Centers for Medicare & Medicaid Services

Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey) Website

Issuer User Guide

Version 2.0

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Introduction

The Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey) website is a secure online website developed by the Centers for Medicare and Medicaid Services (CMS) to support QHP Enrollee Survey operations.

The QHP Enrollee Survey website has three objectives:

- Enable QHP issuers to attest to the survey eligibility criteria or report ineligibility status.
- Enable QHP issuers with eligible reporting units to report survey vendor selection to CMS and confirm sample frame validation.
- Enable QHP survey vendors to securely submit survey data.

All QHP issuers with eligible and/or ineligible reporting units are required to sign in to the QHP Enrollee Survey website to perform the following activities by the deadline established by CMS.

QHP issuers with **eligible** reporting units must:

1. Attest to the QHP Enrollee Survey eligibility criteria for each eligible reporting unit.
2. Authorize contracted HHS-approved vendor to collect data on their behalf.
3. Confirm sample frame validation.

QHP issuers with **ineligible** reporting units must:

1. Report ineligibility status for each ineligible reporting unit.

Issuers will be notified when registration opens to access the QHP Enrollee Survey website to complete the above steps.

Existing QHP issuer users will be able to sign in to the QHP Enrollee Survey website with their previously registered CMS's Identity Management System (IDM) account.

New QHP issuer users must take the following steps to access the website:

1. Register a CMS IDM account. For detailed steps on how to register an account, see Section 1 *(QHP Issuers Without an Existing IDM Account: Register a New User Account in CMS's IDM System).*

2. Request the QHP Survey Issuer role. For detailed steps on how to request the Issuer role, see *Section 2 (QHP Issuers Without the QHP Enrollee Survey Role Assigned: Request the QHP Enrollee Survey Issuer Role).*

   - After receiving a confirmation email that the role request is approved, issuers will be able to sign in to the QHP Enrollee Survey website. For steps on how to sign in to the website, see Section 3 *(All QHP Issuers: Sign In to QHP Enrollee Survey Website).*

Issuers can find answers to the commonly asked questions related to account setup, QHP Enrollee Survey website access, or the attestation process on the Frequently Asked Questions (FAQ) page of the QHP Enrollee Survey website. If you cannot find an answer to your question on the FAQ page, please contact the QHP Enrollee Survey Project Team at QHP_Survey@air.org.

Section 1: QHP Issuers Without an Existing IDM Account – Register a New User Account in CMS's IDM System

This section provides step-by-step instructions on how to register and create a new user ID and password through the CMS IDM system.

Note: If you have registered in CMS IDM before and already have an existing CMS IDM account, please skip the steps in this section. Do not create a duplicate IDM account.

1. Navigate to https://home.idm.cms.gov/.
   The **Sign In** page (Figure 1) appears.

Figure 1: CMS IDM Sign In Page

2. Click the **New User Registration** button.
   The **Personal** tab (Figure 2) of the IDM Self-Service registration page appears.

Figure 2: IDM System User Registration Form – Personal Tab

3. Enter the Name, Date of Birth, and E-mail Address information into the respective fields of the IDM system User Registration form. **You must use the email address where you received the QHP Enrollee Survey attestation process e-mail.**

4. Read the IDM system Terms and Conditions, click the checkbox to acknowledge agreement with the Terms and Conditions, and then click the **Next** button.

   The **Contact** tab (Figure 3) of the IDM Self-Service registration page appears.

Figure 3: IDM System User Registration Form – Contact Tab

5. If the home address is located inside the US, keep the default "US Address" setting. If the home address is located outside of the United States, click the **Foreign Address** radio button.

6. Enter the Home Address and Phone Number information into the respective fields and then click the **Next** button.

   The **Credentials** tab (Figure 4) of the IDM Self-Service registration page appears.

Figure 4: IDM System User Registration Form – Credentials Tab

7. Enter the desired user ID and password into the respective fields of the User registration form.

   Passwords that are used to access the IDM system must conform to the following CMS guidelines:

   - Passwords must be at least 15 characters in length.
   - Passwords must include an uppercase letter.
   - Passwords must include a lowercase letter
   - Passwords must include a number (0 - 9).
   - Passwords must not contain a space.
   - Passwords must not be one of the user's last six passwords.
   - Passwords must not contain parts of the user's First Name, Last Name, or User ID.
   - 24 hours must have elapsed since the last password change.

8. Click the **Security Questions** list box and choose a challenge question from the list that appears.

9. Type the security question answer into the Security Questions **Answer** field.

10. Click the **Submit** button to submit the account registration request.

   The system displays a message that indicates the account was successfully created.

Section 2: QHP Issuers Without the QHP Issuer Role Assigned – Request the QHP Issuer Role

To access the Issuer Dashboard on the QHP Enrollee Survey website to complete the attestation process, issuers must request the "QHP Survey Issuer" role by signing in to the CMS IDM system.

Note: If you already have the "QHP Survey Issuer" role and have signed in to the QHP Enrollee Survey website before, please skip the steps in this section. To check if you already have the Issuer role, sign in to CMS IDM, and click on the **Manage My Roles** button located on the IDM Self-Service dashboard to view your assigned roles and to verify that you have the "QHP Survey Issuer" role.

This section provides the steps that users must follow to sign in to the IDM system to request the QHP Issuer role.

1. Navigate to https://home.idm.cms.gov/.
   The **Sign In** page (Figure 5) appears.

Figure 5: CMS IDM Sign In Page

2. Enter the user ID and password, created while registering an account, into the respective fields.

3. Read the Terms & Conditions, click the check box to acknowledge agreement, and then click the **Sign In** button.

4. In the Verify with Email Authentication window (Figure 6) that appears, if you have multiple registered Multi-factor Authentication (MFA) devices, select an MFA factor by clicking on the drop-down arrow next to the mail icon.
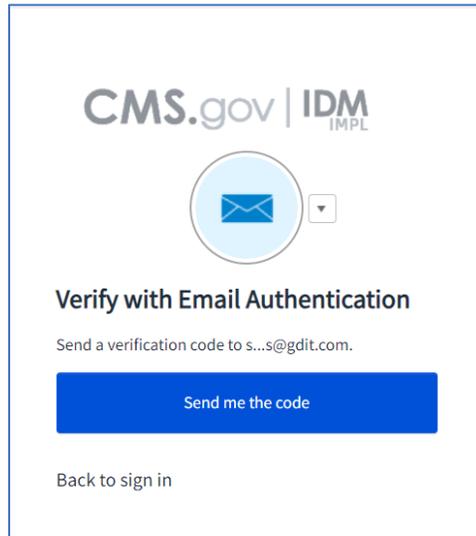
Figure 6: Verification Code Request

Note: All users who sign in to CMS IDM for the first time after creating an account will be prompted to register at least one MFA device. Users may add multiple MFA devices to their IDM account. Users will be prompted to authenticate with an MFA device that is registered to their account each time they sign into the IDM system.

5. Follow the directions for the chosen MFA factor (MFA device).

6. If you chose email as the authentication factor, click the **Send me the code** button in the Verify with Email Authentication window (Figure 6) to request a one-time verification code via email.

7. Enter the verification code received into the **Verification code** field (Figure 7).
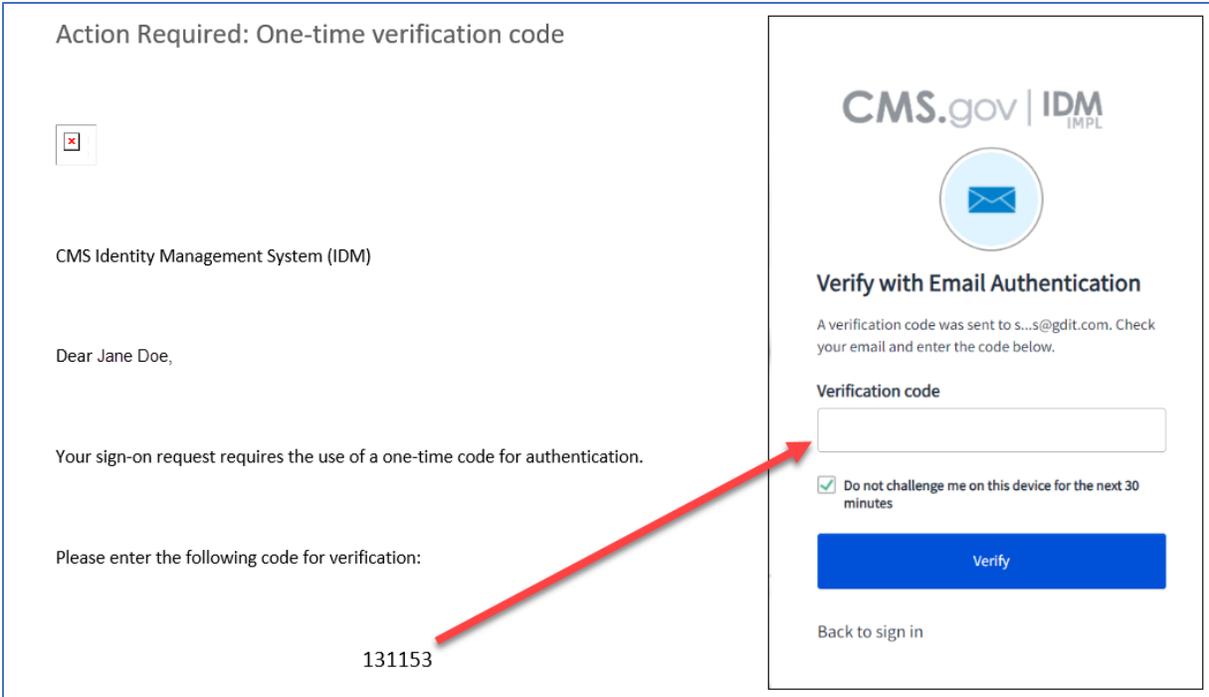
Figure 7: One-time Verification Code Email and the Verification Code Window

8. Click the **Verify** button.

   You will be taken to the IDM Self-Service dashboard.
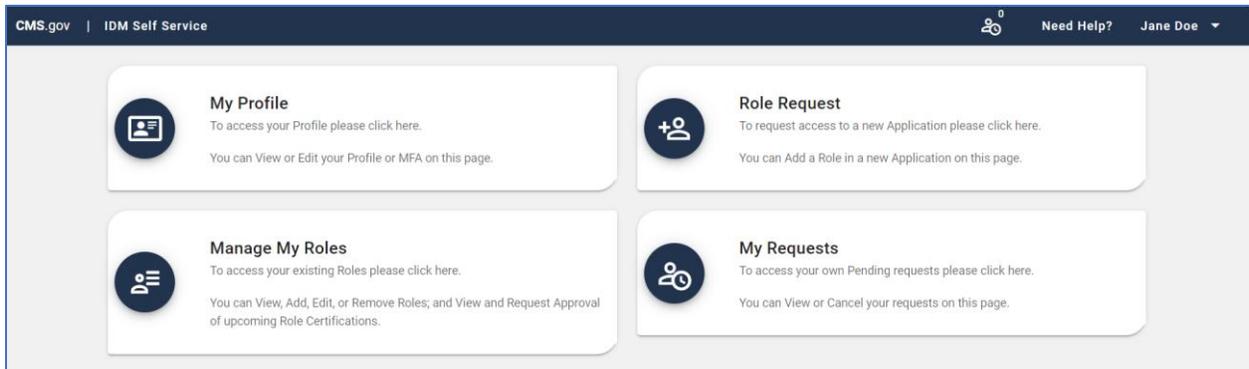
Figure 8: IDM Self-Service Dashboard

9. Click on the **Role Request** button located on the IDM Self-Service dashboard (Figure 8).

   The **Role Request** window (Figure 9) appears.
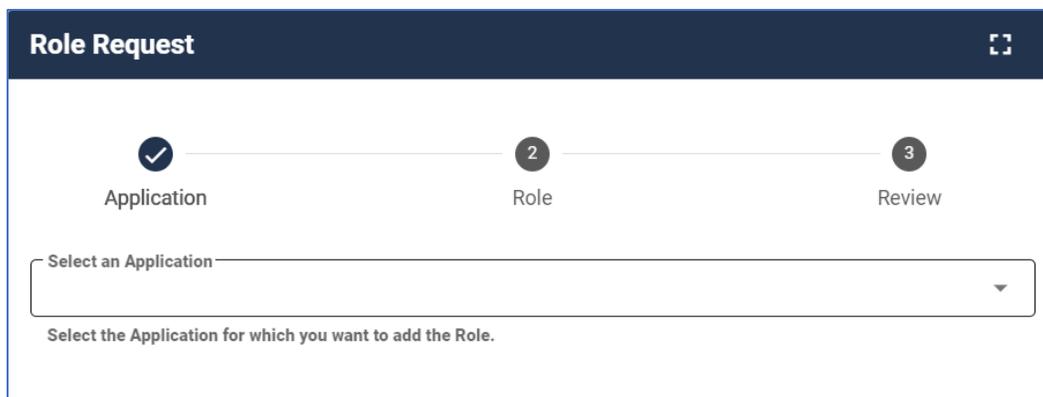
Figure 9: Role Request Page

10. From the **Select an Application** drop-down list (Figure 9), select the "Qualified Health Plan Enrollee Satisfaction Survey" application.
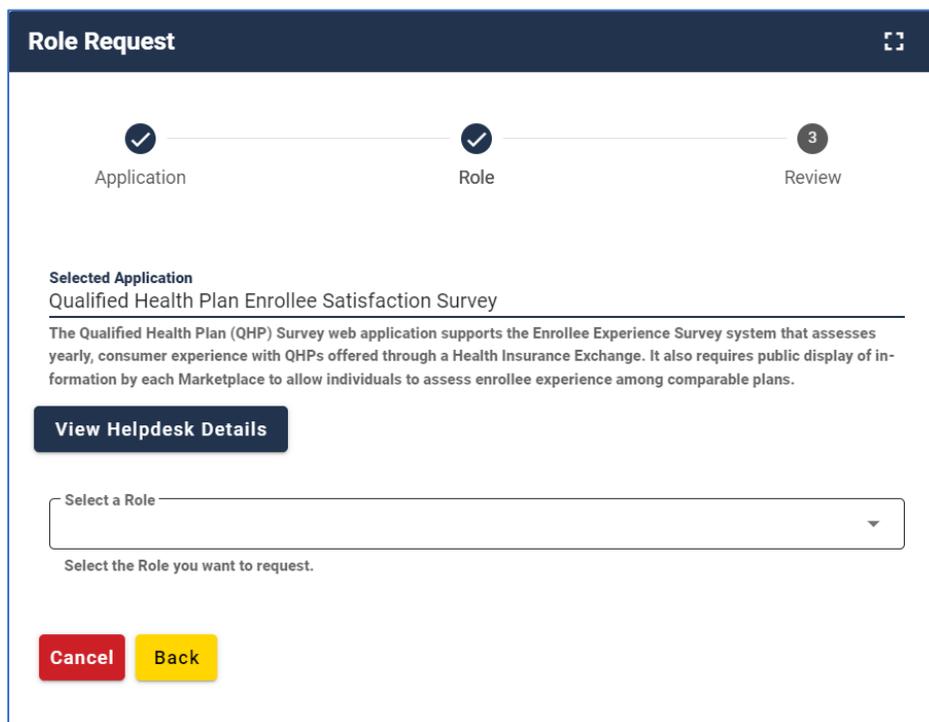
Figure 10: Role Request – Selecting the QHP Application

11. From the **Select a Role** drop-down list (Figure 10), select the "QHP Survey Issuer" role (Figure 11).

Figure 11: Role Request – Selecting the QHP Issuer Role

Upon selecting the QHP Survey Issuer role, the initial Remote Identity Proofing (RIDP) page (Figure 12) will be displayed.

Figure 12: Role Request – Initial RIDP Page

12. Review the **Identity Verification** description statement.

13. Click the **View Terms & Conditions** link and review the RIDP terms and conditions.

14. Click the **I agree to the terms and conditions** check box to acknowledge agreement with the terms and conditions.

15. Click the **Next** button.

    The **Identity Verification** form (Figure 13) appears.

Figure 13: Identity Information Verification Form

16. Enter your Name, Date of Birth, and Email Address information into the respective fields.

17. Enter your Social Security Number (SSN) into the Social Security Number field. Note that this information is *not* stored in the CMS system and is only used for this identity proofing step.

18. Enter your Home Address information and Phone Number information into the respective fields. Note that you must enter your personal information in all fields, such as personal email address,

personal phone number, and home address. Do not enter any business information. Any information you enter is *not* stored in the CMS IDM system and is only used for this identity proofing step.

19. Click the **Submit** button.

The RIDP process begins. Users that successfully complete Online Proofing will see a confirmation message on the screen, after which they can resume the role request process.

If the RIDP Online Proofing process is unsuccessful, the system will display an error message. Users must contact Experian using the contact information and Reference Number provided in the error message and perform Phone Proofing. If Phone Proofing is successful, users can sign in to the IDM system and initiate the role request procedure again. If the Phone Proofing RIDP process is unsuccessful, users may contact the Application Help Desk at QHP_Survey@air.org and inquire about the Manual Proofing process.

Figure 14: RIDP Online Proofing Error Message

Once the RIDP process is successfully completed, the Role Request page will display a text box titled "Reason for Request."

Figure 15: Role Request – Entering the Reason for Request

20. Enter a brief justification statement into this field to provide a justification for the role request.

21. Click the **Submit Role Request** button.

The Role Request page displays a Request ID and a message informing you that the request was successfully submitted.

Once you receive a confirmation email that the role request is approved, you will be able to Sign In to the QHP Enrollee Survey website.

Section 3: All QHP Issuers – Sign In to QHP Enrollee Survey Website

This section provides the steps that users must follow to sign in to the QHP Enrollee Survey website.

1. Navigate to https://qhpsurvey.cms.gov/.

    The **Home** page (Figure 16) is displayed.
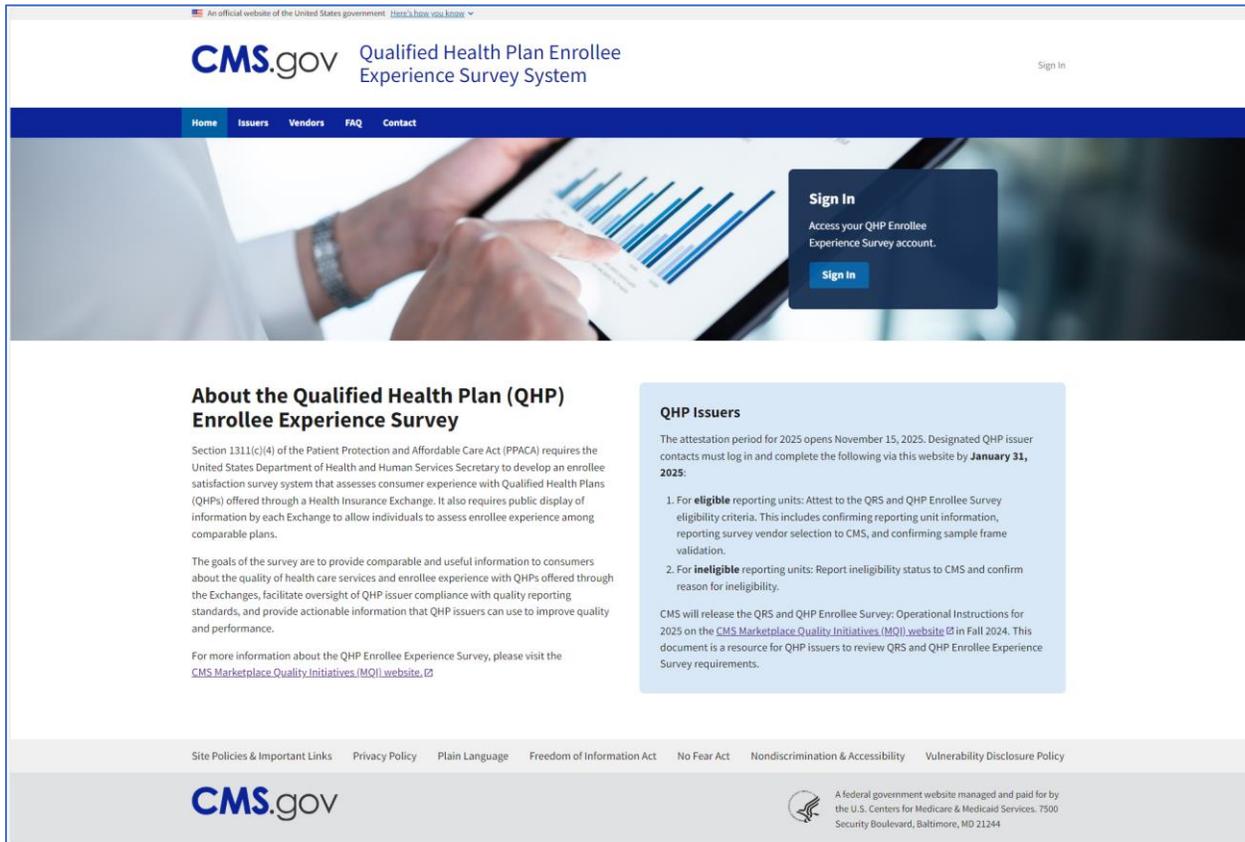
Figure 16: QHP ESS Website Home Page

2. Click on the **Sign in** button in the Sign In box or the Sign In link at the top right of the page to access your QHP Enrollee Survey website account.

    The IDM **Sign In** page (Figure 17) appears.

Figure 17: CMS IDM Sign In Page

3. Enter your User ID and Password.

4. Click the check box to acknowledge agreement, then click the **Sign In** button.

5. Follow the directions for the chosen MFA factor (MFA device) and then click on the **Verify** button.

   The Issuer Dashboard (Figure 18) with a view of the Issuer and Reporting Unit information is displayed.

Figure 18: Issuer Dashboard – View of Issuer and Reporting Unit Information

6. Under the Reporting Units panel, click on the arrow to the left of the Reporting Unit ID to view the attestation questions/prompts to attest to reporting unit eligibility or ineligibility. Follow the question prompts to verify all required information (for example, general information; enrollment status as of July 1, 2024; enrollment status as of January 1, 2025; year plan began

operating; operational status in 2023, 2024, and 2025; and whether the reporting unit will discontinue prior to June 15, 2025).

7. After following the prompts and providing the requested information, eligible reporting units will be prompted with a drop-down menu to select the appropriate survey vendor (or ineligible reporting units will be prompted with a drop-down menu to select the appropriate ineligibility reason). Issuers will also be able to enter additional comments, if needed.

📰 **Reporting Units**

	Reporting Unit	Issuer	↑	Attestation Status	Authorized Vendor	Ineligibility Reason
⌄	18558-IA-EPO	BLUE CROSS AND BLUE SHIELD OF IOWA		In Progress		

Did this reporting unit operate on an Exchange in 2024?
◯ No   ⦿ Yes

Will this reporting unit operate on an Exchange in 2025?
◯ No   ⦿ Yes

Will this reporting unit operate on an Exchange as the exact same product type in 2025 as it did in 2024?
⦿ No   ◯ Yes

Will this reporting unit be discontinued prior to June 15, 2025?
⦿ No   ◯ Yes

Did this reporting unit have an enrollment status greater than 500 as of July 1, 2024?
This count includes all enrollees, not just survey eligible enrollees, from both SHOP and individual markets.
◯ No   ⦿ Yes

Please enter the total number of enrollees in the QHP associated with this reporting unit as of July 1, 2024.
This count should include all enrollees, not just survey eligible enrollees, for both SHOP and individual markets.

`599`

Does reporting unit have an enrollment status greater than 500 as of January 1, 2025 for the exact same product type?
This count should include all enrollees, not just survey eligible enrollees, from both SHOP and individual markets.
◯ No   ⦿ Yes

Please enter the total number of enrollees in the QHP associated with this reporting unit as of January 1, 2025.
This count should include all enrollees, not just survey eligible enrollees, from both SHOP and individual markets.

`700`

What was the first year this reporting unit was operational for the exact same product type?

`2022` ⌄

Has this reporting unit has been operational for at least three years for the exact same product type?
See Exhibit 1 in the 2025 Operational Instructions for definitions of operational, not operational, and discontinued. This field asks whether this reporting unit has been operational on the Exchange in 2023, 2024, and 2025 for the exact same product type. It does not ask whether this reporting unit has reported or submitted QRS clinical measure data and QHP Enrollee Survey response data to CMS for three consecutive years.
◯ No   ⦿ Yes

Based on your selection, this reporting unit is eligible. Please confirm your Authorized Vendor: *

- Please Select an Approved Vendor - ⌄

[**Save**]   [**Cancel**]

Figure 19: Issuer Dashboard – Attestation Questions/Prompts

8. Click on the **Save** button to save your responses to all the attestation questions. If you click **Cancel**, the attestation questions will be returned to their last saved state.

The Attestation Status and Eligibility Status columns of the Reporting Unit table will be updated accordingly to reflect the current state of the attestation process for the corresponding Reporting Unit ID.

Issuers must select each reporting unit and follow the question prompts to verify all required information for each of the reporting units.

Issuers also have the ability to export the data in the Reporting Units data table to a csv file.

9. To download a CSV report that includes saved responses for all Issuers and Reporting Units associated to your login, click the **Attestations Eligibility Vendor Selection Report** button (Figure 20) towards the bottom of the Dashboard page.

⬇ CSV Reports

Reports include data for all Issuers and Reporting Units associated to your login.

Attestations Eligibility Vendor Selection Report

Figure 20: Issuer Dashboard – Button to Download CSV Report

For any questions regarding the attestation process, please contact QHP_Survey@air.org. You may also find answers to some of the commonly asked questions related to account setup, QHP Enrollee Survey website access, or the attestation process under the **FAQ** tab of the QHP Enrollee Survey website.