

Health Insurance Oversight System

Health Insurance Oversight User

Portal Quick 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.

Table of Contents

Health Insurance Oversight System	1
Health Insurance Oversight User	1
Portal Quick Guide	1
1 Create a CMS Enterprise Portal Account (For New Users)	2
2 Register a Multi-Factor Authentication Device (For New Users)	5
3 Request a Role & Identity Verification – New Users (without a role assigned)	5
3.1 Identity Verification	8
3.2 Enter Role Details	10
3.3 Unsuccessful Identity Proofing Steps	11
4 Accessing the HIOS Home Page	12
5 Request HIOS Module Roles	13
6 Create an Organization	17
7 Create an Issuer	21
8 Help Desk Information	23
9 Frequently Asked Questions	24

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

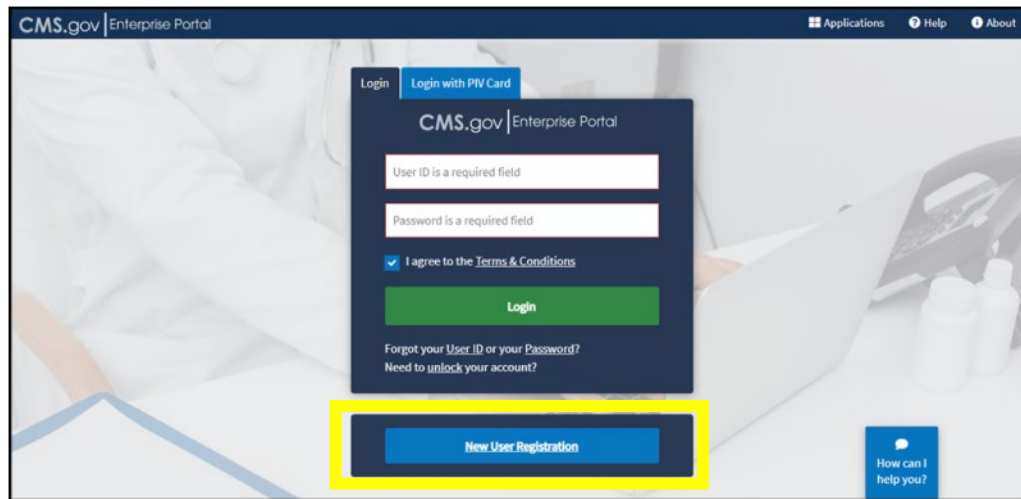
Important Information

- Users that are not registered in HIOS will need to create an Enterprise Portal account.
- If you are an existing HIOS user with an existing IDM user account, skip to section 4.

To create a CMS Enterprise Portal Account:

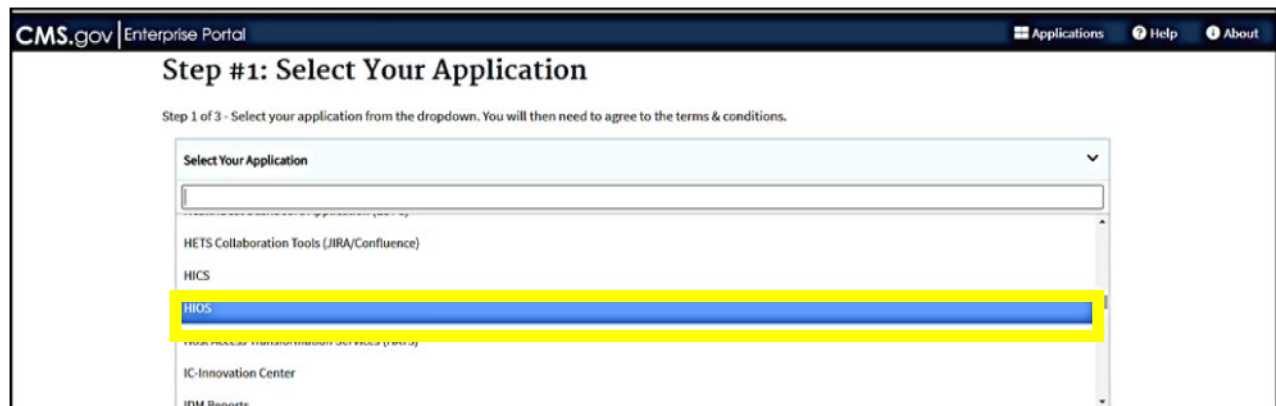
1. Navigate to CMS Enterprise Portal at <https://portal.cms.gov>.
2. Select the **New User Registration** button located at the bottom of the screen (Figure 1).

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

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

Cancel

How can I help you?

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

Figure 4: Register Your Information

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?

6. Step #3: Create User ID, Password & Security Question/Answer- **Complete the user information** and select **Next** (Figure 4).

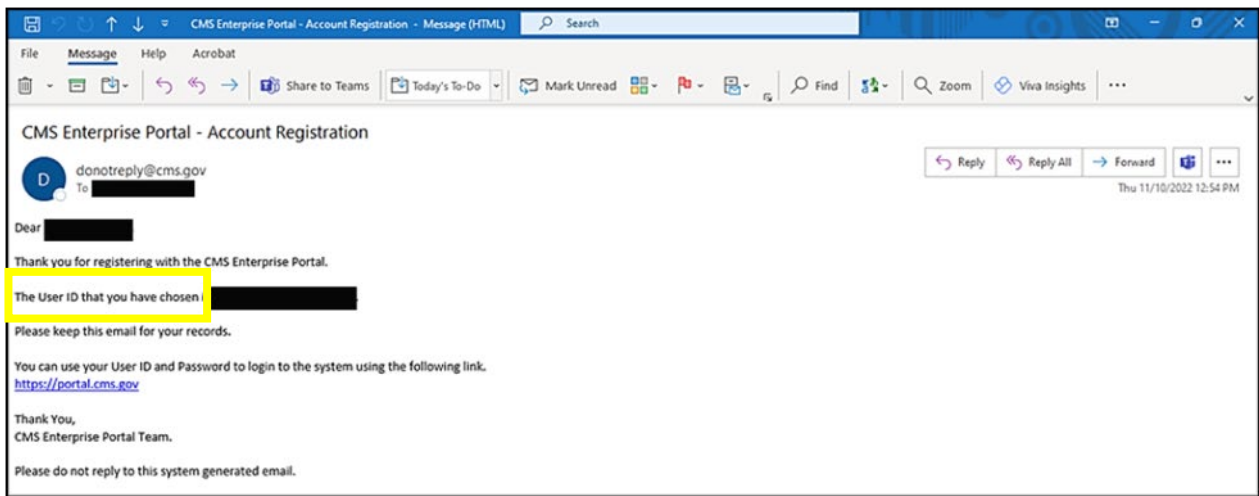
Figure 5: Create User ID & Password

The screenshot shows a web form titled "Step #3: Create User ID, Password & Security Question/Answer". Below the title is a subtitle: "Step 3 of 3 - Please create User ID and Password. Select a Security Question and provide Answer." The form contains the following fields and controls:

- An input field labeled "Enter User ID".
- Two input fields for passwords: "Enter Password" and "Confirm Password". Both fields have an eye icon to the right, indicating a toggle for password visibility.
- A dropdown menu labeled "Select Your Security Question" with a downward arrow.
- An input field labeled "Enter Security Answer".
- At the bottom, there are three buttons: a green "Back" button, a dark green "Next" button, and a blue "Cancel" link.

7. Review the Registration Summary Page and ensure all the information is correct. Select **Submit User** when done (Figure 5).
 - An email will be sent from donotreply@cms.gov acknowledging successful registration. This email will contain

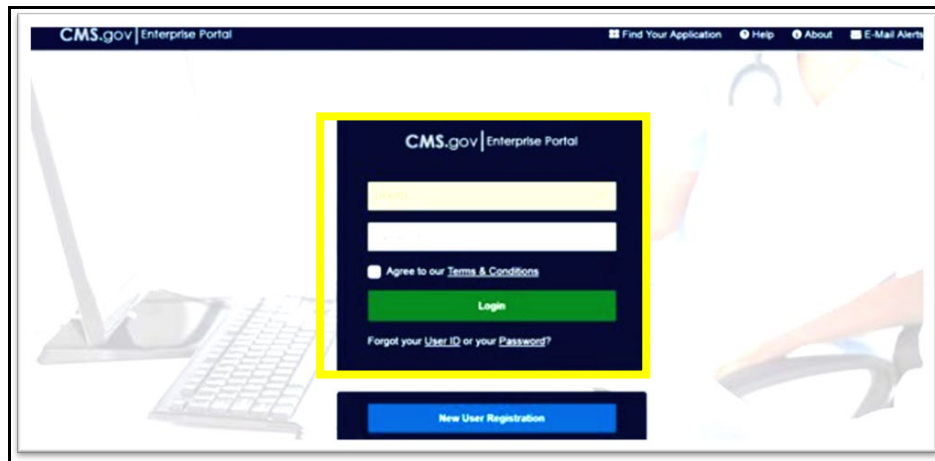
Figure 7: Account Registration Email



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

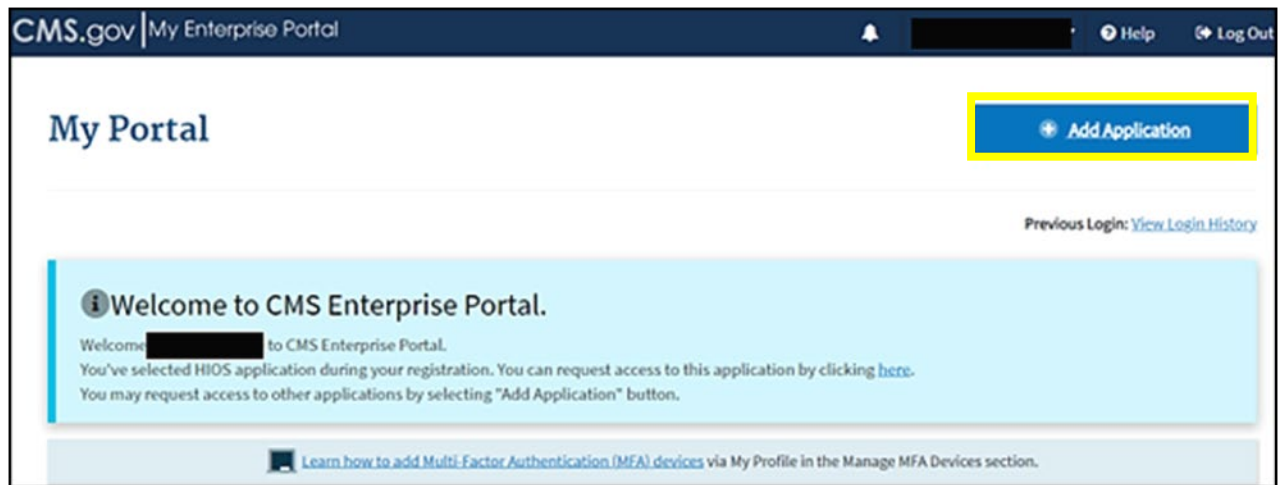


2. First-time users will be prompted to register a multi-factor authentication (MFA) device. Select an option from the drop-down menu. **Enter your preferred option and select Send MFA Code.**
 - The preferred option would be text or email. You may revisit this step in the future to register multiple 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](#).

3 Request a Role & Identity Verification – New Users (without a role assigned)

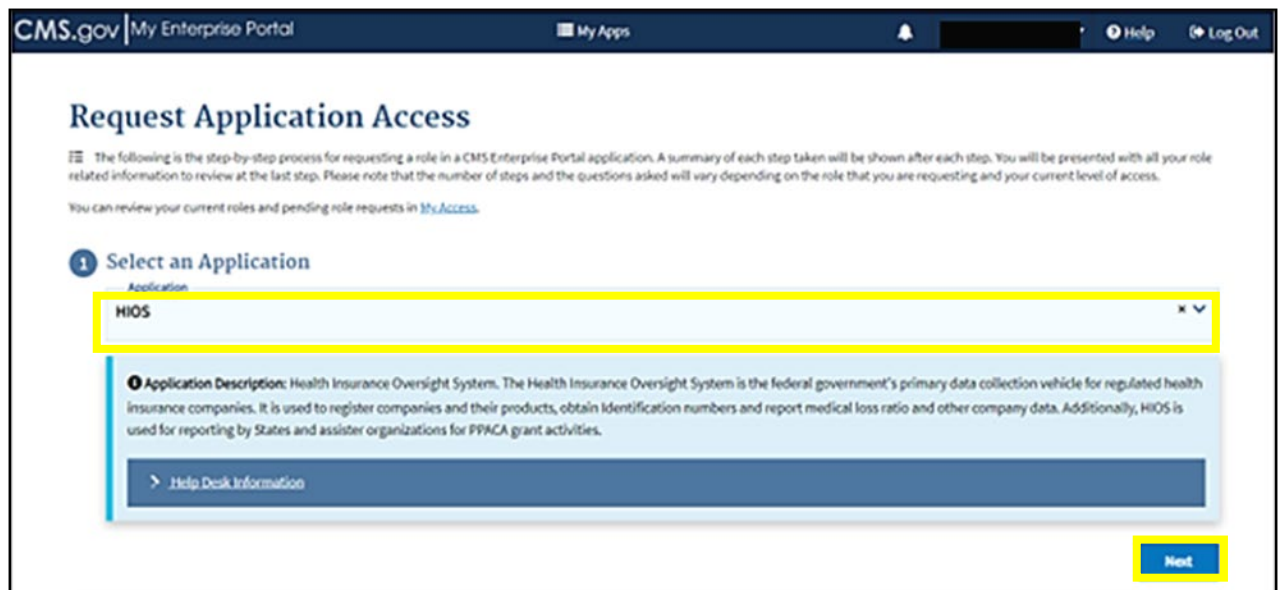
1. After you create your CMS Enterprise Portal Account and set-up your MFA device, return to <https://portal.cms.gov/>. Upon login, you will see your My Portal homepage. Select **Add Application** in the upper right corner (Figure 9).

Figure 9: 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 10).

Figure 10: HIOS Application Access



3. Select **HIOS User** in the **Select a Role** drop-down, then select **Next** (Figure 11).

Figure 11: 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 x v
- 3 Complete Identity Verification**
1 Role Description: HIOS User
- 4 Enter Role Details**
- 5 Enter Reason for Request**

Next

4. Select **Launch** to begin the process of completing identity verification (Figure 12).

Figure 12: Begin Identity Verification

CMS.gov | My Enterprise Portal

My Apps

Anna Coppedge

Help

Log Out

- ✓ HIOS
- 2 Select a Role** ✓ Completed
✓ HIOS User Edit
- 3 Complete Identity Verification**
1 Identity Verification
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.
Launch
- 4 Enter Role Details**
- 5 Enter Reason for Request**

Top

3.1 Identity Verification

1. Step #1: Identity Verification Overview - After you select Launch, select **Next** (Figure 13).

Figure 13: Step #1 - Identity Verification Overview

Step #1: Identity Verification Overview

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.

1. Ensure that you have entered your legal name, current home address, 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/>

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'.

Next [Cancel](#)

2. Step #2: Accept Terms and Conditions - Check **I agree to Terms & Conditions** box and select **Next** (Figure 14).

Figure 14: 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 15).
 - The Social Security Number (SSN) is the primary piece of information that is required.

Figure 15: Step #3 - Enter Your Information

The screenshot shows the 'My Enterprise Portal' interface for Step #3: Enter Your Information. The header includes 'My Enterprise Portal', 'My Apps', and user information 'Bryan Canty'. The form contains several input fields: First Name, Middle Name (optional), Last Name, Suffix (optional), Social Security Number, Birth Month (dropdown), Birth Date (dropdown), Birth Year (dropdown), Home Address Line 1, Home Address Line 2 (optional), City, State (dropdown), ZIP Code, and ZIP+4 Code (optional). There are also fields for Phone Number, Email Address, and a Confirm Email Address field. A section titled 'Is Your Address US Based?' has radio buttons for 'Yes' (selected) and 'No'. A yellow box highlights a checkbox with the text: 'Check here if you have read and verified the information above is accurate and complete as required by Identity Verification.' At the bottom are 'Back', 'Next', and 'Cancel' buttons. A 'Top' button is in the bottom right corner.

4. Step #4: Verify Your Identity - Complete **the identity verification questions** and select the **Checkbox** and then select **Next**. Select **Next** on the Confirmation screen (Figure 16).
- 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 16: Identity Verification Confirmation

The screenshot shows the 'Step #4: Verify Your Identity' Confirmation screen. The header includes 'CMS.gov | My Enterprise Portal', 'My Apps', and 'Help Log Out'. The main heading is 'Step #4: Verify Your Identity'. A green confirmation box with a checkmark icon contains the text: 'Confirmation' and 'You have successfully completed the Remote Identity Proofing process.' A yellow box highlights the 'Next' button at the bottom right of the confirmation box.

3.2 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 17).

Figure 17: Enter Role Details

The screenshot shows the CMS.gov My Enterprise Portal interface. The top navigation bar includes the CMS.gov logo, 'My Enterprise Portal', 'My Apps', a user profile icon, 'Help', and 'Log Out'. The main content area displays a progress bar with four steps: 1. Select a Role (completed), 2. Complete Identity Verification (completed), 3. Enter Role Details (current step), and 4. (not visible). Under step 3, there is a section titled 'Enter Role Details' with a note: 'All fields are required unless marked (optional)'. Below this, there is a form with a dropdown menu labeled 'Select Address location type' which is highlighted with a yellow box. To the right of the dropdown is a label 'Address location type' and a sub-label 'Select Address type of US or Non-US based on your current address'. At the bottom right of the form, there is a blue 'Next' button highlighted with a yellow box.

2. Complete the form and select **Next** (Figure 18).

Figure 18: Role Details Address Information

The screenshot shows the CMS.gov My Enterprise Portal interface. The top navigation bar includes the CMS.gov logo, 'My Enterprise Portal', 'My Apps', a user profile icon, 'Help', and 'Log Out'. The main content area displays a form titled 'Role Details Address Information'. The form contains 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)', 'Select Suffix (optional)', 'Enter Phone Number', and 'Phone Ext (optional)'. At the bottom right of the form, there is a blue 'Next' button highlighted with a yellow box. A 'Top' button is also visible in the bottom right corner.

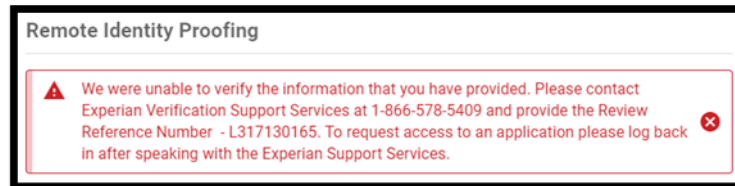
3. Fill-in the reason you need access within the **Enter Reason for Request box** and select **Submit** (Figure 19).
 - For example, "I need to submit my data in the RxDC HIOS module."

Figure 19: 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. If the RIDP Online Proofing is unsuccessful, then the system will display an error message (Figure 20).

Figure 20: Remote Identity Proofing Error



3.3 Unsuccessful Identity Proofing Steps

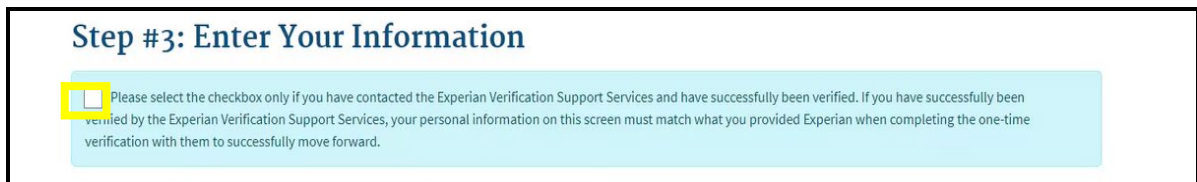
Important Information

- ONLY users that experience an error during the Identity Proofing process will complete this section.

Steps to take if the RIDP Online Proofing is unsuccessful:

1. Write down the Experian support contact information and the Review Reference Number. Select the **Cancel** button.
2. Contact Experian using the contact information provided in the error message and perform Phone Proofing.
3. If Phone Proofing was successful, sign into the IDM System and initiate the role request procedure again. When the user reselects the desired role, IDM will be aware of the success or failure of Online and Phone Proofing. The Role Request window displays a message which asks if Experian has been contacted (Figure 21).

Figure 21: Remote Identity Proofing – Checkbox



4. Select the “*I have already verified my identity with Experian*” checkbox if Experian has been contacted and click the **Next** button.
5. Verify that the information in the form exactly matches the information that was used to successfully verify the user’s identity by phone. Select the **Next** button and then Select the **OK** button. The Attribute menu appears, and the user resumes the Role Request procedure.

4 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.

To Access the HIOS Home Page:

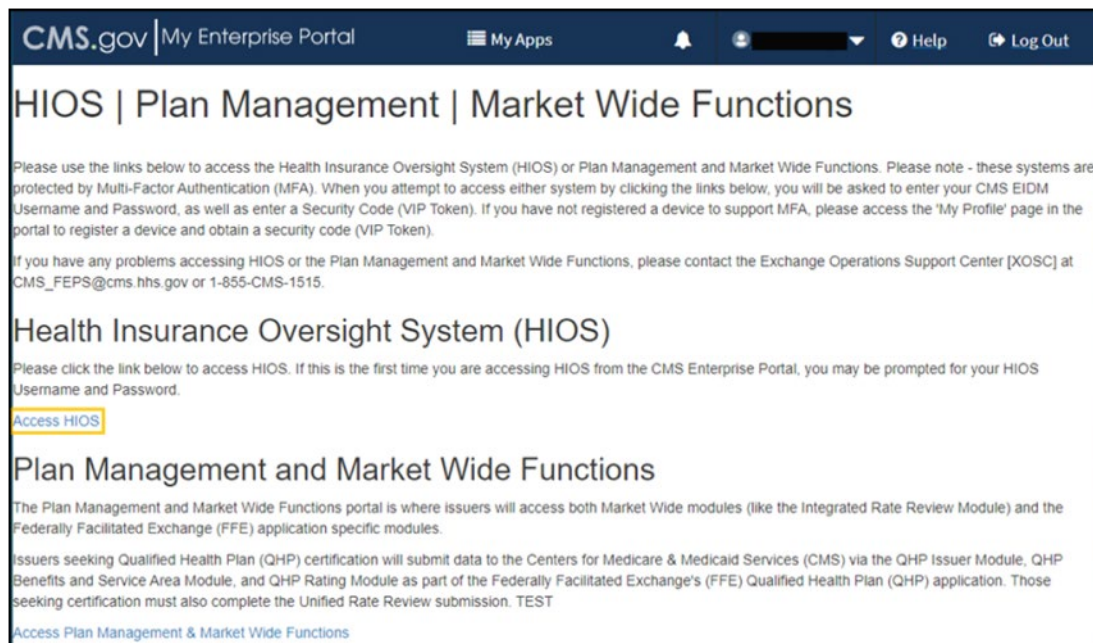
- After the HIOS Role request has been approved, navigate to CMS Enterprise Portal at <https://portal.cms.gov>. On the My Portal homepage, the HIOS application will display. Select **HIOS**, then select **Overview** (Figure 22).

Figure 22: My Portal Page



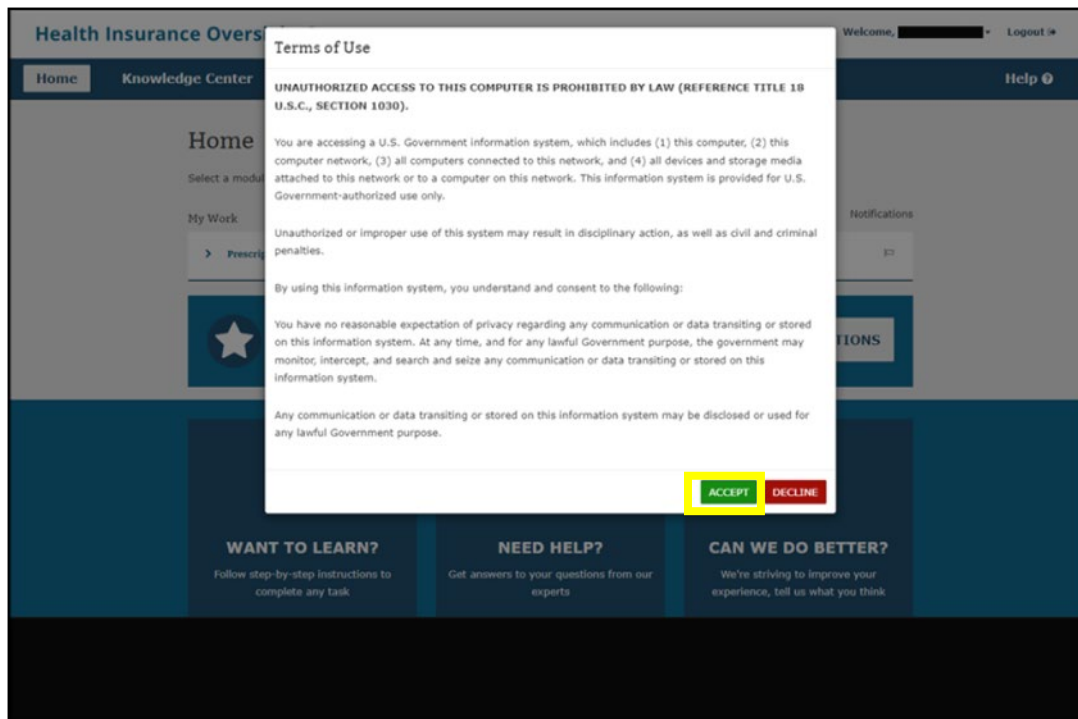
- Select **Access HIOS** (Figure 23).

Figure 23: Access HIOS Page



- Read the Terms of Use and Select **Accept** (Figure 24).

Figure 24: HIOS Terms of Use



5 Request HIOS Module Roles

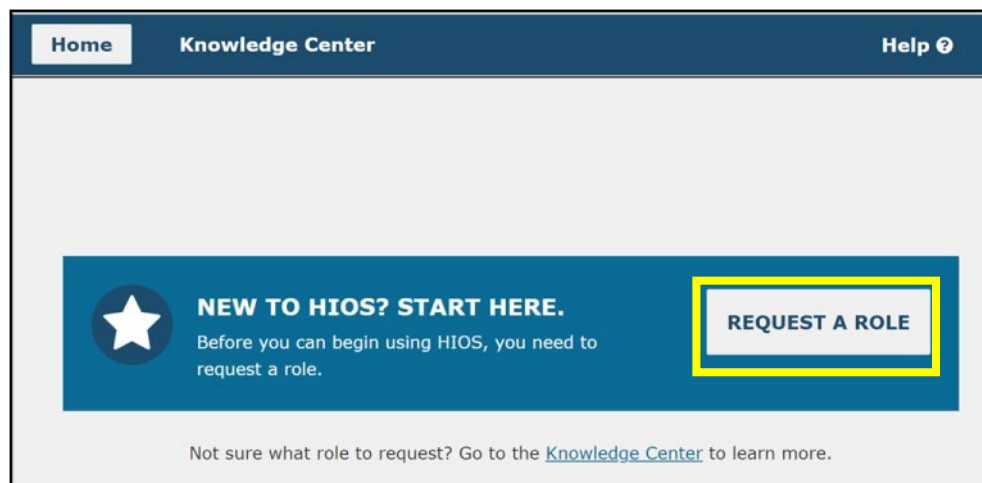
Important Information

- If your organization does not exist in HIOS, skip to section 6 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 7 to create an issuer. Once the issuer has been created and approved in HIOS, you will need to revisit this section to request the role. The issuer must exist in HIOS before a role can be requested.

To request the HIOS roles:

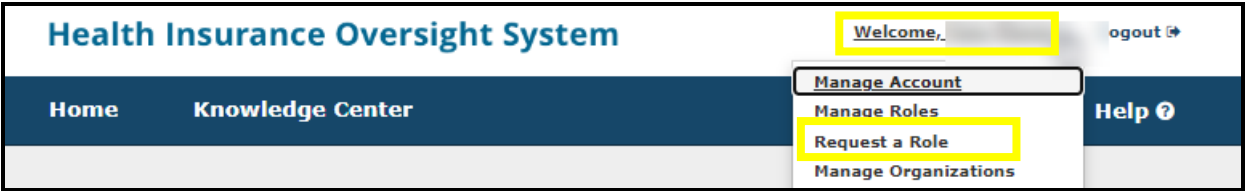
1. New users can select the **Request A Role** button on the page (Figure 25).

Figure 25: HIOS Homepage for New Users



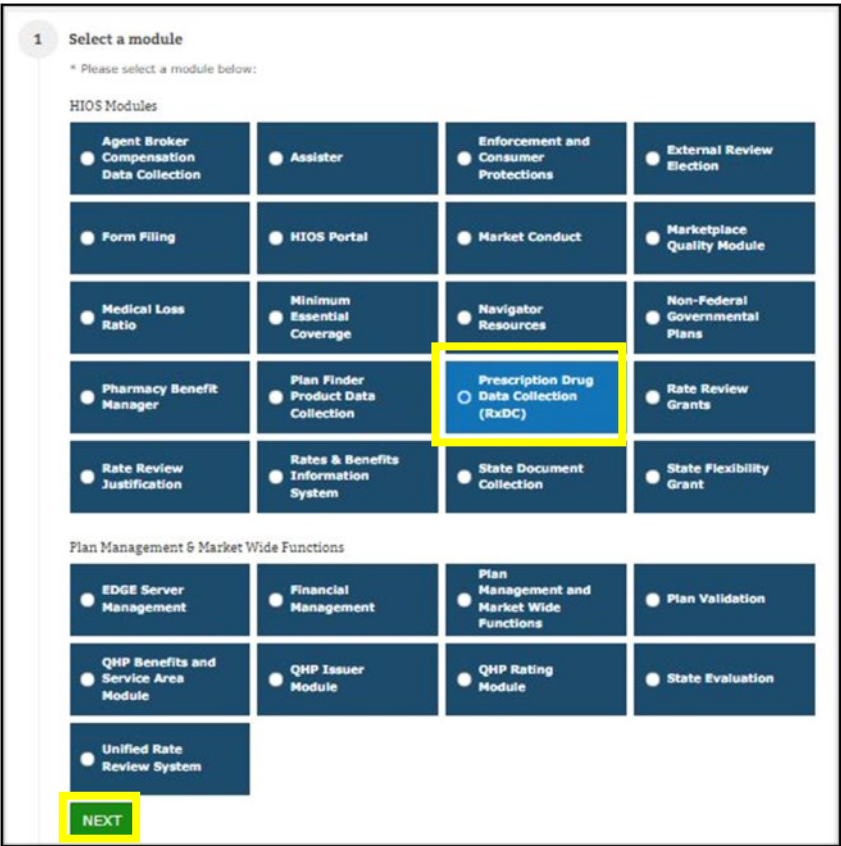
2. Existing HIOS users will need to select the **Welcome** drop-down and then select **Request a Role** (Figure 26).

Figure 26: Request a Role Drop-Down



3. Select a **Module** and select **Next** (Figure 27).

Figure 27: Request a Role - Select a Module



4. Select a **Role**, and if applicable to the module also select **Role Type** and **Contact Type** from step 2 and select **Next** (Figure 28).

Figure 28: Select a Role

Home Knowledge Center Help

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.

1 Select a module

Prescription Drug Data Collection (RxDC)

Revisit this step

2 Select a role

* Please select the role below:

☒ RxDC Submitter

NEXT

5. Select your **Association Type** and then select the **Search** button (Figure 29).

Figure 29: Add 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.

1 Select a module

Prescription Drug Data Collection (RxDC)

Revisit this step

2 Select a role

RxDC Submitter

Revisit this step

3 Add association

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

* Association Type

☐ HIOS Issuer ID

☐ Organization with FEIN

☐ Organization without FEIN (Other Organization)

NEXT

6. Within the Search for Association box, enter **YOUR company's EIN** and select **Search** (Figure 30).
- 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 6 below. After the organization has been approved, you will need to revisit section 5 to request the role.

Figure 30: 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', 'Organization with FEIN' (which is selected), 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 highlighted with a yellow box. A 'NEXT' button is at the bottom.

7. Select your company from the results and select **Next** (Figure 31).

Figure 31: Association Search Results

The screenshot shows the results of the search. The 'Add association' section is the same as in Figure 30. Below the search section, a yellow box highlights the results area. It says 'Showing results for' followed by a blurred input field. Under the heading '* ASSOCIATION', there is a single result with a radio button next to it. A 'NEXT' button is at the bottom.

8. Review the information in the Confirm your request section and select **Submit** (Figure 32).
 - If the information is not correct, return to the step where the incorrect information was entered and make the necessary correction.

Figure 32: Confirm Your Request

The screenshot shows the 'Confirm your request' step. It asks the user to select 'Submit' to complete the request. Below this, a summary box displays the selected information: 'MODULE: Prescription Drug Data Collection (RxDC)', 'ROLE: RxDC Submitter', and 'ASSOCIATIONS' (with a blurred result). At the bottom, there are two buttons: 'SUBMIT' (highlighted with a yellow box) and 'RESET'.

9. After you select Submit, a confirmation box will show noting that your role request has been submitted for approval (Figure 33).
 - 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 33: Role Request Confirmation

The screenshot shows the 'Request a Role' page in the HIOS Knowledge Center. At the top, there is a green confirmation box with a yellow border that reads: 'Confirmation: Your role request has been submitted for approval. Please log back in within 1-2 business days to check the status.' Below this, the page title is 'Request a Role'. A note states: '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.' Another note says: 'Please note, you must first have an organization registered in HIOS in order to request access to a module.' The main section is titled '1 Select a module' and includes a sub-note: '* Please select a module below:'. Under 'HIOS Modules', there are four buttons: 'Agent Broker Compensation Data Collection', 'Assister', 'Enforcement and Consumer Protections', and 'External Review Election'.

6 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:

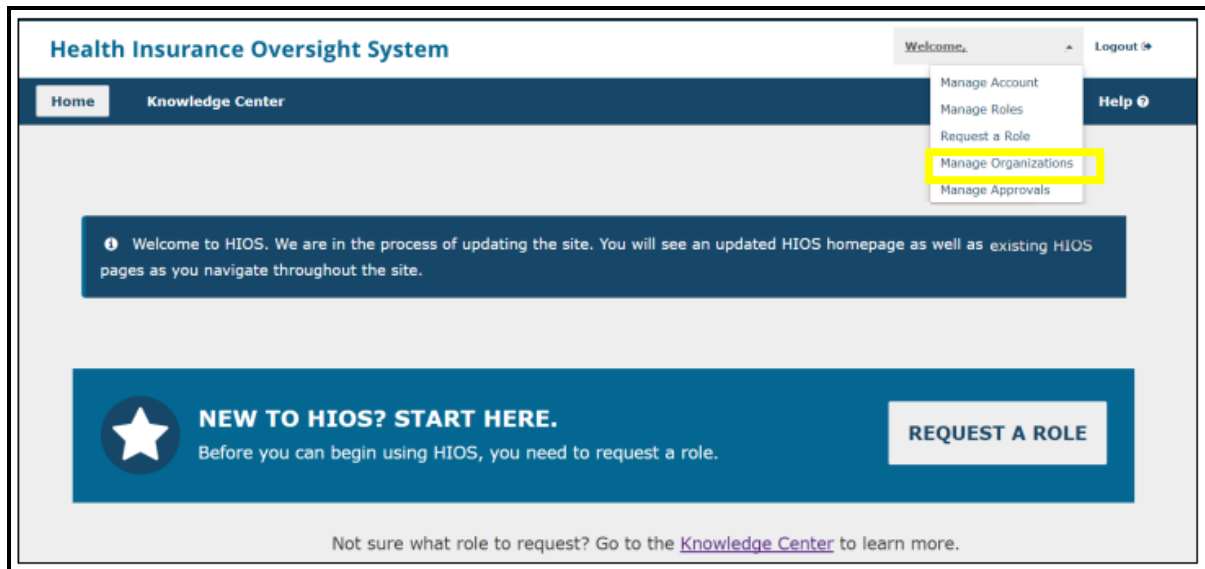
1. If your organization does not currently exist in HIOS, you will receive a message "The organization does not exist..." when attempting to Add association during the role request process. Select **Create an Organization** (Figure 34).

Figure 34: Create Organization Button

The screenshot shows the 'Add association' step of the role request process. A modal dialog box titled 'Create Organization Confirmation' is open, displaying the message: 'The organization does not exist in the system. Please select the "Create an Organization" button to first create the organization or select "Cancel" to use another organization for your search.' The dialog has two buttons: 'CREATE AN ORGANIZATION' (highlighted with a yellow border) and 'CANCEL'. In the background, the 'Add association' form is visible, showing options for 'Association Type' (HIOS Issuer ID, Organization with FEIN, Organization without FEIN) and a search field for the Organization Federal EIN/TIN.

Alternatively, you can create an organization directly from the HIOS home page by selecting **Manage Organizations** from the Welcome drop-down (Figure 35). Either action will take you to the 'Create an Organization' page where you can then complete the steps to register your organization in HIOS.

Figure 35: 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 36).

Organization Primary Function Notes:

- Organizations that are legal entities licensed to sell health insurance products and plans, and/or submitters from the parent corporation of licensed insurance entities, should select the first option.
- Agents and Brokers, TPAs, PBMs, third-party vendors, Consultants, employer sponsored group health plans that are not non-federal governmental plans, self-insured employers, sole proprietors etc. should select the second option.
- For plans that are sponsored by school districts, fire departments, state governments and local governments, select the third option.
- Non-US registered foreign entities that are coming into HIOS to report information for Minimum Essential Coverage should select the last option.

Figure 36: Select the Organization's Primary Function

The screenshot shows a web interface for creating an organization. On the left is a sidebar with a 'Manage Organizations' header and a list of actions: 'My Organizations', 'Create an Organization' (highlighted), 'Add an Issuer', 'Data Change Request', 'Add a Relationship', and 'Organization Search'. The main content area is titled 'Create an Organization' and includes a note: 'Please note, a field with an asterisk (*) before it is a required field.' Below this is a progress indicator with four steps: 1. Select the Organization's Primary Function (active), 2. Enter Federal EIN/TIN, 3. Organization Details, and 4. Confirm Your Request. Step 1 contains a question: '* What is the organization's primary business?' with four radio button options. The first option is 'A legal entity licensed to sell health insurance products and plans.' with a sub-note: 'This is also the required selection if you are the submitter from the parent corporation of licensed health insurance entities, or you are submitting data for Plan Finder (PF), Rates & Benefits Information System (RBIS) or Marketplace Plan Management System (MPMS).' The second option is 'An entity whose primary business is not selling health insurance products and plans.' with a sub-note: 'Examples include agents and brokers, pharmacy benefit managers, third-party administrators, consultants, employer-sponsored group health plans that are not non-federal governmental plans, self-insured employers, sole proprietors, etc.' The third option is 'An employer-sponsored group health plan offered by a state or local government.' with a sub-note: 'Examples include plans that are sponsored by school districts, fire departments, state governments or local governments, etc.' The fourth option is 'A non-US registered entity whose health insurance is regulated by a foreign government.' with a sub-note: 'This is the required selection if you are a non-US registered entity that is submitting data for Minimum Essential Coverage (MEC).' A green 'NEXT' button is located below the options.

< Manage Organizations

- My Organizations
- Create an Organization
- Add an Issuer
- Data Change Request
- Add a Relationship
- Organization Search

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?

☐ **A legal entity licensed to sell health insurance products and plans.**

This is also the required selection if you are the submitter from the parent corporation of licensed health insurance entities, or you are submitting data for Plan Finder (PF), Rates & Benefits Information System (RBIS) or Marketplace Plan Management System (MPMS).

☐ **An entity whose primary business is not selling health insurance products and plans.**

Examples include agents and brokers, pharmacy benefit managers, third-party administrators, consultants, employer-sponsored group health plans that are not non-federal governmental plans, self-insured employers, sole proprietors, etc.

☐ **An employer-sponsored group health plan offered by a state or local government.**

Examples include plans that are sponsored by school districts, fire departments, state governments or local governments, etc.

☐ **A non-US registered entity whose health insurance is regulated by a foreign government.**

This is the required selection if you are a non-US registered entity that is submitting data for Minimum Essential Coverage (MEC).

NEXT

2 **Enter Federal EIN/TIN**

3 **Organization Details**

4 **Confirm Your Request**

3. After selecting your organization's primary function, select **NEXT** (Figure 37).

Figure 37: Finalize Selection

This close-up view shows the bottom portion of the form from Figure 36. It highlights the 'NEXT' button, which is a green rectangle with white text, enclosed in a yellow rectangular border. Below the button, the progress indicator shows step 2, 'Enter Federal EIN/TIN', as the next step in the process.

☐ **An employer-sponsored group health plan offered by a state or local government.**

Examples include plans that are sponsored by school districts, fire departments, state governments or local governments, etc.

☐ **A non-US registered entity whose health insurance is regulated by a foreign government.**

This is the required selection if you are a non-US registered entity that is submitting data for Minimum Essential Coverage (MEC).

NEXT

2 **Enter Federal EIN/TIN**

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 38).

Figure 38: Create an Organization: Enter Federal EIN/TIN

The screenshot shows a form titled "2 Enter Federal EIN/TIN". Below the title, it says "First, let's see if your organization already exists in the system." There is a text input field containing "444666444" and a "SEARCH" button. Below this, a green confirmation box states: "Confirmation: The FEIN/TIN you entered does not already exist in the system. Please select next below to enter your organization's details." At the bottom of the form is a green "NEXT" button. The form is part of a multi-step process, with the next step being "3 Organization Details".

5. Scroll down to Organization Details and complete the form for your organization (Figure 39).

Figure 39: Create an Organization: Organization Details

The screenshot shows a form titled "3 Organization Details". Below the title, it says "Please enter your organization details below." The form contains several fields: "Organization Legal Name" (text input), "Incorporated State" (dropdown menu), "Domiciliary Address" (section header with a help icon), "Address Line 1" (text input), "Address Line 2" (text input), "City" (text input), "State" (dropdown menu), "ZIP Code (5 digits)" (text input), and "ZIP Plus 4 (4 digits)" (text input).

6. Review the organization's information and scroll down to the Confirm Your Request section and select **SUBMIT** (Figure 40).
 - 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 40: Confirm Your Request

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

7 Create an Issuer

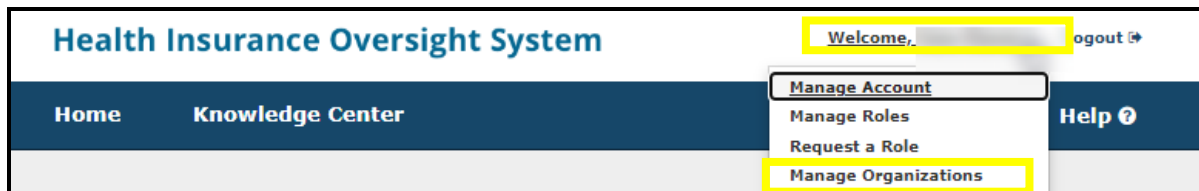
Important Information

- 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 6 to create an organization.
- **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 41).

Figure 41: Manage Organizations



2. On the Manage Organizations page, select **Add an Issuer** (Figure 42).

Figure 42: 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.

[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.

[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.

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 43).

Figure 43: 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](#)
817263871 - JK 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

Domiciliary Address

The domiciliary 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 selection 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.

8 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.

9 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 .
How do users access HIOS?	To access HIOS, visit https://portal.cms.gov . Users will need to complete the registration for the CMS IDM account through the CMS Enterprise Portal prior to requesting access to HIOS.
How do users access HIOS and Plan Management & Market Wide Functions?	To access HIOS, users need to successfully complete the CMS Enterprise Portal registration for an IDM account. When users log in to the CMS Enterprise Portal, there will be a HIOS button displayed on the My Portal page. Users are not on HIOS maintained pages until they select the HIOS button. Once users select the HIOS button, they will be navigated to the landing page and can select either the Access HIOS link or the Access Plan Management & Market Wide Functions link to navigate to the HIOS Home Page. All HIOS and Plan Management functions will display on the same page.
Where do users request roles and access to HIOS modules?	Module access and role requests are done via the Request a Role function on the HIOS Home Page. To submit a request, users select the Request a Role link from the Welcome drop-down menu, the HIOS module(s), and role(s) applicable to the module(s).
Why can users not find the role(s) needed on the Request Role page?	Some roles for HIOS modules have restricted access. These will not display on the user interface. Users will need CMS approval before certain roles can be granted.
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.
How do users view or access the module(s)?	To access the requested module, users need to select the correct link on the CMS Enterprise Portal page, either the Access HIOS link or the Access Plan Management & Market Wide Functions link. Users will also need to have the correct user role(s) to access specific HIOS module(s).
When users launch the module, there is no link available to access an application. How do users view the link to access an application?	Some HIOS modules (i.e., EDGE Server Management, Financial Management, QHP Modules, or RBIS) have a submission window where a link to an application can be accessible. When the submission window is closed, the link will not display, and users may see a message stating the application is not available or the submission window is closed.