Health Insurance Casework System Access Guidance
November 1, 2019

This document provides information to issuers about how to request access to the Health Insurance Casework System (HICS). Qualified health plan (QHP) issuers operating in Federally-facilitated Exchanges (FFEs) or in states that delegate certain authorities to the FFE resolve consumer cases through HICS.

As of the date of this guidance, the paper-based (HHS 745 form) application process for issuers to request access to HICS has been officially replaced by the electronic Enterprise User Administration (EUA) Front End Interface (EFI) application process. Issuers that need HICS access will now be required to complete and submit applications through EFI. The system enhancements offer new electronic receipt and processing of applications for HICS access that eliminates the burden of completing and retaining paper records and physically moving paper applications through multiple steps of the HICS application process.

Please note that these instructions are only for issuers who do NOT already have a 4 character CMS User ID. If you are requesting that additional HIOS Issuer ID(s) or additional Job Codes be added to your current User ID, do NOT submit a new request for HICS access. Instead, please contact Suzanne Ripley via email (suzanne.ripley1@cms.hhs.gov) for these type of requests.

I. Instructions for Requesting HICS Access

Prior to starting this process, please add the following email addresses to your email address book and/or "safe senders list" to ensure delivery: eua@cms.hhs.gov

1. Open your web browser and enter the **EUA Front-End Interface (EFI) URL:** https://eua.cms.gov/efi

   Note: At this time, you must use either IE 9+ or Firefox 35+ with compatibility mode disabled. Google Chrome is not currently supported.

2. Click the "Register" button.

3. Enter your personal details in the respective boxes. Create your own "username" and "password".

   Note: Both the user name and password are case sensitive. The password must be eight to twenty-four characters long, include at least one uppercase letter, contain at least one special character (e.g., @, ! , %), and contain at least one number. The email address you use in EFI must be the same email address you will use in your HICS user account.

4. Click on the "Sign Up" tab and log out.

5. Upon receipt of an automated email from EUA, click on the "Activate EFI Account" link.

6. Enter the "username" and "password" that you created during the EFI registration process and then click on the "Login" tab.

7. At the "Warning" screen, click on the "Agree" Tab to continue.

8. Click on the "Access" menu and select "New User Request," which will take you to the "User Details" section.

9. In that section, select "Business Partner" from the "Category" field.

10. Select "HICS" from the "Type" field.

    Note: Failure to select HICS will result in your request being routed through the wrong workflow, which **will** delay the creation of your user ID.

11. In the "Request Justification" field, indicate why you need a CMS user account (e.g., I require access to HICS for casework activities). Provide enough details so that we are able to understand what you will be doing in HICS.

12. Select "Personal Details" and enter the required information.

    Note: Enter your Social Security Number (SSN) with the dashes included (i.e., xxx-xx-xxxx).

13. Select "Contact Details" and enter the required information.

14. Select "Additional Details" and enter the required information.

    For "CMS Region/Facility," select the CMS Region/Facility in which your office is located (see table below for reference). Do **not** select any "Central Office" or "N/A" as a location.

Region	Location (State)
1	Boston (CT, ME, MA, NH, RI, VT)
2	New York (NJ, NY, PR, VI)
3	Philadelphia (DE, DC, MD, PA, VA, WV)
4	Atlanta (AL, NC, SC, FL, GA, KY, MS, TN)
5	Chicago (IL, IN, MI, MN, OH, WI)
6	Dallas (AR, LA, NM, OK, TX)
7	Kansas City (IA, KS, MO, NE)
8	Denver (CO, MT, ND, SD, UT, WY)
9	San Francisco (AZ, CA, GU, HI, NV)
10	Seattle (AK, ID, OR, WA)

For Plan Number(s) enter the 5-digit number(s) associated with your company, also referred to as a HIOS Issuer ID(s).

For the "Are you a Consultant?" question, select "no."

15. Select "Submit Request." You will then receive an on-screen message stating that the submission was successful as well as an automated confirmation email from EFI. If you choose to "save" your request, you can log back into EFI and modify the request details at a later time.

For questions or issues regarding your EFI submission, please contact Suzanne Ripley via email (Suzanne.Ripley1@cms.hhs.gov).

II. What to Expect Once a HICS Access Request Has Been Approved

- Once a request has been approved, users will receive an email from CMS (eua@cms.hhs.gov) with a user ID, default password, and instructions to certify CMS system access through Enterprise User Administration (EUA) at https://eua.cms.gov. Users must change the default password.
- Through EUA, users must complete the Computer Based Training (CBT). Failure to access EUA and complete CBT within 3 days from receipt of user ID and password will result in the inability to gain HICS access and the account will be revoked. Please go to https://www.cms.gov/cbt/login/ to access CBT.
- Please note that EUA and CBT are separate (two different websites).
- Upon completion of CBT, users will be able to login to HICS. Users will use the same user ID that was used for EUA access. Please keep a copy of your CBT completion certificate as a record of completing the course.
- Log into HICS at https://hics.cms.gov to ensure successful access into the system.
- Users must change passwords every 60 days. To change a HICS password, login to EUA and select "change password." If you find that your access is revoked, please contact HICS_Access@cms.hhs.gov.

III. Recertifying Users for HICS Access

In order to maintain HICS access, users must complete a recertification process annually, which includes (1) logging into EUA to complete recertification and (2) an annual completion of CBT within three business days of receipt of the email notice.

- Log into the EUA System Access Certification (SAC) page at https://eua.cms.gov/eurekify/portal/login using your HICS credentials.
- If you find a certification item on your home screen, select the "Certify" button to proceed.
- Select the check box that appears next to your name. This action will automatically select the check boxes for all of your associated job codes.
- Select the "Keep" button in order to retain access to the selected job codes.
- On the summary page, select the "Submit" button to continue.
- On the confirmation pop-up window, select the "X" that appears in the upper right hand corner to complete the system access review step.

IV. Helpful Resources

- To reset the login password, login to the EUA website at https://eua.cms.gov. If the user has difficulty changing the EUA password, the CMS IT Help Desk can automatically reset the password and can be reached at (410) 786-2580/1-888-205-0684.
- To complete CBT, the user will need to access the website at https://www.cms.gov/cbt/login.
- Users can confirm completion of CBT at https://eua.cms.gov. Under the "View Identity" tab in EUA, a user is able to check on the status of the CBT to see if it is complete or pending.
- For issues uploading or submitting complaints into HICS, the user will need to contact the HICS Help Desk at hics@cms.hhs.gov or 1-888-205-0684.