

Health Insurance Oversight System (HIOS) Health Plan and Other Entity Enumeration System User Manual



System Version Release 04.01

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1 Introduction

The Department of Health and Human Services (HHS) has adopted a standard for a unique health plan identifier (HPID) and an other entity identifier (OEID). The adoption of a unique health plan identifier is designed to eliminate the need for multiple identifiers in order to streamline HIPAA standard transactions. The unique identifiers may also be used for any other lawful purpose to uniquely identify a health plan or other entity.

The Office of E-Health Standards and Services (OEHS), as delegated by HHS, has developed the final rule for the adoption of unique identifiers and the creation of an online enumeration system. The enumeration system has been named the Health Plan and Other Entity Enumeration System (HPOES) and is referred to as such in this document.

This user manual explains the user functionality of the HPOES module within the Health Insurance Oversight System (HIOS), including submitting an application, creating a profile, approving an application, assignment of an HPID or OEID number, and editing an application. This manual provides step-by-step instructions for the features and functionalities available in HPOES.

2 Introduction to Health Plan and Other Entity Enumeration System

The HPOES System requires three types of users: ‘Guest’, ‘Submitter’ and ‘Authorizing Official’. A user has access to functionality within the system based on the roles associated to their user type.

The following is a brief description of the three user roles within the HPOES System:

1. Guest – A Guest user who does not need to apply for a Health Plan Identifier (HPID) or Other Entity Identifier (OEID), but would like to stay current on HPOES news and information.
2. Submitter – A Submitter user is a representative of a Health Plan or an Other Entity who has the ability to complete and submit an application on behalf of the health plan or other entity.
3. Authorizing Official – An Authorizing Official user is an individual that has the authority to legally bind the entity and holds ultimate responsibility, for example the chief executive officer (CEO), the chief compliance officer, and the chief financial officer (CFO). An Authorizing Official approves applications submitted by the company’s Submitter user(s).

2.1 What is the purpose of the health plan identifier?

The primary purpose of the health plan identifier is for use in standard transactions. In standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.

2.2 What entities can get a Health Plan Identifier (HPID)?

An entity must meet the definition of Health Plan at 45 CFR 160.103 to get an HPID. For purposes of the HPID, there are two classifications of health plans – a Controlling Health Plan (CHP) and a Subhealth Plan (SHP). A Controlling Health Plan must get an HPID, while a Subhealth Plan is eligible but not required to get an HPID. To determine whether a Subhealth Plan should get an HPID, the CHP and/or the SHP should consider whether the SHP needs to be identified in the standard transactions. A CHP may get an HPID for its SHP or may direct a SHP to get an HPID.

2.3 What entities are eligible to get an Other Entity Identifier (OEID)?

An entity is eligible to get an OEID if the entity meets ALL of the following:

1. Needs to be identified in the standard transactions;
2. Is NOT eligible to obtain an HPID;
3. Is NOT eligible to obtain an National Provider Identifier (NPI); and
4. Is NOT an Individual

Examples of entities that are eligible to get an OEID include third party administrators, clearinghouses, and non-HIPAA covered entities such as auto liability and workers compensation carriers.

2.4 When must a health plan get and use HPIDs?

Health plans that are not Small Health Plans must get HPIDs by November 5, 2014. Small health plans must get HPIDs by November 5, 2015. All health plans and other HIPAA covered entities must use an HPID to identify a health plan that has an HPID in the standard transactions by November 7, 2016.

2.5 When must other entities get and use OEIDs?

Other Entities are not required to get or use OEIDs. The OEID is a voluntary identifier. The value of the OEID is that it can create greater standardization in the transactions so that all parties that need to be identified in the standard transactions would have a standard identifier that would be listed in a publicly available searchable database.

3 Health Plan and Other Entity Enumeration System

HPOES is accessed by three types of users: Guest, Submitter and Authorizing Official. A user's access to system functionalities depend upon the user role assigned to that user. If you experience issues with access to a specific functionality within the HPOES System, please contact the Exchange Operations Support Center (XOSC). The Exchange Operations Support Center (XOSC) contact information can be found in section [5](#).

3.1 HPOES Functionality

This section discusses the different functionalities available to each user type. There is a separate section for Guest, Submitter, and Authorizing Official user roles.

3.1.1 'Guest' User Role

Within the HPOES System, a Guest user can access the following functionalities:

- Submit Feedback
- Request access to switch to 'Submitter' or 'Authorizing Official' user roles
- Manage an organization in HIOS

[Figure 1: HPOES Guest User Homepage](#) below is a screenshot of the HPOES System homepage displayed once a Guest user logs into HIOS and clicks on the 'Health Plan and Other Entity Enumeration System' link.

Figure 1: HPOES Guest User Homepage

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

HIOS MAIN PAGE | HOME | FAQ | CONTACT US | SIGN OUT

User Registration

Register an Organization

Health Plan and Other Entity Enumeration System

Announcements

HPID and OEID applications are now available. [Click here](#) to learn how to get started with your application.

[Read More](#)

What is the purpose of the health plan identifier?

The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.

What entities can get a Health Plan Identifier (HPID)?

An entity must meet the definition of health plan at 43 CFR, 140.103 to get an HPID. For purposes of the HPID, there are two classifications of health plans - a Controlling Health Plan (CHP) and a Subhealth Plan (SHP). A controlling health plan must get an HPID, while a subhealth plan is eligible but not required to get an HPID. To determine whether a subhealth plan should get an HPID, the CHP and/or the SHP should consider whether the SHP needs to be identified in the standard transactions. A CHP may get an HPID for its SHP or may direct a SHP to get an HPID.

Enumeration Requirements and Options for CHPs and SHPs

Entity	Enumeration Requirements	Enumeration Options
CHPs	Must get an HPID for itself	May get an HPID(s) for its SHP(s) May direct its SHP(s) to get an HPID(s)
SHPs	Not required to get an HPID	May get an HPID at the direction of its CHP May get an HPID on its own initiative

What entities are eligible to get an Other Entity Identifier (OEID)?

An entity is eligible to get an OEID if the entity meets ALL of the following:

- needs to be identified in the standard transactions;
- is NOT eligible to obtain an HPID;
- is NOT eligible to obtain a National Provider Identifier (NPI); and
- is NOT an individual

Examples of entities that are eligible to get an OEID include third party administrators, clearinghouses, and non-HIPAA covered entities such as auto liability and workers compensation carriers.

When can an entity get an HPID/OEID?

HPID/OEID applications are not currently available in the Health Plan and Other Entity Enumeration System (HPOES), but users will be notified as information becomes available.

When must a health plan get and use HPIDs?

Health plans that are not small health plans must get HPIDs by November 5, 2014. Small health plans must get HPIDs by November 5, 2015. All health plans and other HIPAA covered entities must use an HPID to identify a health plan that has an HPID in the standard transactions by November 7, 2016.

HPID Implementation

Entity Type	Compliance Date for Obtaining HPID	Full Implementation Date for Using HPID in Standard Transactions
Health Plans, except small health plans	November 5, 2014	November 7, 2016
Small Health Plans	November 5, 2015	November 7, 2016
Healthcare Clearinghouses	N/A	November 7, 2016
Healthcare Providers	N/A	November 7, 2016

When must other entities get and use OEIDs?

Other entities are not required to get or use OEIDs. The OEID is a voluntary identifier. The value of the OEID is that it can create greater standardization in the transactions so that all parties that need to be identified in the standard transactions would have a standard identifier that would be listed in a publicly available searchable database.

How to request a New HPOES user role

You currently have guest role access to HPOES and in order to perform additional functions in HPOES, you will need to request access as either a Submitter user or an Authorizing Official user. All requests for access will be approved by the HIOS Helpdesk.

To determine what type of role you will need in HPOES, please consider the two questions below.

A) Who is a Submitter user?

A Submitter user is a representative of a Health Plan or an Other Entity and will be the person responsible for completing and submitting an application on behalf of the health plan or other entity.

B) Who is an Authorizing Official user?

An Authorizing Official user is the individual that has the authority to legally bind the entity and is the individual that HIOS ultimate responsibility, for example the chief executive officer (CEO), the chief compliance officer, and the chief financial officer (CFO). An Authorizing Official approves applications submitted by the company's Submitter user(s). [Click here](#) to access the instructions for user management and registering an organization.

If you have questions regarding your access, please contact the HIOS Helpdesk phone at: 1-877-363-6227 or email: hsuarac@oesip.dhs.gov.

Have feedback for us?

[Submit](#)

Welcome **Jolene Nguyen**

Events and Webinars

Please visit the [HPID website](#) for information on upcoming trainings and webinars.

Help

If at any point you experience any problems with the application or have questions, please contact the HIOS Helpdesk in one of the following ways:

Phone: 1-877-363-6227

Email: hsuarac@oesip.dhs.gov

Resources

- [HPID Fact Book \(PDF\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Accessibility | Rules of Behavior | Web Policies | File Formats and Plug-Ins

U.S. Department of Health & Human Services, 200 Independence Avenue, S.W., Washington, D.C. 20203

3.1.2 'Submitter' User Role

Within the HPOES system, a user with a 'Submitter' user role can perform the following functions:

- Submit a Controlling Health Plan (CHP) HPID application
- Submit a Subhealth Plan (SHP) HPID application
- Submit an Other Entity Identifier (OEID) application
- Search Applications
- Edit Applications
- View Audit History for Applications

The following sections provide a description of these functionalities.

3.1.2.1 How to submit an Controlling Health Plan (CHP) application

Step 1: Navigate to the HIOS Main Page.

Step 2: Select 'Health Plan and Other Entity Enumeration System' button on the left hand menu.

User will be directed to the 'HPOES Homepage' for a Submitter User. (Please see [Figure 2: HPOES Submitter User Homepage](#) below).

Figure 2: HPOES Submitter User Homepage

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

Welcome Jolene Nguyen

All Users:

- User Management
- Register an Organization
- Search Applications

Controlling Health Plan Functions:

- Create Profile and Apply for HPID
- View Profile
- Apply for SHP HPID(s)

Subhealth Plan Functions:

- Apply for SHP HPID(s)

Other Entity Functions:

- Create Profile and Apply for OEID
- View Profile

Health Plan and Other Entity Enumeration System

Announcements

Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are available starting March 29th.

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

Health Plan and Other Entity Enumeration System Application Instructions

How do I obtain an HPID or OEID?

First, an entity must determine if it is going to obtain an HPID or OEID, and therefore must determine whether it meets the definition of health plan. If the entity is going to obtain an HPID it should follow these [HPID application instructions \(pdf, 483.0KB\)](#). If the entity is going to obtain an OEID it will follow these [OEID application instructions \(pdf, 384.4KB\)](#).

What is the purpose of the health plan identifier?

The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.

Events and Webinars

Please visit the [HPID website](#) for information on upcoming trainings and webinars.

Help

If at any point you experience any problems with the application or have questions, please contact the Exchange Operations Support Center (XOSC) in one of the following ways:

Phone: 1-855-267-1515

Email: CMS_FEPS@cms.hhs.gov

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select ‘Create Profile and Apply for HPID’ button on the left hand menu.

The user will be directed to the first step in the Controlling Health Plan profile creation process.

Step 4: Provide company information.

The user will need to select a company from the Company Name dropdown. If the user does not see the company in the company dropdown list, they can navigate to the HIOS Main Page to request permission to request on the company's behalf.

Based on the company selected from the drop down, the system will prepopulate the data elements for those fields contained within the HIOS database. (Please see [Figure 3: Company Information Page – CHP](#) below).

Additionally, the user will be required to enter either an NAIC Number or a Payer Identification Number to proceed in the application. The user may click on the NAIC Number or Payer Identification Number links to see a pop-up definition of each term.

Figure 3: Company Information Page – CHP

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

HIOS MAIN PAGE
HOME
FAQ
CONTACT US
SIGN OUT

Welcome Jolene Nguyen

Your Progress: **1. Entity Information** 2. Authorizing Official 3. Application Review

Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'HIOS Main Page' button above. Once on the HIOS Main Page, select the 'Manage an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

***Company Name - State - Federal EIN:**

UM Test Company - VA - 102030405
▼

Federal EIN: 102030405

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

*In order to complete the application, you must provide either an NAIC Number or a Payer Identification Number. You may provide both an NAIC Number and up to ten Payer Identification Numbers.

NAIC Number: Payer Identification Number:

Save And Add
Another Payer ID

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

Payer ID	Action
No records to display.	

[CONTINUE](#)

Step 5: Provide Authorizing Official Information.

Once the company information has been collected, the user will input their authorizing official’s information. If an authorizing official for the company had previously been approved through the User Role management function in HIOS, their information will be prepopulated. (Please see [Figure 4: Authorizing Official Contact Information Page – CHP](#) below).

Figure 4: Authorizing Official Contact Information Page – CHP

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

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Your Progress: 1. Entity Information 2. **Authorizing Official** 3. Application Review

Authorizing Official Contact Information

Please enter the following information:

Note: (*) Indicates a required field.

*Title of Authorizing Official:

Prefix: *First Name: Middle Initial: *Last Name: Suffix:

*Email Address: *Phone Number: Phone Ext:

Please note that the contact listed above will receive notification that they have been designated as the company's Authorizing Official in the Health Plan and Other Entity Enumeration System.

[BACK](#) [CONTINUE](#)

Step 6: Click ‘Apply for HPID’ button.

Once the authorizing official’s information has been provided, the user will be directed to the profile and application review page. The system will display all information captured throughout the profile creation process. Once the certification checkbox is selected, the ‘Apply for HPID’ button will become active.

The user will then click the ‘Apply for HPID’ button to submit their application. An email will be sent out to the Authorizing Official informing them that an application is currently pending their approval. Another email will be sent to the submitter user informing them that their application has been received and is currently pending approval. (Please see [Figure 5: Profile and Application Review Page – CHP](#) below).

Figure 5: Profile and Application Review Page – CHP

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

Your Progress: 1. Entity Information 2. Authorizing Official 3. **Application Review**

Profile and Application Review

Note: (*) Indicates a required field. Please review the information listed below.
If changes to the information are required prior to submitting the application, please select the 'Back' link.

Controlling Health Plan Information

Company Information

Company Name:	UM Test Company
Federal EIN:	102030405
NAIC:	12345

Domiciliary Address

Address Line 1:	123 Main Street
Address Line 2:	N/A
City:	Fairfax
State:	VA
Zip:	22124
Zip Plus 4:	N/A

Authorizing Official

Title:	CEO
Contact Name:	Jolene Nguyen
Email Address:	jpn4p@virginia.edu
Phone Number:	703-222-4445
Phone Ext:	N/A

If the information above is correct, please check the certification box, and select the 'Apply for HPID' button to request an HPID.

Once an application has been submitted, an email will be sent to the Authorizing Official for approval. After the Authorizing Official approves the application, the entity will receive an HPID.

*I certify that all data submitted for this application are complete and accurate.

[BACK](#) [Apply for HPID](#)

Once the user submits the application, they will be navigated to the 'Profile Summary' page. (Please see [Figure 6: Profile Summary Page – CHP](#) below). If the user has access to more than one profile, they may use the 'Company Name' dropdown to navigate between profiles. If

the selected company has both a Health Plan and Other Entity profile, the user may use the 'Application Type' dropdown to navigate between the two.

A user may also access the 'Profile Summary' page ([Figure 6: Profile Summary Page – CHP](#)) by clicking on the 'View Profile' button on the HPOES Homepage. (Please see [Figure 2: HPOES Submitter User Homepage](#) below). The user can view the summary of their profile and the status of their application on the 'Profile Summary' page.

Figure 6: Profile Summary Page – CHP

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

Profile Summary

Thank you for submitting your application.

The HPID application is pending system validation and approval by your Authorizing Official. Once the health plan has been assigned an HPID, you will receive an email notification.

To view a profile, please select a Company Name and Application Type below:

Company Name - State - FEIN:

Application Type:

Company Information

Application Number: 0000413

HPID: **Pending**

Company Name: UM Test Company
Federal EIN: 102030405
NAIC: 12345

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 703-222-4444
Phone Ext: N/A

To obtain additional HPIDs, please select the 'Apply for SHP HPID(s)' button below. Please note that the 'Apply for SHP HPID(s)' button will only become enabled once the CHP HPID application has been approved and the CHP HPID has been assigned. The system will not accept SHP HPID applications until a CHP has been assigned an HPID.

3.1.2.1.1 Apply for Subhealth Plan (SHP) HPID under a CHP Profile

If a user associated to a CHP would like to apply for SHP HPID(s), the user can click on the ‘Apply for SHP HPID(s)’ button on the Profile Summary page to request HPID(s) for their Subhealth Plan(s). This button only becomes active after the CHP has been assigned an HPID. If the CHP has not been assigned an HPID yet, the ‘Apply for SHP HPID(s)’ button will be grayed out. (Please see [Figure 7: Profile Summary – No CHP HPID Assigned](#) below).

Figure 7: Profile Summary – No CHP HPID Assigned

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

Profile Summary

Thank you for submitting your application.

The HPID application is pending system validation and approval by your Authorizing Official. Once the health plan has been assigned an HPID, you will receive an email notification.

To view a profile, please select a Company Name and Application Type below:

Company Name - State - FEIN:

Application Type:

Company Information

Application Number: 0000413

HPID: **Pending**

Company Name: UM Test Company
Federal EIN: 102030405
NAIC: 12345

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 703-222-4444
Phone Ext: N/A

To obtain additional HPIDs, please select the 'Apply for SHP HPID(s)' button below. Please note that the 'Apply for SHP HPID(s)' button will only become enabled once the CHP HPID application has been approved and the CHP HPID has been assigned. The system will not accept SHP HPID applications until a CHP has been assigned an HPID.

If the CHP has already been assigned an HPID, the ‘Apply for SHP HPID(s)’ button will be enabled, as shown in [Figure 8: Profile Summary – CHP HPID Assigned](#). Once the user clicks the ‘Apply for SHP HPID(s)’ button from the ‘Profile Summary’ page, the system will start a SHP application and automatically populate the CHP information pulled from the ‘Profile Summary’ page. The user is navigated to the ‘Subhealth Plan Identification’ page shown in [Figure 12: Subhealth Plan Type](#) and follows the process mentioned in section [3.1.2.2](#) to request HPID(s) for their SHPs.

If the CHP has any associated SHPs, the SHP HPID application information will display in a table on the ‘Profile Summary’ page, shown in [Figure 8: Profile Summary – CHP HPID Assigned](#). If the user clicks on the ‘View’ link within the table, they will be navigated to the ‘View Application’ page shown in [Figure 9: View Approved SHP Application](#).

Figure 8: Profile Summary – CHP HPID Assigned

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

Profile Summary

To view a profile, please select a Company Name and Application Type below:

Company Name - State - FEIN:

Application Type:

Company Information

Application Number: 0000107
HPID: 7538162760
Company Name: Company 321321
Federal EIN: 321321321
NAIC: 34232

Domiciliary Address

Address Line 1: 321 Main Street
Address Line 2: N/A
City: Fairfax
State: MD
Zip: 22124
Zip Plus 4: N/A

Authorizing Official

Title: CFO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 170-393-8073
Phone Ext: N/A

To obtain additional HPIDs, please select the 'Apply for SHP HPID(s)' button below. Please note that the 'Apply for SHP HPID(s)' button will only become enabled once the CHP HPID application has been approved and the CHP HPID has been assigned. The system will not accept SHP HPID applications until a CHP has been assigned an HPID.

Apply for SHP HPID(s)

SHP HPID(s)

Please select the view application link to view application details.

Page Size:
Displaying 1 - 3, of 3 found.

Application Number	Submitted Date	SHP Type	Company Name	Status	HPID Number	Actions
0000124	3/5/2013 4:32:36 PM	Line of Business	Company 321321	Approved	7891798028	View
0000125	3/5/2013 4:33:15 PM	Other Category	Company 321321	Approved	7700889935	View
0000172	3/23/2013 1:25:40 PM	Other Category	Hawaii Medical Service Association	Approval Pending	Pending	View

Figure 9: View Approved SHP Application

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

View Application

To make a change to this application, please click the 'Edit Application' button below. Once the edit to the application has been submitted, the Authorizing Official will have the ability to approve or reject the edits. After the Authorizing Official approves the edit submission, the application will be updated to reflect the changes.

[Edit Application](#)

HPID: 7891798028

Status: **Approved**

Application Number: 0000124

Controlling Health Plan Information

Company Name: Company 321321
Entity Classification: Health Plan
Federal EIN: 321321321
State: MD

Subhealth Plan Information

Company Information

Company Name: Company 321321
Federal EIN: 321321321

Domiciliary Address

Address Line 1: 321 Main Street
Address Line 2: N/A
City: Fairfax
State: MD
Zip: 22124
Zip Plus 4: N/A

Line of Business Information

Type: Medicaid Risk
Product Name/Brand Name: Test
Payer Identification Number: 11212dd

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 7039380732
Phone Ext: N/A

[View Audit History](#)

[BACK](#)

3.1.2.2 How to submit a Subhealth Plan (SHP) HPID application

Step 1: Navigate to the HIOS Main Page.

Step 2: Select 'Health Plan and Other Entity Enumeration System' button on the left hand menu.

User will be directed to the 'HPOES Homepage' for a Submitter User. (Please see [Figure 10: HPOES Submitter User Homepage](#) below).

Figure 10: HPOES Submitter User Homepage

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

All Users:

- User Management
- Register an Organization
- Search Applications

Controlling Health Plan Functions:

- Create Profile and Apply for HPID
- View Profile
- Apply for SHP HPID(s)

Subhealth Plan Functions:

- Apply for SHP HPID(s)

Other Entity Functions:

- Create Profile and Apply for OEID
- View Profile

Health Plan and Other Entity Enumeration System

Announcements

Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are available starting March 29th.

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

Health Plan and Other Entity Enumeration System Application Instructions

How do I obtain an HPID or OEID?

First, an entity must determine if it is going to obtain an HPID or OEID, and therefore must determine whether it meets the definition of health plan. If the entity is going to obtain an HPID it should follow these [HPID application instructions \(pdf, 483.0KB\)](#). If the entity is going to obtain an OEID it will follow these [OEID application instructions \(pdf, 384.4KB\)](#).

What is the purpose of the health plan identifier?

The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.

Events and Webinars

Please visit the [HPID website](#) for information on upcoming trainings and webinars.

Help

If at any point you experience any problems with the application or have questions, please contact the Exchange Operations Support Center (XOSC) in one of the following ways:

Phone: 1-855-267-1515

Email: CMS_FEPS@cms.hhs.gov

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select the ‘Apply for SHP HPID(s)’ button on the left hand menu. (Users can select this button under either the CHP Functions or the SHP Functions.)

The user will be directed to the first step in the Subhealth Plan application creation process.

Step 4: Identify the Controlling Health Plan.

The user will need to identify the Controlling Health plan either by selecting the CHP from the dropdown menu or by searching by the CHP HPID number. (Please see [Figure 11: SHP Application – Controlling Health Plan Identification](#) below).

Figure 11: SHP Application – Controlling Health Plan Identification

The screenshot shows the 'Health Insurance Oversight System' interface. At the top, it says 'Health Plan and Other Entity Enumeration System'. There are navigation buttons: 'HIOS MAIN PAGE', 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. A user greeting 'Welcome Jolene Nguyen' is visible. A progress bar shows 'Your Progress: 1. Entity Information 2. Authorizing Official 3. Application Review'. The main heading is 'Controlling Health Plan (CHP) Identification'. A note states: '(*) Indicates a required field. *Please indicate your Controlling Health Plan (CHP) to proceed. You may either select your CHP Name or search by the CHP HPID Number. NOTE: If your CHP has not yet received its HPID, you will not be able to move forward until they have received their HPID. Please call the Exchange Operations Support Center (XOSC) at 1-855-267-1515 if you have any questions.' There are two radio button options: 'CHP Name - State - Federal EIN:' with a dropdown menu showing 'Select', and 'CHP HPID Number:' with a text input field. A 'Search' button is located below the input fields. A 'CONTINUE' link is in the bottom right corner.

The user will be directed to the next step of the application process where the user selects the Subhealth plan type. If a user clicks on the hyperlinks for any of the Subhealth plan types, the system displays a definition of the terms displayed on the screen. (Please see [Figure 12: Subhealth Plan Type](#) below).

Step 5: Identify the Subhealth Plan Type.

Figure 12: Subhealth Plan Type

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

Your Progress: 1. Entity Information 2. Authorizing Official 3. Application Review

Subhealth Plan Type

(*) Indicates a required field.
*Please select one of the following:
To view the definitions of the terms listed below, please select the link.

- Company
- Issuer
- Product
- Line of Business
- Other Category

BACK CONTINUE

The user will be directed to the ‘SHP Application Review’ page to confirm their profile selection. (Please see [Figure 13: SHP Application Review](#) below).

Figure 13: SHP Application Review

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

Your Progress: 1. **Entity Information** 2. Authorizing Official 3. Application Review

SHP Application Review

You've selected the following options for this application:

- Health Plan
- Subhealth Plan (SHP)
- Controlling Health Plan Name: Test Demo Insurance
- Company

To continue with the application process, please select the 'Continue' link. If changes are required, select the 'Back' link.

[BACK](#) [CONTINUE](#)

The next few steps will walk through the information pages for each SHP type: company, issuer, product, line of business, and other category.

Step 6(a): Provide Company Information.

Once the user indicates their application selection as 'Company' in **Step 5**, they must select/provide their Company information. If the user does not see the company in the company dropdown list, they can navigate to the HIOS Main Page to request permission to request on the company's behalf. Based on the company selected from the drop down, the system will repopulate the data elements for those fields contained within the HIOS database.

Additionally, the user will be required to enter either an NAIC Number or a Payer Identification Number to proceed in the application. The user may click on the NAIC Number or Payer Identification Number links to see a pop-up definition of each term.

(Please see [Figure 14: Company Information Page – Subhealth Plan](#) below).

Figure 14: Company Information Page – Subhealth Plan

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

Your Progress: **1. Entity Information** 2. Authorizing Official 3. Application Review

Apply for SHP HPID(s)

1. Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'HIOS Main Page' button above. Once on the HIOS Main Page, select the 'Manage an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

***Company Name - State - Federal EIN:**

Test 112233445 - NV - 112233445
▼

Federal EIN: 112233445

Domiciliary Address

Address Line 1: 11223344 Test Drive
Address Line 2: 2233445566
City: Lebanon
State: NV
Zip: 12345
Zip Plus 4: 1234

2. NAIC/Payer ID Information

*In order to complete the application, you must provide either an NAIC Number or a Payer Identification Number. You may provide both an NAIC Number and up to ten Payer Identification Numbers.

NAIC Number: **Payer Identification Number:**

Save And Add
Another Payer ID

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

Payer ID	Action
No records to display.	

[BACK](#)
[CONTINUE](#)

Step 6(b): Provide Issuer Information

Once the user indicates their application selection as ‘Issuer’ in **Step 5**, they must first select the Company from the drop down and then select/provide the Issuer information. The user will select the Issuer information from the drop down, which will draw from information already within the HIOS database.

If the user does not see the issuer in the issuer dropdown list, they can click navigate to the HIOS Main Page to register the new issuer.

Additionally, the user will be required to enter either an NAIC Number or a Payer Identification Number to proceed in the application. The user may click on the NAIC Number or Payer Identification Number links to see a pop-up definition of each term. (Please see [Figure 15: Issuer Information Page – Subhealth Plan](#) below).

Step 6(c): Provide Product Information

Once the user indicates their application selection as ‘Product’ in **Step 5**, they must first select the Company and Issuer information from the drop downs and then select the Product information. The user will select the Product information from the drop down, which will draw from information already within the HIOS database.

Additionally, the user will be required to enter either an NAIC Number or a Payer Identification Number to proceed in the application. The user may click on the NAIC Number or Payer Identification Number links to see a pop-up definition of each term. (Please see [Figure 16: Product Information Page – Subhealth Plan](#) below).

Figure 16: Product Information Page – Subhealth Plan

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Your Progress: 1. **Entity Information** 2. Authorizing Official 3. Application Review

Apply for SHP HPID(s)

1. Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'HIOS Main Page' button above. Once on the HIOS Main Page, select the 'Manage an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

***Company Name - State - Federal EIN:**

Federal EIN: 112233445

Domiciliary Address

Address Line 1: 11223344 Test Drive
Address Line 2: 2233445566
City: Lebanon
State: NV
Zip: 12345
Zip Plus 4: 1234

2. Issuer Information

Please enter Issuer information.

***Issuer Name - State - ID:**

3. Product Information

Please enter Product information.

***Product Name - Market Type - Product Type - ID:**

4. NAIC/Payer ID Information

*In order to complete the application, you must provide either an NAIC Number or a Payer Identification Number. You may provide both an NAIC Number and up to ten Payer Identification Numbers.

NAIC Number: Payer Identification Number:

<input style="width: 90%;" type="text" value="12345"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="background-color: #4CAF50; color: white; padding: 5px 10px;" type="button" value="Save And Add Another Payer ID"/>
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

Payer ID	Action
No records to display.	

[BACK](#)
[CONTINUE](#)

Step 6(d): Provide Line of Business Information

Once the user indicates their application selection as ‘Line of Business’ in **Step 5**, they must first select the Company from the drop down and then select/provide the Line of Business information.

The different Line of Business types are:

- Comprehensive (hospital and medical)
- Dental-Only
- Federal Employees Health Plans (FEHBP)
- HMO (Health Management Organization)
- Hospital/Surgical
- Individual Practice Association
- Medicaid Cost
- Medicaid Risk
- Medicare Cost
- Medicare Other
- Medicare Risk
- Medicare Supplement
- Network Model
- Other (Specify)
- POS (Point of Service)
- PPO (Preferred Provider Organization)
- Self-funded
- Staff Model
- Vision-Only

Additionally, the user will be required to enter either an NAIC Number or a Payer Identification Number to proceed in the application. The user may click on the NAIC Number or Payer Identification Number links to see a pop-up definition of each term. (Please see [Figure 17: Line of Business Information Page – Subhealth Plan](#) below).

Figure 17: Line of Business Information Page – Subhealth Plan

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Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

Your Progress: **1. Entity Information** 2. Authorizing Official 3. Application Review

Apply for SHP HPID(s)

1. Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'HIOS Main Page' button above. Once on the HIOS Main Page, select the 'Manage an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

***Company Name - State - Federal EIN:**

Federal EIN: 112233445

Domiciliary Address

Address Line 1: 11223344 Test Drive
Address Line 2: 2233445566
City: Lebanon
State: NV
Zip: 12345
Zip Plus 4: 1234

2. Line of Business Information

Please enter Line of Business information.

***Type:**

***Product Name/Brand Name:**

3. NAIC/Payer ID Information

*In order to complete the application, you must provide either an NAIC Number or a Payer Identification Number. You may provide both an NAIC Number and up to ten Payer Identification Numbers.

NAIC Number: Payer Identification Number:

Save And Add Another Payer ID

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

Payer ID	Action
No records to display.	

[BACK](#)
[CONTINUE](#)

Step 6(e): Provide Other Category Information

Once the user indicates their application selection as ‘Other Category’ in **Step 5**, they must first select the Company from the drop down and then select/provide the Other Category information.

Additionally, the user will be required to enter either an NAIC Number or a Payer Identification Number to proceed in the application. The user may click on the NAIC Number or Payer Identification Number links to see a pop-up definition of each term. (Please see [Figure 18: Other Category Information Page – Subhealth Plan](#) below).

Figure 18: Other Category Information Page – Subhealth Plan

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

Your Progress: **1. Entity Information** 2. Authorizing Official 3. Application Review

Apply for SHP HPID(s)

1. Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'HIOS Main Page' button above. Once on the HIOS Main Page, select the 'Manage an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

***Company Name - State - Federal EIN:**

Federal EIN: 112233445

Domiciliary Address

Address Line 1: 11223344 Test Drive
Address Line 2: 2233445566
City: Lebanon
State: NV
Zip: 12345
Zip Plus 4: 1234

2. Other Category Information

Please enter Other Category information.

***Other Category Name:**

***Type/Description:**

3. NAIC/Payer ID Information

*In order to complete the application, you must provide either an NAIC Number or a Payer Identification Number. You may provide both an NAIC Number and up to ten Payer Identification Numbers.

NAIC Number: Payer Identification Number:

Save And Add Another Payer ID

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

Payer ID	Action
No records to display.	

[BACK](#)
[CONTINUE](#)

Step 7: Authorizing Official Information.

Once the CHP has been selected, the user has made their Subhealth Plan selection in **Step 5** and completed their relevant Subhealth Plan information, the CHP's Authorizing Official contact information will be displayed.

Figure 19: Authorizing Official Contact Information Page – SHP Application

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

Your Progress: 1. Entity Information 2. **Authorizing Official** 3. Application Review

Authorizing Official Contact Information

Please enter the following information:

Title:	CEO
Contact Name:	Jolene Nguyen
Email Address:	jpn4p@virginia.edu
Phone Number:	17032224445
Phone Ext:	N/A

Please note that the contact listed above will receive notification that they have been designated as the company's Authorizing Official in the Health Plan and Other Entity Enumeration System.

[BACK](#) [CONTINUE](#)

Step 8: Click 'Apply for HPID' button.

Once the authorizing official's information displays on the page, the user will be navigated to the Application Review page. The system will display all information captured throughout the application process. Once the certification checkbox is selected, the 'Apply for HPID' button will become active.

The user will then click the 'Apply for HPID' button to submit their application. An email will be sent out to the CHP's authorizing official informing them that an application is currently pending their approval. An email will be sent to the submitter user informing them that their application has been received and is currently pending. (Please see [Figure 20](#) through [Figure 22](#) for the Application Review pages for Product, Line of Business, and Other Category below).

Figure 20: Application Review – Product

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

Your Progress: 1. Entity Information 2. Authorizing Official 3. **Application Review**

Application Review

Note: (*) Indicates a required field. Please review the information listed below.
If changes to the information are required prior to submitting the application, please select the 'Back' link.

Controlling Health Plan Name: Test Demo Insurance

Subhealth Plan Information

Company Information

Company Name: Test 112233445
Federal EIN: 112233445

Domiciliary Address

Address Line 1: 11223344 Test Drive
Address Line 2: 2233445566
City: Lebanon
State: NV
Zip: 12345
Zip Plus 4: 1234

Issuer Information

Issuer Legal Name: Test 112233445
Issuer State: CO
Issuer ID: 17894

Product Information

Product ID: 15703IL001
Product Name: Test PPP Cert
Market Type: Small Group
Product Type: PPO
NAIC Number: 12345

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 17032224445
Phone Ext: N/A

If the information above is correct, please check the certification box, and select the 'Apply for HPID' button to request an HPID.

Once an application has been submitted, an email will be sent to the Authorizing Official for approval. After the Authorizing Official approves the application, the entity will receive an HPID.

*I certify that all data submitted for this application are complete and accurate.

[BACK](#) [Apply for HPID](#)

Figure 21: Application Review – Line of Business

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

Your Progress: 1. Entity Information 2. Authorizing Official 3. **Application Review**

Application Review

Note: (*) Indicates a required field. Please review the information listed below.
If changes to the information are required prior to submitting the application, please select the 'Back' link.

Controlling Health Plan Name: Test Demo Insurance

Subhealth Plan Information

Company Information

Company Name: Test 112233445
Federal EIN: 112233445

Domiciliary Address

Address Line 1: 11223344 Test Drive
Address Line 2: 2233445566
City: Lebanon
State: NV
Zip: 12345
Zip Plus 4: 1234

Line of Business Information

Type: Dental-Only
Product Name/Brand Name: Test
NAIC Number: 12345

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 17032224445
Phone Ext: N/A

If the information above is correct, please check the certification box, and select the 'Apply for HPID' button to request an HPID.

Once an application has been submitted, an email will be sent to the Authorizing Official for approval. After the Authorizing Official approves the application, the entity will receive an HPID.

*I certify that all data submitted for this application are complete and accurate.

[BACK](#) [Apply for HPID](#)

Figure 22: Application Review – Other Category

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

Your Progress: 1. Entity Information 2. Authorizing Official 3. **Application Review**

Application Review

Note: (*) Indicates a required field. Please review the information listed below.
If changes to the information are required prior to submitting the application, please select the 'Back' link.

Controlling Health Plan Name: Test Demo Insurance

Subhealth Plan Information

Company Information

Company Name: Test 112233445
Federal EIN: 112233445

Domiciliary Address

Address Line 1: 11223344 Test Drive
Address Line 2: 2233445566
City: Lebanon
State: NV
Zip: 12345
Zip Plus 4: 1234

Other Category Information

Other Category Name: Test
Type/Description: Test Description
NAIC Number: 12345

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 17032224445
Phone Ext: N/A

If the information above is correct, please check the certification box, and select the 'Apply for HPID' button to request an HPID.

Once an application has been submitted, an email will be sent to the Authorizing Official for approval. After the Authorizing Official approves the application, the entity will receive an HPID.

*I certify that all data submitted for this application are complete and accurate.

[BACK](#) [Apply for HPID](#)

Step 9: Application Summary Page

Once the user has reviewed and submitted their application, the user is navigated to a summary of their application. (Please see [Figure 23: Application Summary Page](#) below).

At this point, the user has two options:

- 1) If the user would like to request HPID(s) for another company that are under the same Controlling Health Plan, the user must click the 'Get Additional SHP HPID(s)' button on the Application Summary page and follow the steps mentioned in section [3.1.2.1.1](#).
- 2) If the user would like to request HPID(s) for another company that is under a different Controlling Health Plan or does not require additional HPID(s) at this time, the user can click the 'Done' button on the Application Summary page. The system will then navigate the user to the HPOES Homepage.

Figure 23: Application Summary Page

Health Insurance Oversight System

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Welcome Jolene Nguyen

Application Summary

Thank you for submitting your application.

The HPID application is pending system validation and approval by your Authorizing Official. Once the entity has been assigned an HPID, you will receive an email notification.

Application Number: 0000414

Controlling Health Plan Name: Test Demo Insurance

Company Information

Company Name: Test 112233445
Federal EIN: 112233445

Other Category Information

Other Category Name: Test
Type/Description: Test Description
NAIC Number: 12345

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 17032224445
Phone Ext: N/A

You may choose one of the following options:

A. If you would like to request HPID(s) for another company that are under the same Controlling Health Plan, please select the '**Get Additional SHP HPID(s)**' button below.

B. If you would like to request HPID(s) for another company that is under a different Controlling Health Plan or do not require additional HPID(s) at this time, please select the '**Done**' button below.

[Get Additional SHP HPID\(s\)](#) [Done](#)

After the user has submitted their application, the designated CHP authorizing official will review the application and has the option to approve the application. Email notifications will be sent to the user notifying them if an application is approved or rejected. If approved, the user will get an email notification with the HPID assigned for to their Subhealth Plan.

3.1.2.3 How to submit an Other Entity (OE) application

Step 1: Navigate to the HIOS Main Page.

Step 2: Select 'Health Plan and Other Entity Enumeration System' button on the left hand menu.

User will be directed to the 'HPOES Homepage' for a Submitter User. (Please see [Figure 24: HPOES Submitter User Homepage](#) below).

Figure 24: HPOES Submitter User Homepage

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Health Plan and Other Entity Enumeration System

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

Welcome Jolene Nguyen

All Users:

- User Management
- Register an Organization
- Search Applications

Controlling Health Plan Functions:

- Create Profile and Apply for HPID
- View Profile
- Apply for SHP HPID(s)

Subhealth Plan Functions:

- Apply for SHP HPID(s)

Other Entity Functions:

- Create Profile and Apply for OEID
- View Profile

Health Plan and Other Entity Enumeration System Announcements

Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are available starting March 29th.

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

Health Plan and Other Entity Enumeration System Application Instructions

How do I obtain an HPID or OEID?

First, an entity must determine if it is going to obtain an HPID or OEID, and therefore must determine whether it meets the definition of health plan. If the entity is going to obtain an HPID it should follow these [HPID application instructions \(pdf, 483.0KB\)](#). If the entity is going to obtain an OEID it will follow these [OEID application instructions \(pdf, 384.4KB\)](#).

What is the purpose of the health plan identifier?

The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.

Events and Webinars

Please visit the [HPID website](#) for information on upcoming trainings and webinars.

Help

If at any point you experience any problems with the application or have questions, please contact the Exchange Operations Support Center (XOSC) in one of the following ways:

Phone: 1-855-267-1515

Email: CMS_FEPS@cms.hhs.gov

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select 'Create Profile and Apply for OEID' button on the left hand menu.

The user will be directed to the first step in the Other Entity profile creation process.

Step 4: Provide company information.

The user will need to select a company from the Company Name dropdown. If the user does not see the company they wish to enumerate, they can click navigate to the HIOS Main Page to request permission to request on the company's behalf.

Based on the company selected from the drop down, the system will prepopulate the data elements for those fields contained within the HIOS database. The user will also need to select the business classification from the drop down. (Please see [Figure 25: Company Information Page – Other Entity](#) below).

The different business classifications are:

- Atypical Provider
- Clearinghouse
- Other
- Third Party Administrator
- Third Party Repricer

Additionally, the user will be required to enter a Payer Identification Number for all business classifications except atypical provider, where the user will be required to enter an Atypical Provider Identifier to proceed with the application.

Figure 25: Company Information Page – Other Entity

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Welcome Jolene Nguyen

Your Progress: **1. Entity Information** 2. Authorizing Official 3. Application Review

Company Information

If your company is already registered with HIOS, please select the appropriate company below. If your company is not registered with HIOS, please select the 'HIOS Main Page' button above. Once on the HIOS Main Page, select the 'Manage an Organization' button to begin the registration process.

Note: (*) Indicates a required field.

***Company Name - State - Federal EIN:**

Federal EIN: 102030405

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

***Business Classification:**

*Please enter a Payer Identification Number to proceed.

Payer Identification Number:

Save And Add
Another Payer ID

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

Payer ID	Action
No records to display.	

[CONTINUE](#)

Step 5: Provide Authorizing Official Information.

Once the company information has been collected, the user will input their authorizing official's information. If an authorizing official for the company had previously been approved through the User Role management function in HIOS, their information will be prepopulated. (Please see [Figure 26: Authorizing Official Contact Information Page – Other Entity](#) below).

Figure 26: Authorizing Official Contact Information Page – Other Entity

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

Your Progress: 1. Entity Information 2. **Authorizing Official** 3. Application Review

Authorizing Official Contact Information

Please enter the following information:

Note: (*) Indicates a required field.

*Title of Authorizing Official:

Prefix: *First Name: Middle Initial: *Last Name: Suffix:

*Email Address: *Phone Number: Phone Ext:

Please note that the contact listed above will receive notification that they have been designated as the company's Authorizing Official in the Health Plan and Other Entity Enumeration System.

[BACK](#) [CONTINUE](#)

Step 6: Click ‘Apply for OEID’ button.

Once the authorizing official’s information has been provided, the user will be directed to the profile and application review page. The system will display all information captured throughout the profile creation process. Once the certification checkbox is selected, the ‘Apply for OEID’ button will become active.

The user will then click the ‘Apply for OEID’ button to submit their application. An email will be sent out to the authorizing official informing them that an application is currently pending their approval. An email will be sent to the submitter user informing them that their application has been received and is pending. (Please see [Figure 27: Profile and Application Review Page – Other Entity](#) below).

Figure 27: Profile and Application Review Page – Other Entity

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome **Jolene Nguyen**

Your Progress: 1. Entity Information 2. Authorizing Official 3. **Application Review**

Profile and Application Review

Note: (*) Indicates a required field. Please review the information listed below.
If changes to the information are required prior to submitting the application, please select the 'Back' link.

Other Entity Information

Company Information

Company Name:	UM Test Company
Business Classification:	Third Party Administrator
Federal EIN:	102030405
Payer Identification Number:	12345

Domiciliary Address

Address Line 1:	123 Main Street
Address Line 2:	N/A
City:	Fairfax
State:	VA
Zip:	22124
Zip Plus 4:	N/A

Authorizing Official

Title:	CEO
Contact Name:	Jolene Nguyen
Email Address:	jpn4p@virginia.edu
Phone Number:	703-222-4444
Phone Ext:	N/A

If the information above is correct, please check the certification box, and select the 'Apply for OEID' button to request an OEID.

Once an application has been submitted, an email will be sent to the Authorizing Official for approval. After the Authorizing Official approves the application, the entity will receive an OEID.

*I certify that all data submitted for this application are complete and accurate.

[BACK](#) [Apply for OEID](#)

The user will be directed to the 'Profile Summary' page. (Please see [Figure 28: Profile Summary Page – Other Entity](#) below). If the user has access to more than one profile, they may use the 'Company Name' dropdown to navigate between profiles. If the selected company

has both a Health Plan and Other Entity profile, the user may use the ‘Application Type’ dropdown to navigate between the two.

Once the user has submitted an application or clicked the ‘View Profile’ button on the HPOES Homepage ([Figure 24: HPOES Submitter User Homepage](#)) they will be directed to the ‘Profile Summary’ page. (Please see [Figure 28: Profile Summary Page – Other Entity](#) below). The user can view the summary of their profile and the status of their application on the ‘Profile Summary’ page.

Figure 28: Profile Summary Page – Other Entity

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

Profile Summary

Thank you for submitting your application.

The OEID application is pending system validation and approval by your Authorizing Official. Once the other entity has been assigned an OEID, you will receive an email notification.

To view a profile, please select a Company Name and Application Type below:

Company Name - State - FEIN:

Application Type:

Company Information

Application Number: 0000415

OEID: **Pending**

Company Name: UM Test Company
Business Classification: Third Party Administrator
Federal EIN: 102030405
Payer Identification Number: 12345

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 703-222-4444
Phone Ext: N/A

3.1.2.4 Search Applications – Submitter User

Step 1: Navigate to the HIOS Main Page.

Step 2: Select ‘Health Plan and Other Entity Enumeration System’ button on the left hand menu.

User will be directed to the ‘HPOES Homepage’ for a Submitter User. (Please see [Figure 29: HPOES Submitter User Homepage](#) below).

Figure 29: HPOES Submitter User Homepage

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

Welcome Jolene Nguyen

All Users:

- User Management
- Register an Organization
- Search Applications

Controlling Health Plan Functions:

- Create Profile and Apply for HPID
- View Profile
- Apply for SHP HPID(s)

Subhealth Plan Functions:

- Apply for SHP HPID(s)

Other Entity Functions:

- Create Profile and Apply for OEID
- View Profile

Health Plan and Other Entity Enumeration System

Announcements

Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are available starting March 29th.

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

Health Plan and Other Entity Enumeration System Application Instructions

How do I obtain an HPID or OEID?

First, an entity must determine if it is going to obtain an HPID or OEID, and therefore must determine whether it meets the definition of health plan. If the entity is going to obtain an HPID it should follow these [HPID application instructions \(pdf, 483.0KB\)](#). If the entity is going to obtain an OEID it will follow these [OEID application instructions \(pdf, 384.4KB\)](#).

What is the purpose of the health plan identifier?

The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.

Events and Webinars

Please visit the [HPID website](#) for information on upcoming trainings and webinars.

Help

If at any point you experience any problems with the application or have questions, please contact the Exchange Operations Support Center (XOSC) in one of the following ways:

Phone: 1-855-267-1515

Email: CMS_FEPS@cms.hhs.gov

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select 'Search Applications' button on the left hand menu.

Please see [Figure 30: Search Applications](#) below.

Figure 30: Search Applications

The screenshot shows the 'Health Insurance Oversight System' interface. At the top, there is a green header with the system name and subtitle. Below the header is a navigation bar with buttons for 'HIOS MAIN PAGE', 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. A user greeting 'Welcome Jolene Nguyen' is displayed on the right. The main content area is titled 'Search Applications' and contains instructions: 'Please select the desired criteria to filter the application records and select the 'Search' button to view the applicable results.' Below the instructions are four input fields: 'Company Name' (text box), 'HPID/OEID' (text box), 'Application Type' (dropdown menu with 'All' selected), and 'Application Status' (dropdown menu with 'All' selected). A 'Search' button is located below these fields. At the bottom of the page, there is a footer with links for 'Accessibility', 'Rules of Behavior', 'Web Policies', and 'File Formats and Plug-Ins', followed by the address: 'U.S. Department of Health & Human Services · 200 Independence Avenue, S.W. · Washington, D.C. 20201'.

Once the user has defined the search criteria, they will be able to view the results. (Please see [Figure 31: Search Results](#) below).

Figure 31: Search Results

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#)
[HOME](#)
[FAQ](#)
[CONTACT US](#)
[SIGN OUT](#)

Welcome Jolene Nguyen

Search Applications

Please select the desired criteria to filter the application records and select the 'Search' button to view the applicable results.

Company Name:
HPID/OEID:

Application Type:
Application Status:

Health Plan Category:

Please select the View Application link to view application details.

⏪ < 1 > ⏩ Page Size: Displaying 1 - 2, of 2 found.

Application Number ↕	Submitted Date ↕	Application Type ↕	Health Plan Category ↕	Company Name ↕	Status ↕	HPID/OEID Number ↕	Actions
0000006	2/25/2013	HPID	CHP	Test Demo Insurance	Approved	7114920342	View
0000178	7/23/2013	HPID	SHP	Test Demo Insurance	Approved	7770586908	View

Step 4: Select the record to view application details.

Please see [Figure 32: View Application](#).

Figure 32: View Application

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

View Application

To make a change to this application, please click the 'Edit Application' button below. Once the edit to the application has been submitted, the Authorizing Official will have the ability to approve or reject the edits. After the Authorizing Official approves the edit submission, the application will be updated to reflect the changes.

[Edit Application](#)

HPID: 7134122374

Status: **Approved**

Application Number: 0000396

Controlling Health Plan Information

Company Name: OESS Test Company 5
Entity Classification: Health Plan
Federal EIN: 867530955
NAIC Number: 12345
Payer Identification Number: 11111A

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Vienna
State: VA
Zip: 22180
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: OESS Test Five
Email Address: oesstestfive@yahoo.com
Phone Number: 15713068920
Phone Ext: N/A

[View Audit History](#)

[BACK](#)

3.1.2.5 Edit Applications – Submitter User

Step 1: Navigate to the HIOS Main Page.

Step 2: Select ‘Health Plan and Other Entity Enumeration System’ button on the left hand menu.

User will be directed to the ‘HPOES Homepage’ for a Submitter User. (Please see [Figure 33: HPOES Submitter User Homepage](#) below).

Figure 33: HPOES Submitter User Homepage

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

Welcome Jolene Nguyen

All Users:

- User Management
- Register an Organization
- Search Applications

Controlling Health Plan Functions:

- Create Profile and Apply for HPID
- View Profile
- Apply for SHP HPID(s)

Subhealth Plan Functions:

- Apply for SHP HPID(s)

Other Entity Functions:

- Create Profile and Apply for OEID
- View Profile

Health Plan and Other Entity Enumeration System

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Published 03/18/2013

Health Plan and Other Entity Enumeration System Application Instructions

How do I obtain an HPID or OEID?

First, an entity must determine if it is going to obtain an HPID or OEID, and therefore must determine whether it meets the definition of health plan. If the entity is going to obtain an HPID it should follow these [HPID application instructions \(pdf, 483.0KB\)](#). If the entity is going to obtain an OEID it will follow these [OEID application instructions \(pdf, 384.4KB\)](#).

What is the purpose of the health plan identifier?

The primary purpose of the health plan identifier is for use in the standard transactions. In the standard transactions, the HPID will replace proprietary health plan identifiers that vary in lengths and formats. In addition, information about health plans and their HPIDs will be available in a public database to facilitate the routing of transactions.

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If at any point you experience any problems with the application or have questions, please contact the Exchange Operations Support Center (XOSC) in one of the following ways:

Phone: 1-855-267-1515

Email: CMS_FEPS@cms.hhs.gov

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select 'Search Applications' button on the left hand menu.

Please see [Figure 34: Search Applications](#) below.

Figure 34: Search Applications

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

Search Applications

Please select the desired criteria to filter the application records and select the 'Search' button to view the applicable results.

Company Name: **HPID/OEID:**

Application Type: **Application Status:**

Health Plan Category:

[Accessibility](#) | [Rules of Behavior](#) | [Web Policies](#) | [File Formats and Plug-Ins](#)

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Once the user has defined the search criteria, they will be able to view the results. (Please see [Figure 35: Search Results](#) below).

Figure 35: Search Results

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#)
[HOME](#)
[FAQ](#)
[CONTACT US](#)
[SIGN OUT](#)

Welcome Jolene Nguyen

Search Applications

Please select the desired criteria to filter the application records and select the 'Search' button to view the applicable results.

Company Name:
HPID/OEID:

Application Type:
Application Status:

Health Plan Category:

[Search](#)

Please select the View Application link to view application details.

⏪ < 1 > ⏩ Page Size: Displaying 1 - 2, of 2 found.

Application Number ↕	Submitted Date ↕	Application Type ↕	Health Plan Category ↕	Company Name ↕	Status ↕	HPID/OEID Number ↕	Actions
0000006	2/25/2013	HPID	CHP	Test Demo Insurance	Approved	7114920342	View
0000178	7/23/2013	HPID	SHP	Test Demo Insurance	Approved	7770586908	View

Step 4: Select the record you wish to edit.

Please see [Figure 36: View Application \(Edit Application Button\)](#).

Figure 36: View Application (Edit Application Button)

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

View Application

To make a change to this application, please click the 'Edit Application' button below. Once the edit to the application has been submitted, the Authorizing Official will have the ability to approve or reject the edits. After the Authorizing Official approves the edit submission, the application will be updated to reflect the changes.

[Edit Application](#)

HPID: 7134122374

Status: **Approved**

Application Number: 0000396

Controlling Health Plan Information

Company Name: OESS Test Company 5
Entity Classification: Health Plan
Federal EIN: 867530955
NAIC Number: 12345
Payer Identification Number: 11111A

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Vienna
State: VA
Zip: 22180
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: OESS Test Five
Email Address: oesstestfive@yahoo.com
Phone Number: 15713068920
Phone Ext: N/A

[View Audit History](#)

[BACK](#)

If the user does not see the edit button on the ‘View Application’ page and the application status is ‘Approved,’ this means the user does not have the proper access to edit the application. The user can navigate to the HIOS Main Page to request permission to access the company.

Alternatively, if the application status displays as ‘Edit Pending Approval,’ an edit has already been submitted for the application. Please note that no additional edit submissions will be accepted until the Authorizing Official has approved or rejected the previous edit submission.

Step 5: Select the ‘Edit’ button on the application.

Once the ‘Edit’ button is selected, certain fields can be edited by the user depending on the application type. Please see the below table for a list of field users may edit.

Table 1: Editable Fields on Applications

Field Name	Application Type
NAIC	HPID Application
Payer ID	OEID and HPID Applications
Line of Business Type	SHP HPID Line of Business Application
Product Name/Brand Name	SHP HPID Line of Business Application
Other Description	SHP HPID Line of Business Application
Other Category Name	SHP HPID Other Category Application
Type/Description	SHP HPID Other Category Application
Atypical Provider ID	OEID Application
Business Classification	OEID Application
Description of Classification	OEID Application

The editable fields will be highlighted in a blue box. Additionally, please note that if there are any changes to HIOS information in the application, a pencil icon () will display next to the updated field(s). This information will automatically be included in the edit submission but is not editable by the HPOES user since the information is pulled from data that is maintained outside of HPOES. (Please see [Figure 37: Edit Application](#) below).

Figure 37: Edit Application

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

Edit Application

Please click the 'Submit' button once you have made all necessary edits. Once the update to the application has been submitted, the Authorizing Official will have the ability to approve or reject the edits to the application. After the Authorizing Official approves the edit submission, the application will be updated to reflect the changes.

Note: If an update has been made to HIOS information that is maintained outside of HPOES, there will be a pencil icon next to each affected field. Please note the updated HIOS information will also be reviewed by the Authorizing Official as part of the edit approval process.

Note: (*) Indicates a required field.

HPID: 7134122374

Status: Approved

Application Number: 0000396

Controlling Health Plan Information

Company Name: OESS Test Company 5
Entity Classification: Health Plan
Federal EIN: 867530955

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Vienna
State: VA
Zip: 22180
Zip Plus 4: N/A

*In order to complete the application, you must provide either an NAIC Number or a Payer Identification Number. You may provide both an NAIC Number and up to ten Payer Identification Numbers.

NAIC Number: **Payer Identification Number:**

[Save And Add Another Payer ID](#)

Below are the Payer IDs that have been added. You may select the 'Delete' button to remove a Payer ID from the table.

Payer ID	Action
11111A	Delete

Authorizing Official

Title: N/A
Contact Name: OESS Test Six
Email Address: oesstestsix@yahoo.com
Phone Number: 15713068920
Phone Ext: N/A

[Cancel](#) [Submit](#)

Step 6: Once all edits have been made to the application, the user will need select 'Submit'.

A pop-up message will appear asking the user to confirm their edit submission. (Please see [Figure 38: Edit Application with Confirmation](#) below). Please note that the system only allows for one edit submission at a time. If the user has additional edits to make to the application, they should select the 'Cancel' button on the page and complete all updates prior to submitting their updates.

Figure 38: Edit Application with Confirmation

The screenshot displays a web application interface with a confirmation pop-up. The background form contains the following information:

- Federal EIN:** 123123123
- NAIC Number:** 12345
- Domiciliary Address:**
 - Address Line 1: 456 All Star way
 - Address Line 2: N/A
 - City: Arlington
 - State: VA
 - Zip: 22098
 - Zip Plus 4: N/A
- NAIC Number: Payer Identification Numbers:** 15655
- Below are the Payer IDs that are currently associated with the table:**

Payer ID	Action
No records to display.	
- Authorizing Official:**
 - Title: CEO
 - Contact Name: Jolene Nguyen
 - Email Address: jpn4p@virginia.edu
 - Phone Number: 7032224444
 - Phone Ext: N/A

The pop-up message, titled "Message from webpage", contains the following text: "Once you click the 'OK' button, you will not be able to make any further edits until the Authorizing Official reviews the changes. If you would like to make additional edits before submitting the update, please click the 'Cancel' button." The pop-up has "OK" and "Cancel" buttons.

Step 7: When the user is ready to confirm their edit submission, they will need to select the 'OK' button in the pop-up.

After the user has submitted the edit to the application, the application status will change from 'Approved' to 'Edit Pending Approval'. Users will be able to view both the most current approved application as well as the edit(s) submitted when the application is in the 'Edit Pending Approval' status. (Please see [Figure 39: View an Application in 'Edit Pending Approval' Status](#) below).

Figure 39: View an Application in 'Edit Pending Approval' Status

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

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Welcome Jolene Nguyen

View Application

Note: The information shown in the 'Approved Application View' column displays the most current approved application information in the system. The information shown in the 'Edit Pending Approval View' column displays the application information pending the Authorizing Official's approval.

Please note that the changes highlighted in **red and italicized** are those that have been made by a user in HPOES. Changes with a pencil icon represent fields where updates have been made to HIOS information that is maintained outside of HPOES.

HPID: 7134122374

Status: **Edit Pending Approval**

Application Number: 0000396

Approved Application View	Edit Pending Approval View
<h4 style="color: #4CAF50;">Controlling Health Plan Information</h4> <p>Company Name: OESS Test Company 5 Entity Classification: Health Plan Federal EIN: 867530955 NAIC Number: 12345 Payer Identification Number: 11111A</p> <h4 style="color: #4CAF50;">Domiciliary Address</h4> <p>Address Line 1: 123 Main Street Address Line 2: N/A City: Vienna State: VA Zip: 22180 Zip Plus 4: N/A</p> <h4 style="color: #4CAF50;">Authorizing Official</h4> <p>Title: CEO Contact Name: OESS Test Five Email Address: oesstestfive@yahoo.com Phone Number: 571-306-8920 Phone Ext: N/A</p>	<h4 style="color: #4CAF50;">Controlling Health Plan Information</h4> <p>Company Name: OESS Test Company 5 Entity Classification: Health Plan Federal EIN: 867530955 NAIC Number: 12345 Payer Identification Number: 11111A 23214</p> <h4 style="color: #4CAF50;">Domiciliary Address</h4> <p>Address Line 1: 123 Main Street Address Line 2: N/A City: Vienna State: VA Zip: 22180 Zip Plus 4: N/A</p> <h4 style="color: #4CAF50;">Authorizing Official</h4> <p> Title: N/A Contact Name: OESS Test Six Email Address: oesstest6@yahoo.com Phone Number: 571-306-8920 Phone Ext: N/A</p>

[View Audit History](#)

[BACK](#)

Once the edit has been submitted, the designated Authorizing Official will receive an email notification alerting the user that there is an edit pending their review. The Authorizing Official will need to log into HPOES to review the edit and has the option to approve or reject the edit to the application. An email notification will be sent to the user notifying them whether the edit has been approved or rejected.

Please note that once an edit has been approved, the application status will display as ‘Approved’ and the application record will be updated to include the most current approved application (which includes HIOS changes when applicable).

If the edit has been rejected, the application status will display as ‘Approved’ as the rejection only applies to the edit and not the HPID/OEID itself. The application record will not be updated, but will display the most current approved application in the system. If the edit submission has been rejected, the user may submit new edits for that application if they wish to do so.

3.1.2.6 View Audit History – Submitter User

Step 1: Navigate to the HIOS Main Page.

Step 2: Select ‘Health Plan and Other Entity Enumeration System’ button on the left hand menu.

User will be directed to the ‘HPOES Homepage’ for a Submitter User. (Please see [Figure 40: HPOES Submitter User Homepage](#) below).

Figure 40: HPOES Submitter User Homepage

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

Welcome Jolene Nguyen

All Users:

- User Management
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Published 03/18/2013

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Email: CMS_FEPS@cms.hhs.gov

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- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select ‘Search Applications’ button on the left hand menu.

Please see [Figure 41: Search Applications](#) below.

Figure 41: Search Applications

The screenshot shows the 'Health Insurance Oversight System' interface. At the top, there is a green header with the system name and subtitle. Below the header is a navigation bar with buttons for 'HIOS MAIN PAGE', 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. A welcome message 'Welcome Jolene Nguyen' is displayed on the right. The main content area is titled 'Search Applications' and contains instructions: 'Please select the desired criteria to filter the application records and select the 'Search' button to view the applicable results.' Below the instructions are four input fields: 'Company Name' (text box), 'HPID/OEID' (text box), 'Application Type' (dropdown menu with 'All' selected), and 'Application Status' (dropdown menu with 'All' selected). A 'Search' button is located below these fields. At the bottom of the page, there are links for 'Accessibility', 'Rules of Behavior', 'Web Policies', and 'File Formats and Plug-Ins', followed by the address: 'U.S. Department of Health & Human Services · 200 Independence Avenue, S.W. · Washington, D.C. 20201'.

Once the user has defined the search criteria, they will be able to view the results. (Please see [Figure 42: Search Results](#) below).

Figure 42: Search Results

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

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[HOME](#)
[FAQ](#)
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Welcome Jolene Nguyen

Search Applications

Please select the desired criteria to filter the application records and select the 'Search' button to view the applicable results.

Company Name:
HPID/OEID:

Application Type:
Application Status:

Health Plan Category:

[Search](#)

Please select the View Application link to view application details.

⏪ < 1 > ⏩ Page Size: Displaying 1 - 2, of 2 found.

Application Number ↕	Submitted Date ↕	Application Type ↕	Health Plan Category ↕	Company Name ↕	Status ↕	HPID/OEID Number ↕	Actions
0000006	2/25/2013	HPID	CHP	Test Demo Insurance	Approved	7114920342	View
0000178	7/23/2013	HPID	SHP	Test Demo Insurance	Approved	7770586908	View

Step 4: Select the record to view.

Please see [Figure 43: View Application](#) .

Figure 43: View Application (Audit History Button)

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

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View Application

To make a change to this application, please click the 'Edit Application' button below. Once the edit to the application has been submitted, the Authorizing Official will have the ability to approve or reject the edits. After the Authorizing Official approves the edit submission, the application will be updated to reflect the changes.

[Edit Application](#)

HPID: 7043213280

Status: **Approved**

Application Number: 0000397

Controlling Health Plan Information

Company Name: OESS Test Company 2
Entity Classification: Health Plan
Federal EIN: 867530922
Payer Identification Number: 12345
22113
test

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Vienna
State: VA
Zip: 22180
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: OESS Test Five
Email Address: oesstestfive@yahoo.com
Phone Number: 571-306-8920
Phone Ext: N/A

[View Audit History](#)

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Step 5: Select the ‘View Audit History’ button on the application.

A table will generate below the button with the audit history for the selected application. If applications have been approved, users will be able to see certain links within the audit history table. (Please see [Figure 44: View Application with Audit History Table](#) below).

Figure 44: View Application with Audit History Table

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Welcome OESS Test Two

View Application

To make a change to this application, please click the 'Edit Application' button below. Once the edit to the application has been submitted, the Authorizing Official will have the ability to approve or reject the edits. After the Authorizing Official approves the edit submission, the application will be updated to reflect the changes.

[Edit Application](#)

HPID: 7043213280

Status: Approved

Application Number: 0000397

Controlling Health Plan Information

Company Name: OESS Test Company 2
Entity Classification: Health Plan
Federal EIN: 867530922
Payer Identification Number: 12345
 22113
 test

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Vienna
State: VA
Zip: 22180
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: OESS Test Five
Email Address: oesstestfive@yahoo.com
Phone Number: 15713068920
Phone Ext: N/A

[View Audit History](#)

Please select the 'View Application' link to view the information associated to each approved application. If you would like to see details of the changes made to an approved edited application, please select the 'Detailed Description' link. Please note links are only displayed for applications where additional information is available.

Page Size: 10
Displaying 1 - 8, of 8 found.

Date/Time ↕	User Name ↕	Description ↕	Action
11/07/2013 03:29 PM	OESS Test Five	Application Edit Approved Detailed Description	View Application
11/07/2013 03:29 PM	OESS Test Three	Application Edit Submitted	
11/07/2013 03:27 PM	OESS Test Five	Application Edit Approved Detailed Description	View Application
11/07/2013 03:27 PM	OESS Test Three	Application Edit Submitted	
11/07/2013 03:26 PM	OESS Test Five	Application Edit Rejected	
11/07/2013 03:26 PM	OESS Test Three	Application Edit Submitted	
11/07/2013 03:25 PM	OESS Test Five	Application Approved	View Application
11/07/2013 12:07 PM	OESS Test Three	Application Submitted	

[BACK](#)

Step 6: Select ‘View Application’ link.

The ‘View Application’ page from the Audit History table would appear in a new tab in the window. The page will display a snapshot of each approved application. The user will be able to distinguish between the different approved applications with the date/time stamp displayed in the top right hand corner of the page. (Please see [Figure 45: View Application from Audit History](#) below).

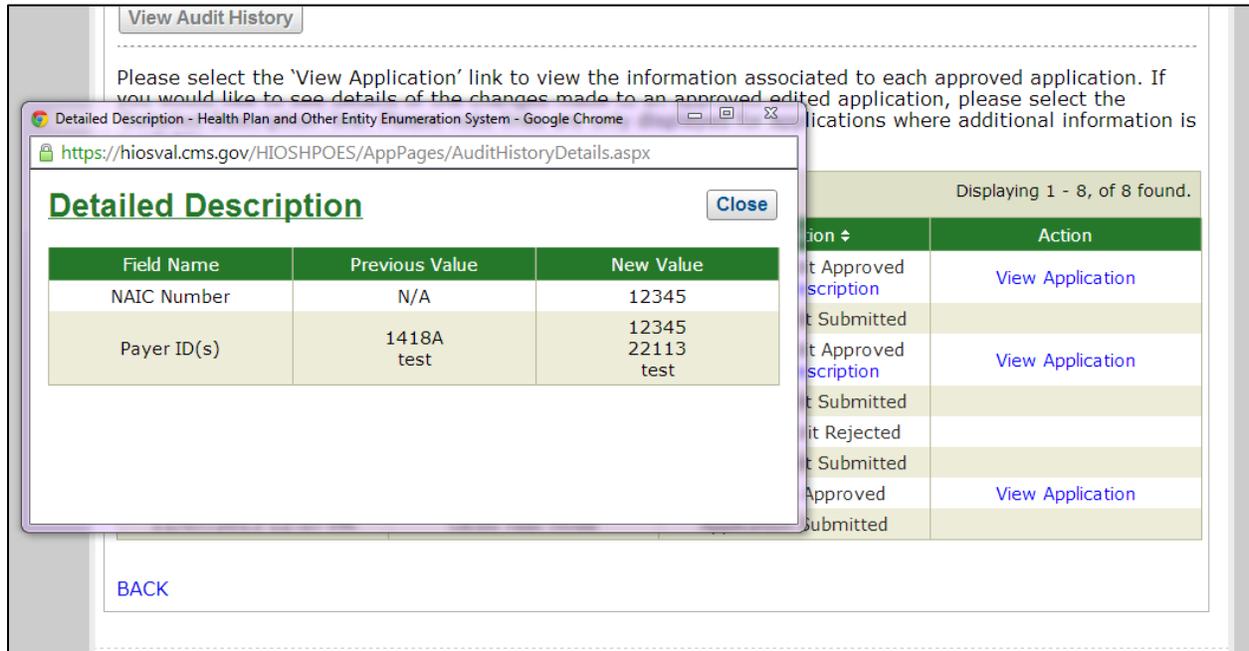
Figure 45: View Application from Audit History

View Application		Application approved on: 11/07/2013 03:29 PM
HPID:	7043213280	
Status:	Approved	
Application Number:	0000397	
Controlling Health Plan Information		
Company Name:	OESS Test Company 2	
Entity Classification:	Health Plan	
Federal EIN:	867530922	
Payer Identification Number:	12345 22113 test	
Domiciliary Address		
Address Line 1:	123 Main Street	
Address Line 2:	N/A	
City:	Vienna	
State:	VA	
Zip:	22180	
Zip Plus 4:	N/A	
Authorizing Official		
Title:	CEO	
Contact Name:	OESS Test Five	
Email Address:	oesstestfive@yahoo.com	
Phone Number:	15713068920	
Phone Ext:	N/A	

Step 7: Select ‘Detailed Description’ link.

Once the user clicks on the ‘Detailed Description’ link, a pop-up window will appear that displays the specific approved edits to the application. (Please see [Figure 46: Detailed Description from Audit History](#) below).

Figure 46: Detailed Description from Audit History



3.1.3 Authorizing Official

Within the HPOES system, a user with an 'Authorizing Official' role can perform the following functions:

- View Pending Tasks
- Approve an initial application
- Reject an initial application
- Approve an edit to an approved application
- Reject an edit to an approved application
- Search Applications
- View Audit History for Applications

The following sections provide a description of these functionalities.

3.1.3.1 Approve an Initial Application

Step 1: Navigate to the HIOS Main Page.

Step 2: Select 'Health Plan and Other Entity Enumeration System' button on the left hand menu.

User will be directed to the 'HPOES Homepage' for an Authorizing Official. (Please see [Figure 47: HPOES Homepage for Authorizing Official](#) below).

Figure 47: HPOES Homepage for Authorizing Official

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Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are available starting March 29th.

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

Welcome to the Health Plan and Other Entity Enumeration System!

A representative from your organization has submitted an application for a [Health Plan Identifier \(HPID\)](#) or [Other Entity Identifier \(OEID\)](#). Each application has a designated [Authorizing Official](#). In order for an organization to receive an HPID or OEID, the Authorizing Official must review and approve the application. Once the applications have been approved by you as the Authorizing Official, the HPID or OEID will be assigned and displayed on the page. The representative that submitted the application will receive an email notification of the application approval which will also list the relevant HPID or OEID numbers. To learn more about how to approve an application, [download the detailed instruction document \(pdf, 288.0KB\)](#).

To check your pending tasks, navigate to the [Pending Tasks page](#).

To search for an application please select the "Search Applications" button on the left menu.

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select the 'Pending Tasks' button.

The user will be directed to the 'Pending Tasks' page. Only applications assigned to the Authorizing Official user that are pending their approval will appear in their pending task list. (Please see [Figure 48: Pending Tasks Page](#) below).

Figure 48: Pending Tasks Page

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Pending Tasks

Below are the applications that are awaiting your approval as the designated Authorizing Official

[⏪](#)
[⏩](#)
1
2
3
4
⏭
Page Size:
Displaying 21 - 30, of 33 found.

Application Number ↕	Submitted Date ↕	Application Type ↕	Health Plan Category ↕	Company Name ↕	Status ↕	HPID/OEID Number ↕	Actions
0000302	9/9/2013	HPID	SHP	JN Test Company 9-9 Name Change	Approval Pending	Pending	Select
0000321	9/11/2013	HPID	SHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000325	9/12/2013	HPID	SHP	JN Test Company 9-11	Approval Pending	Pending	Select
0000361	10/17/2013	HPID	SHP	JN 9-23 SHP Change 3	Approval Pending	Pending	Select
0000363	10/17/2013	HPID	SHP	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000367	10/21/2013	HPID	CHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000370	10/22/2013	OEID	N/A	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000371	10/22/2013	OEID	N/A	JN Test Company 10-21	Approval Pending	Pending	Select
0000373	10/22/2013	HPID	CHP	JN Test Company 10-22	Approval Pending	Pending	Select
0000375	10/23/2013	HPID	CHP	JN Test Company 10-23	Approval Pending	Pending	Select

Step 4: Click the ‘Select’ link for an application.

Once the Authorizing Official reviews the application, they will have the option to confirm it. The user reviews the application and selects the ‘Confirm’ button to certify the information is correct. (Please see [Figure 49: Application Confirmation Page](#) below).

Once an option has been selected, the user will click the ‘Submit’ button. Please note that the CHP information shown on SHP applications may not reflect the most current information. To ensure that the CHP information displayed is correct, any updates need to be approved in order for the CHP information to be updated in HPOES.

Figure 49: Application Confirmation Page

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Welcome Jolene Nguyen

Application Confirmation

Please review the information listed below. Please click the 'Submit' button to approve or reject an application. An email notification will be sent to the submitter notifying them their application has been approved or rejected. Once an application has been approved, the entity will be assigned an HPID.

Please note that the CHP information associated to this SHP application may not reflect the most current information. To ensure that the CHP information displayed is current, any edits or updates need to be approved in order for the CHP information to be updated in HPOES.

Note: (*) Indicates a required field.

HPID: Pending

Status: Approval Pending

Application Number: 0000363

Controlling Health Plan Information

Company Name: JN Test Company 10-17 Change
Entity Classification: Health Plan
Federal EIN: 151515151
State: VA

Subhealth Plan Information

Company Information

Company Name: JN Test Company 10-17 Change
Federal EIN: 151515151

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Oakton
State: VA
Zip: 22124
Zip Plus 4: N/A

Line of Business Information

Type: Self-funded
Product Name/Brand Name: test
NAIC Number: 12345
Payer Identification Number: 12345

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 703-222-4445
Phone Ext: N/A

Confirm or Return Application

* I wish to:

Confirm the record accuracy: I certify that this application is complete and accurate.

Reject: This application is incomplete and/or inaccurate.

[Submit](#)

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Once the Authorizing Official confirms and approves the application, they will see the ‘Approval Confirmation’ page. (Please see [Figure 50: Approval Confirmation \(after Authorizing Official approval\) Page](#) below).

Upon application approval, an HPID or OEID number will be systematically generated, depending on the application type. An email will be sent to the Submitter user informing them that their application has been approved and will provide them with the assigned HPID/OEID number.

Figure 50: Approval Confirmation (after Authorizing Official approval) Page



3.1.3.2 Reject an Initial Application

Step 1: Navigate to the HIOS Main Page.

Step 2: Select ‘Health Plan and Other Entity Enumeration System’ button on the left hand menu.

User will be directed to the ‘HPOES Homepage’ for an Authorizing Official. (Please see [Figure 51: HPOES Homepage for Authorizing Official](#) below).

Figure 51: HPOES Homepage for Authorizing Official

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Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are available starting March 29th.

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

Welcome to the Health Plan and Other Entity Enumeration System!

A representative from your organization has submitted an application for a [Health Plan Identifier \(HPID\)](#) or [Other Entity Identifier \(OEID\)](#). Each application has a designated [Authorizing Official](#). In order for an organization to receive an HPID or OEID, the Authorizing Official must review and approve the application. Once the applications have been approved by you as the Authorizing Official, the HPID or OEID will be assigned and displayed on the page. The representative that submitted the application will receive an email notification of the application approval which will also list the relevant HPID or OEID numbers. To learn more about how to approve an application, [download the detailed instruction document \(pdf, 288.0KB\)](#).

To check your pending tasks, navigate to the [Pending Tasks page](#).

To search for an application please select the "Search Applications" button on the left menu.

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select the 'Pending Tasks' button.

The user will be directed to the 'Pending Tasks' page. Only applications assigned to the Authorizing Official user that are pending their approval will appear in the table. (Please see [Figure 52: Pending Tasks Page](#) below).

Figure 52: Pending Tasks Page

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Pending Tasks

Below are the applications that are awaiting your approval as the designated Authorizing Official

Application Number	Submitted Date	Application Type	Health Plan Category	Company Name	Status	HPID/OEID Number	Actions
0000302	9/9/2013	HPID	SHP	JN Test Company 9-9 Name Change	Approval Pending	Pending	Select
0000321	9/11/2013	HPID	SHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000325	9/12/2013	HPID	SHP	JN Test Company 9-11	Approval Pending	Pending	Select
0000361	10/17/2013	HPID	SHP	JN 9-23 SHP Change 3	Approval Pending	Pending	Select
0000363	10/17/2013	HPID	SHP	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000367	10/21/2013	HPID	CHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000370	10/22/2013	OEID	N/A	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000371	10/22/2013	OEID	N/A	JN Test Company 10-21	Approval Pending	Pending	Select
0000373	10/22/2013	HPID	CHP	JN Test Company 10-22	Approval Pending	Pending	Select
0000375	10/23/2013	HPID	CHP	JN Test Company 10-23	Approval Pending	Pending	Select

Step 4: Click ‘Select’ link for an application.

Once the Authorizing Official reviews the application, they will have the option to reject it. The user reviews the application and selects the ‘Reject’ button. A text box will appear with additional instructional text informing the Authorizing Official that they have the option to provide the reason or their rejection. (Please see [Figure 53: Application Confirmation Page](#) below).

Once the reject option has been selected, the user will click the ‘Submit’ button.

Figure 53: Application Confirmation Page

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Application Confirmation

Please review the information listed below. Please click the 'Submit' button to approve or reject an application. An email notification will be sent to the submitter notifying them their application has been approved or rejected. Once an application has been approved, the entity will be assigned an HPID.

Please note that the CHP information associated to this SHP application may not reflect the most current information. To ensure that the CHP information displayed is current, any edits or updates need to be approved in order for the CHP information to be updated in HPOES.

Note: (*) Indicates a required field.

HPID: Pending

Status: Approval Pending

Application Number: 0000321

Controlling Health Plan Information

Company Name: JN Test Company 9-9 Name Change
Entity Classification: Health Plan
Federal EIN: 908070605
State: VA

Subhealth Plan Information

Company Information

Company Name: JN Test Company 10-21
Federal EIN: 181818181

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

Line of Business Information

Type: Vision-Only
Product Name/Brand Name: Test
NAIC Number: 12345
Payer Identification Number: 12345

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 703-222-4445
Phone Ext: N/A

Confirm or Return Application

* I wish to:

Confirm the record accuracy: I certify that this application is complete and accurate.

Reject: This application is incomplete and/or inaccurate.

Please note, you have the option to provide the user with an explanation for this rejection in the comment box below. Once the rejection has been submitted, the user will receive an email notification of the rejection. If an explanation has been provided below, it will be included in the email sent to the user.

[Submit](#)

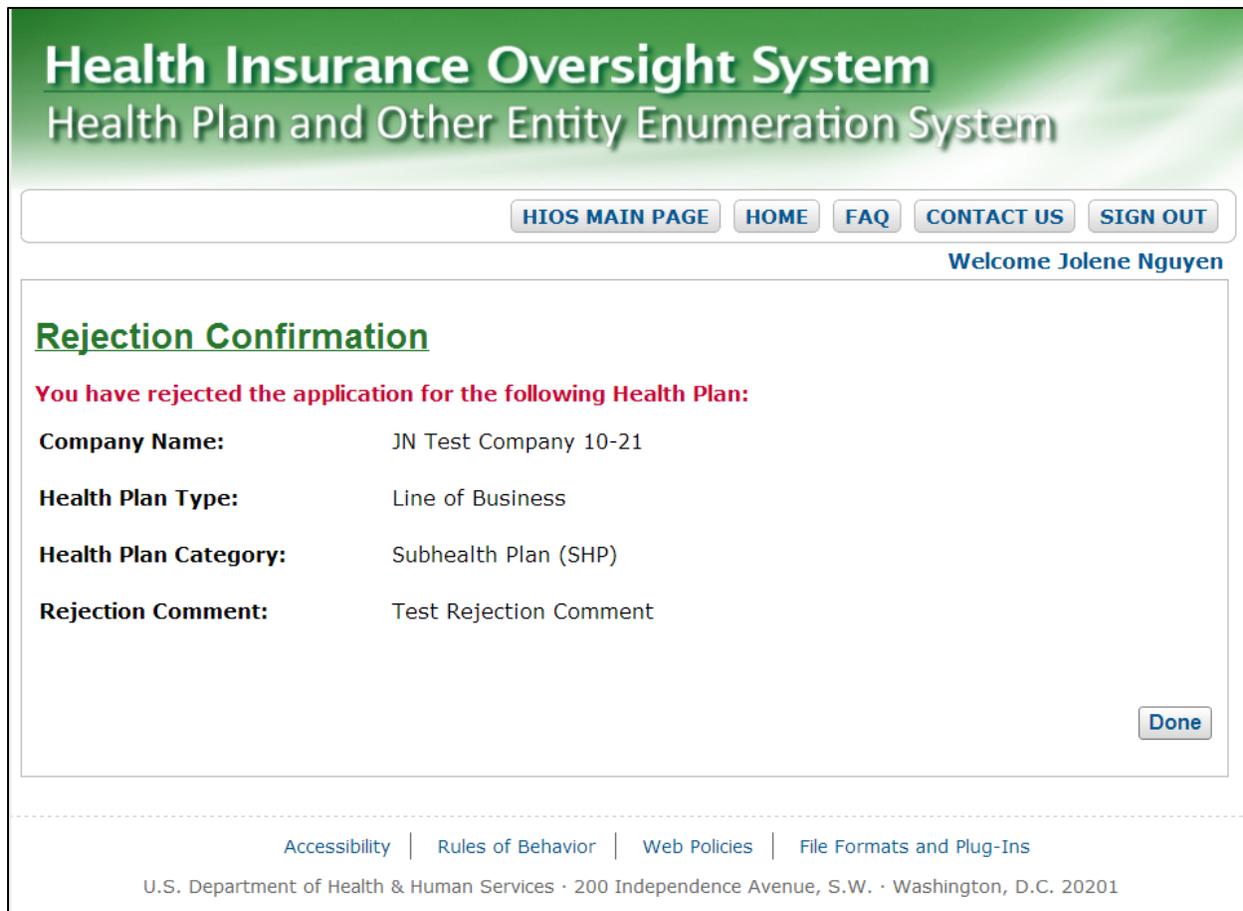
[View Audit History](#)

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Once the Authorizing Official rejects the application, they will see the ‘Rejection Confirmation’ page. (Please see [Figure 54: Rejection Confirmation Page](#) below).

An email will be sent to the Submitter user informing them that their application has been rejected and if applicable, include the rejection comment. If an application has been rejected, the user has the option to create another application for that health plan or other entity.

Figure 54: Rejection Confirmation Page



3.1.3.3 Approve an Edit to an Application

Step 1: Navigate to the HIOS Main Page.

Step 2: Select ‘Health Plan and Other Entity Enumeration System’ button on the left hand menu.

User will be directed to the ‘HPOES Homepage’ for an Authorizing Official. (Please see [Figure 55: HPOES Homepage for Authorizing Official](#) below).

Figure 55: HPOES Homepage for Authorizing Official

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Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are available starting March 29th.

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

Welcome to the Health Plan and Other Entity Enumeration System!

A representative from your organization has submitted an application for a [Health Plan Identifier \(HPID\)](#) or [Other Entity Identifier \(OEID\)](#). Each application has a designated [Authorizing Official](#). In order for an organization to receive an HPID or OEID, the Authorizing Official must review and approve the application. Once the applications have been approved by you as the Authorizing Official, the HPID or OEID will be assigned and displayed on the page. The representative that submitted the application will receive an email notification of the application approval which will also list the relevant HPID or OEID numbers. To learn more about how to approve an application, [download the detailed instruction document \(pdf, 288.0KB\)](#).

To check your pending tasks, navigate to the [Pending Tasks page](#).

To search for an application please select the "Search Applications" button on the left menu.

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select the 'Pending Tasks' button.

The user will be directed to the 'Pending Tasks' page and will see both initial applications as well as edits to approved applications assigned to the Authorizing Official for their review. (Please see [Figure 56: Pending Tasks Page](#) below).

Figure 56: Pending Tasks Page

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Welcome **Jolene Nguyen**

Pending Tasks

Below are the applications that are awaiting your approval as the designated Authorizing Official

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Displaying 21 - 30, of 33 found.

Application Number ↕	Submitted Date ↕	Application Type ↕	Health Plan Category ↕	Company Name ↕	Status ↕	HPID/OEID Number ↕	Actions
0000302	9/9/2013	HPID	SHP	JN Test Company 9-9 Name Change	Approval Pending	Pending	Select
0000321	9/11/2013	HPID	SHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000325	9/12/2013	HPID	SHP	JN Test Company 9-11	Approval Pending	Pending	Select
0000361	10/17/2013	HPID	SHP	JN 9-23 SHP Change 3	Approval Pending	Pending	Select
0000363	10/17/2013	HPID	SHP	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000367	10/21/2013	HPID	CHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000370	10/22/2013	OEID	N/A	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000371	10/22/2013	OEID	N/A	JN Test Company 10-21	Approval Pending	Pending	Select
0000373	10/22/2013	HPID	CHP	JN Test Company 10-22	Approval Pending	Pending	Select
0000375	10/23/2013	HPID	CHP	JN Test Company 10-23	Approval Pending	Pending	Select

Step 4: Click the ‘Select’ link to view the application record with edit(s) pending approval. The applications that have been edited will display a status of ‘Edit Pending Approval’ on the pending tasks page.

Once the Authorizing Official reviews the edited application, they will have the option to confirm or reject it. As part of the edit review process, the Authorizing Official may see two different types of changes: HPOES changes, which are made by the HPOES user, and HIOS changes (when applicable), which are changes made to information maintained outside of HPOES.

Changes highlighted in *red and italicized* are those that have been made by a user in HPOES.

Changes with a pencil icon () represent fields where updates have been made to HIOS information that is maintained outside of HPOES that also require Authorizing Official approval prior to the HPOES application being updated.

The Authorizing Official user will need to review the application and select the ‘Confirm’ button to approve the edit(s) to the application. (Please see [Figure 57: Edit Review Page](#) below).

Once the ‘Confirm’ button has been selected, the user will click the ‘Submit’ button. Please note that the CHP information shown on SHP applications may not reflect the most current information. To ensure that the CHP information displayed is correct, any updates need to be approved in order for the CHP information to be updated in HPOES.

Figure 57: Edit Review Page

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Welcome Jolene Nguyen

View Application

Please review the information listed below. Please click the 'Submit' button after you have approved or rejected the application. An email notification will be sent to the submitter notifying them their application has been approved or rejected. If the update is approved, the application information will be updated in the system. If the update is rejected, the application will remain the same with no updates to the application information. Please note that the assigned HPID or OEID number will remain the same.

Note: The information shown in the 'Approved Application View' column displays the most current approved application information in the system. The information shown in the 'Edit Pending Approval View' column displays the application information pending the Authorizing Official's approval.

Please note that the changes highlighted in **red and italicized** are those that have been made by a user in HPOES. Changes with a pencil icon ✎ represent fields where updates have been made to HIOS information that is maintained outside of HPOES.

Note: (*) Indicates a required field.

OEID: **6114920344**

Status: **Edit Pending Approval**

Application Number: **0000008**

Approved Application View	Edit Pending Approval View
<h4 style="color: #4CAF50;">Company Information</h4> <p>Company Name: Test Demo Insurance</p> <p>Business Classification: Other</p> <p>Description of Classification: Testing Other BC</p> <p>Federal EIN: 123123123</p> <p>Payer Identification Number: 33333</p> <h4 style="color: #4CAF50;">Domiciliary Address</h4> <p>Address Line 1: 456 All Star way</p> <p>Address Line 2: N/A</p> <p>City: Arlington</p> <p>State: VA</p> <p>Zip: 22098</p> <p>Zip Plus 4: N/A</p> <h4 style="color: #4CAF50;">Authorizing Official</h4> <p>Title: CEO</p> <p>Contact Name: Jolene Nguyen</p> <p>Email Address: jpn4p@virginia.edu</p> <p>Phone Number: 703-222-4444</p> <p>Phone Ext: N/A</p>	<h4 style="color: #4CAF50;">Company Information</h4> <p>Company Name: Test Demo Insurance</p> <p>Business Classification: <i>Clearinghouse</i></p> <p>Federal EIN: 123123123</p> <p>Payer Identification Number: <i>33333</i> <i>12354</i></p> <h4 style="color: #4CAF50;">Domiciliary Address</h4> <p>Address Line 1: 456 All Star way</p> <p>Address Line 2: N/A</p> <p>City: Arlington</p> <p>State: VA</p> <p>Zip: 22098</p> <p>Zip Plus 4: N/A</p> <h4 style="color: #4CAF50;">Authorizing Official</h4> <p>Title: CEO</p> <p>Contact Name: Jolene Nguyen</p> <p>Email Address: jpn4p@virginia.edu</p> <p>✎ Phone Number: 703-222-4445</p> <p>Phone Ext: N/A</p>

Confirm or Return Application

* I wish to:

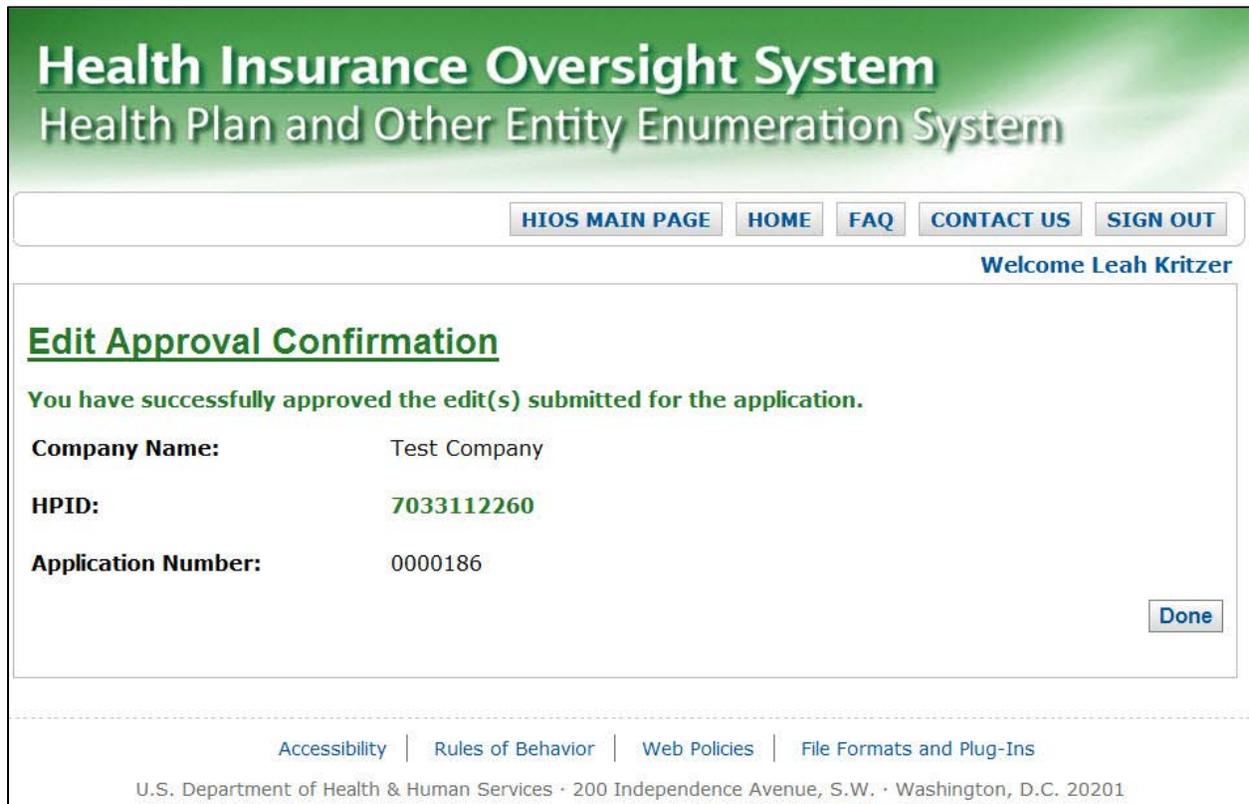
Confirm the record accuracy: I certify that this application is complete and accurate.

Reject: This application is incomplete and/or inaccurate.

[BACK](#)

After the Authorizing Official confirms and approves the application, they will see the ‘Approval Confirmation’ page. (Please see [Figure 58: Edit Approval Confirmation Page](#) below). Once approved, an email will be sent to the Submitter user informing them that the edit to their application has been approved.

Figure 58: Edit Approval Confirmation Page



Please note that once an edit has been approved, the application status will display as ‘Approved’ and the application record will be updated to include the most current approved application (which includes HIOS changes when applicable).

3.1.3.4 Reject an Edit to an Application

Step 1: Navigate to the HIOS Main Page.

Step 2: Select ‘Health Plan and Other Entity Enumeration System’ button on the left hand menu.

User will be directed to the ‘HPOES Homepage’ for an Authorizing Official. (Please [Figure 59: HPOES Homepage for Authorizing Official](#) below).

Figure 59: HPOES Homepage for Authorizing Official

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

HIOS MAIN PAGE HOME FAQ CONTACT US SIGN OUT

Welcome Jolene Nguyen

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Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are available starting March 29th.

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

Welcome to the Health Plan and Other Entity Enumeration System!

A representative from your organization has submitted an application for a [Health Plan Identifier \(HPID\)](#) or [Other Entity Identifier \(OEID\)](#). Each application has a designated [Authorizing Official](#). In order for an organization to receive an HPID or OEID, the Authorizing Official must review and approve the application. Once the applications have been approved by you as the Authorizing Official, the HPID or OEID will be assigned and displayed on the page. The representative that submitted the application will receive an email notification of the application approval which will also list the relevant HPID or OEID numbers. To learn more about how to approve an application, [download the detailed instruction document \(pdf, 288.0KB\)](#).

To check your pending tasks, navigate to the [Pending Tasks page](#).

To search for an application please select the "Search Applications" button on the left menu.

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select the 'Pending Tasks' button.

The user will be directed to the 'Pending Tasks' page and will see both initial applications as well as edits to approved applications assigned to the Authorizing Official for their review. (Please see [Figure 60: Pending Tasks Page](#) below).

Figure 60: Pending Tasks Page

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#)
[HOME](#)
[FAQ](#)
[CONTACT US](#)
[SIGN OUT](#)

Welcome Jolene Nguyen

Pending Tasks

Below are the applications that are awaiting your approval as the designated Authorizing Official

⏪ ⏩ 1 2 3 4 ⏭ Page Size: Displaying 21 - 30, of 33 found.

Application Number ↕	Submitted Date ↕	Application Type ↕	Health Plan Category ↕	Company Name ↕	Status ↕	HPID/OEID Number ↕	Actions
0000302	9/9/2013	HPID	SHP	JN Test Company 9-9 Name Change	Approval Pending	Pending	Select
0000321	9/11/2013	HPID	SHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000325	9/12/2013	HPID	SHP	JN Test Company 9-11	Approval Pending	Pending	Select
0000361	10/17/2013	HPID	SHP	JN 9-23 SHP Change 3	Approval Pending	Pending	Select
0000363	10/17/2013	HPID	SHP	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000367	10/21/2013	HPID	CHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000370	10/22/2013	OEID	N/A	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000371	10/22/2013	OEID	N/A	JN Test Company 10-21	Approval Pending	Pending	Select
0000373	10/22/2013	HPID	CHP	JN Test Company 10-22	Approval Pending	Pending	Select
0000375	10/23/2013	HPID	CHP	JN Test Company 10-23	Approval Pending	Pending	Select

Step 4: Click the ‘Select’ link to view the application record with edit(s) pending approval. The applications that have been edited will display a status of ‘Edit Pending Approval’ on the pending tasks page.

Once the Authorizing Official reviews the edited application, they will have the option to confirm or reject it. As part of the edit review process, the Authorizing Official may see two different types of changes: HPOES changes, which are made by the HPOES user, and HIOS changes (when applicable), which are changes made to information maintained outside of HPOES.

Changes highlighted in *red and italicized* are those that have been made by a user in HPOES. Changes with a pencil icon () represent fields where updates have been made to HIOS information that is maintained outside of HPOES that also require Authorizing Official approval prior to the HPOES application being updated.

The user will need to review the application and select the 'Reject' button to reject the edit(s) to the application. A text box will appear with additional instructional text informing the Authorizing Official that they have the option to provide the reason or their rejection. (Please see [Figure 61: Edit Review Page](#) below).

Once the 'Reject' button has been selected, the user will click the 'Submit' button. A text box will appear with additional instructional text informing the Authorizing Official that they have the option to provide the reason or their rejection.

Figure 61: Edit Review Page

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Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

View Application

Please review the information listed below. Please click the 'Submit' button after you have approved or rejected the application. An email notification will be sent to the submitter notifying them their application has been approved or rejected. If the update is approved, the application information will be updated in the system. If the update is rejected, the application will remain the same with no updates to the application information. Please note that the assigned HPID or OEID number will remain the same.

Note: The information shown in the 'Approved Application View' column displays the most current approved application information in the system. The information shown in the 'Edit Pending Approval View' column displays the application information pending the Authorizing Official's approval.

Please note that the changes highlighted in **red and italicized** are those that have been made by a user in HPOES. Changes with a pencil icon represent fields where updates have been made to HIOS information that is maintained outside of HPOES.

Note: (*) Indicates a required field.

OEID: 6114920344

Status: Edit Pending Approval

Application Number: 0000008

Approved Application View	Edit Pending Approval View
<h4 style="color: #4CAF50;">Company Information</h4> <p>Company Name: Test Demo Insurance Business Classification: Other Description of Classification: Testing Other BC Federal EIN: 123123123 Payer Identification Number: 33333</p> <h4 style="color: #4CAF50;">Domiciliary Address</h4> <p>Address Line 1: 456 All Star way Address Line 2: N/A City: Arlington State: VA Zip: 22098 Zip Plus 4: N/A</p> <h4 style="color: #4CAF50;">Authorizing Official</h4> <p>Title: CEO Contact Name: Jolene Nguyen Email Address: jpn4p@virginia.edu Phone Number: 703-222-4444 Phone Ext: N/A</p>	<h4 style="color: #4CAF50;">Company Information</h4> <p>Company Name: Test Demo Insurance Business Classification: Clearinghouse Federal EIN: 123123123 Payer Identification Number: 33333 12354</p> <h4 style="color: #4CAF50;">Domiciliary Address</h4> <p>Address Line 1: 456 All Star way Address Line 2: N/A City: Arlington State: VA Zip: 22098 Zip Plus 4: N/A</p> <h4 style="color: #4CAF50;">Authorizing Official</h4> <p>Title: CEO Contact Name: Jolene Nguyen Email Address: jpn4p@virginia.edu Phone Number: 703-222-4445 Phone Ext: N/A</p>

Confirm or Return Application

* I wish to:

Confirm the record accuracy: I certify that this application is complete and accurate.
 Reject: This application is incomplete and/or inaccurate.

Please note, you have the option to provide the user with an explanation for this rejection in the comment box below. Once the rejection has been submitted, the user will receive an email notification of the rejection. If an explanation has been provided below, it will be included in the email sent to the user.

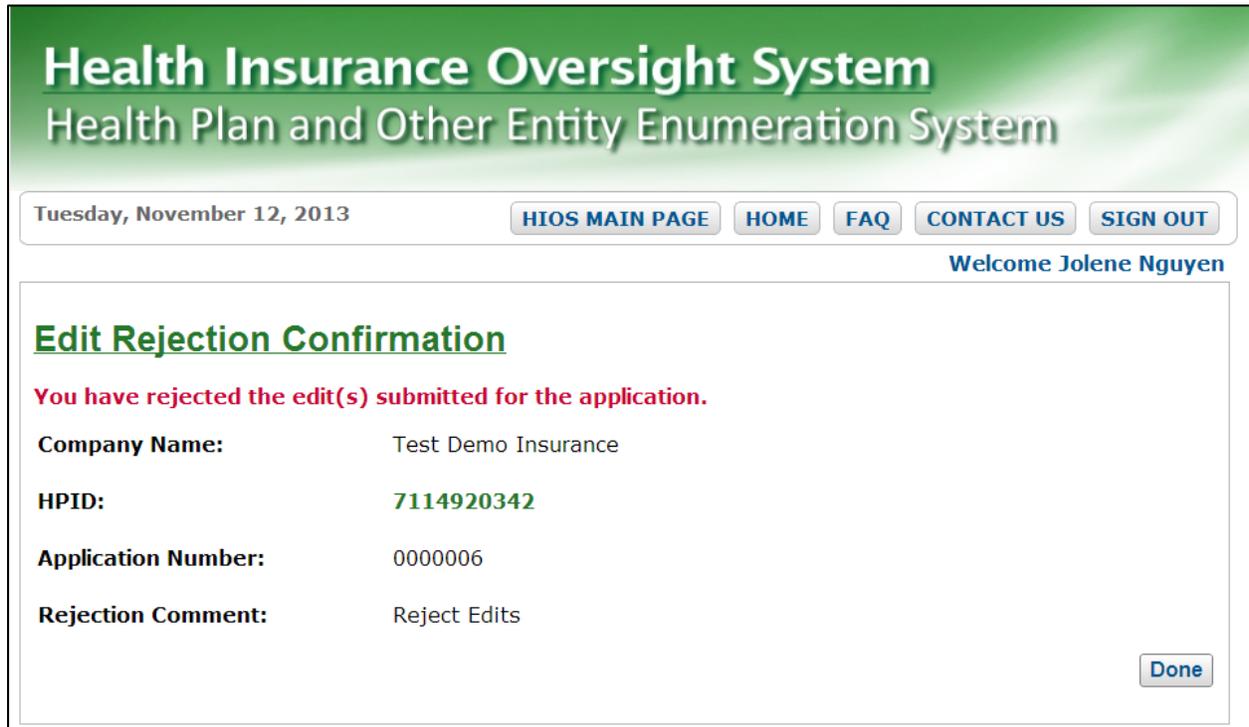
[Submit](#)

[View Audit History](#)

[BACK](#)

After the Authorizing Official rejects the application, they will see the ‘Edit Rejection Confirmation’ page. (Please see [Figure 62: Edit Rejection Confirmation Page](#) below). Once rejected, an email will be sent to the Submitter user informing them that the edit to their application has been rejected, and, if applicable, include the rejection comment.

Figure 62: Edit Rejection Confirmation Page



Once the edit has been rejected, the HPID/OEID status will display as ‘Approved’ as the rejection only applies to the edit and not the HPID/OEID itself. The application record will not be updated, but will display the most current approved application in the system. If the edit submission has been rejected, the user may submit new edits for that application if they wish to do so.

3.1.3.5 Search Applications – Authorizing Official User

Step 1: Navigate to the HIOS Main Page.

Step 2: Select ‘Health Plan and Other Entity Enumeration System’ button on the left hand menu.

User will be directed to the ‘HPOES Homepage’ for an Authorizing Official. (Please see [Figure 63: HPOES Homepage for Authorizing Official](#) below).

Figure 63: HPOES Homepage for Authorizing Official

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Welcome Jolene Nguyen

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Announcements

Welcome to the Health Plan and Other Entity Enumeration System!

HPID and OEID applications are available starting March 29th.

See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

Welcome to the Health Plan and Other Entity Enumeration System!

A representative from your organization has submitted an application for a [Health Plan Identifier \(HPID\)](#) or [Other Entity Identifier \(OEID\)](#). Each application has a designated [Authorizing Official](#). In order for an organization to receive an HPID or OEID, the Authorizing Official must review and approve the application. Once the applications have been approved by you as the Authorizing Official, the HPID or OEID will be assigned and displayed on the page. The representative that submitted the application will receive an email notification of the application approval which will also list the relevant HPID or OEID numbers. To learn more about how to approve an application, [download the detailed instruction document \(pdf, 288.0KB\)](#).

To check your pending tasks, navigate to the [Pending Tasks page](#).

To search for an application please select the "Search Applications" button on the left menu.

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select the ‘Search Applications’ button on the left hand menu.

Please see [Figure 64: Search Applications](#) below.

Figure 64: Search Applications

The screenshot shows the 'Health Insurance Oversight System' interface. At the top, there is a green header with the system name and subtitle. Below the header is a navigation bar with buttons for 'HIOS MAIN PAGE', 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. A welcome message 'Welcome Jolene Nguyen' is displayed on the right. The main content area is titled 'Search Applications' and contains instructions: 'Please select the desired criteria to filter the applications and select the 'View Application' button to view the application results. If no filters are utilized, all records for which you are the Authorizing Official will be displayed.' Below the instructions are three input fields: 'Company Name' (a text box), 'Application Type' (a dropdown menu set to 'All'), and 'Application Status' (a dropdown menu set to 'All'). A 'View Application' button is centered below these fields.

In addition to selecting the 'Pending Tasks' link, an Authorizing Official can search for applications based on the company name, application type, or application status. It will display both pending and approved applications assigned to them. Once the user has defined the search criteria, they will be able to view the results and view or approve/reject an application. (Please see [Figure 65: Search Applications Page Results](#) below).

Figure 65: Search Applications Page Results

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

Search Applications

Please select the desired criteria to filter the applications and select the 'View Application' button to view the application results. If no filters are utilized, all records for which you are the Authorizing Official will be displayed.

Company Name:
Application Type: **Application Status:**

[View Application](#)

NOTE: To view or update an application or record, select an action under the "Actions" column.

« < 1 2 3 4 5 6 7 8 9 10 > » Page Size: <input type="text" value="10"/>	Displaying 81 - 90, of 97 found.						
Application Number ↕	Submitted Date ↕	Application Type ↕	Health Plan Category ↕	Company Name ↕	Status ↕	HPID/OEID Number ↕	Actions
0000347	10/9/2013	HPID	CHP	JN 9-23 SHP Change 3	Approved	7417950657	View
0000348	10/9/2013	HPID	SHP	JN 9-23 SHP Change 3	Approved	7326041564	View
0000355	10/15/2013	HPID	CHP	JN Test Company 10-15	Approved	7871596012	View
0000361	10/17/2013	HPID	SHP	JN 9-23 SHP Change 3	Approval Pending	Pending	Select
0000362	10/17/2013	HPID	CHP	JN Test Company 10-17 Change	Approved	7598768738	View
0000363	10/17/2013	HPID	SHP	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000364	10/17/2013	HPID	SHP	JN Test Company 10-17 Change	Approved	7407859645	View
0000367	10/21/2013	HPID	CHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000370	10/22/2013	OEID	N/A	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000371	10/22/2013	OEID	N/A	JN Test Company 10-21	Approval Pending	Pending	Select

Step 4: Select the record to view application details.

Please see [Figure 66: View Application Page](#) below.

Figure 66: View Application Page

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

View Application

HPID: 7871596012

Status: Approved

Application Number: 0000355

Controlling Health Plan Information

Company Name: JN Test Company 10-15
Entity Classification: Health Plan
Federal EIN: 123333333
NAIC Number: 12345
Payer Identification Number: 12345

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 703-222-4444
Phone Ext: N/A

[View Audit History](#)

[BACK](#)

3.1.3.6 View Audit History – Authorizing Official User

Step 1: Navigate to the HIOS Main Page.

Step 2: Select ‘Health Plan and Other Entity Enumeration System’ button on the left hand menu.

User will be directed to the ‘HPOES Homepage’ for an Authorizing Official. (Please see [Figure 67: HPOES Homepage for Authorizing Official](#) below).

Figure 67: HPOES Homepage for Authorizing Official

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Welcome Jolene Nguyen

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Announcements

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See information below to learn how to obtain an HPID or OEID. It is estimated that it will take an average of **10-15** minutes to complete an application.

Published 03/18/2013

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A representative from your organization has submitted an application for a [Health Plan Identifier \(HPID\)](#) or [Other Entity Identifier \(OEID\)](#). Each application has a designated [Authorizing Official](#). In order for an organization to receive an HPID or OEID, the Authorizing Official must review and approve the application. Once the applications have been approved by you as the Authorizing Official, the HPID or OEID will be assigned and displayed on the page. The representative that submitted the application will receive an email notification of the application approval which will also list the relevant HPID or OEID numbers. To learn more about how to approve an application, [download the detailed instruction document \(pdf, 288.0KB\)](#).

To check your pending tasks, navigate to the [Pending Tasks page](#).

To search for an application please select the "Search Applications" button on the left menu.

Resources

- [HPID Final Rule \(PDF, 610KB\)](#)
- [HPID Fact Sheet](#)
- [HPID Administrative Simplification Page](#)
- [Affordable Care Act and Administrative Simplification Provisions Page](#)
- [Training Presentations](#)

Step 3: Select 'Search Applications' button on the left hand menu.

Please see [Figure 68: Search Applications](#) below.

Figure 68: Search Applications

The screenshot shows the 'Health Insurance Oversight System' interface. At the top, the title reads 'Health Insurance Oversight System' and 'Health Plan and Other Entity Enumeration System'. Below the title is a navigation bar with buttons for 'HIOS MAIN PAGE', 'HOME', 'FAQ', 'CONTACT US', and 'SIGN OUT'. A user greeting 'Welcome Jolene Nguyen' is displayed on the right. The main content area is titled 'Search Applications' and contains a paragraph of instructions: 'Please select the desired criteria to filter the applications and select the 'View Application' button to view the application results. If no filters are utilized, all records for which you are the Authorizing Official will be displayed.' Below this text are three input fields: 'Company Name' (a text box), 'Application Type' (a dropdown menu with 'All' selected), and 'Application Status' (a dropdown menu with 'All' selected). A 'View Application' button is centered below these fields.

Once the user has defined the search criteria, they will be able to view the results. (Please see [Figure 69: Search Results](#) below).

Figure 69: Search Results

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

HIOS MAIN PAGE
HOME
FAQ
CONTACT US
SIGN OUT

Welcome Jolene Nguyen

Search Applications

Please select the desired criteria to filter the applications and select the 'View Application' button to view the application results. If no filters are utilized, all records for which you are the Authorizing Official will be displayed.

Company Name:
Application Type: All
Application Status: All

View Application

NOTE: To view or update an application or record, select an action under the "Actions" column.

« « 1 2 3 4 5 6 7 8 9 10 » »	Page Size: 10	Displaying 81 - 90, of 97 found.
---	----------------------------	----------------------------------

Application Number ↕	Submitted Date ↕	Application Type ↕	Health Plan Category ↕	Company Name ↕	Status ↕	HPID/OEID Number ↕	Actions
0000347	10/9/2013	HPID	CHP	JN 9-23 SHP Change 3	Approved	7417950657	View
0000348	10/9/2013	HPID	SHP	JN 9-23 SHP Change 3	Approved	7326041564	View
0000355	10/15/2013	HPID	CHP	JN Test Company 10-15	Approved	7871596012	View
0000361	10/17/2013	HPID	SHP	JN 9-23 SHP Change 3	Approval Pending	Pending	Select
0000362	10/17/2013	HPID	CHP	JN Test Company 10-17 Change	Approved	7598768738	View
0000363	10/17/2013	HPID	SHP	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000364	10/17/2013	HPID	SHP	JN Test Company 10-17 Change	Approved	7407859645	View
0000367	10/21/2013	HPID	CHP	JN Test Company 10-21	Approval Pending	Pending	Select
0000370	10/22/2013	OEID	N/A	JN Test Company 10-17 Change	Approval Pending	Pending	Select
0000371	10/22/2013	OEID	N/A	JN Test Company 10-21	Approval Pending	Pending	Select

Step 4: Select the record to view.

Please see [Figure 70: View Application \(Audit History Button\)](#).

Figure 70: View Application (Audit History Button)

Health Insurance Oversight System
Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

View Application

HPID: 7871596012

Status: Approved

Application Number: 0000355

Controlling Health Plan Information

Company Name: JN Test Company 10-15
Entity Classification: Health Plan
Federal EIN: 123333333
NAIC Number: 12345
Payer Identification Number: 12345

Domiciliary Address

Address Line 1: 123 Main Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 703-222-4444
Phone Ext: N/A

[View Audit History](#)

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Step 5: Select the ‘View Audit History’ button on the application.

A table will generate below the button with the audit history for the selected application. If applications have been approved, users will be able to see certain links within the audit history table. (Please see [Figure 71: View Application with Audit History Table](#) below).

Figure 71: View Application with Audit History Table

Health Insurance Oversight System

Health Plan and Other Entity Enumeration System

[HIOS MAIN PAGE](#) [HOME](#) [FAQ](#) [CONTACT US](#) [SIGN OUT](#)

Welcome Jolene Nguyen

View Application

HPID: 7417950657

Status: Approved

Application Number: 0000347

Controlling Health Plan Information

Company Name: JN 9-23 SHP Change
Entity Classification: Health Plan
Federal EIN: 404040404
NAIC Number: 12345

Domiciliary Address

Address Line 1: 123 R Street
Address Line 2: N/A
City: Fairfax
State: VA
Zip: 22124
Zip Plus 4: N/A

Authorizing Official

Title: CEO
Contact Name: Jolene Nguyen
Email Address: jpn4p@virginia.edu
Phone Number: 703-222-4444
Phone Ext: N/A

[View Audit History](#)

Please select the 'View Application' link to view the information associated to each approved application. If you would like to see details of the changes made to an approved edited application, please select the 'Detailed Description' link. Please note links are only displayed for applications where additional information is available.

[<](#) [< 1 >](#) [>](#) [>](#)
Page Size:
Displaying 1 - 6, of 6 found.

Date/Time ↕	User Name ↕	Description ↕	Action
10/17/2013 03:19 PM	Jolene Nguyen	Application Edit Rejected	
10/17/2013 03:19 PM	xxxxne xxxxen	Application Edit Submitted	
10/09/2013 01:31 PM	Jolene Nguyen	Application Edit Approved	View Application
10/09/2013 01:31 PM	xxxxne xxxxen	Application Edit Submitted	
10/09/2013 01:25 PM	Jolene Nguyen	Application Approved	View Application
10/09/2013 01:22 PM	xxxxne xxxxen	Application Submitted	

[BACK](#)

Step 6: Select ‘View Application’ link.

The ‘View Application’ page from the Audit History table would appear in a new tab in the window. The page will display a snapshot of each approved application. The user will be able to distinguish between the different approved applications with the date/time stamp that will be displayed in the top right hand corner of the page. (Please see [Figure 72: View Application from Audit History](#) below).

Figure 72: View Application from Audit History

<u>View Application</u>		Application approved on: 11/07/2013 03:29 PM
HPID:	7043213280	
Status:	Approved	
Application Number:	0000397	
Controlling Health Plan Information		
Company Name:	OESS Test Company 2	
Entity Classification:	Health Plan	
Federal EIN:	867530922	
Payer Identification Number:	12345 22113 test	
Domiciliary Address		
Address Line 1:	123 Main Street	
Address Line 2:	N/A	
City:	Vienna	
State:	VA	
Zip:	22180	
Zip Plus 4:	N/A	
Authorizing Official		
Title:	CEO	
Contact Name:	OESS Test Five	
Email Address:	oesstestfive@yahoo.com	
Phone Number:	15713068920	
Phone Ext:	N/A	

Step 7: Select ‘Detailed Description’ link.

Once the user clicks on the ‘Detailed Description’ link, a pop-up window will appear that displays the specific approved edits to the application. (Please see [Figure 73: Detailed Description from Audit History](#) below).

Figure 73: Detailed Description from Audit History

View Audit History

Please select the 'View Application' link to view the information associated to each approved application. If you would like to see details of the changes made to an approved edited application, please select the applications where additional information is

Detailed Description - Health Plan and Other Entity Enumeration System - Google Chrome
<https://hiosval.cms.gov/HIOSHPOES/AppPages/AuditHistoryDetails.aspx>

Detailed Description Close

Field Name	Previous Value	New Value
NAIC Number	N/A	12345
Payer ID(s)	1418A test	12345 22113 test

Displaying 1 - 8, of 8 found.

Application Status	Action
Application Approved	View Application
Application Submitted	
Application Approved	View Application
Application Submitted	
Application Rejected	
Application Submitted	
Application Approved	View Application
Application Submitted	

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4 Definitions

Health Plan:

[A]n individual or group that provides, or pays the cost of medical care (as defined in section 2791(a)(2) of the Public Health Service Act (42 U.S.C. 300gg–91(a)(2))...

Health plan includes the following, singly or in combination:

- (i) A group health plan, as defined in this section.
 - (ii) A health insurance issuer, as defined in this section.
 - (iii) An HMO, as defined in this section.
 - (iv) Part A or Part B of the Medicare program under title XVIII of the Act.
 - (v) The Medicaid program under title XIX of the Act, 42 U.S.C. 1396, et seq.
 - (vi) An issuer of a Medicare supplemental policy (as defined in section 1882(g)(1) of the Act, 42 U.S.C. 1395ss(g)(1)).
 - (vii) An issuer of a long term care policy, excluding a nursing home fixed indemnity policy.
 - (viii) An employee welfare benefit plan or any other arrangement that is established or maintained for the purpose of offering or providing health benefits to the employees of two or more employers.
 - (ix) The health care program for active military personnel under title 10 of the United States Code.
 - (x) The veterans health care program under 38 U.S.C. chapter 17.
 - (xi) The Civilian Health and Medical Program of the Uniformed Services (CHAMPUS) (as defined in 10 U.S.C. 1072(4)).
 - (xii) The Indian Health Service program under the Indian Health Care Improvement Act, 25 U.S.C. 1601, et seq.
 - (xiii) The Federal Employees Health Benefits Program under 5 U.S.C. 8902, et seq.
 - (xiv) An approved State child health plan under title XXI of the Act, providing benefits for child health assistance that meet the requirements of section 2103 of the Act, 42 U.S.C. 1397, et seq.
 - (xv) The Medicare+Choice program under Part C of title XVIII of the Act, 42 U.S.C. 1395w–21 through 1395w–28.
 - (xvi) A high risk pool that is a mechanism established under State law to provide health insurance coverage or comparable coverage to eligible individuals.
 - (xvii) Any other individual or group plan, or combination of individual or group plans, that provides or pays for the cost of medical care (as defined in section 2791(a)(2) of the PHS Act, 42 U.S.C. 300gg–91(a)(2)).
- 2) Health plan excludes:
- (i) Any policy, plan, or program to the extent that it provides, or pays for the cost of, excepted benefits that are listed in section 2791(c)(1) of the PHS Act, 42 U.S.C. 300gg–91(c)(1); and
 - (ii) A government funded program (other than one listed in paragraph (1)(i)–(xvi) of this definition):
 - (A) Whose principal purpose is other than providing, or paying the cost of, health care; or
 - (B) Whose principal activity is:
 - (1) The direct provision of health care to persons; or
 - (2) The making of grants to fund the direct provision of health care to persons.

Controlling Health Plan (CHP):

A CHP means a health plan that:

1. Controls its own business activities, actions, or policies OR is controlled by an entity that is not a health plan; and
2. If it has a sub health plan(s) exercises sufficient control over the sub health plan(s) to direct its/their business activities, actions, or policies

Subhealth Plan (SHP):

A SHP means a health plan whose business activities, actions, or policies are directed by a controlling health plan.

Small Health Plan:

Small health plan means a health plan with annual receipts of \$5 million or less.

Other Entity:

An entity that meets ALL of the following:

1. Needs to be identified in the standard transactions;
2. Is NOT eligible to obtain an HPID;
3. Is NOT eligible to obtain an National Provider Identifier (NPI); and
4. Is NOT an individual.

Individual:

Individual means the person who is the subject of protected health information.

5 Contact Us/Support

The following section captures support information for questions related to policy, technical installation, and downloads.

5.1 Contact Us/ Support Details

If you have questions related to application installation or need technical support please contact the Exchange Operations Support Center (XOSC) at CMS_FEPS@cms.hhs.gov or at 1-855-267-1515.

The Exchange Operations Support Center (XOSC) hours of operation currently are 9 AM to 6 PM ET, Monday – Friday.