

# 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](mailto:CMS_FEPS@cms.hhs.gov).

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

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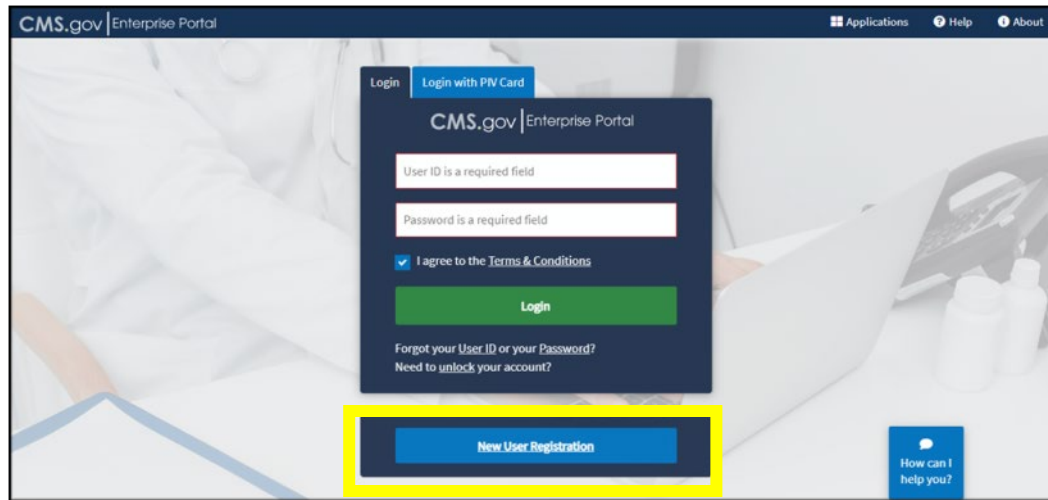
## Important Information

- 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, go to section 4.

## To create a CMS Enterprise Portal Account:

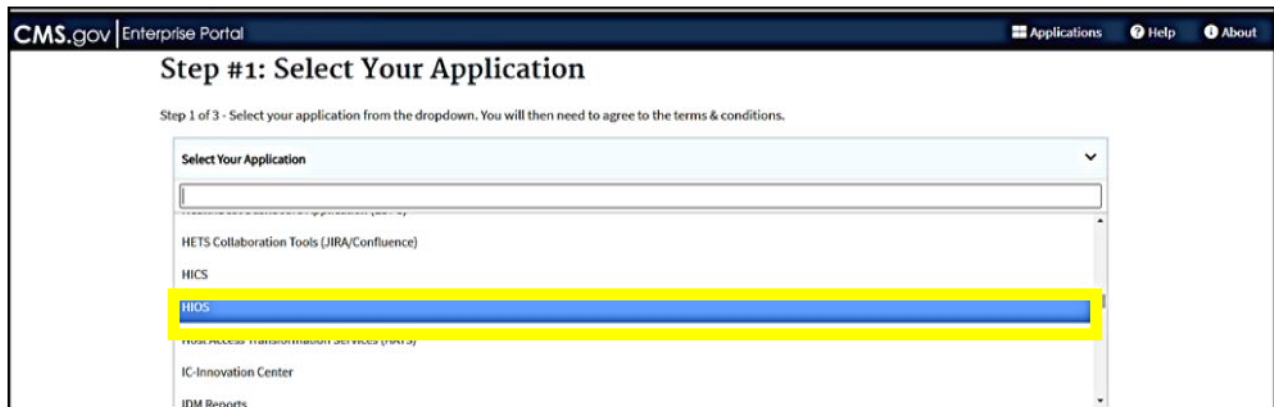
1. Navigate to CMS Enterprise Portal at <https://portal.cms.gov>.
2. Select the **New User Registration** button located at the bottom of the screen (Figure 1).

Figure 1: CMS Enterprise Portal New User Registration



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

CMS.gov | Enterprise Portal

Applications Help About

## Step #1: Select Your Application

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

HIOS

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

### Terms & Conditions

OMB No.0938-1236 | Expiration Date: 08/31/2025 | Paperwork Reduction Act

#### Consent to Monitoring

By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We encourage you to read the [HHS Rules of Behavior](#).

[Protecting Your Privacy](#)

I agree to the Terms and Conditions

Next Cancel

How can I help you?

- Step #2: Register Your Information – **Complete the form** with your personal information and select **Next** (Figure 4).  
**(NOTE - Please use your work email address when you create your account (Enter Email Address, Confirm Email Address fields).**

Figure 4: Register Your Information

CMS.gov | Enterprise Portal

Applications Help About

## Step #2: Register Your Information

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

All fields are required unless marked (optional).

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

Select Birth Month Select Birth Date Select Birth Year

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

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

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

Enter Email Address Confirm Email Address

Enter Phone Number

Back Next Cancel

How can I help you?

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

Figure 5: Create User ID & Password

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

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

Enter User ID

Enter Password  Confirm Password

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

Select Your Security Question

Enter Security Answer

Back Next Cancel

7. Review the Registration Summary Page and **ensure all the information is correct**. Select **Submit User** when done (Figure 6).
  - An email will be sent from donotreply@cms.gov acknowledging successful registration. This email will contain your Identity Management System (IDM) **User ID** necessary for Multi-Factor Authentication (Figure 7).

Figure 6: Registration Summary

CMS.gov Enterprise Portal Applications Help About E-Mail Alerts

### Registration Summary

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

HHS/OPFE: Health Insurance Oversight System

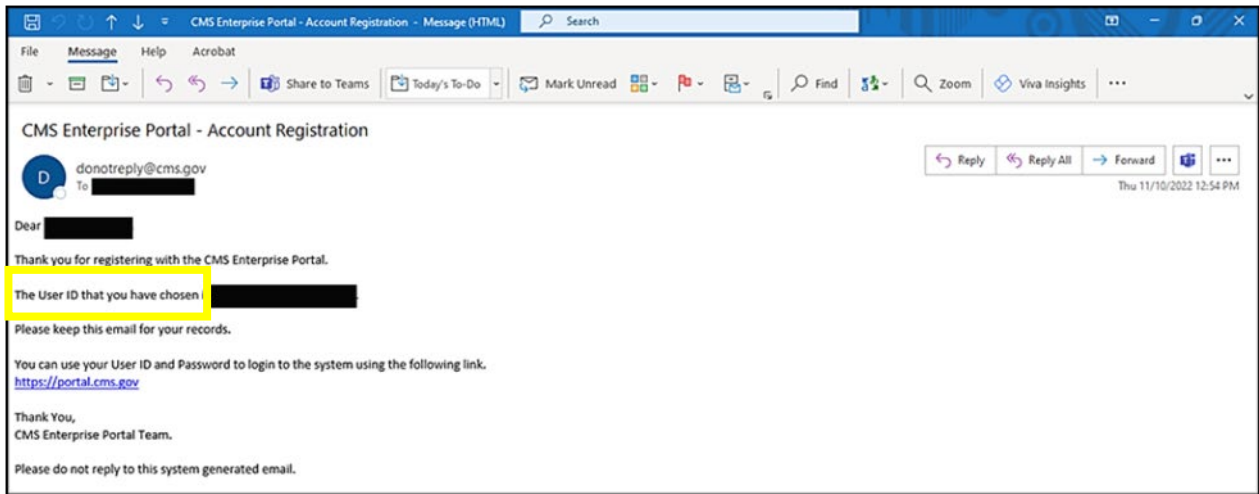
All fields are required unless marked 'Optional':

First Name: test  
Enter Middle Name (optional)  
Last Name: test  
Suffix (optional): IV

Enter Social Security Number (optional)  
Birth Month: May  
Birth Date: 31  
Birth Year: 1990

Home Address #1

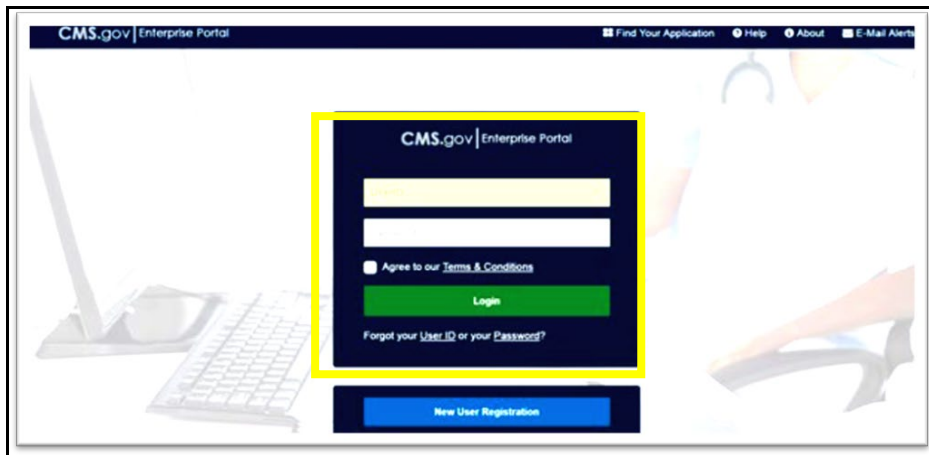
Figure 7: Account Registration Email



## 2 Multi-Factor Authentication Device (For New & Existing Users)

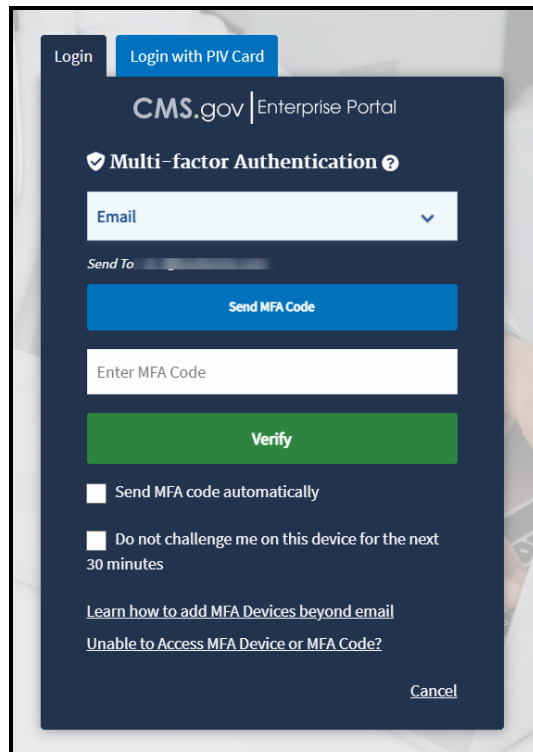
1. After you receive the email with your User ID, return to the CMS Enterprise Portal at <https://portal.cms.gov/> and login with your User ID and password (Figure 8).

Figure 8: CMS Enterprise Portal Login Page



2. First-time users will be prompted to register a multi-factor authentication (MFA) device.
  - Your email address will be automatically registered as your primary MFA device.
  - The email address MFA option is required and cannot be removed as an MFA device.
  - You may navigate to the **My Profile** page and then select **Manage MFA Devices** at any time in the future to register additional devices.
  - If your email changes, you will need to edit your email address in the **Personal Information** section of the **My Profile** page to update your MFA email address.
  - The code should be sent to your device within a couple of minutes.
3. On the Multi-factor Authentication screen, verify that email is selected and then select **Send MFA Code** to receive your one-time login code. Once you have received your code enter it into the **Enter MFA Code** text box and select **Verify** (Figure 9). **Note** – If you have additional devices registered you may select that option from the drop-down instead of email.

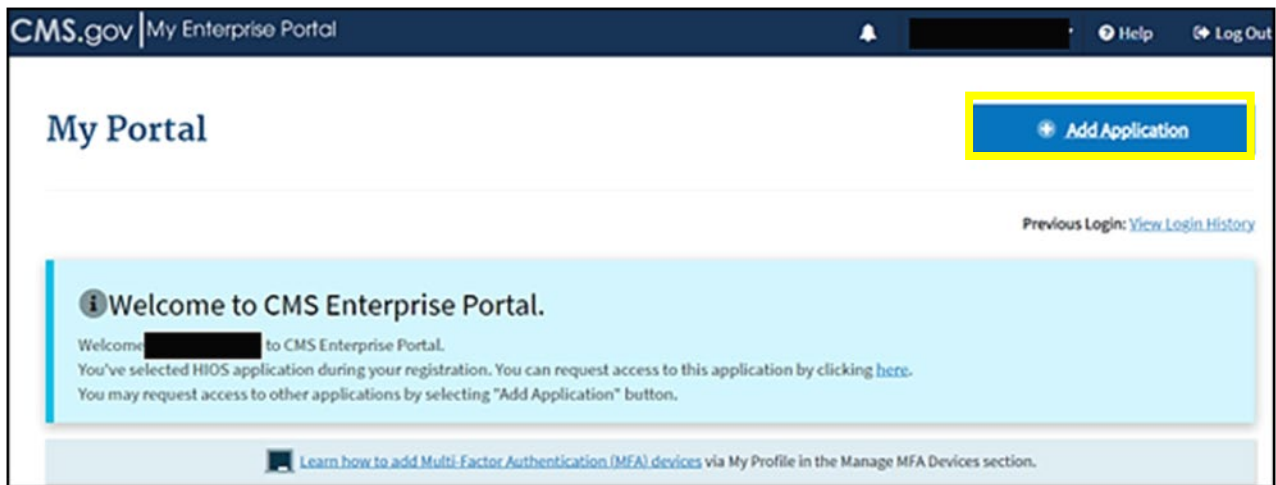
Figure 9: Multi-Factor Authentication



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

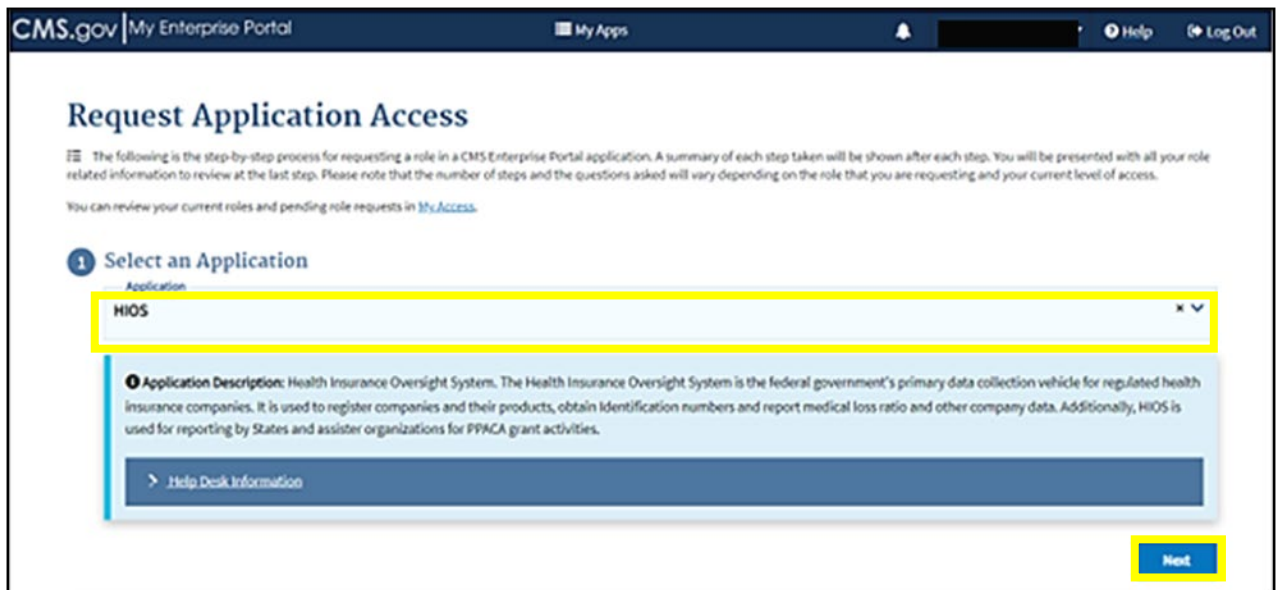
1. After you create your CMS Enterprise Portal Account and set-up your MFA device, return to <https://portal.cms.gov/>. Upon login, you will see your My Portal homepage. Select **Add Application** in the upper right corner (Figure 10).

Figure 10: My Portal Home Page – Add Application



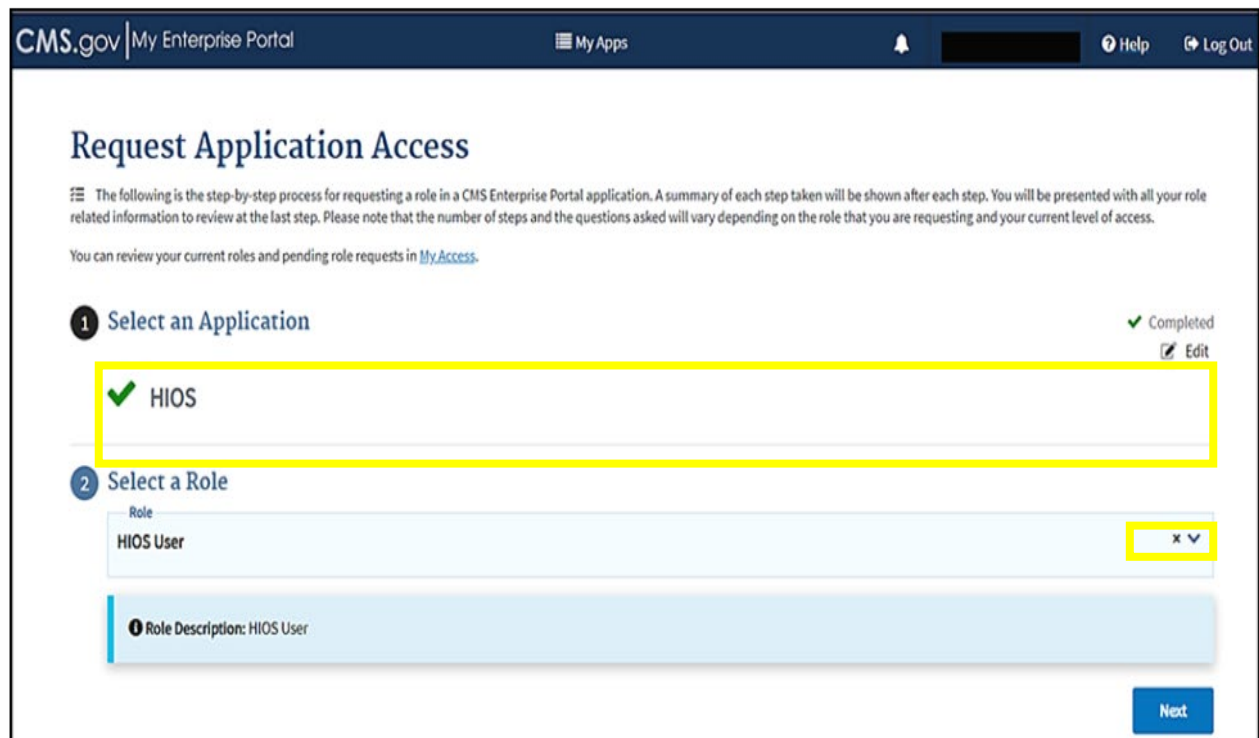
2. On the Request Application Access screen, select **HIOS** from the **Select an Application** drop-down, then select **Next** (Figure 11).

Figure 11: HIOS Application Access



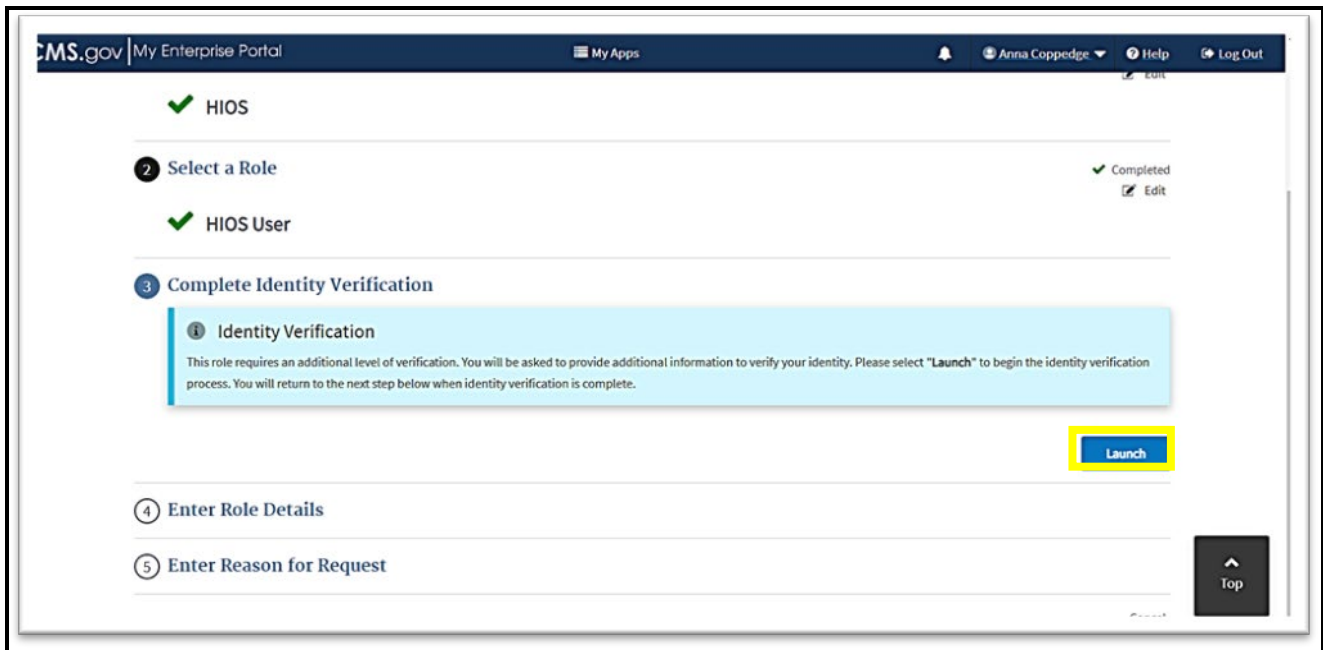
3. Select **HIOS User** in the **Select a Role** drop-down, then select **Next** (Figure 12).

Figure 12: Select the HIOS User Role



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

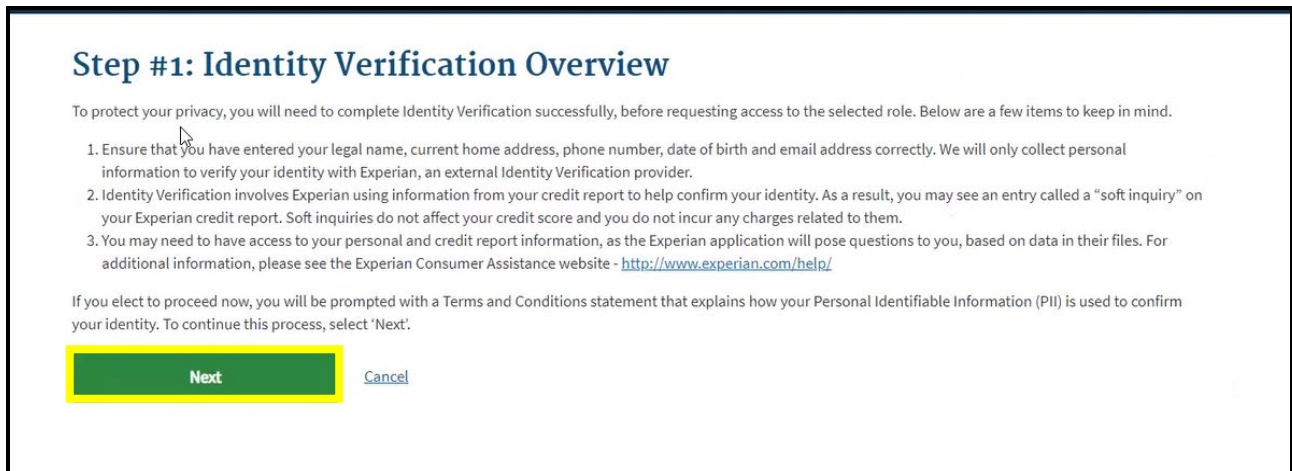
Figure 13: Begin Identity Verification



### 3.1 Identity Verification

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

Figure 14: Step # 1 - Identity Verification Overview



2. Step #2: Accept Terms and Conditions - Check **I agree to Terms & Conditions** box and select **Next** (Figure 15).



Figure 15: Step #2 - Accept Terms & Conditions

MS.gov | My Enterprise Portal

### Step #2: Accept Terms & Conditions

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

#### Protecting Your Privacy

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

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

#### HHS Rules of Behavior

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

I agree to the Terms & Conditions

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

3. **Complete the form** to verify your identity and then select **Next** (Figure 16).
  - The Social Security Number (SSN) is the primary piece of information that is required.

Figure 16: Step #3 - Enter Your Information

My Enterprise Portal

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

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

Enter Social Security Number  Birth Month  Birth Date  Birth Year

Is Your Address US Based?  
 Yes  No

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

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

Phone Number

Email Address  Confirm Email Address

Changing your email address will remove any email MFA that you currently have.  
You can register a new email MFA in "Manage MFA Devices".

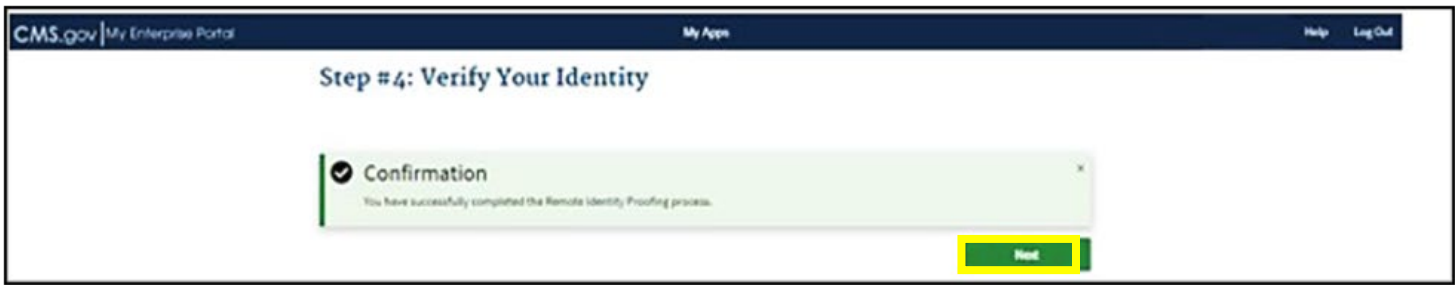
Check here if you have read and verified the information above is accurate and complete as required by Identity Verification.

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

Top

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 17).
  - Examples of the identity verification questions include the dates you lived at an address, worked at a job, or opened a credit card.
  - **Entering this information will not impact your credit score.**

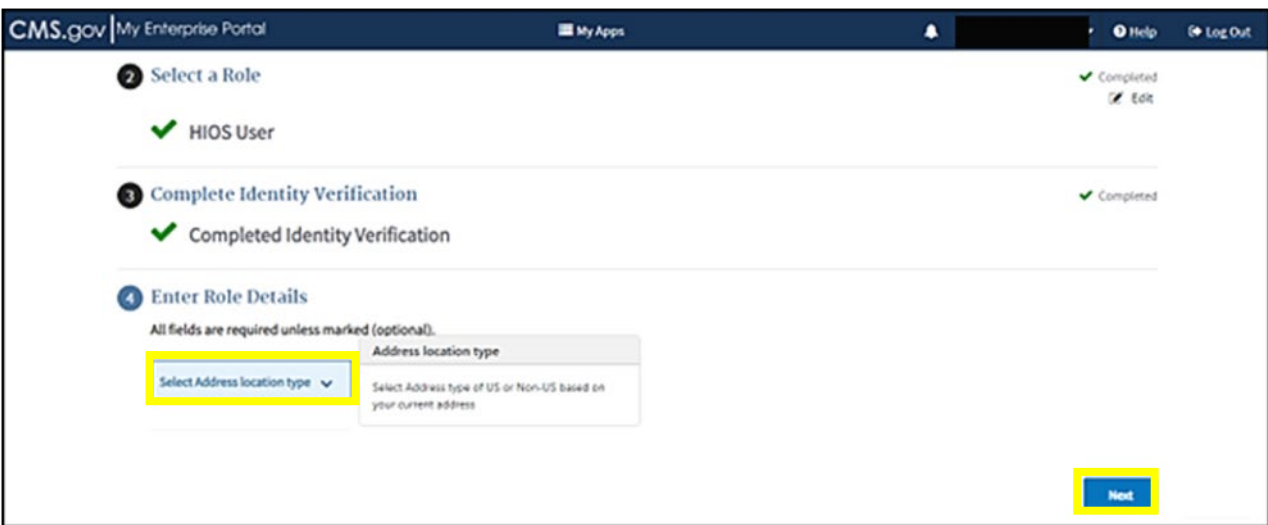
Figure 17: Identity Verification Confirmation



### 3.2 Enter Role Details

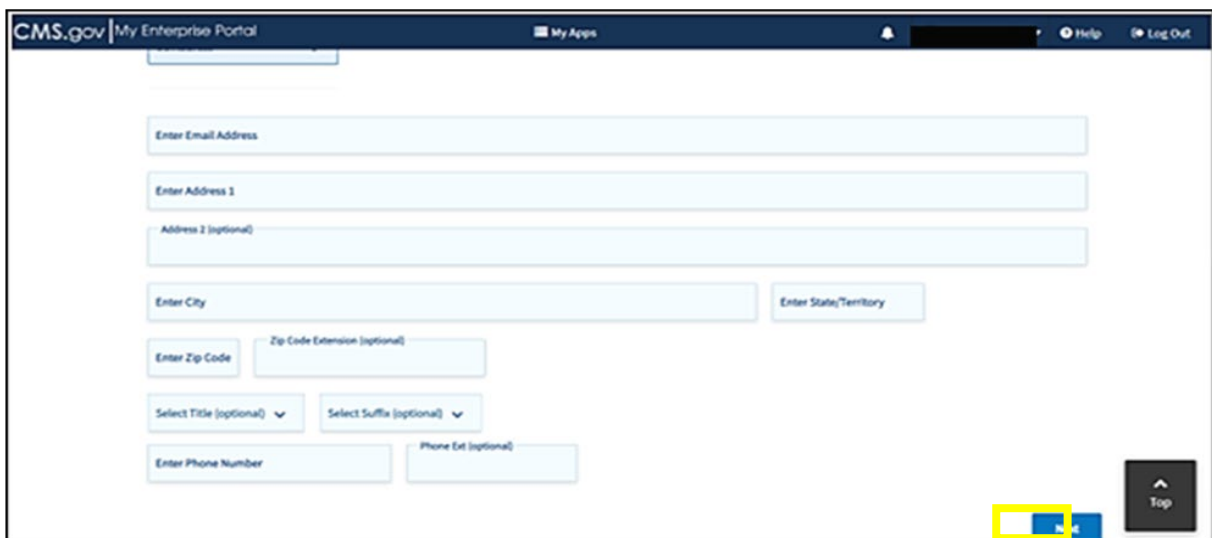
1. Upon completion of the identity verification, you will be returned to the Request Application Access screen. In the Enter Role Details section, **select Address location type** from the drop-down menu (Figure 18).

Figure 18: Enter Role Details



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

Figure 19: Role Details Address Information



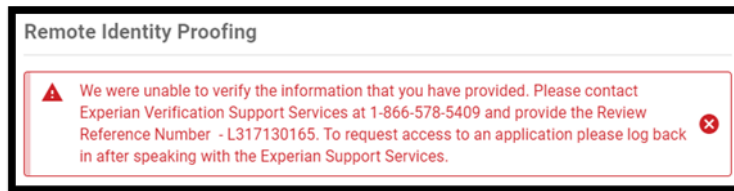
- Fill in the reason you need access within the **Enter Reason for Request** box and select **Submit** (Figure 20).
  - For example, "I need to submit my data in the RxDc HIOS module."

Figure 20: Enter Reason for Request



- When the pop-up confirmation message appears, select **OK**.
- When the **Request New Application Access Acknowledgement** message appears, select **OK** again.
- If the RIDP Online Proofing is unsuccessful, then the system will display an error message (Figure 21).

Figure 21: Remote Identity Proofing Error



### 3.3 Unsuccessful Identity Proofing Steps

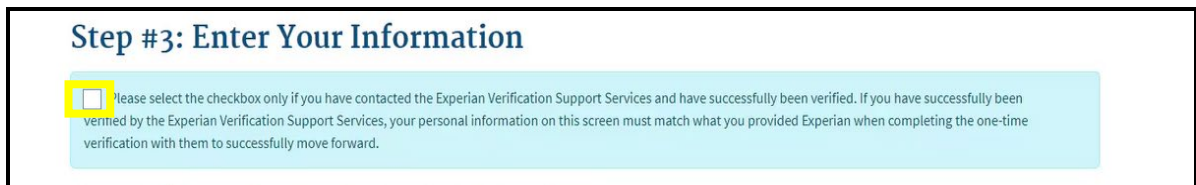
#### Important Information

- 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:

- Write down the Experian support contact information and the Review Reference Number. Select the **Cancel** button.
- Contact Experian using the contact information provided in the error message and perform Phone Proofing.
- 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 22).

Figure 22: Remote Identity Proofing – Checkbox



- 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.

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## 4 Accessing the HIOS Home Page

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### Important Information

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

### To Access the HIOS Home Page:

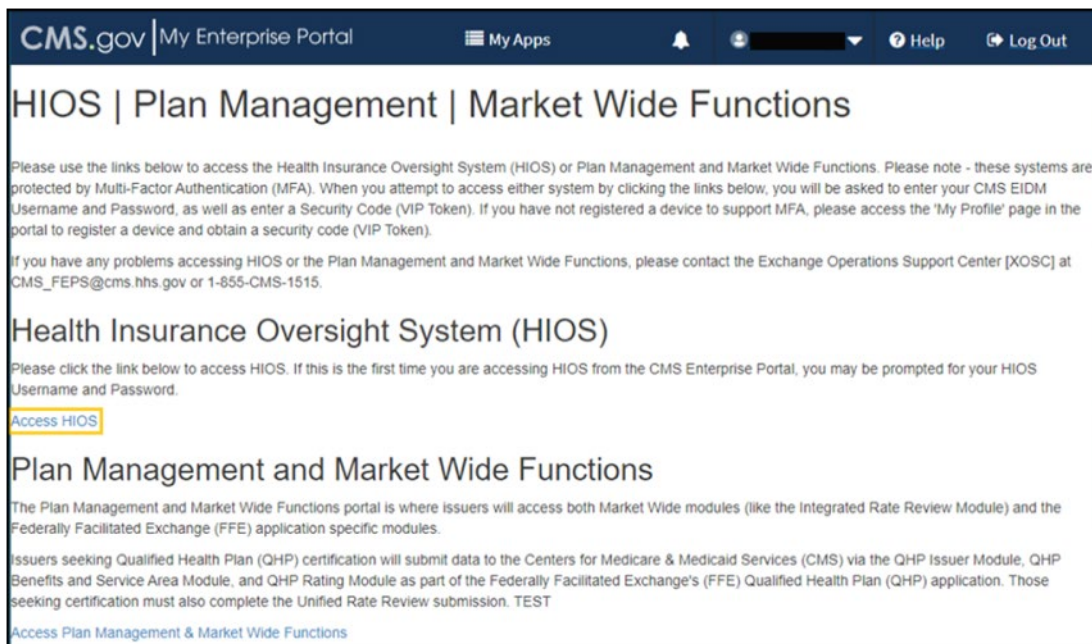
1. After the HIOS Role request has been approved, navigate to CMS Enterprise Portal at <https://portal.cms.gov>. On the My Portal homepage, the HIOS application will display. Select **HIOS**, then select **Overview** (Figure 23).

Figure 23: My Portal Page



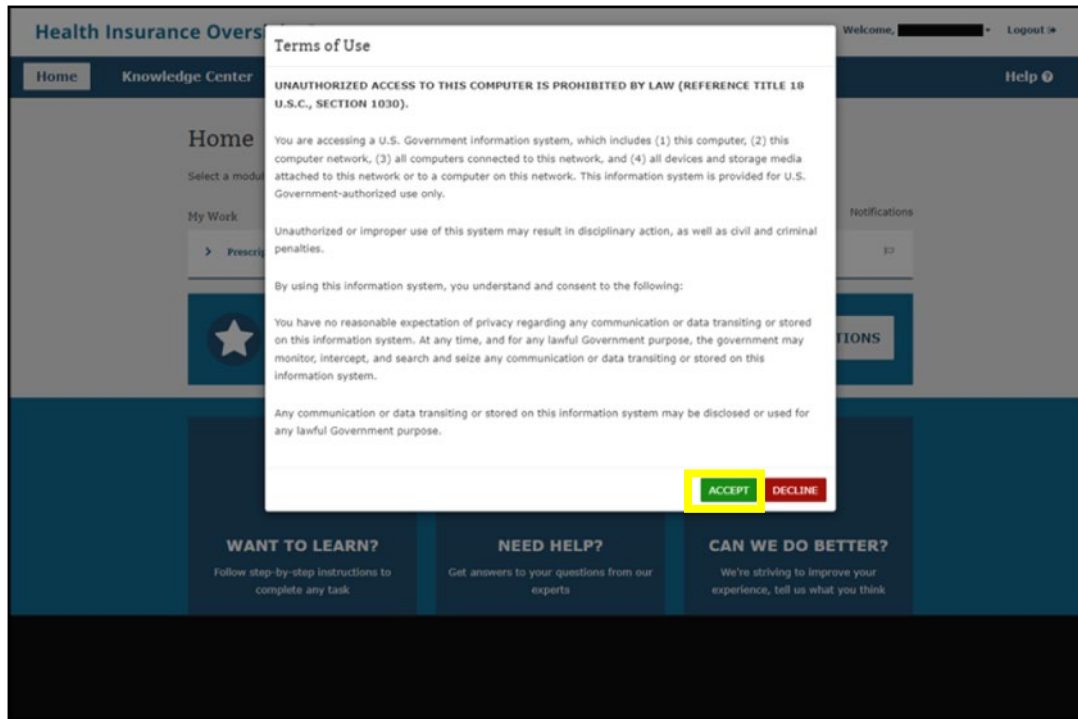
2. Select **Access HIOS** (Figure 24).

Figure 24: Access HIOS Page



3. Read the Terms of Use and Select **Accept** (Figure 25).

Figure 25: HIOS Terms of Use



## 5 Request HIOS Module Roles

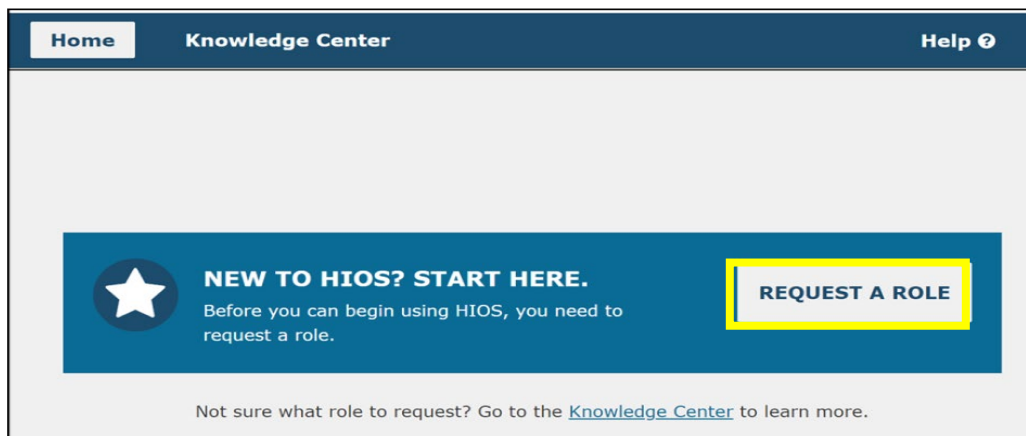
### Important Information

- If your organization does not exist in HIOS, go 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, go 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:

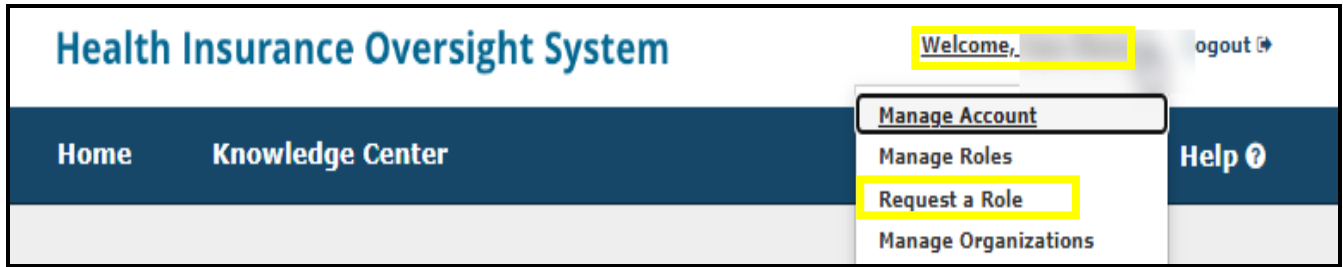
1. New users can select the **Request A Role** button on the page (Figure 26).

Figure 26: HIOS Homepage for New Users



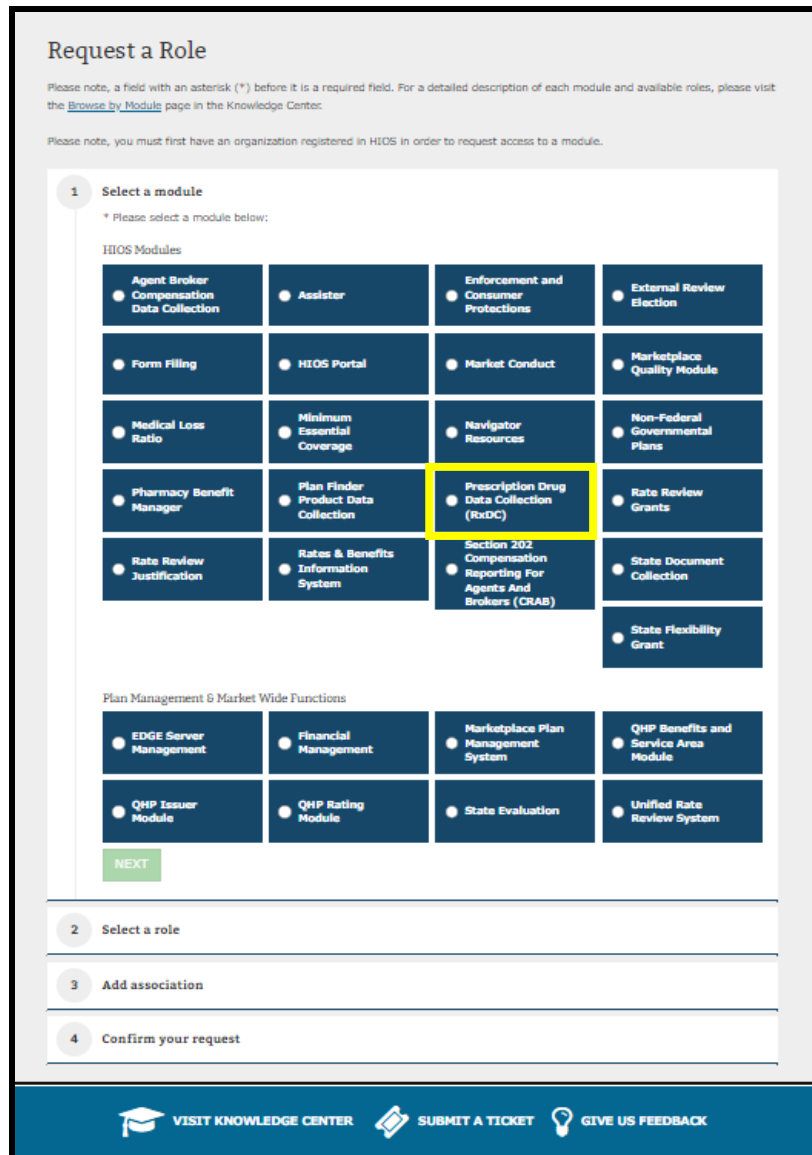
- Existing HIOS users will need to select the **Welcome** drop-down and then select **Request a Role** (Figure 27).

Figure 27: Request a Role Drop-Down



- Select a **Module** and select **Next** (Figure 28).

Figure 28: Request a Role - Select a Module



- Select a **Role**, and if applicable to the module also select **Role Type** and **Contact Type** from step 2 and select **Next** (Figure 29).

Figure 29: Select a Role

The screenshot shows the 'Request a Role' page. At the top, there are navigation links for 'Home', 'Knowledge Center', and 'Help'. The main heading is 'Request a Role'. Below the heading, there are two paragraphs of text: '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.' and 'Please note, you must first have an organization registered in HIOS in order to request access to a module.' The form is divided into two steps. Step 1 is 'Select a module' with the value 'Prescription Drug Data Collection (RxDC)' and a 'Revisit this step' button. Step 2 is 'Select a role' with the value 'RxDC Submitter' and a 'Revisit this step' button. Below step 2, there is a sub-heading '\* Please select the role below:' and a radio button selected for 'RxDC Submitter'. A green 'NEXT' button is highlighted at the bottom of step 2.

5. Select your **Association Type** and then select the **Search** button (Figure 30).

Figure 30: Add Association

The screenshot shows the 'Request a Role' page. It includes the same navigation and introductory text as Figure 29. The form now shows three steps. Step 1 is 'Select a module' with 'Prescription Drug Data Collection (RxDC)'. Step 2 is 'Select a role' with 'RxDC Submitter'. Step 3 is 'Add association', which is highlighted with a yellow box. Below step 3, there is a sub-heading 'To add an Association to this role request, you must search for it in the system.' and a sub-heading '\* Association Type' with three radio button options: 'HIOS Issuer ID', 'Organization with FEIN', and 'Organization without FEIN (Other Organization)'. A green 'NEXT' button is visible at the bottom of step 3.

6. Within the Search for Association box, enter **YOUR company's EIN** and select **Search** (Figure 31).

- 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 31: Search for Association

The screenshot shows the 'Request a Role' page. It includes the same navigation and introductory text as Figure 29. The form now shows three steps. Step 1 is 'Select a module' with 'Prescription Drug Data Collection (RxDC)'. Step 2 is 'Select a role' with 'RxDC Submitter'. Step 3 is 'Add association', which is highlighted with a yellow box. Below step 3, there is a sub-heading 'To add an Association to this role request, you must search for it in the system.' and a sub-heading '\* Association Type' with three radio button options: 'HIOS Issuer ID', 'Organization with FEIN', and 'Organization without FEIN (Other Organization)'. Below the radio buttons, there is a sub-heading '\* Search for association' and a paragraph: 'Please enter the Organization Federal EIN/TIN below. The Federal EIN/TIN must be a 9 digit, numeric value.' A search box with a 'SEARCH' button is highlighted with a yellow box. A green 'NEXT' button is visible at the bottom of step 3.

7. Select your **company** from the results and select **Next** (Figure 32).

Figure 32: Association Search Results



8. Review the information in the Confirm your request section and select **Submit** (Figure 33).
  - If the information is not correct, return to the step where the incorrect information was entered and make the necessary correction.

Figure 33: Confirm Your Request

9. After you select Submit, a confirmation box will show noting that your role request has been submitted for approval (Figure 34).
  - You will see a confirmation message notifying you that you may log back into HIOS within 1-2 business days to check the status of your request, and additionally you will receive an email notification with the details of your request once it has been processed. To see your user role(s) and access permissions, select the Manage Roles link from the username drop down menu.



Figure 34: Role Request Confirmation

 **Confirmation:** Your request has been submitted for approval. An email notification will be sent with the details of your request once it has been processed and you can also check for an update in the system within 1-2 business days. 

## 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

\* Please select a module below:

HIOS Modules

<input type="radio"/> Assister	<input type="radio"/> Enforcement and Consumer Protections	<input type="radio"/> External Review Election	<input type="radio"/> Form Filing
<input type="radio"/> HIOS Portal	<input type="radio"/> Market Conduct	<input type="radio"/> Marketplace Quality Module	<input type="radio"/> Medical Loss Ratio
<input type="radio"/> Minimum Essential Coverage	<input type="radio"/> Navigator Resources	<input type="radio"/> Non-Federal Governmental Plans	<input type="radio"/> Pharmacy Benefit Manager
<input type="radio"/> Plan Finder Product Data Collection	<input type="radio"/> Prescription Drug Data Collection (RxDC)	<input type="radio"/> Rate Review Grants	<input type="radio"/> Rate Review Justification
<input type="radio"/> Rates & Benefits Information System	<input type="radio"/> Section 202 Compensation Reporting For Agents And Brokers (CRAB)	<input type="radio"/> State Document Collection	<input type="radio"/> State Flexibility Grant

## 6 Create an Organization

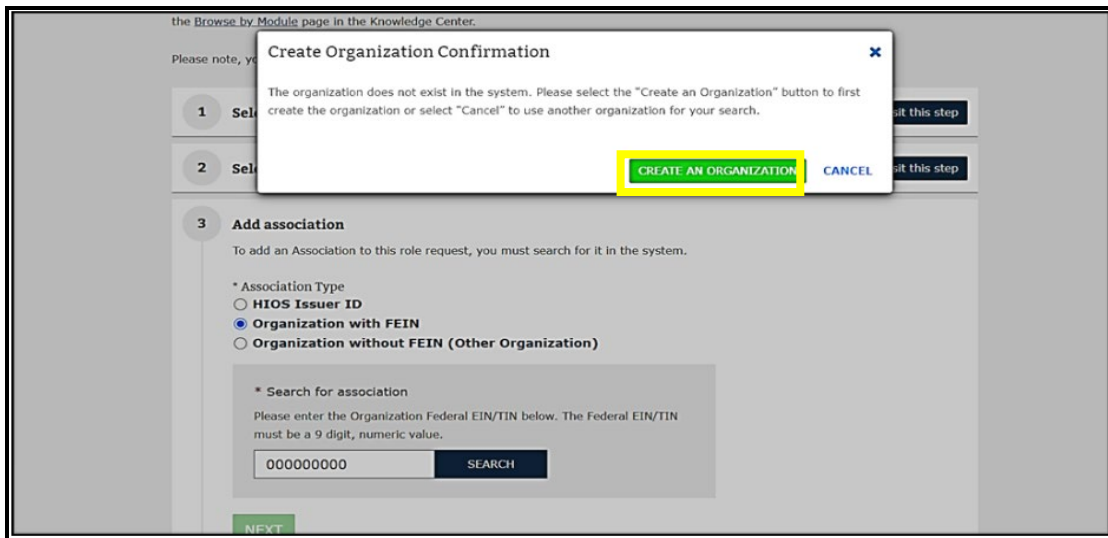
### Important Information

- 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. Users should only create an organization for their own company).
- 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:

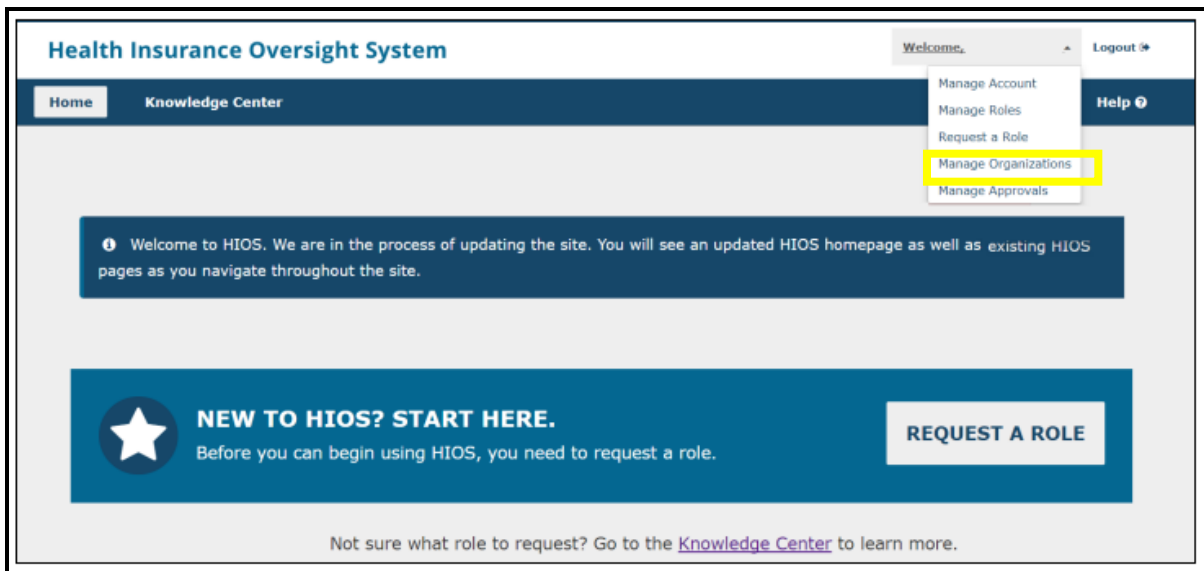
1. If your organization does not currently exist in HIOS, you will receive a message “The organization does not exist...” when attempting to Add association during the role request process. Select **Create an Organization** (Figure 35).

Figure 35: Create Organization Button



Alternatively, you can create an organization directly from the HIOS home page by selecting **Manage Organizations** from the Welcome drop-down (Figure 36). 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 36: 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 37).

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 37: Select the Organization's Primary Function

The screenshot displays a web interface for creating an organization. On the left is a sidebar with navigation options: 'Manage Organizations', '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 (current step), 2. Enter Federal EIN/TIN, 3. Organization Details, and 4. Confirm Your Request. Step 1 contains a required question: '\* What is the organization's primary business?'. There are four radio button options, each with a description and examples. 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 38).

Figure 38: Finalize Selection

**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 39).

Figure 39: Create an Organization: Enter Federal EIN/TIN

2 **Enter Federal EIN/TIN**

First, let's see if your organization already exists in the system.

\* Enter the organization's FEIN and select "Search"

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

444666444 **SEARCH**

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

**NEXT**

3 **Organization Details**

5. **Scroll down** to Organization Details and complete the form for your organization (Figure 40).

Figure 40: Create an Organization: Organization Details

6. Review the organization’s information and scroll down to the Confirm Your Request section and select **SUBMIT** (Figure 41).
  - 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 41: Confirm Your Request

---

## 7 Create an Issuer

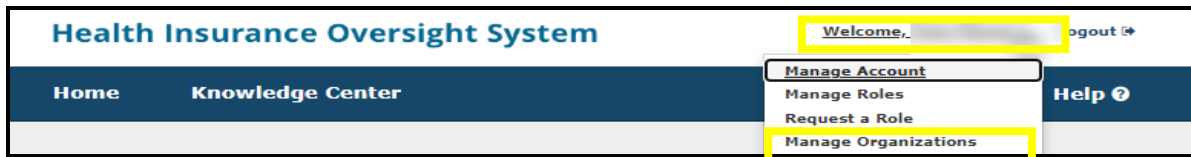
### Important Information

- 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:

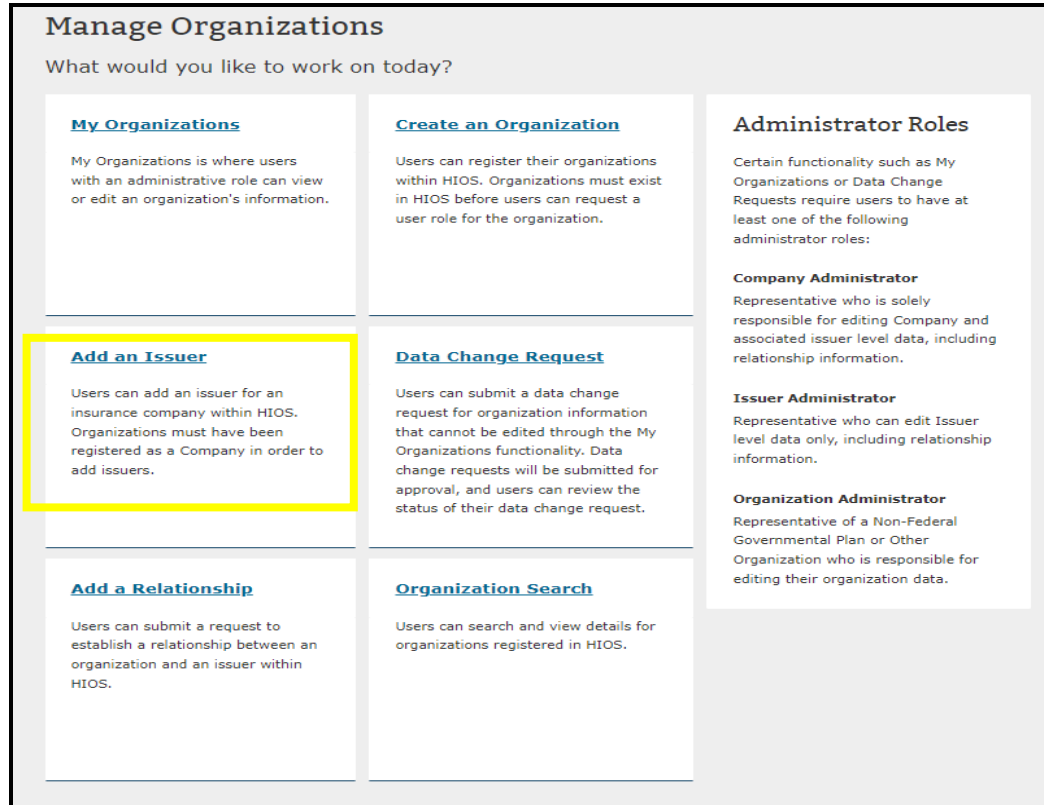
1. Select the **Manage Organizations** link on the HIOS Home Page (Figure 42).

Figure 42: Manage Organizations



2. On the Manage Organizations page, select **Add an Issuer** (Figure 43).

Figure 43: Add an Issuer



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 44).

Figure 44: Issuer Details

**Manage Organizations**

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

## Add an Issuer

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

- 1 Search for an Organization** [Revisit this step](#)  
817263571 - JN Test Company Edit 2 on 11-21-14
- 2 Issuer Registered State** [Revisit this step](#)  
Texas (TX)
- 3 Issuer Details**  
Issuer Marketing Name:   

Please note, users must select "Yes" for at least one of the following market type coverage:

  - \* Does this issuer offer coverage in the Individual Market?  
 Yes  
 No
  - \* Does this Issuer offer coverage in the Small Group Market?  
 Yes  
 No
  - \* Does this issuer offer coverage in the Large Group Market?  
 Yes  
 No

**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](mailto: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
<b>Who can users contact for system support?</b>	For Production system support, users can call the Marketplace Service Desk at 1-855-267-1515 or email <a href="mailto:CMS_FEPS@cms.hhs.gov">CMS_FEPS@cms.hhs.gov</a> .
<b>How do users access HIOS?</b>	To access HIOS, visit <a href="https://portal.cms.gov">https://portal.cms.gov</a> . Users will need to complete the registration for the CMS IDM account through the CMS Enterprise Portal prior to requesting access to HIOS.
<b>How do users access HIOS and Plan Management &amp; Market Wide Functions?</b>	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 <b>HIOS</b> button displayed on the My Portal page. Users are not on HIOS maintained pages until they select the <b>HIOS</b> button. Once users select the <b>HIOS</b> button, they will be navigated to the landing page and can select either the <b>Access HIOS</b> link or the <b>Access Plan Management &amp; Market Wide Functions</b> link to navigate to the HIOS Home Page. All HIOS and Plan Management functions will display on the same page.
<b>Where do users request roles and access to HIOS modules?</b>	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 <b>Request a Role</b> link from the Welcome drop-down menu, the HIOS module(s), and role(s) applicable to the module(s).
<b>Why can users not find the role(s) needed on the Request Role page?</b>	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.
<b>Which roles allow users to edit organization information?</b>	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.
<b>How do users view or access the module(s)?</b>	To access the requested module, users need to select the correct link on the CMS Enterprise Portal page, either the <b>Access HIOS</b> link or the <b>Access Plan Management &amp; Market Wide Functions</b> link. Users will also need to have the correct user role(s) to access specific HIOS module(s).
<b>When users launch the module, there is no link available to access an application. How do users view the link to access an application?</b>	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.
<b>Why can't I access my account anymore?</b>	After 2 years of inactivity, your IDM account gets deprovisioned, and your account removed from HIOS. You will have to create a new account to access HIOS again. After 2 years of inactivity, your IDM account gets deprovisioned, and your account removed from HIOS. You will have to create a new account to access HIOS again. Navigate to CMS Enterprise Portal at <a href="https://portal.cms.gov">https://portal.cms.gov</a> (Select the New User Registration button).