

CMS Enterprise Portal and Health Insurance Oversight System

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 EIDM account. EIDM is the acronym for CMS' Enterprise 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.). EIDM handles the identity verification of users trying to request access to CMS systems. A CMS EIDM 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 EIDM account and request access to HIOS.

1 Register for a CMS EIDM Account (For New Users)

1. Navigate to the CMS Enterprise Portal (<https://portal.cms.gov>) and click the 'New User Registration' link on the right side of the page (See Figure 1).
2. Agree to the Terms and Conditions and click the 'Next' button to continue.
3. On the New User Registration page, enter the required personal information and choose the desired User ID and Password. The User ID uniquely identifies you to EIDM, and therefore cannot be changed. You'll need to select challenge questions and answers for identity verification and account management. After completing the registration, an email acknowledging successful registration to EIDM will be sent, along with your User ID.



Figure 1: CMS Enterprise Portal Homepage

2 Request Access to HIOS (For New Users)

1. Navigate to the CMS Enterprise Portal (<https://portal.cms.gov>) and click the 'Login to CMS Secure Portal' button.
2. Accept the Terms and Conditions and enter your EIDM credentials.
3. Click the 'Request Access Now' button. From the Access Catalog, click the 'Request Access' button for the HIOS application.
4. On the My Access page, click the 'Request New System Access' link. Select 'HIOS Application' from the System Description drop-down menu and 'HIOS Issuer' for the Role.
5. On the Request New System Access page, click the hyperlink provided to register for access to HIOS (See Figure 2). On the Request HIOS Account page, complete the HIOS registration form and submit for approval. Once the HIOS user registration request has been reviewed and approved, you'll receive an email containing the HIOS Authorization Code.
6. Repeat steps 1-4 above. On the Request New System Access page, enter the HIOS Authorization Code and then click the 'Submit' button (See Figure 2). On the Successful Completion page, click the 'OK' button. This concludes the EIDM function. Log out of the CMS Enterprise Portal.

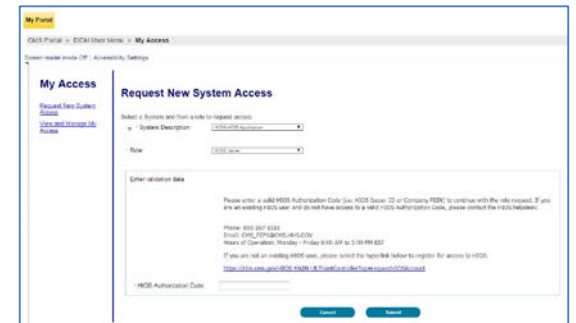


Figure 2: CMS Enterprise Portal – Request New System Access

For CMS Enterprise Portal issues, contact the Exchange Operations Support Center at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov.

7. Repeat steps 1-2 above. You'll see a yellow 'HIOS' button on the top left of the dashboard. Click the yellow 'HIOS' button. On the landing page, click the 'Access HIOS' or the 'Access Plan Management & Market Wide Functions' link to access HIOS functionality (See Figure 3).



Figure 3: CMS Enterprise Portal - Access HIOS

3 Register an Organization (For New Users)

Not all users will need to register an organization in HIOS but new users will not have any organizational associations or role permissions. The 'Manage an Organization' functionality allows new users to create an organization before requesting a user role(s).

1. Click the 'Manage an Organization' button on the HIOS Home Page (See Figure 4).



Figure 4: HIOS Home Page

2. On the Manage an Organization page, select 'Create new organization' from the drop-down menu (See Figure 5).
3. Select the Organization Type. There is a hyperlink to a list of organization types and their definitions to help you decide which organization type to create. Provide a Federal EIN/TIN in order to conduct a search to determine if the organization currently exists in HIOS. If the organization does not have an FEIN, select 'Other Organization Type' from the drop-down list and check the box, 'My organization does not have an FEIN'. Enter the organization name to conduct a search (See Figure 5).
4. If an organization does not exist, you'll need to register the new organization by clicking the 'Create Organization' button (See Figure 6). On the Register New Organization page, enter your organization's information and click the 'Continue' button.

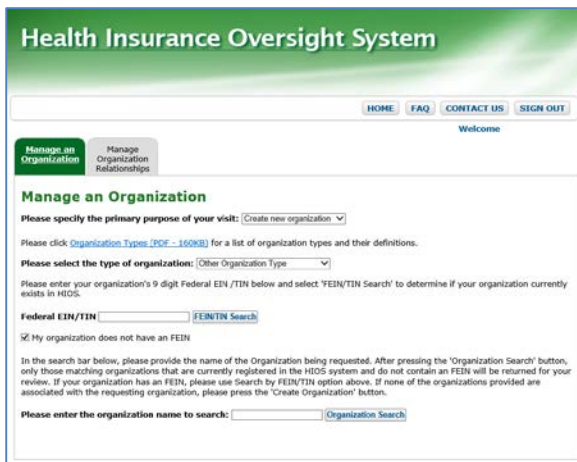


Figure 5: HIOS - Manage an Organization

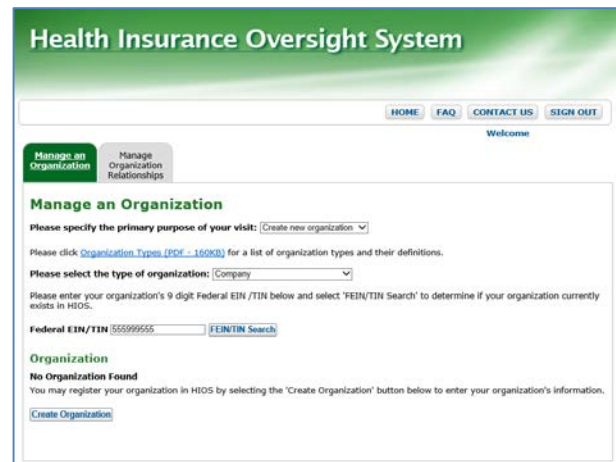


Figure 6: HIOS - Create Organization

5. On the Register Attributes for New Organization page, enter your organization's attribute information and click the 'Review/Continue' button (See Figure 7). Review your organization information and then click the 'Submit' button.
6. You'll see a confirmation message notifying you to log back in to HIOS within 1-2 business days to check the status of your request. Click the 'Continue' button to navigate back to the Manage an Organization page.



Figure 7: HIOS - Register Attributes for New Organization

4 Add Issuer(s) to an Organization

If an organization exists in HIOS, users can add an Issuer(s) to that organization.

1. Click the 'Manage an Organization' button on the HIOS Home Page (See Figure 4).
2. On the Manage an Organization page, select 'Edit existing organization' from the drop-down menu (See Figure 8).
3. Select the Organization Type.
4. Enter the Federal EIN/TIN and click the 'FEIN/TIN Search' button.
5. Click the 'Add Issuer' button.
6. On the Register New Issuer page, enter the Issuer information and click the 'Save and Add Another Issuer' button (See Figure 9).
7. The Issuer(s) that you have requested to create will display on the page. Click the 'Submit' button.
8. You'll see a confirmation message notifying you to log back in to HIOS within 1-2 business days to check the status of your request. Click the 'Continue' button to navigate back to the Manage an Organization page.

Organization Legal Name	Organization Type	Federal EIN/TIN	Action
HIOS Test Company	Company	555999555	View

Figure 8: HIOS – Add Issuer

Issuer Legal Name: HIOS Test Company
Issuer Marketing Name: _____
Registration State: _____
Federal EIN: 555999555
HIOE Company Code: _____
HIOE Group Code: _____
Market Type and Line of Business: _____
Company Address:
Address Line 1: _____
Address Line 2: _____
City: _____
State: _____
ZIP code: _____
ZIP Plus 4: _____

Figure 9: HIOS – Register New Issuer

5 Request Role(s)

Users with an organizational association can request a role(s) for the HIOS module(s).

1. Click the 'Role Management' button on the HIOS Home Page (See Figure 4).
2. Click the 'Request Role' tab. On the Request Role page, there's a hyperlink to a description of each module and the role functionality (See Figure 10).
3. Select from the Module drop-down menu.
4. Select the Requested Role, User Type, User Sub-Type (if applicable to the module) and click the 'Continue' button.
5. Enter the Issuer ID and click the 'Search' button.
6. Click the 'Review/Continue' button and proceed to submit the role request.
7. You'll see a confirmation message notifying you to log back in to HIOS within 1-2 business days to check the status of your request. To see your user role(s) and access permissions, click the 'View Existing Role' tab.

Module: HIOE Plan Finder Product Data Collection (PF)
Requested Role: Issuer
User Type: Individual Market Subscriber
User Sub-Type: Primary Contact
Issuer Association:
Issuer ID: 81731
Search Results: 81731 - FFE Test Company - VA

Figure 10: HIOS - Request Role

Frequently Requested HIOS Roles

The table below provides a description of the most frequently requested roles:

HIOS Module	Role & Description
HIOS – Portal	<p>Company Administrator: A representative of a Company or Non Insurance Company can request this role to edit their organization information. The Company Administrator can also edit the information for the associated Issuers. A company can have any number of Company Administrators. A user with a Submitter or Validator roles for a Company cannot be a Company Administrator.</p> <p>Issuer Administrator: A representative of the Issuer who will be solely responsible for editing of the Issuer level information. Each Issuer can have multiple administrators. A user with a Submitter or Validator role cannot be an Issuer Administrator.</p> <p>Organization Administrator: A representative of a Non-Federal Governmental Plans organization or Other Organization Type that will be responsible for editing the organization information. Each organization can have multiple administrators.</p> <p>Role Approval Administrator: A role that can be obtained by a representative of an organization (currently applies only to Non-Federal Governmental Plans organization). Once users obtain this role for a particular organization, they will be solely responsible for approving any role requests for that particular organization.</p>
Plan Finder Product Data Collection	<p>State User is associated to a state and can view all the Issuer organizations assigned to that state.</p> <p>Submitter User is a representative of an organization who can submit and view Issuer data. <i>Primary Submitter contact:</i> The Primary Submitter is the primary contact for the submission issues. <i>Backup Submitter contact:</i> The Backup Submitter is the backup contact for the submission issues.</p> <p>Validator User is a representative of an organization who can validate the data submitted by the Issuer. <i>Primary Validator contact:</i> The Primary Validator is the primary contact for the validation issues. <i>Backup Validator contact:</i> The Backup Validator is the backup contact for the validation issues.</p> <p>Attestation User: An official within an organization, usually CEO or CFO, who attests the data submitted.</p> <p>NOTE: The Primary and Backup contacts cannot be edited in Plan Finder. Users need to contact the Exchange Operations Support Center at 1-855-267-1515 or email CMS_FEPS@cms.hhs.gov to submit a change request to the user information.</p>

HIOS Frequently Asked Questions

Questions	Answers
Who can users contact for system support?	For Production system support, users can call the Exchange Operations Support Center 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 EIDM account through the CMS Enterprise Portal prior to requesting a HIOS account. See page 1 of this guide for instructions on how to register for a CMS EIDM account and request access to HIOS.
Why are users required to enter their EIDM (Enterprise Identity Management) credentials to access HIOS?	Users must register for an EIDM account and obtain an EIDM User ID and password to access the CMS Enterprise Portal. HIOS has been integrated with the CMS Enterprise Portal and is only accessible through the Portal.
What is the approval process for users requesting access to HIOS?	Users with EIDM credentials need to complete the HIOS account information form and provide their organizational email address. The system does not accept domains such as Gmail, Yahoo, etc. The organizational email is one of the main criteria to verify the user to the organization relationship. Users will not have immediate approval. The user information is verified and processed on the backend.
How do users obtain a HIOS Authorization Code?	Once the HIOS user registration request has been reviewed and approved, an email containing the HIOS Authorization Code will be sent to the organizational email address provided by the user. Users should also check their Junk Email folder to ensure the message was not marked as spam.
How do users access HIOS and Plan Management & Market Wide Functions?	Users need to successfully complete the CMS Enterprise Portal registration for an EIDM account in order to access HIOS. When users log in to the CMS Enterprise Portal, there will be a yellow 'HIOS' button displayed on the top left of the dashboard. Users are not on HIOS maintained pages until they click the yellow 'HIOS' button. Users click the yellow 'HIOS' button, then the 'Access HIOS' link to navigate to the HIOS Home Page for organization registration and role requests. Users click the 'Access Plan Management & Market Wide Functions' link to access Marketplace application specific modules.
Where do users request roles and access to HIOS modules?	Module access and role requests are done via the Role Management function on the HIOS Home Page. To submit a request, users select the 'Request Role' tab, 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 or Issuer Administrator role to edit organization information and complete such tasks as updating the TPA information for that organization.
How do users view the green button(s) to the module(s) requested?	To access the green button for the module requested, users need to click 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 click the green button, 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 when 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.