CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES
CENTER FOR CONSUMER INFORMATION
& INSURANCE OVERSIGHT

HICS IDM

Access Guide

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Revision History

Version	Date	Revision Owner	Description of Changes
0.1	07/28/2021	Cognosante	Baseline

Table of Contents

List of Exhibits

1.0 Introduction

This document provides guidance for existing Health Insurance Casework System (HICS) users regarding how to establish a HICS account in the new Identity Management (IDM) platform.

HICS provides access to cases that originate from the Health Insurance Marketplace Call Center and other sources. The application enables users to add, edit, search, and resolve cases, and download case files and reports.

CMS established IDM to provide users with a means to securely access CMS applications. Because HICS is now hosted through IDM, each user must create an IDM account in order to continue to access the application.

2.0 Creating an IDM Account

To complete new user registration, a user must enter the necessary profile information, choose a user ID and password, and establish a challenge question and answer for security purposes. Each user must also register an MFA device. Registering an MFA device provides another layer of security for the account by requiring the entry of a security code, in addition to the user ID and password, at each login.

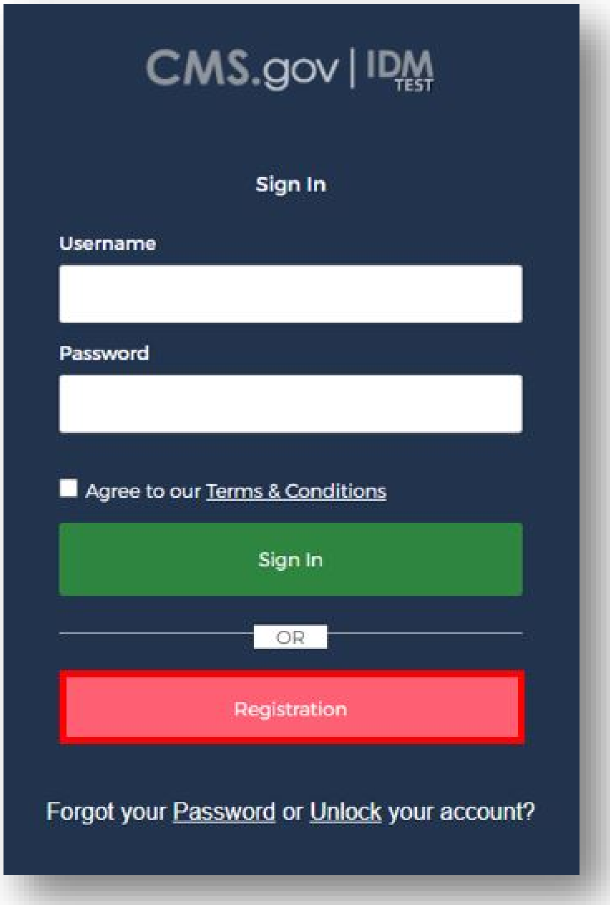
The following sections outline the steps for completing new user registration and registering an MFA device in IDM.

NOTE: Users with an existing IDM account and registered MFA device should proceed to **Section 3.0, Requesting Access to HICS**.

2.1 Completing New User Registration

1. Go to the IDM website at https://home.idm.cms.gov/.
2. Click ***Registration*** (Exhibit 1).

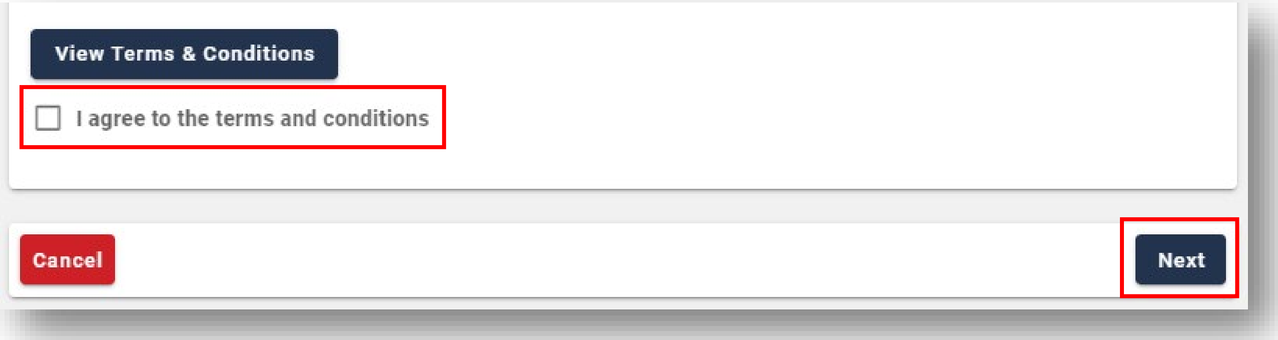
Exhibit 1: IDM Registration Button


CMS.gov | IDM TEST
Sign In
Username
Password
□ Agree to our Terms & Conditions
Sign In
OR
Registration
Forgot your Password or Unlock your account?

3. Provide the required information on the Personal screen.
   NOTE: All fields must be completed unless marked optional.
4. Click the ***View Terms & Conditions*** button to review the terms and conditions (Exhibit 13).

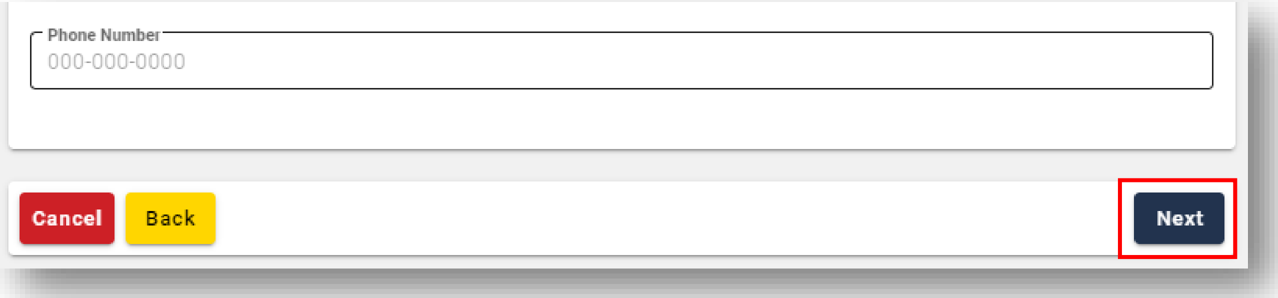
5. Click the ***I agree to the terms and conditions*** checkbox.
6. Click ***Next*** (Exhibit 2).

Exhibit 2: Terms and Conditions Checkbox and Next Button



7. Provide the required information on the Contact screen.
   NOTE: All fields must be completed unless marked optional.
8. After entering the required information, click ***Next*** to continue (Exhibit 3Exhibit 3).

Exhibit 3: Contact Screen Next Button

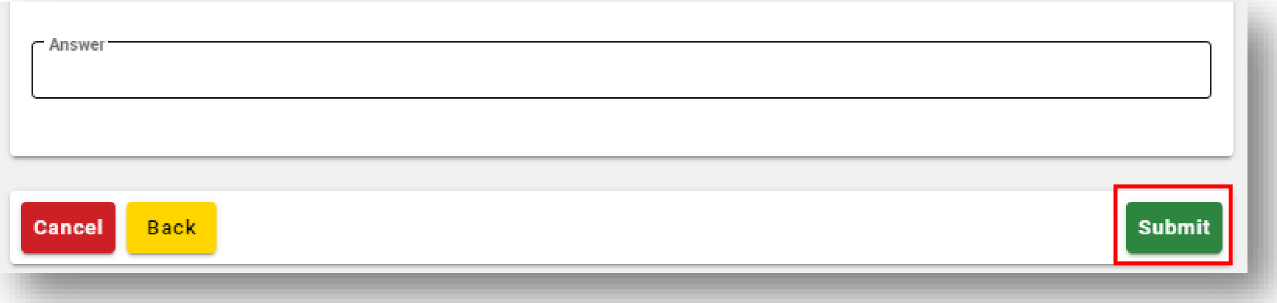


9. On the Credentials screen, create a user ID, password, and security question.
   a. Create a user ID in accordance with the following:
      i. Use the format FirstName.LastName (e.g., Jane.Doe).
      ii. There cannot be any spaces before or after the user ID.
      iii. The user ID may contain uppercase letters, lowercase letters, and numbers.
      iv. The user ID may contain the at symbol (@) in a valid email address format (e.g., jane.doe@email.com).
      v. The user ID must be more than six and fewer than 74 characters.
         NOTE: If the FirstName.LastName format exceeds the character limit or is not an available user ID, make adjustments as needed.
      vi. The user ID cannot begin or end with a special character.
   b. Create a password. The password must:
      i. Be a minimum of eight characters.
      ii. Contain at least one uppercase letter.
      iii. Contain at least one lowercase letter.

   iv. Contain at least one number.
   v. Contain at least one special character (not including ?, <, >, (,), /, \, or &)
  c. Set up the security question as follows:
   i. From the Security Questions drop-down menu, choose a security question.
   ii. In the corresponding Answer field, enter the answer to the question selected.
   NOTE: Be sure to memorize or make note of the security question answer, as this is necessary for login information recovery.

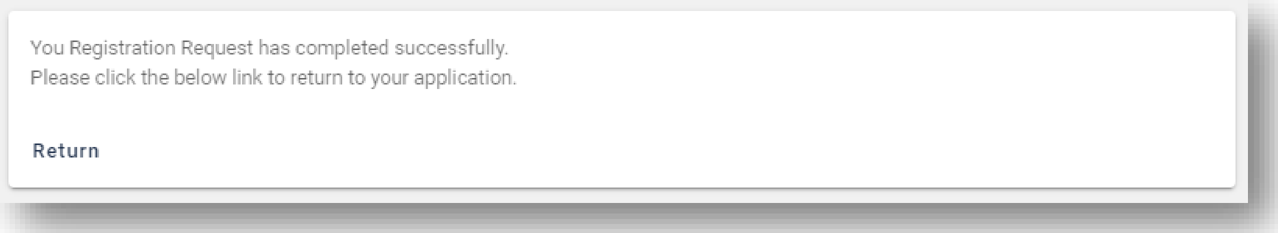
10. Click ***Submit*** (Exhibit 4) to continue.

Exhibit 4: Credentials Screen Submit Button



11. On the Registration Summary screen, review the information entered and make any necessary changes.
    NOTE: Verify that the email address has been entered correctly, as this will be the primary contact method for CMS and IDM to provide information and notifications regarding the account.
12. Click ***Submit***. A confirmation message (Exhibit 5) will display acknowledging the successful registration, and a confirmation email containing the user ID will be sent from no-reply@idm.cms.gov to the email address associated with the account.

Exhibit 5: Confirmation Message



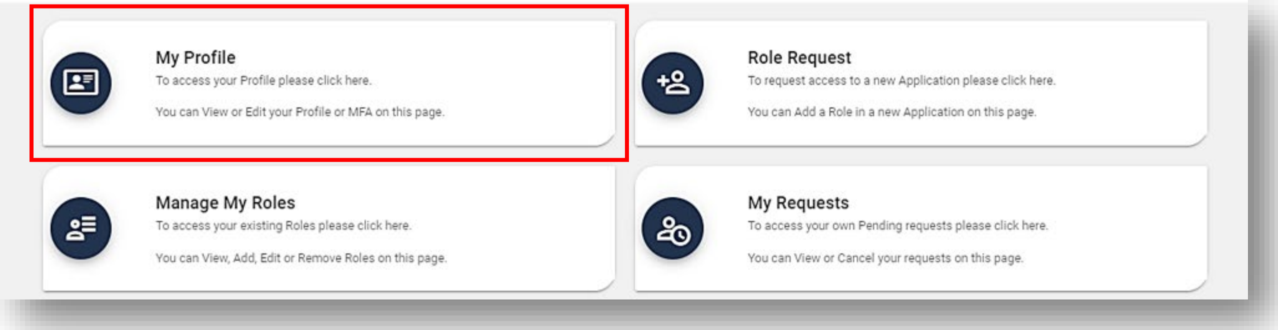
You Registration Request has completed successfully.
Please click the below link to return to your application.

13. Upon receiving the confirmation message, continue to **Section 2.2, Updating the MFA Device**.
    NOTE: If the confirmation message does not appear, contact the Marketplace Service Desk (MSD) at **1 (855) 267-1515** or CMS_FEPS@cms.hhs.gov for assistance.

2.2 Updating the MFA Device

1. Go to the IDM website at https://home.idm.cms.gov.
2. Log in using the appropriate IDM user ID and password.
3. Click ***My Profile*** (Exhibit 6).

Exhibit 6: My Profile Option



My Profile
To access your Profile please click here.
You can View or Edit your Profile or MFA on this page.

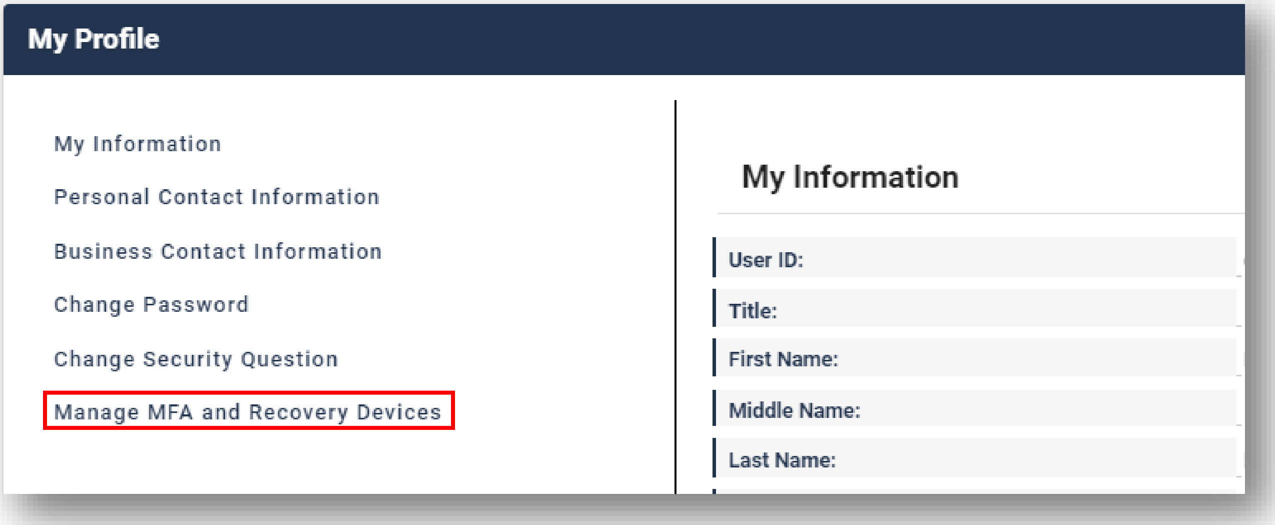
Role Request
To request access to a new Application please click here.
You can Add a Role in a new Application on this page.

Manage My Roles
To access your existing Roles please click here.
You can View, Add, Edit or Remove Roles on this page.

My Requests
To access your own Pending requests please click here.
You can View or Cancel your requests on this page.

4. Click ***Manage MFA and Recovery Devices*** (Exhibit 7) from the menu.

Exhibit 7: Manage MFA and Recovery Devices Option



My Profile

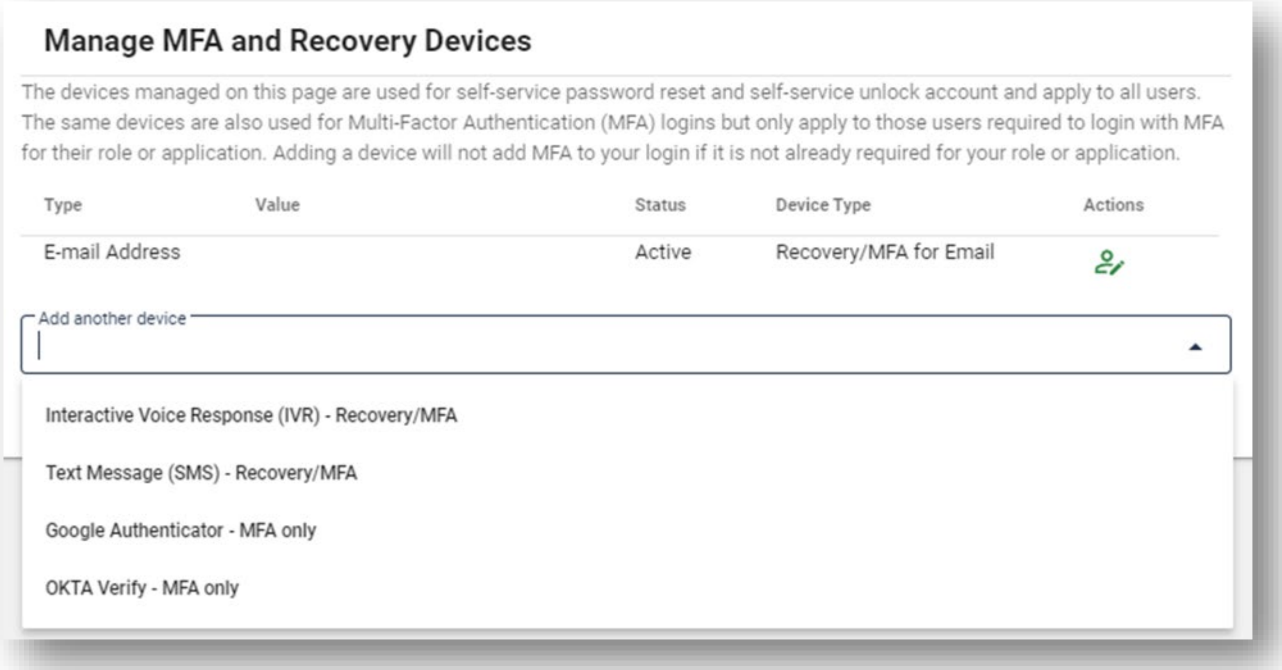
My Information
Personal Contact Information
Business Contact Information
Change Password
Change Security Question
Manage MFA and Recovery Devices

My Information

User ID:
Title:
First Name:
Middle Name:
Last Name:

5. Select the desired MFA device from the Add Another Device drop-down menu (Exhibit 8).

Exhibit 8: Add Another Device Menu



Manage MFA and Recovery Devices

The devices managed on this page are used for self-service password reset and self-service unlock account and apply to all users. The same devices are also used for Multi-Factor Authentication (MFA) logins but only apply to those users required to login with MFA for their role or application. Adding a device will not add MFA to your login if it is not already required for your role or application.

Type	Value	Status	Device Type	Actions
E-mail Address		Active	Recovery/MFA for Email	

Add another device

Interactive Voice Response (IVR) - Recovery/MFA
Text Message (SMS) - Recovery/MFA
Google Authenticator - MFA only
OKTA Verify - MFA only

6. Enter the appropriate information based on the MFA device selected.
7. Click ***Submit***. A confirmation message will indicate that the MFA device was successfully registered. **NOTE**: An email notification from no-reply@idm.cms.gov will also be sent to the email address associated with the account.

3.0 Requesting Access to HICS

To access HICS, each user must request the applicable HICS end user role within IDM and complete Identity Verification.

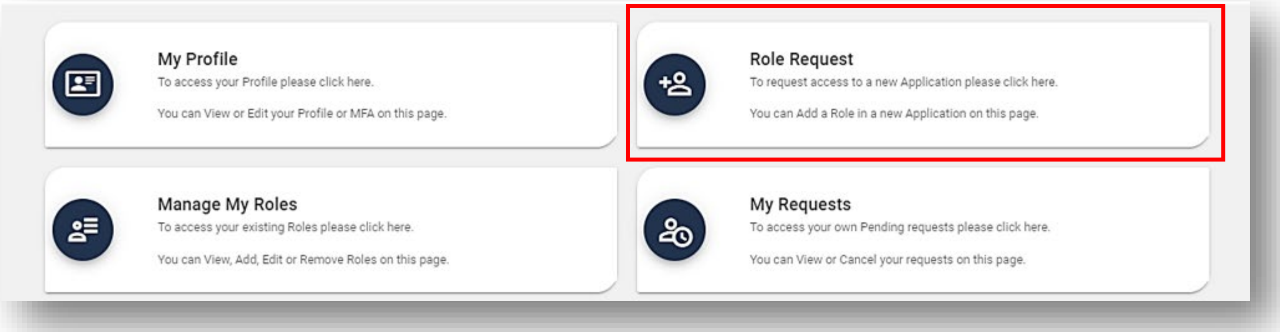
Identity Proofing is a secure process that aims to protect each user's privacy and prevent fraudulent activity from being conducted in the user's name. During this process, the user answers several multiple-choice questions involving personal information.

The following sections provide instructions for completing the role request and verification process.

3.1 Requesting the HICS Role

1. Go to the IDM website at https://home.idm.cms.gov.
2. Log in using the appropriate IDM user ID and password.
3. On the IDM Self Service screen, click the ***Role Request*** button (Exhibit 9) in the top right of the screen.

Exhibit 9: Role Request Button



My Profile
To access your Profile please click here.
You can View or Edit your Profile or MFA on this page.

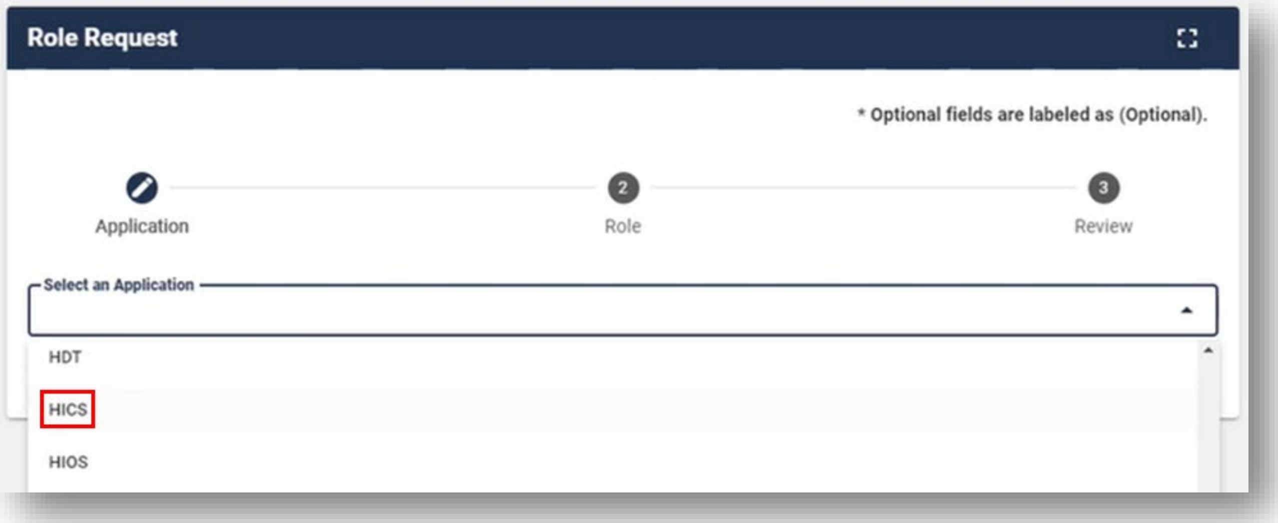
Role Request
To request access to a new Application please click here.
You can Add a Role in a new Application on this page.

Manage My Roles
To access your existing Roles please click here.
You can View, Add, Edit or Remove Roles on this page.

My Requests
To access your own Pending requests please click here.
You can View or Cancel your requests on this page.

4. From the Select an Application drop-down menu, select ***HICS*** (Exhibit 10).

Exhibit 10: Select an Application Menu – HICS Option

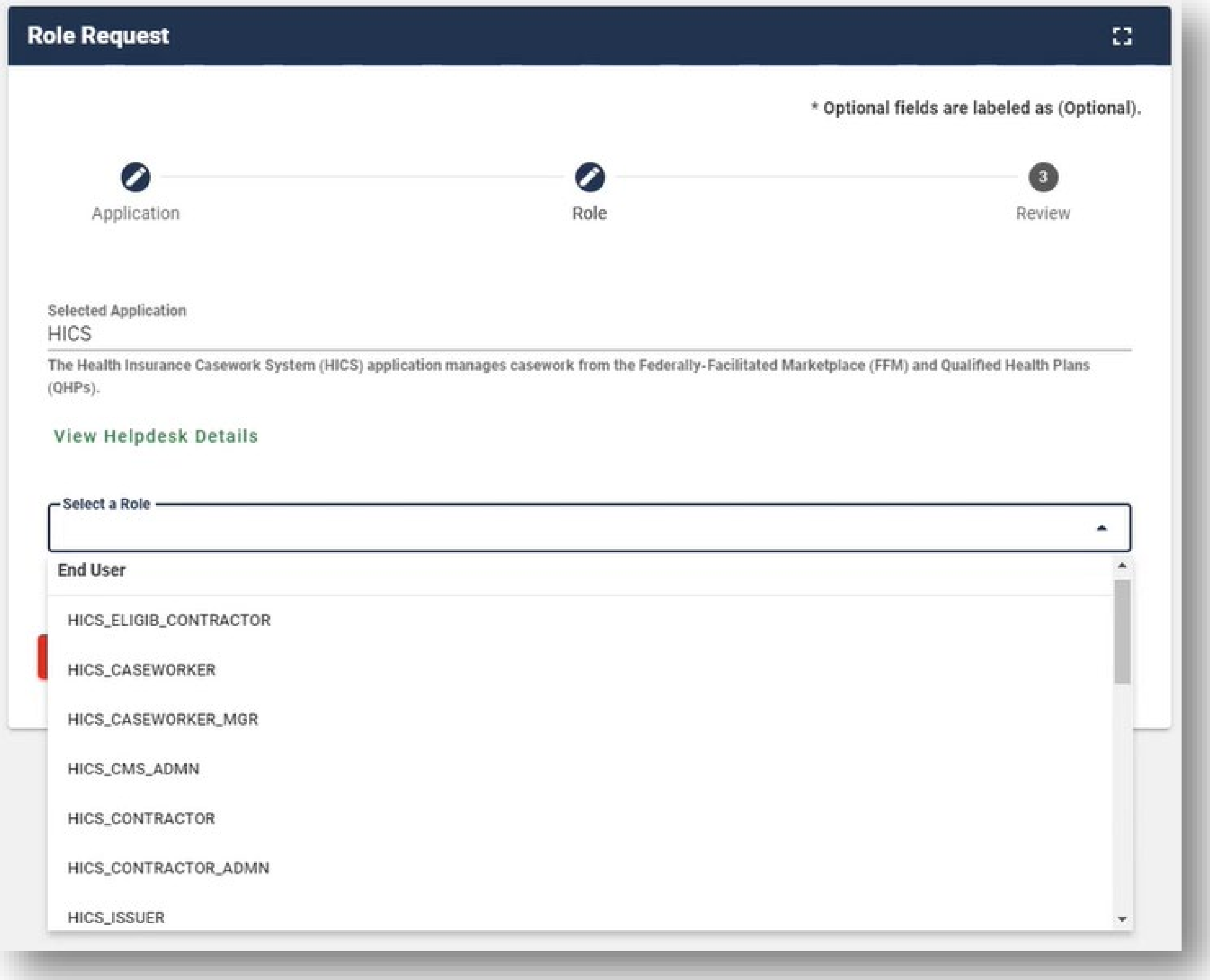


Role Request

* Optional fields are labeled as (Optional).

5. Select the applicable HICS end user role from the Select a Role drop-down menu (Exhibit 11). For more information regarding which role to select, refer to HICS End User Role Quick Reference Guide.
   NOTE: Users who have not completed Remote Identity Proofing (RIDP) will be prompted to complete the steps outlined in **Section 3.2**, **Completing RIDP**, at this time.

Exhibit 11: Select a Role Menu – HICS End User Role Options



Role Request

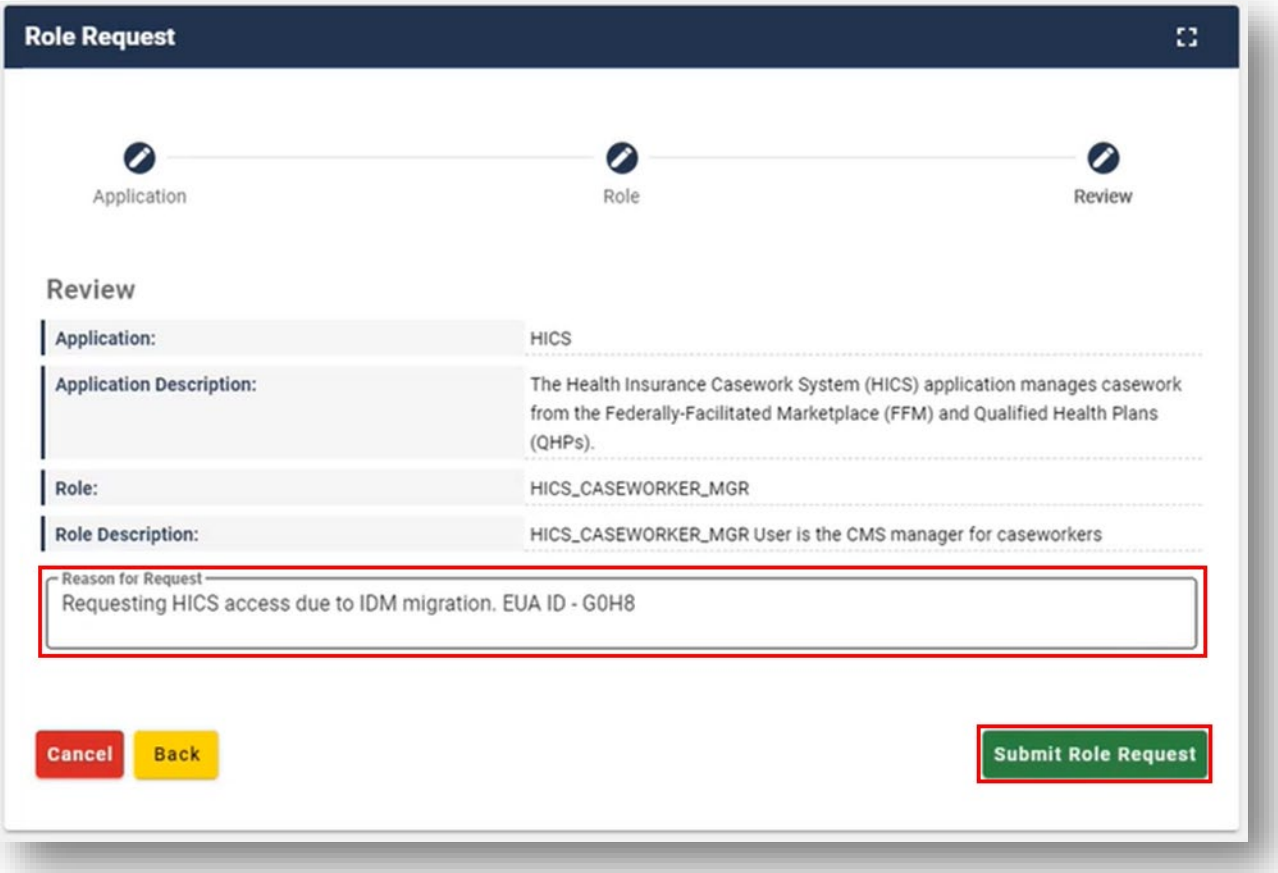
* Optional fields are labeled as (Optional).

Selected Application
HICS

The Health Insurance Casework System (HICS) application manages casework from the Federally-Facilitated Marketplace (FFM) and Qualified Health Plans (QHPs).

6. Type *Requesting HICS access due to IDM cutover. EUA ID – [EUA ID]* in the Reason for Request field (Exhibit 12).
7. Click ***Submit Role Request*** (Exhibit 12).

Exhibit 12: Reason for Request Field and Submit Role Request Option


Role Request

Review

Application:	HICS
Application Description:	The Health Insurance Casework System (HICS) application manages casework from the Federally-Facilitated Marketplace (FFM) and Qualified Health Plans (QHPs).
Role:	HICS_CASEWORKER_MGR
Role Description:	HICS_CASEWORKER_MGR User is the CMS manager for caseworkers

Reason for Request: Requesting HICS access due to IDM migration. EUA ID - G0H8

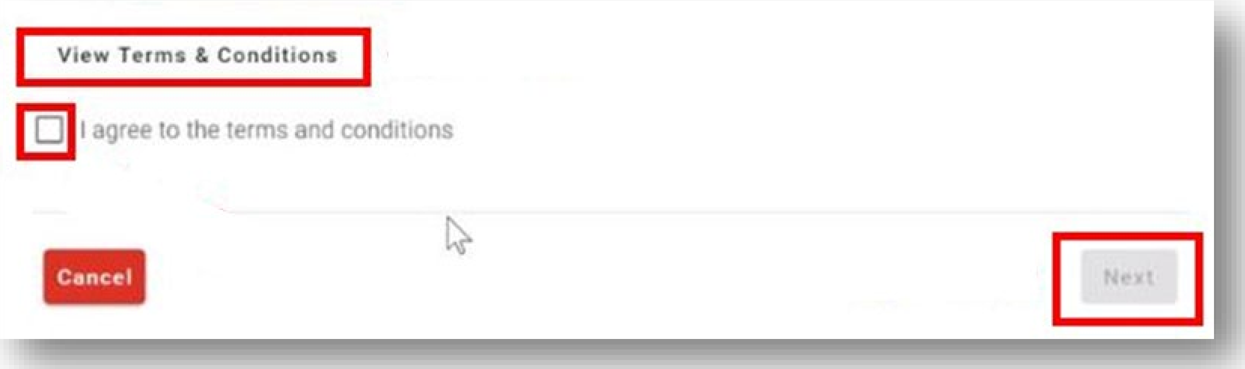
8. Make note of the Request Tracking Number, which will be emailed to the address associated with the IDM account after the HICS access request is successfully submitted. The role request approval will also be emailed to the email address associated with the IDM account.
   NOTE: If the approval email is not sent within seven business days, contact the Marketplace Service Desk (MSD) at **1 (855) 267-1515** or CMS_FEPS@cms.hhs.gov for assistance, identifying the related Request Tracking Number. Check Spam, Junk, and Clutter folders prior to contacting the help desk.

3.2 Completing RIDP

NOTE: If RIDP fails at any point in this process, follow the instructions on the screen to contact the appropriate support desk for further assistance.

1. Review the identity verification description statement.
2. Click the ***View Terms & Conditions*** link to review the terms and conditions (Exhibit 13).
3. Click the ***I agree to the terms and conditions*** checkbox (Exhibit 13).
4. Click ***Next*** (Exhibit 13).

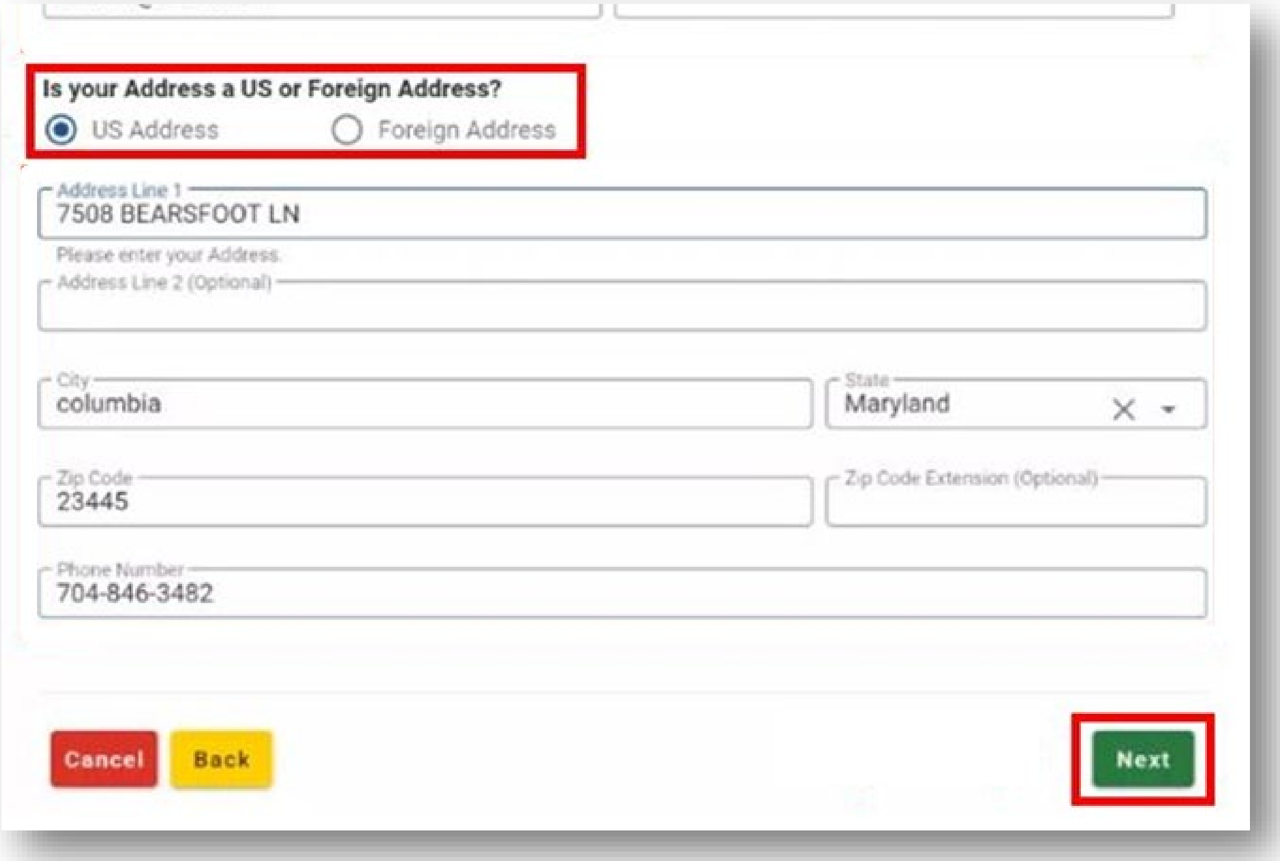
Exhibit 13: Terms and Conditions and Next Button



□ I agree to the terms and conditions

5. Provide the required information in the respective fields.
   NOTE: All fields must be completed unless marked optional.
6. Keep the default ***US Address*** selection (Exhibit 14), as the address entered must be in the United States.
7. Click ***Next*** (Exhibit 14).

Exhibit 14: Default Address Selection and Next Button

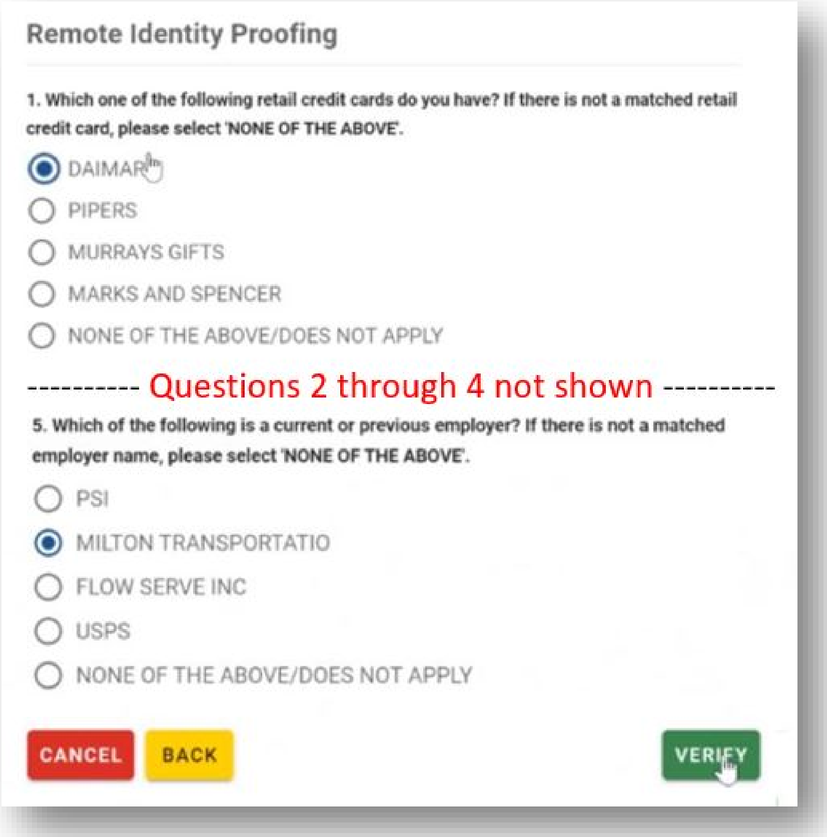


Is your Address a US or Foreign Address?
● US Address ○ Foreign Address

Address Line 1: 7508 BEARSFOOT LN
Please enter your Address.
Address Line 2 (Optional):
City: columbia
State: Maryland
Zip Code: 23445
Zip Code Extension (Optional):
Phone Number: 704-846-3482

8. Carefully read each question and click the radio button next to the correct response. Exhibit 15 shows example Remote Identify Proofing questions.
9. Click the ***Verify*** button (Exhibit 15).

Exhibit 15: Example RIDP Questions and Verify Button



Remote Identity Proofing

1. Which one of the following retail credit cards do you have? If there is not a matched retail credit card, please select 'NONE OF THE ABOVE'.

● DAIMAR
○ PIPERS
○ MURRAYS GIFTS
○ MARKS AND SPENCER
○ NONE OF THE ABOVE/DOES NOT APPLY

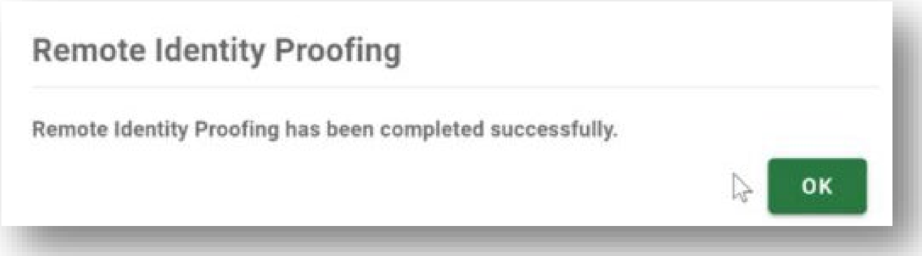
---------- Questions 2 through 4 not shown ----------

5. Which of the following is a current or previous employer? If there is not a matched employer name, please select 'NONE OF THE ABOVE'.

○ PSI
● MILTON TRANSPORTATIO
○ FLOW SERVE INC
○ USPS
○ NONE OF THE ABOVE/DOES NOT APPLY

10. Click the green ***OK*** button (Exhibit 16) to close the completion message.

Exhibit 16: RIDP Completion Message



Remote Identity Proofing

Remote Identity Proofing has been completed successfully.

11. Resume the process outlined in **Section 3.1**, **Requesting the HICS Role**, from Step 6.