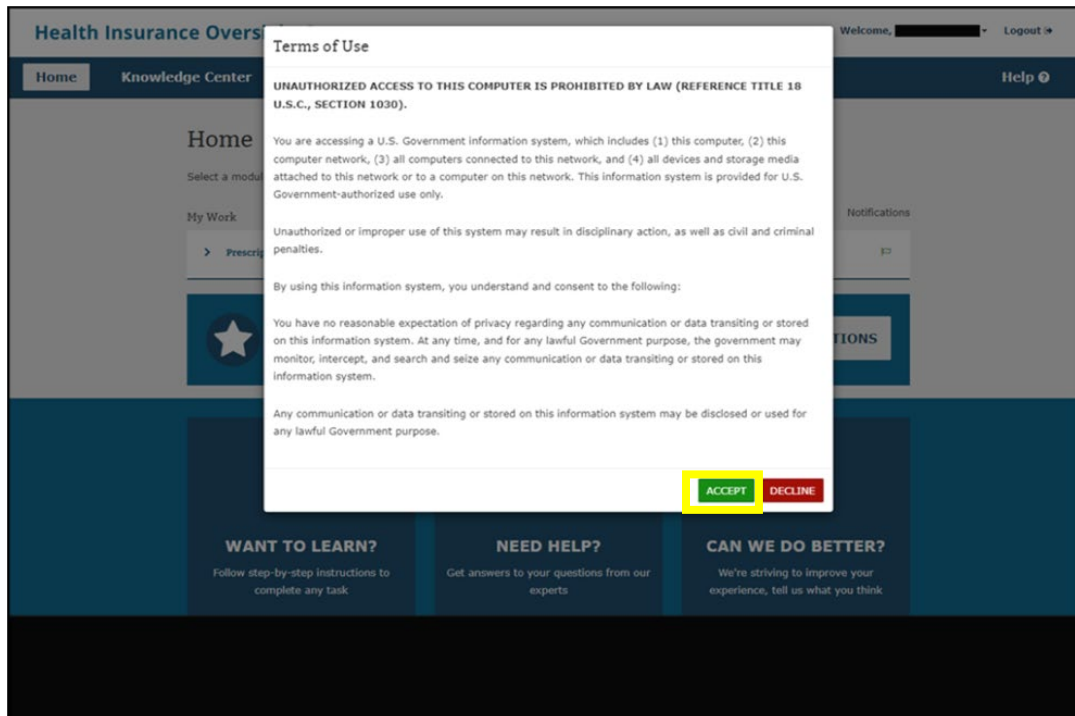
2. Select **Access HIOS** (Figure 2).

Figure 1: Access HIOS Page



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

Figure 2: HIOS Terms of Use



2 Request HIOS Module Roles

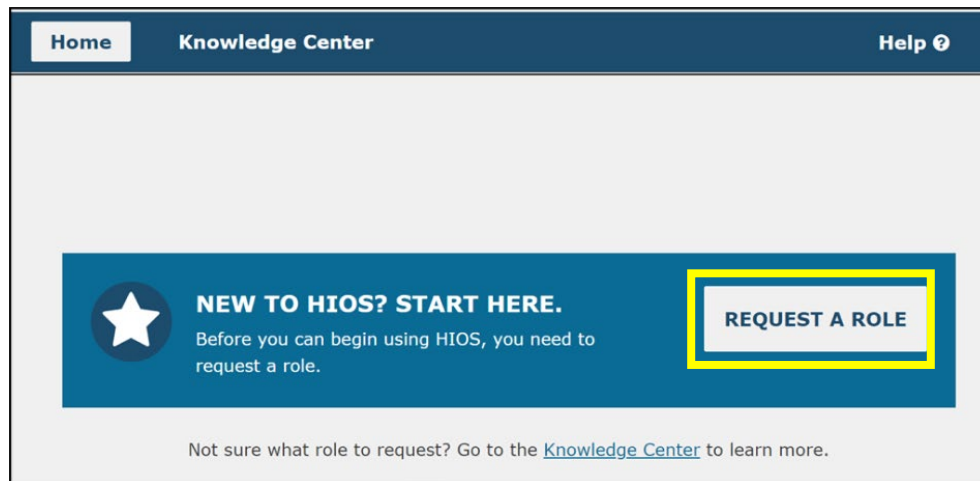
Important Information

- If your organization does not exist in HIOS, please refer to the **HIOS Portal Quick Guide**.
- Prior to Managing TPA Relationships, users will need to request a **Company Administrator** or an **Issuer Administrator** role in the **HIOS Portal** Module. Only these two user roles will have access to this functionality.

To request the HIOS roles:

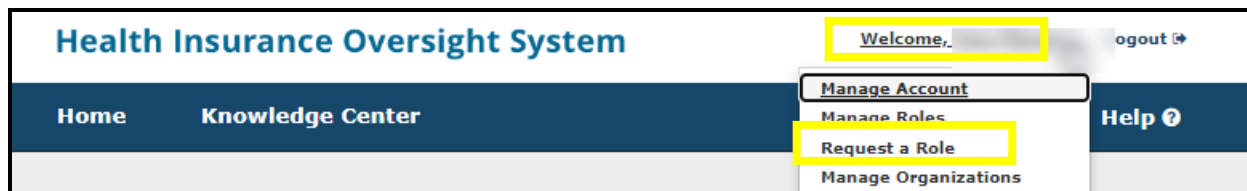
1. New users can select the **Request A Role** button on the page (Figure 4).

Figure 4: HIOS Homepage for New Users



2. Existing HIOS users will need to select the **Welcome** drop-down and then select **Request a Role** (Figure 5).

Figure 5: Request a Role Drop-Down



3. Select a **HIOS Portal** as the module and select **Next**.
4. Select a role (Company Administrator or Issuer Administrator) from Step 2 and select **Next**.
 - If you selected the Company Administrator role, provide an Organization ID related to the company **Providing TPA Services**
 - If you selected the Issuer Administrator role, provide a HIOS Issuer ID related to the issuer **Receiving TPA Services**.
5. Enter the Organization ID for the association in Step 3 and then select the **Search** button. If an Organization ID does not exist, you will see a popup message instructing you to select the Create an Organization button to first create the organization or select the Cancel button to use another Organization ID.
6. Select the Add button to associate the role to multiple Issuers per request. The system allows up to 10 Issuers per submission and then select **Next** (Figure 6).

Figure 6: Search for Association

Request a Role

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.

Please note, you must first have an organization registered in HIOS in order to request access to a module.

- Select a module** Plan Finder Product Data Collection [Revisit this step](#)
- Select a role** Issuer, Individual Market Submitter, Primary Contact [Revisit this step](#)
- Add association**

To add an Association to this role request, you must search for it in the system.

* Association Type

 - HIOS Issuer ID**

* Search for association

Please enter the HIOS Issuer ID below and select the Search button. Once an issuer is found, select the "Add" button to associate the Issuer to the role. The HIOS Issuer ID must be a 5 digit, numeric value. You must add at least 1 Issuer, and may add up to 10 Issuers per submission.

13490 [SEARCH](#)

Showing results for "13490"

13490 - Test Company (MS) [Add](#)

2 ITEMS ADDED TO REQUEST

IX 10011 ✕ NY 11296 ✕

[NEXT](#)
- Confirm your request**

- Review the information in the Confirm your request section and select **Submit** (Figure 7).
 - If the information is not correct, return to the step where the incorrect information was entered and make the necessary correction.

Figure 7: Confirm Your Request

4 Confirm your request

Please select "Submit" to complete your request.

MODULE

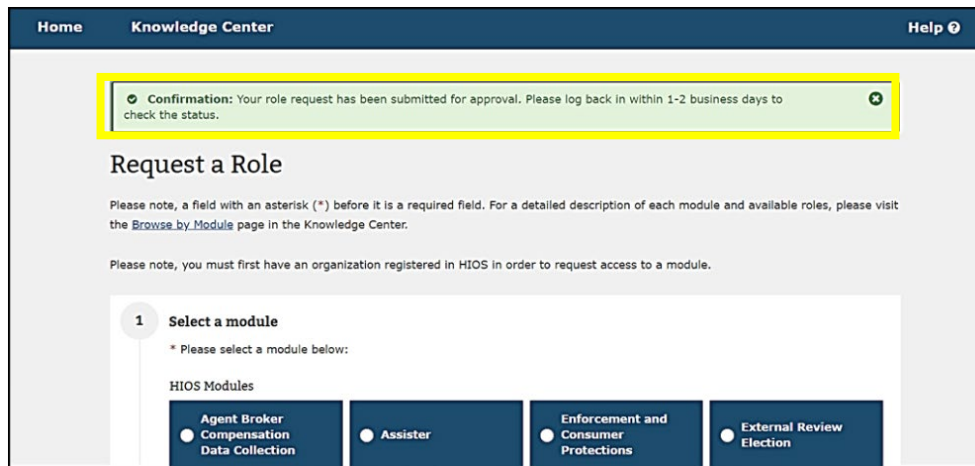
ROLE

ASSOCIATIONS

[SUBMIT](#) [RESET](#)

- After you select Submit, a confirmation box will show noting that your role request has been submitted for approval (Figure 8).
 - 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 8: Role Request Confirmation



3 Adding a Relationship

Important Information

- If you need assistance registering a New Organization in HIOS, please refer to the **HIOS Portal Quick Guide**.
- TPA service providers already in the system should view the **Organization Details** page to ensure that they have the correct TPA attribute. TPA Information will not appear for Non-Federal and Other Organizations. To be set up as a TPA an organization must have either the **Enrollment** or **Edge** checkbox checked on the **Organization Details** page.
- The purpose of the 'Add a Relationship' functionality is to establish a relationship between Third Party Administrators (TPAs) and the organizations they provide one or more services. A relationship requires one TPA (Companies and/or Non-Insurance Companies) and one or more consumer of services (consumer). The consumer of services must be an Insurance Company with at least one Issuer associated with the company. A relationship can be initiated by either party and will require approval from the other party.

To Add a Relationship in HIOS:

1. Select **Manage Organizations** on the HIOS Home Page Welcome drop-down.
2. On the Manage Organizations page, select **Add a Relationship** (Figure 9).

Figure 9: Add a Relationship

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. Select the **Relationship** Type, indicate with the appropriate radio button if your organization is **Providing** or **Receiving** TPA Services, Enter the organization's FEIN and select "Search." If **Receiving** TPA Services: Mark the checkboxes next to as many issuers, for the relationship, as needed (Figure 10). Select **Next** from Step 1.

Figure 10: Issuer Requests Company

Health Insurance Oversight System

Welcome, [User] Logout

Home Knowledge Center Help

Add a Relationship

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

- #### 1 Relationship Type

* What relationship are you trying to initiate?

☒ TPA Enrollment

* Is your organization providing or receiving the TPA Services?

☐ My organization is providing TPA Services

☒ My organization is receiving TPA Services

* 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.

987654321

Showing associated issuers related to "987654321 - Aetna"

☒ 987654321 - Aetna

Select all	Issuer Details	Resident State
☐	12345 - Aetna	Virginia
☐	98765 - Aetna	Arkansas
☐	27382 - Aetna	West Virginia
☐	74821 - Aetna	Texas
☐	23182 - Aetna	New Mexico
☐	34212 - Aetna	New York
☐	23123 - Aetna	Colorado
☐	34234 - Aetna	California
☐	55555 - Aetna	Washington
☐	76543 - Aetna	Ohio

First Previous 1 2 3 4 Next Last
- #### 2 Relationship Details
- #### 3 Relationship Attributes
- #### 4 Confirm Your Request

4. Enter the organization's FEIN and select "Search." If **Providing** TPA Services: Mark the checkboxes next to as many issuers, for the relationship, as needed (Figure 11). Select **Next** from Step 2.

Figure 11: Company Requests Issuer

Add a Relationship

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

1 Relationship Type TPA Enrollment, Providing TPA Services, Issuance, Add Iss. [Revisit this step](#)

2 Relationship Details

Enter the FEIN of the organization you are trying to establish a relationship with and select "Search"

Please enter the Organizations Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value

987654321 [SEARCH](#)

Showing associated issuers related to "987654321 - Aetna"

987654321 - Aetna

Select all issuers	Issuer Details	Registered State
☒	12345 - Aetna	Virginia
☐	98765 - Aetna	Arkansas
☐	27382 - Aetna	West Virginia
☐	74821 - Aetna	Texas
☐	23182 - Aetna	New Mexico
☐	34212 - Aetna	New York
☐	23123 - Aetna	Colorado
☐	34234 - Aetna	California
☐	55555 - Aetna	Washington
☐	76543 - Aetna	Ohio

Records per page: 10

First Previous 1 2 3 4 Next Last

[NEXT](#)

3 Relationship Attributes

4 Confirm Your Request

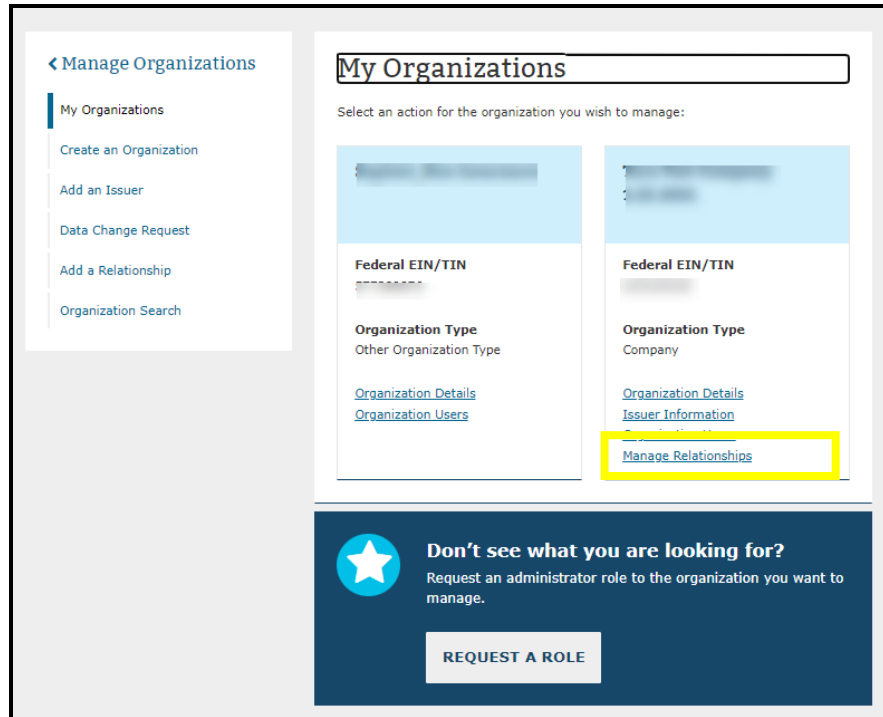
5. Enter the date that the relationship starts and the date the relationship ends from Step 3 and Select **Next**.
6. Proceed to submit the relationship request in Step 4. You will see a confirmation message notifying you to log back into HIOS to check the status of your request. To see your TPA relationship(s), select the **Manage Organizations** link from the welcome drop-down menu, select My Organizations, and select **Manage Relationships**. Only users who have an administrative role will be able to view the relationships for their organization.

4 Manage Relationships

Important Information

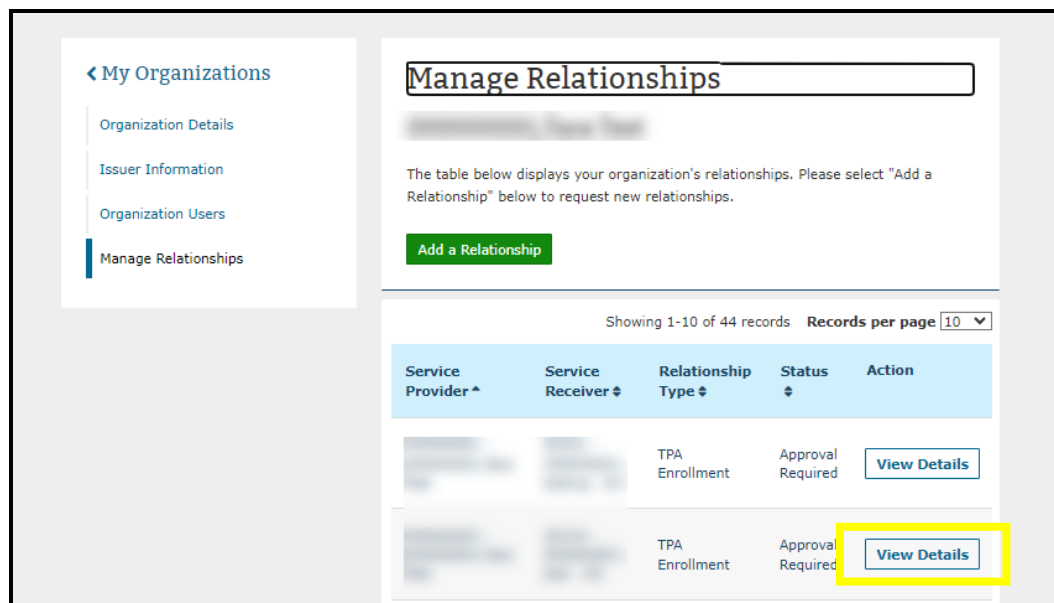
- Users with an administrative role will receive an email notifying them they need to "approve" a relationship. They can view any relationships that are in the system for that organization on the Manage Relationship page.
1. Select the **Manage Organizations** link on the HIOS Home Page Welcome Drop-Down.
 2. On the Manage Organizations page, select the **My Organizations** link.
 3. Select **Manage Relationships** (Figure 12).

Figure 12: My Organizations



- Relationships with a **Pending** status need the other organization's approval. Relationships with an **Approval Required** need your approval. Select **View Details** to review the relationship details (Figure 13).

Figure 3: Manage Relations



- On the View Details page, you can select **Approve Relationship** if this a valid request or **Deny Relationship** if this is not a valid relationship (Figure 14).

Figure 4: View Relationship Details Page

View Relationship Details

Review the relationship information below and select "Approve Relationship" if this request is valid. If this is not a valid relationship, select "Deny Relationship".

Service Provider	Service Receiver
Relationship Type	Status
TPA Enrollment	Approval Required
Effective Start Date	Effective End Date
09-29-2022	09-29-2023
APPROVE RELATIONSHIP	DENY RELATIONSHIP

[← BACK TO MANAGE RELATIONSHIPS](#)

- You will see a confirmation pop-up related to your choice. Once confirmed, select **Manage Organizations** to view your organizations and relationships. The relationship requestor will need to check back into HIOS to see if their request was approved.

5 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.

6 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 are the Effective Start and End Dates?	The date when the relationship starts and ends. The effective End date cannot be before the effective Start Date and the time between the Start/End dates cannot be more than 10 years.
How do users access the Manage Relationship page?	The Manage Relationship page can be accessed from the My Organizations page for organizations that users have an administrative role for. Only users who have a company, organization, or issuer administrator role may access this page.
Which roles allow users to edit organization information?	Users should have the Company Administrator, Issuer Administrator, or Organization Administrator role to edit organization information and complete such tasks as updating the TPA information for that organization.

Questions	Answers
What are the statuses on The Manage Relationship page?	The relationships can have the following statuses: • Approval Required (for relationships that need your approval) • Pending (for relationships that need the other organization's approval) • Approved • Denied