

Manage Data Changes for the Health Insurance Oversight System

Quick Reference Guide

The Manage Data Changes functionality is available to users with the Company Administrator, Issuer Administrator, and Organization Administrator roles. This guide provides instructions for administrators to create and submit data change requests in HIOS. To access the Manage Data Changes functionality in the Health Insurance Oversight System (HIOS), users will need to go through the CMS Enterprise Portal and register for a CMS EIDM account. 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. For instructions on how to register for an EIDM and HIOS account, refer to the “CMS Enterprise Portal and Health Insurance Oversight System User Quick Reference Guide”.

1 Request HIOS User Role

Users must have one of the following roles in HIOS to create and submit a request for data change. For instructions on how to request user roles, refer to the “CMS Enterprise Portal and Health Insurance Oversight System User Quick Reference Guide”.

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.

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.

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.

2 Access the Manage Data Changes Function

Once users have the Company, Issuer, or Organization Administrator role, follow the steps below to access the Manage Data Changes function.

1. On the HIOS Home Page, select the “Manage an Organization” button to navigate to the Manage Data Changes page.
2. Select the “Manage Data Changes” tab to view and create requests (See Figure 1).



Figure 1: HIOS - Manage Data Changes

3 Create Data Change Requests

Updates to certain data elements that are not editable on the HIOS user interface can be requested on the Manage Data Changes page and through the Company and Issuer “Edit” page.

1. Company, Issuer, and Organization Administrators can create a data change request by clicking the “Create Request for Data Change” button on the Manage Data Changes page (See Figure 2).
2. Company and Issuer Administrators can also access this functionality via the “Create Request for Data Change” link found on the “Edit Company” and the “Edit Issuer” page (See Figure 3).

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Manage Data Changes

Please select a Request Status from the drop-down list below to view the corresponding requests.

Request Status: Pending Approval

Search By Request ID: Request ID Search

Request ID	Request Created Date	Status	Status updated Date	NOTE	Action
DCR15	03/02/2016 1:32 PM	Pending Approval	03/02/2016 1:32 PM	Data for 508/Security	View
DCR13	03/02/2016 1:31 PM	Pending Approval	03/02/2016 1:31 PM	Data for 508/Security	View
DCR5	03/02/2016 11:38 AM	Pending Approval	03/02/2016 11:38 AM	testing 3/2	View
DCR4	03/01/2016 9:20 PM	Pending Approval	03/01/2016 9:20 PM	test 3/1	View

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[Create Request For Data Change](#)

Figure 2: Manage Data Changes – Create Request for Data Change

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Edit Company

Please fill in the form below with your Organization's information. To make changes to the fields currently not editable, please use the following link: [Create Request For Data Change](#). Note: Only changes related to existing organizational data can be requested. Notes: (*) Indicates a required field.

*Organization Type: Company
 *Organization Legal Name: Test Company 222
 *Federal EIN/TIN: 22222222
 Validation Status: Validation in Progress
 NAIC Company Code:
 NAIC Group Code:
 Group Name:
 Address Line 1:
 Address Line 2:
 City:
 State:
 ZIP code:
 ZIP Plus 4:
 Are you a TPA?

Edit Issuer

Please fill in the form below with your Issuer's information. To make changes to the fields currently not editable, please use the following link: [Create Request For Data Change](#). Note: Only changes related to existing organizational data can be requested. Notes: (*) Indicates a required field.

*Issuer ID: 12332
 *Issuer Legal Name: Test Company 222
 Issuer Marketing Name:
 Registered State: VA
 Federal EIN/TIN: 22222222
 NAIC Company Code:

Figure 3: Edit Company/Edit Issuer – Create Request for Data Change

Company Administrators

1. Select the value to change from the "What values would you like to change?" drop-down menu (See Figure 4). Company Administrators are able to select the values for the Organization, Issuer, and Product.
2. Company Administrators of multiple organizations will see a list of companies displayed in the drop-down menu. Select the company for which you are making the data change (See Figure 5).

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Create Data Change Request

What values would you like to change?

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Figure 4: Create Data Change Request – Select Values

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Create Data Change Request

What values would you like to change? FEIN/TIN

Choose the organization

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Figure 5: Create Data Change Request – Select Company

3. The current value of the selected field is displayed. You'll need to enter the new value, or select from a predefined list of values, and a reason for change (maximum of 250 characters) and then click the 'Submit' button (See Figure 6).
4. If a change to the organization type from Company or Non Insurance to a Non-Federal Governmental Plans is needed, you'll need to select the 'Self-Funded' or 'Fully Insured' radio button before clicking the 'Submit' button (See Figure 7).
5. You'll see a confirmation message displayed on the screen. A Request ID will be assigned, along with a "Pending Approval" status (See Figure 15). Click the "Continue" button to return to the Manage Data Changes page.

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Create Data Change Request

What values would you like to change? FEIN/TIN

Choose the organization Test Company 222 - FEIN - 222222222 - Company

Current Value	*New Value	*Reason for change
222222222		

Back Submit

Figure 6: Create Data Change Request – New Value and Reason for Change

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Create Data Change Request

What values would you like to change? Organization Type

Choose the organization Test Company 222 - FEIN - 222222222 - Company

Current Value	*New Value	*Reason for change
Company	Non-Federal Governmental Plans	

Please select the type: * ☐ Self Funded ☐ Fully Insured

Back Submit

Figure 7: Create Data Change Request – Organization Type change from Company to Non-Federal Governmental Plans

Issuer Administrators

1. Select the value to change from the “What values would you like to change?” drop-down menu (See Figure 8). Issuer Administrators are able to select the values for Issuer and Product only.
2. If the value you would like to change is for an Issuer, you’ll need to choose the Issuer from the drop-down menu (See Figure 9).
3. If the value you would like to change is for a Product, you’ll need to select the Issuer and the Product associated to that Issuer (See Figure 10).
4. The current value of the selected field is displayed. You’ll need to enter the new value, or select from a predefined list of values, and a reason for change (maximum of 250 characters) and then click the ‘Submit’ button (See Figure 11).
5. You’ll see a confirmation message displayed on the screen. A Request ID will be assigned, along with a “Pending Approval” status (See Figure 15). Click the “Continue” button to return to the Manage Data Changes page.

Figure 8: Select Values for Issuer or Product

Figure 9: Create Data Change Request for an Issuer

Figure 10: Create Data Change Request for a Product

Figure 11: Current Value, New Value, and Reason for Change

Organization Administrators

1. Select the value to change from the “What values would you like to change?” drop-down menu. Organization Administrators are able to select the values for the Organization only (See Figure 12).
2. Organization Administrators of multiple organizations will see a list of organizations displayed in the drop-down menu. Select the organization for which you are making the data change. The current value of the selected field is displayed. You’ll need to enter the new value, or select from a predefined list of values.
 - To change an Organization Type from Non-Federal Governmental Plans to a Company or Non Insurance Company, you’ll need to select an incorporated state (See Figure 13).
 - To change Other Organization Type to a Company, you’ll need to enter a FEIN and select an incorporated state (See Figure 14).
3. Enter a reason for change (maximum of 250 characters) and then click the ‘Submit’ button.
4. You’ll see a confirmation message displayed on the screen. A Request ID will be assigned, along with a “Pending Approval” status (See Figure 15). Click the “Continue” button to return to the Manage Data Changes page.

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Create Data Change Request

What values would you like to change?

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Figure 12: Select Values for the Organization

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Create Data Change Request

What values would you like to change? Organization Type

Choose the organization IMPL Test 1 - FEIN - 787876767 - Non-Federal Governmental Plans

Current Value	*New Value	*Reason for change
Non-Federal Governmental Plans	Company	

Please select an incorporated state:*

Back Submit

Figure 13: Organization Type Change from Non-Federal Governmental Plans to a Company

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Create Data Change Request

What values would you like to change? Organization Type

Choose the organization AA Other NOFEIN Non-US - Middleton, Ecuador

Current Value	*New Value	*Reason for change
Other Organization Type	Company	

Please enter an FEIN:*

Please select an incorporated state:*

Back Submit

Figure 14: Organization Type Change for Other Organization Type to a Company

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Confirmation

Change request DCR52 has been successfully submitted and is currently pending approval. If you have any questions, please contact the Exchange Operations Support Center (XOSC) at CMS_FEPS@cms.hhs.gov or 1-855-267-1515.

Continue

Figure 15: Confirmation of Change Request Submission

4 View Data Change Requests

1. Company, Issuer, and Organization Administrators can view data change requests on the Manage Data Changes page (See Figure 16).
2. Select one of the following the statuses from the "Request Status" drop-down menu.
 - Pending Approval
 - Approved
 - Denied
 - Unable to Process
 - Completed
3. You can sort the change requests by clicking the arrows in the column headers or enter a "Request ID" to search for a particular request.
4. Click the "View" link to review the change request details (See Figure 17).

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Manage Data Changes

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Request ID	Request Created Date	Status	Status updated Date	NOTE	Action
DCR15	03/02/2016 1:33 PM	Pending Approval	03/02/2016 1:33 PM	Data for 50b/Security	View
DCR13	03/02/2016 1:31 PM	Pending Approval	03/02/2016 1:31 PM	Data for 50b/Security	View
DCR5	03/02/2016 11:38 AM	Pending Approval	03/02/2016 11:38 AM	testing 3/2	View
DCR4	03/01/2016 9:20 PM	Pending Approval	03/01/2016 9:20 PM	test 3/1	View

Create Request For Data Change

Figure 16: Manage Data Changes

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Data Change Details View

Change Request ID: DCR52

Request Created Date: 03/06/2016 9:55 PM

Username: [REDACTED].com

Federal EIN/TIN: 787876767

Organization Legal Name: IMPL Test 1

Organization Type: Non-Federal Governmental Plans

Attribute: Organization Type

Current Value: Non-Federal Governmental Plans

New Value: Company

Supplement Attributes: Incorporated State: AL

Note: Approved by EIZ for testing

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Figure 17: Data Change Details View

Email Notifications for Data Change Requests

Email notifications are sent to administrators based on the Request Status. The table below illustrates the HIOS users who receive emails for each Request Status.

Request Status	Company, Issuer, or Organization Administrator
Pending Approval	No
Approved	No
Denied	Yes
Completed	Yes
Unable to Process	Yes