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FFE Plan Management Supplemental Submission Module User Guide

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Table of Contents

1 Introduction 1
2 Overview 1
2.1 Document Conventions 1
3 Getting Started 2
3.1 Set-Up Considerations 2
3.2 User Access Considerations 2
3.3 Accessing the System 2
3.4 System Organization and Navigation 2
3.5 Exiting the System 3
4 Using the System 4
4.1 Summary Page 4
4.2 URL Data Page 6
4.2.1 Download Issuer URL Template File 7
4.2.1.1 Issuer URL Template 9
4.2.2 Upload Issuer URL Template File 13
4.2.2.1 Creating an Issuer URL Template File in .csv Format 13
4.2.2.2 Uploading the Issuer URL Template File 14
4.2.2.3 Upload Issuer URL Template File – Validating Status 15
4.2.2.4 Upload Issuer URL Template File – Submission Successful Status 15
4.2.2.5 Upload Issuer URL Template File – Error Status 15
4.2.3 Search & Update URLs 20
4.2.3.1 Search & Update URLs – Choose URL Type Dropdown 20
4.2.3.2 Search & Update URLs – Search Field 21
4.2.3.3 Search & Update URLs – Transparency in Coverage URL Display 21
4.2.3.4 Search & Update URLs – Payment, Plan Brochure, or SBC URLs Display 22
4.2.3.5 Search & Update URLs – Formulary URLs Display 23
4.2.3.6 Search & Update URLs – Network URLs Display 24
4.2.3.7 Search & Update URLs – No Results Found 25
4.2.3.8 Update URLs – Confirmation Pop-Up 26
4.2.3.9 Update URLs – Updates Successful 27
5 Troubleshooting & Support 28
5.1 URL Data Page – Troubleshooting and Support 28
5.1.1 Download Issuer URL Template File Error Messages 28
5.1.2 Upload Issuer URL Template File Error Messages 29
5.1.3 Search & Update URLs Error Messages 30
5.2 Special Considerations 33
5.3 Support 33
Appendix A: Using the Issuer URL Template in Excel A-1
Appendix B: Acronyms and Abbreviations B-1
Appendix C: Glossary C-1
Appendix D: Referenced Documents D-1

List of Figures

Figure 1: Summary Page 4
Figure 2: Summary Page with no Issuers 5
Figure 3: URL Data Page 6
Figure 4: Successful Issuer URL Template Generation 7
Figure 5: Failed Issuer URL Template File Generation 9
Figure 6: Issuer URL Template File 9
Figure 7: Upload Issuer URL Template File Section with Uploaded File 14
Figure 8: Upload Issuer URL Template File in Validating Status 15
Figure 9: Upload Issuer URL Template File in Successful Submission Status 15
Figure 10: Upload Issuer URL Template File in Error Status 16
Figure 11: Issuer URL Template File Error Report 16
Figure 12: Search & Update URLs Dropdown 20
Figure 13: Search & Update URLs Search Field 21
Figure 14: Transparency in Coverage URL Type Search Results 22
Figure 15: Payment, Plan Brochure, or SBC URL Type Search Results 22
Figure 16: Formulary URL Type Search Results 23
Figure 17: Network URL Type Search Results 24
Figure 18: Search & Update URLs No Results 25
Figure 19: URL Update Confirmation Pop-Up 26
Figure 20: URL Updates Successful Banner 27
Figure 21: Issuer URL Template Generation Error 28
Figure 22: URL Updates Errors Banner 31
Figure 23: Generated Issuer URL Template File A-1
Figure 24: Opening as Excel from Google Chrome Download 1 of 2 ..... A-1
Figure 25: Opening as Excel from Google Chrome Download 2 of 2 ..... A-2
Figure 26: Opening as Excel from Mozilla Firefox Download A-2
Figure 27: Opening as Excel from Internet Explorer Download 1 of 3 ..... A-3
Figure 28: Opening as Excel from Internet Explorer Download 2 of 3 ..... A-3
Figure 29: Opening as Excel from Internet Explorer Download 3 of 3 ..... A-3
Figure 30: Issuer URL Template Default View A-3
Figure 31: Columns to Adjust A-4
Figure 32: One Column Width Set to Fit Text A-4
Figure 33: Issuer URL Template File with Expanded Columns and Filters A-5
Figure 34: Filter Dropdown A-6

List of Tables

Table 1: Summary Page Fields 5
Table 2: Download Issuer URL Template File Section Fields 7
Table 3: Issuer URL Template Fields 9
Table 4: Upload Issuer URL Template File Section Fields 14
Table 5: Issuer URL Template – Validations and Error Messages 16
Table 6: Download Issuer URL Template Error Messages 28
Table 7: Upload Issuer URL Template Error Messages 29
Table 8: Search & Update URLs – Validations and Error Messages 31

Table 9: Points of Contact..... 34
Table 10: Acronyms and Abbreviations B-1
Table 11: Glossary C-1

1 Introduction

This document provides an overview and step-by-step guide for how to use the *Supplemental Submission Module* system.

The Plan Management (PM) *Supplemental Submission Module* is a web application built in the Health Insurance Oversight System (HIOS) where Issuers can submit the Uniform Resource Locator (URL) associated with their Qualified Health Plan (QHP) Application.

2 Overview

Issuers can use the *Supplemental Submission Module* to submit URL data for the plans they offer. Specifically, the module provides:

- URL data collection templates (.csv files) that Issuers and their representatives can download, populate, and upload into the *Supplemental Submission Module*.
- Tools that issuers can use to submit, review, and modify URL data either by uploading a URL data collection template (.csv file) or entering URL information directly into the user interface (UI).

2.1 Document Conventions

Modules or systems are indicated by *italics*. Sections or templates of the *Supplemental Submission Module* are indicated in **bold**. Fields or buttons requiring action are indicated by ***bold italics***. Links requiring action are indicated by underlined blue text.

NOTE: The term ‘user’ is used throughout this document to refer to an individual with access to the *Supplemental Submission Module*.

3 Getting Started

To ensure that the user can access the *Supplemental Submission Module*, this section describes how the web browser should be set up, as well as how to access and navigate the Module. The web page design aligns to the CMS.gov web brand and is Section 508 compliant.

3.1 Set-Up Considerations

To optimize user experience within the *Supplemental Submission Module*:

1. Please ***disable pop-up blockers*** prior to accessing the Plan Management system.
2. Use one of the following browsers (latest version available for supported operating systems as of 11/19/2020):
    - Internet Explorer 11
    - Firefox 83
    - Chrome 87.0

NOTE: The Module complies with Health and Human Services (HHS) design standards: all associated webpages are designed for viewing at a minimum screen resolution of 1024 x 768.

3.2 User Access Considerations

All users must have a CMS (Centers for Medicare and Medicaid Services) Enterprise Portal Identifier (ID) and HIOS user role to access the system. Users are also required to have a **Submitter** or **Validator** designation for the *Benefits and Service Area Module* in order to access the *Supplemental Submission Module*.

For further details on how to establish a CMS Enterprise Portal ID or how to request a Submitter or Validator role for the *Benefits and Service Area Module*, please contact the Help Desk (see section 5.3).

3.3 Accessing the System

Users can access the module by logging into the CMS Enterprise Portal. The user will be directed to their "My Portal" page and should then select the ***HIOS*** application. Once in the HIOS portal, choose the ***QHP Benefits and Service Area Module*** and select ***Launch this Module***. Then, on the bottom half of the landing page within the *QHP Supplemental Submission Module* section, select the Access QHP Supplemental Submission Module link.

3.4 System Organization and Navigation

The *Supplemental Submission Module* consists of the Summary page and URL Data page.

The Summary page is the first page users see when navigating to the *Supplemental Submission Module*. It provides the user with the ability to select an Issuer ID, then view and update URL data.

The URL Data page is divided into three sections, which allow the user to submit and review QHP URL submissions either through a .csv file or directly through the UI:

1. Download Issuer URL Template File Section
2. Upload Issuer URL Template File Section
3. Search & Update URLs Section

These pages are further described within sections 4.1 (Summary page) and 4.2 (URL Data page).

3.5 Exiting the System

To exit the system, click the ***Logout*** link located at the bottom right corner of the page header.

4 Using the System

The following sections provide instructions about using the various functions and features of the *Supplemental Submission Module*.

4.1 Summary Page

The Summary page, shown in Figure 1, is the first page displayed after the user successfully logs into the *Supplemental Submission Module*. The user can access the URL Data Page in order to edit/view URL data for Issuers displayed on the Summary Page. An Issuer must have successfully submitted at least one Plans and Benefits template to the *Benefits & Service Area Module* or via the *System for Electronic Rates and Form Filing (SERFF)* system to appear in the Issuers Table.

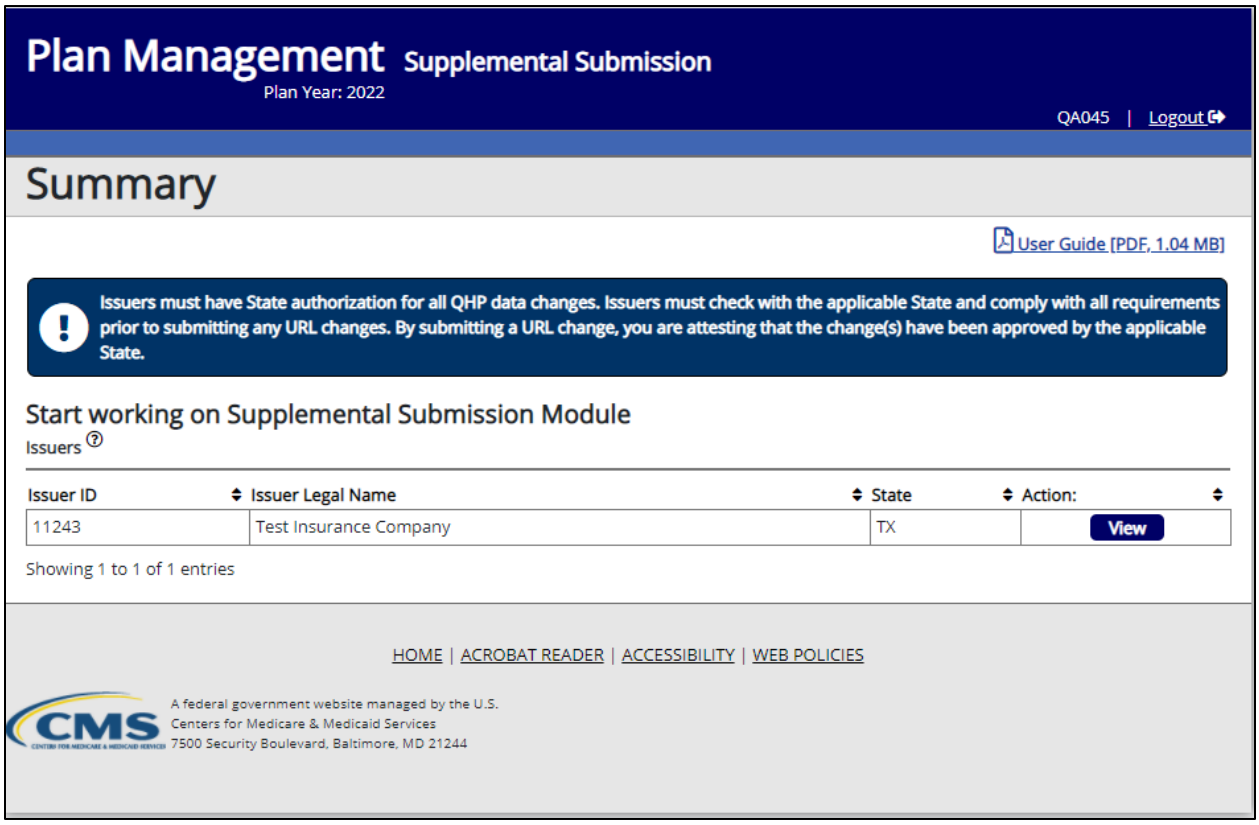


Figure 1: Summary Page

The user may begin editing URL data by selecting the ***Edit*** button that corresponds with an Issuer in the Issuer's Table. If a submission window is not currently open, the user can select the ***View*** button to have read-only access to the *Supplemental Submission Module*.

All columns are sortable by ascending or descending order, using the up and down carets.

If the user does not have access to an Issuer ID that has successfully submitted a valid Plans and Benefits template, the Issuers Table will display "No data available in table," shown in Figure 2.

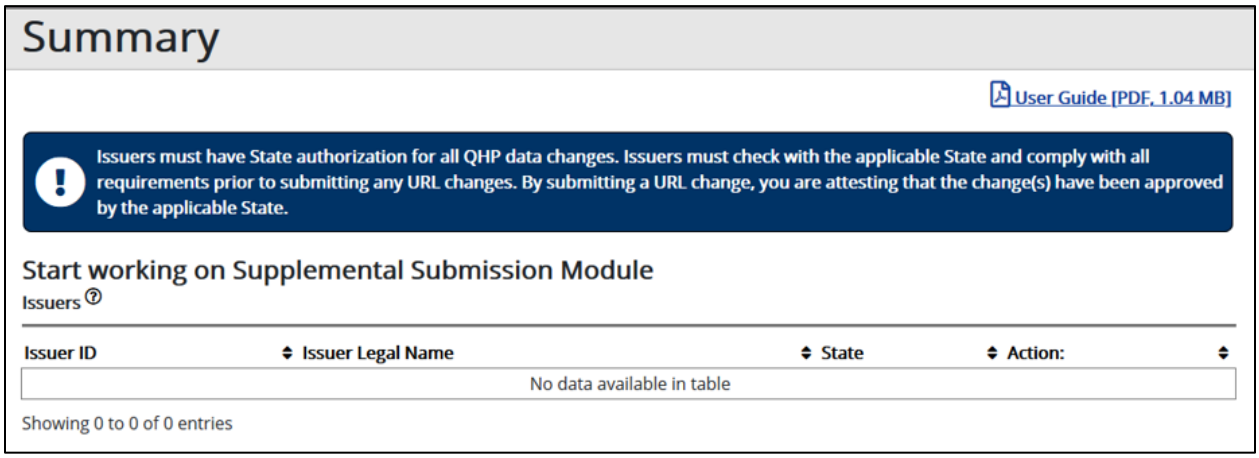


Figure 2: Summary Page with no Issuers

Table 1 describes the fields in the Summary page and provides instructions for navigating the Issuers Table.

Table 1: Summary Page Fields

Name	Action	Description
Issuers Table	N/A	For HIOS Issuer IDs associated with the account: displays the Issuer IDs and legal names that have successfully submitted a Plans & Benefits template. Displays “No data available in table” if no Issuer IDs have successfully submitted a Plans & Benefits template.
Edit	Select	Navigates to the URL Data page for the selected Issuer. ***Edit*** button will appear when there is an open submission window for the Issuer for at least one section in the Supplemental Submission Module (URL Data).
View	Select	Navigates to the URL Data page for the selected Issuer with read-only access. ***View*** button will appear when a submission window is closed for the Issuer for all sections of the Supplemental Submission Module (URL Data).

4.2 URL Data Page

The URL Data page allows users to review and update URL data and is divided into three main sections: the **Download Issuer URL Template File** section, the **Upload Issuer URL Template File** section, and the **Search & Update URLs** section.

Figure 3 shows the URL Data page.

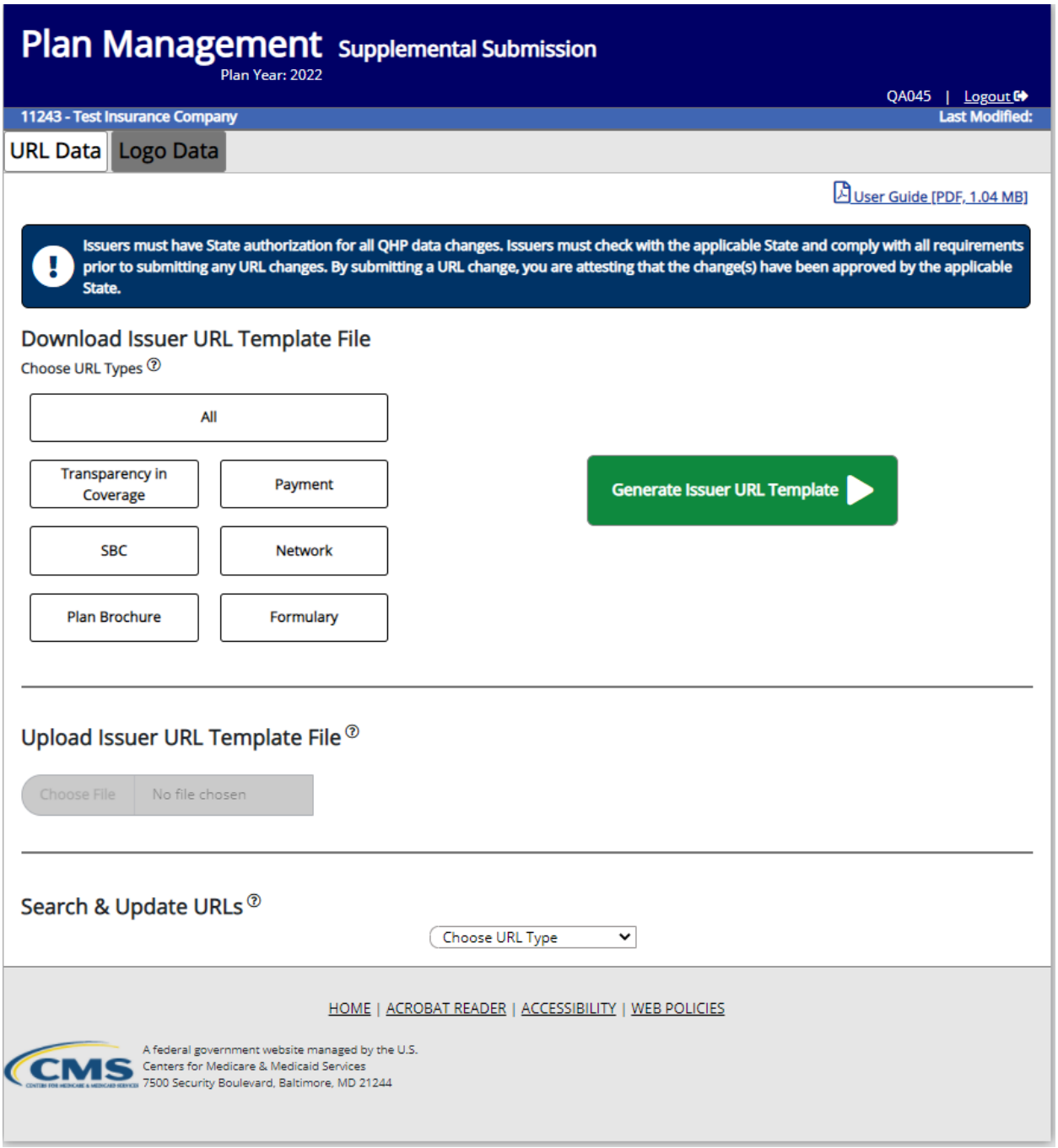


Figure 3: URL Data Page

4.2.1 Download Issuer URL Template File

Users are able to generate an **Issuer URL Template** file, which will display all URLs currently associated with an Issuer ID. Users will have the ability to filter the URLs that populate in the **Issuer URL Template** file using six criteria: ***All***, ***Transparency in Coverage, SBC*** (Summary of Benefits & Coverage), ***Plan Brochure***, ***Payment***, ***Network***, and ***Formulary***. Users can select one or more URL types to be included in the **Issuer URL Template**, or select the ***All*** button to download a template populated with all six URL types.

After a user selects which URL type(s) to populate in the template and selects the ***Generate Issuer URL Template*** button, the Download Issuer URL Template link will appear.

Figure 4 shows the template ready for download in the **Download Issuer URL Template File** section.

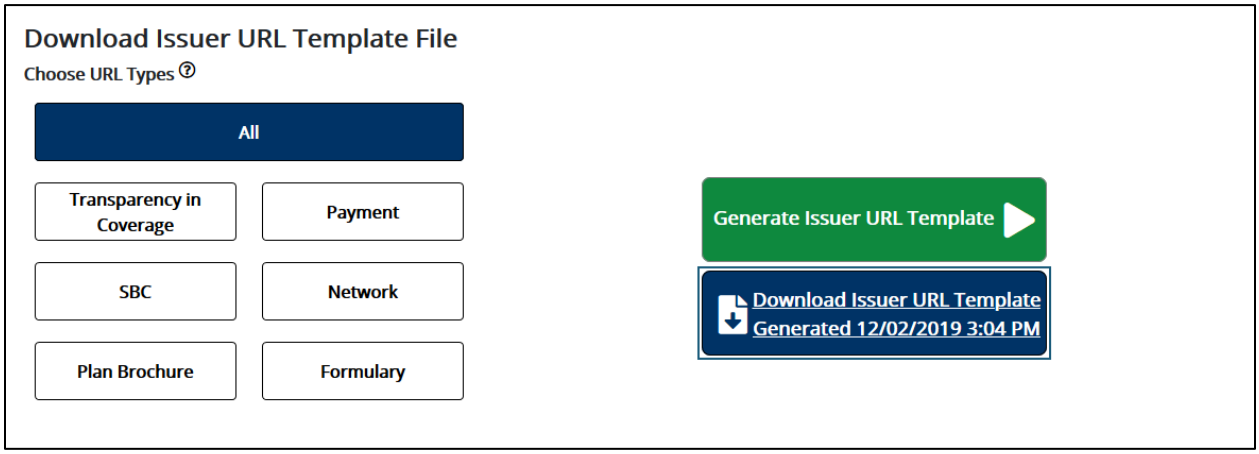


Figure 4: Successful Issuer URL Template Generation

Table 2 describes the fields in the **Download Issuer URL Template File** section.

Table 2: Download Issuer URL Template File Section Fields

Field	Action	Description
All	Select	Select ***All*** to download the **Issuer URL Template** file populated with the Transparency in Coverage, Payment, SBC, Network, Plan Brochure, and Formulary URLs currently associated with an Issuer ID. **NOTE:** selecting the ***All*** button will deselect the other six URL type buttons.
Transparency in Coverage	Select	Select ***Transparency in Coverage*** to populate only the Transparency in Coverage URL within the **Issuer URL Template** file. **Note:** selecting the ***Transparency in Coverage*** button will deselect the ***All*** button, however the user can multi-select other URL types.

Field	Action	Description
Payment	Select	Select ***Payment*** to populate only Payment URL data within the **Issuer URL Template** file. **NOTE:** selecting the ***Payment*** button will deselect the ***All*** button, however the user can multi-select other URL types.
SBC	Select	Select ***SBC*** to populate only Summary of Benefits & Coverage URL data within the **Issuer URL Template** file. **NOTE:** selecting the ***SBC*** button will deselect the ***All*** button, however the user can multi-select other URL types.
Network	Select	Select ***Network*** to populate only Network URL data within the **Issuer URL Template** file. **NOTE:** selecting the ***Network*** button will deselect the ***All*** button, however the user can multi-select other URL types.
Plan Brochure	Select	Select ***Plan Brochure*** to populate only Plan Brochure URL data within the **Issuer URL Template** file. **NOTE:** selecting the ***Plan Brochure*** button will deselect the ***All*** button, however the user can multi-select other URL types.
Formulary	Select	Select ***Formulary*** to populate only Formulary URL data within the **Issuer URL Template** file. **NOTE:** selecting the ***Formulary*** button will deselect the ***All*** button, however the user can multi-select other URL types.
Generate Issuer URL Template	Select	Select ***Generate Issuer URL Template*** to download the **Issuer URL Template** file containing the URL Types.
Download Issuer URL Template	Select	The Download Issuer URL Template is displayed once the template has been generated. Selecting the link will download the template and is available until the user logs out.

If a system issue occurs during the generation of an **Issuer URL Template** file, the user will be notified with an error message and prompted to retry downloading, as shown in Figure 5. For additional troubleshooting support for the **Download Issuer URL Template File** section, please refer to section 5.1.

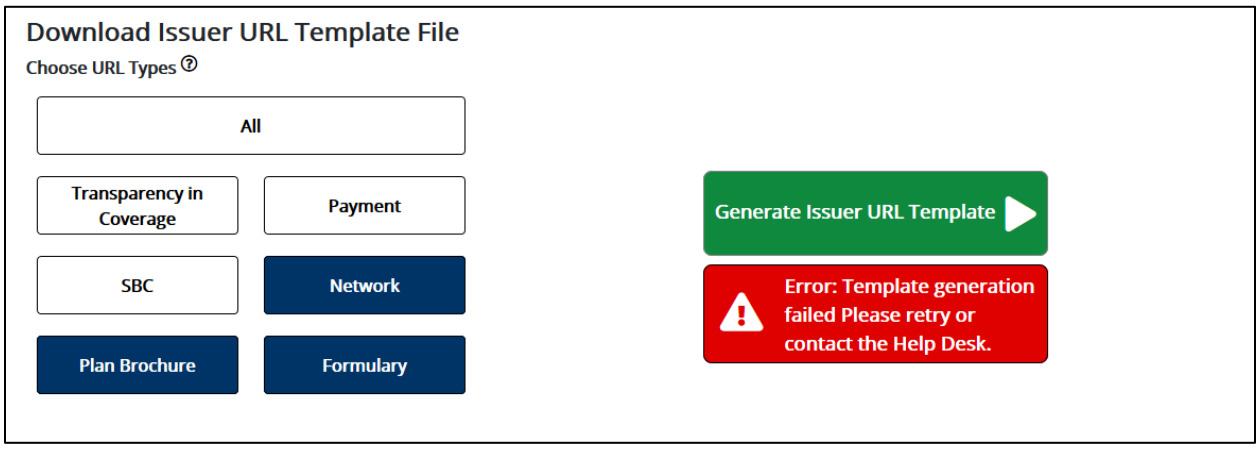


Figure 5: Failed Issuer URL Template File Generation

4.2.1.1 Issuer URL Template

The **Issuer URL Template file** provides details of the URLs currently associated with an Issuer ID, and allows the user to easily submit a large number of URL changes at once. Users complete the template by entering values in the ***New URL*** column, then uploading the file to the **Upload Issuer URL Template File** section of the web page. An example of the **Issuer URL Template** file is shown in Figure 6.

*For additional instructions on how to download and navigate the **Issuer URL Template**, see Appendix A.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	HIOS Issuer ID:	10333												
2	GENERATED 2019-07-25T14:12:02													
3	URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column). For more details and instructions please reference the user guide that can be downloaded from the UI.													
4	URL Type	URL ID	Market Ty	Product Ty	Current URL	New URL								
5	Transparency in Coverage	10333	N/A	N/A	http://www.google.com/TransparencyinCoverage	http://www.google.com/TransparencyinCoverage1								
6	Summary of Benefits and Coverage	10333TX0010001-00	N/A	N/A	http://www.google.com/SBC	http://www.google.com/SBC1								
7	Formulary	TXF010	Individual	Dental	http://www.google.com/Formulary	http://www.google.com/Formulary1								
8	Network	TXN005	SHOP	HealthCar	http://www.google.com/Network	http://www.google.com/Network1								
9	Payment	10333TX0010005	N/A	N/A	http://www.google.com/Payment	http://www.google.com/Payment1								
10	Plan Brochure	10333TX0010003-01	N/A	N/A	http://www.google.com/PlanBrochure	http://www.google.com/PlanBrochure1								
11														

Figure 6: Issuer URL Template File

Table 3 below displays the field names, description, and acceptable values for the **Issuer URL Template** file.

Table 3: Issuer URL Template Fields

Field Name	Field Description	Field Rules
HIOS Issuer ID	Unique five-digit number that identifies a specific Issuer.	Numeric: (xxxxx) (HIOS 5-digit Issuer ID)

Field Name	Field Description	Field Rules
Generation Timestamp	Shows the date and time that the **Issuer URL Template** file was generated.	GENERATED YYYY-MM-DDTHH:MM:SS[Time zone] **NOTE:** An **Issuer URL Template** file downloaded from the QHP Certification website will not have a generation timestamp. Template can be uploaded with or without this field.
Instructional Text	Provides user instruction on how to populate the template to make URL updates.	Instructional Text says "*URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column). For more details and instruction, please reference the user guide that can be downloaded from the UI.*" **NOTE:** An **Issuer URL Template** file can be uploaded with or without this field.
URL Type	Indicates the URL category.	Fields must be populated with one of the following exact text options: 1. Formulary 2. Network 3. Payment 4. Plan Brochure 5. Summary of Benefits and Coverage 6. Transparency in Coverage

Field Name	Field Description	Field Rules
URL ID	Indicates the identifier associated with the URL and URL Type. These IDs will be pulled from the QHP Templates submitted to the system via the HIOS PM Modules or SERFF.	Field value must align with the URL Type listed for the same row, and follow the conventions listed below: Formulary ID (for Formulary URL Type): • Alphanumeric • Consists of state (XX) plus "F" and Formulary ID number (xxx) o (e.g. TXF001) Network ID (for Network URL Type): • Alphanumeric • Consists of state (XX) plus "N" and Network ID number (xxx) o (e.g. TXN001) Issuer ID (for Transparency in Coverage URL Type): • Numeric • Unique five-digit number that identifies a specific Issuer. o (e.g. 12345) Plan ID (for Payment URL Type): • Alphanumeric • Consists of an Issuer ID (xxxxx) plus state (XX) plus Product ID number (xxx) and a Plan Unique Identifier number (xxxx) o (e.g. 12345TX0010001) Plan Variant ID (for Plan Brochure and Summary of Benefits and Coverage URL Types): • Alphanumeric • Consists of Plan ID value, followed by a hyphen (-) and a 2-digit variant ID o (e.g. 12345TX0010001-01) **NOTE:** Users may not submit new URL IDs to the system via the **Issuer URL Template** file.

Field Name	Field Description	Field Rules
Market Type	Indicates the Market that the URL ID is associated with.	Fields must be populated with one of the following exact text options: 1. Individual 2. SHOP 3. N/A **NOTE:** Issuers submitting their QHP Application via the HIOS PM Modules should enter the value “N/A”. **NOTE:** An **Issuer URL Template** file downloaded within the *Supplemental Submission Module* will be pre-populated with the value “N/A” for Issuers submitting their QHP Application via the HIOS PM Modules. **NOTE:** Users will not be able to change their Market Type in the system via the **Issuer URL Template** file**.** **NOTE:** Market Type for Transparency in Coverage URL must have a value of “N/A” for all Issuers.
Product Type	Indicates the Product that the URL ID is associated with.	Fields must be populated with one of the following exact text options: 1. HealthCare 2. Dental 3. N/A **NOTE:** Issuers submitting their QHP Application via the HIOS PM Modules should enter the value “N/A”. **NOTE:** An **Issuer URL Template** file downloaded within the *Supplemental Submission Module* will be pre-populated with the value “N/A” for Issuers submitting their QHP Applications via the HIOS PM Modules. **NOTE:** Users will not be able to change their Product Type in the FFE system via the **Issuer URL Template** file**.** **NOTE:** Product Type for Transparency in Coverage URL must have a value of “N/A” for all Issuers.

Field Name	Field Description	Field Rules
Current URL	Lists the URL value that is currently stored in the system for the respective URL Type, URL ID, Market Type, and Product Type combination.	Field will contain the latest URL submitted to the system for the Issuer. **NOTE:** If the value is blank, then it means no URL is currently stored in the system. **NOTE:** Updates to the value in this column will not be processed and stored in the system.
New URL	Allows the user to submit a new URL, replacing the Current URL in the system for the respective URL Type, URL ID, Market Type, and Product Type combination.	Field should be populated with the new URL the user would like to submit for the Issuer. The URL must meet the following requirements: • Must start with "http://" or "https://" • Cannot contain spaces • Cannot contain commas **NOTE:** If the value is left blank, the system will not process the blank value and no changes will be made to the current URL.

4.2.2 Upload Issuer URL Template File

Users are able to submit URL updates by uploading a completed **Issuer URL Template** file. The system will then validate that **Issuer URL Template** file is in the proper format and contains acceptable values. The URL updates will be stored in the system if the template passes all validations. If there is an error with the uploaded template, the system will return an error message and/or report outlining the validation error. For additional troubleshooting support for the **Upload Issuer URL Template File** section, please refer to section 5.1.2.

4.2.2.1 Creating an Issuer URL Template File in .csv Format

It is recommended to generate and download an **Issuer URL Template File** from the **Download Issuer URL Template File** section of the *Supplemental Submission Module* or from the QHP Certification website. Once the user has made edits and saved changes on the downloaded version, the user can upload the file. In addition, users are also able to create and upload their own template as long as it satisfies the following criteria:

1. The file type must be .csv
2. The file name must be less than or equal to 100 characters, and may only contain the following characters (without spaces):
   - a-z
   - A-Z
   - 0-9
   - . (period)

- _ (underscore)
- - (hyphen)

3. The **Issuer URL Template** file must contain the **HIOS Issuer ID** and corresponding value in the first row of the .csv file (see Figure 6). The **HIOS Issuer ID** in the uploaded **Issuer URL Template** file must match the Issuer ID selected from the Summary page.
4. The following column headers and information must all be in adjacent cells within the second, third, or fourth row of the .csv file, in the exact order listed below:
   - **URL Type**
   - **URL ID**
   - **Market Type**
   - **Product Type**
   - **Current URL**
   - **New URL**

4.2.2.2 Uploading the Issuer URL Template File

Users can upload the **Issuer URL Template** file by performing the following actions:

1. In the **Upload Issuer URL Template File** section of the **URL Data** page, select the ***Choose File*** button.
2. Select an appropriate **Issuer URL Template** .csv file. The name of the chosen file will appear on the field next to the ***Choose File*** button.
3. Select the ***Submit*** button.

Figure 7 shows the **Upload Issuer URL Template File** section.

Figure 7: Upload Issuer URL Template File Section with Uploaded File

Table 4 describes the fields in the **Upload Issuer URL Template File** section.

Table 4: Upload Issuer URL Template File Section Fields

Field Name	Description
File Input button	The user is prompted to select a .csv file to submit.
Submit button	This button is clicked to submit the selected **Issuer URL Template** file for validation and storage.

4.2.2.3 Upload Issuer URL Template File – Validating Status

Once the **Issuer URL Template** file has been selected and the ***Submit*** button has been selected, a **Status** will appear. The following statuses can be found in this status box:

- Validating [Issuer URL Template file name]
- [Issuer URL Template file name] submitted successfully
- [Issuer URL Template file name] failed validations. View Error Report

The **Status** will automatically refresh within the page once the file has been validated. The **Validating** status shows that the system is currently validating and/or saving the file. Users are not allowed to upload a new file while a file is in **Validating** status.

Figure 8 shows an example of an **Issuer URL Template** file in **Validating** status.

Figure 8: Upload Issuer URL Template File in Validating Status

4.2.2.4 Upload Issuer URL Template File – Submission Successful Status

If the **Issuer URL Template** file passes validation and was stored successfully, a **Submission Successful** status will display. Users are able to upload a new file once the submission is successful.

Figure 9 shows an example of an **Issuer URL Template** file in **Submission Successful** status.

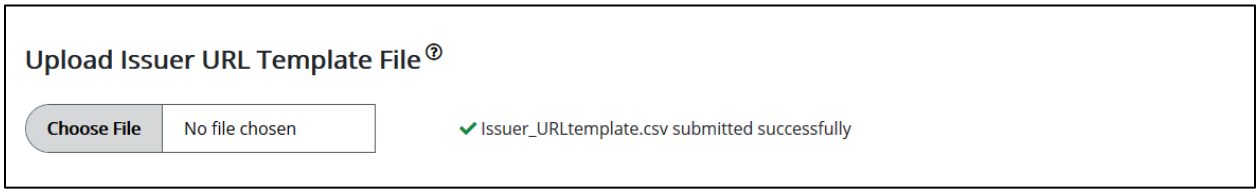


Figure 9: Upload Issuer URL Template File in Successful Submission Status

4.2.2.5 Upload Issuer URL Template File – Error Status

If the **Issuer URL Template** file fails validations, the user will see an **Error** status and a downloadable Error Report, which can be accessed via the View Error Report link. In the event that an **Issuer URL Template** file enters an **Error** status, the submitted updates are not saved and the user must correct the errors before uploading a new file.

Figure 10 shows an example of an **Issuer URL Template File** in **Error** status.

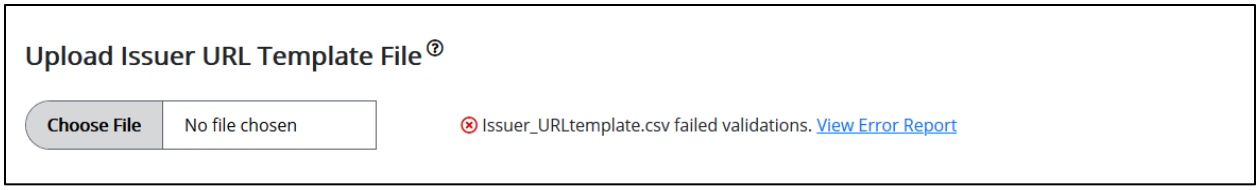
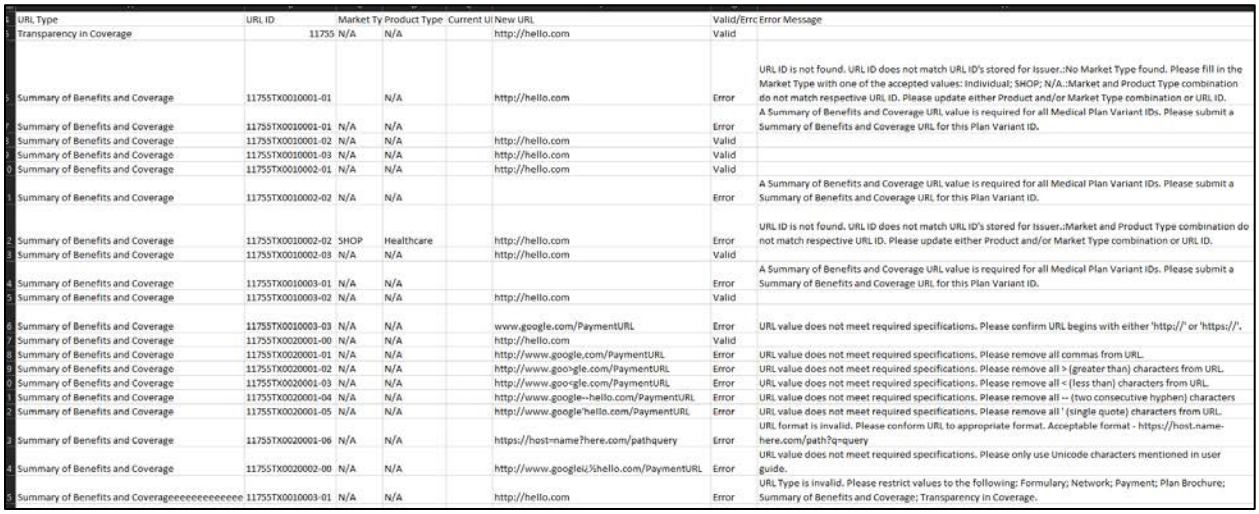


Figure 10: Upload Issuer URL Template File in Error Status

The Error Report will be the same **Issuer URL Template** file submitted by the user, but with two additional columns to indicate whether each row was valid or had errors. If the row had errors, a detailed error message is also provided. Users may enter updates directly to the rows that failed validation in the Error Report, then resubmit the file to the **Upload Issuer URL Template File** field. Users are not required to delete the Valid/Error or Error Message columns for the re-uploaded file to process successfully. A sample of the Error Report is shown in Figure 11.



	URL Type	URL ID	Market Ty	Product Type	Current UI	New URL	Valid/Erro	Error Message
2	Transparency in Coverage	11755	N/A	N/A		http://hello.com	Valid	
3	Summary of Benefits and Coverage	11755TX0010001-01		N/A		http://hello.com	Error	URL ID is not found. URL ID does not match URL ID's stored for Issuer.:No Market Type found. Please fill in the Market Type with one of the accepted values: Individual; SHOP; N/A.:Market and Product Type combination do not match respective URL ID. Please update either Product and/or Market Type combination or URL ID.
7	Summary of Benefits and Coverage	11755TX0010001-01	N/A	N/A			Error	A Summary of Benefits and Coverage URL value is required for all Medical Plan Variant IDs. Please submit a Summary of Benefits and Coverage URL for this Plan Variant ID.
8	Summary of Benefits and Coverage	11755TX0010001-02	N/A	N/A		http://hello.com	Valid	
9	Summary of Benefits and Coverage	11755TX0010001-03	N/A	N/A		http://hello.com	Valid	
10	Summary of Benefits and Coverage	11755TX0010002-01	N/A	N/A		http://hello.com	Valid	
11	Summary of Benefits and Coverage	11755TX0010002-02	N/A	N/A			Error	A Summary of Benefits and Coverage URL value is required for all Medical Plan Variant IDs. Please submit a Summary of Benefits and Coverage URL for this Plan Variant ID.
12	Summary of Benefits and Coverage	11755TX0010002-02	SHOP	Healthcare		http://hello.com	Error	URL ID is not found. URL ID does not match URL ID's stored for Issuer.:Market and Product Type combination do not match respective URL ID. Please update either Product and/or Market Type combination or URL ID.
13	Summary of Benefits and Coverage	11755TX0010002-03	N/A	N/A		http://hello.com	Valid	
14	Summary of Benefits and Coverage	11755TX0010003-01	N/A	N/A			Error	A Summary of Benefits and Coverage URL value is required for all Medical Plan Variant IDs. Please submit a Summary of Benefits and Coverage URL for this Plan Variant ID.
15	Summary of Benefits and Coverage	11755TX0010003-02	N/A	N/A		http://hello.com	Valid	
16	Summary of Benefits and Coverage	11755TX0010003-03	N/A	N/A		www.google.com/PaymentURL	Error	URL value does not meet required specifications. Please confirm URL begins with either 'http://' or 'https://'.
17	Summary of Benefits and Coverage	11755TX0020001-00	N/A	N/A		http://hello.com	Valid	
18	Summary of Benefits and Coverage	11755TX0020001-01	N/A	N/A		http://www.google,com/PaymentURL	Error	URL value does not meet required specifications. Please remove all commas from URL.
19	Summary of Benefits and Coverage	11755TX0020001-02	N/A	N/A		http://www.goo>gle.com/PaymentURL	Error	URL value does not meet required specifications. Please remove all > (greater than) characters from URL.
20	Summary of Benefits and Coverage	11755TX0020001-03	N/A	N/A		http://www.goo<gle.com/PaymentURL	Error	URL value does not meet required specifications. Please remove all < (less than) characters from URL.
21	Summary of Benefits and Coverage	11755TX0020001-04	N/A	N/A		http://www.google--hello.com/PaymentURL	Error	URL value does not meet required specifications. Please remove all -- (two consecutive hyphen) characters
22	Summary of Benefits and Coverage	11755TX0020001-05	N/A	N/A		http://www.google'hello.com/PaymentURL	Error	URL value does not meet required specifications. Please remove all ' (single quote) characters from URL.
23	Summary of Benefits and Coverage	11755TX0020001-06	N/A	N/A		https://host-name?here.com/pathquery	Error	URL format is invalid. Please conform URL to appropriate format. Acceptable format - https://host.name-here.com/path?q=query
24	Summary of Benefits and Coverage	11755TX0020002-00	N/A	N/A		http://www.google¡½hello.com/PaymentURL	Error	URL value does not meet required specifications. Please only use Unicode characters mentioned in user guide.
25	Summary of Benefits and Coverageeeeeeeeeeeee	11755TX0010003-01	N/A	N/A		http://hello.com	Error	URL Type is invalid. Please restrict values to the following: Formulary; Network; Payment; Plan Brochure; Summary of Benefits and Coverage; Transparency in Coverage.

Figure 11: Issuer URL Template File Error Report

Table 5 provides a list of the possible error messages that may appear in the Error Report.

Table 5: Issuer URL Template – Validations and Error Messages

Validation	Error Message
URL Type does not match accepted values.	If blank – "No URL Type found. Please fill in the URL Type with one of the accepted values: Formulary; Network; Payment; Plan Brochure; Summary of Benefits and Coverage; Transparency in Coverage." If invalid – "URL Type is invalid. Please restrict values to the following: Formulary; Network; Payment; Plan Brochure; Summary of Benefits and Coverage; Transparency in Coverage."

Validation	Error Message
URL ID does not match URL IDs currently stored for the Issuer.	If blank – “No URL ID found. Please fill in the URL ID.” If not found in database – “URL ID is not found. URL ID does not match URL ID’s stored for Issuer.” If invalid – “URL ID is invalid. Please conform URL ID to appropriate format.”
Market Type does not match accepted values.	If blank – “No Market Type found. Please fill in the Market Type with one of the accepted values: Individual; SHOP; N/A.” If invalid – “Invalid Market Type. Please fill in the Market Type with one of the accepted values: Individual; SHOP; N/A.”
Product Type does not match accepted values.	If blank – “No Product Type found. Please fill in the Product Type with one of the accepted values: HealthCare; Dental; N/A.” If invalid – “Invalid Product Type. Please fill in the Product Type with one of the accepted values: HealthCare; Dental; N/A.”

Validation	Error Message
New URL did not pass structural validations.	If URL does not start with http:// or https:// - “URL value does not meet required specifications. Please confirm URL begins with either ‘http://’ or ‘https://’.” If URL contains a space – “URL value does not meet required specifications. Please remove all spaces from URL.” If URL contains a comma – “URL value does not meet required specifications. Please remove all commas from URL.” If URL exceeds 600 characters – “URL value does not meet required specifications. Please restrict URL length to be less than or equal to 600 characters.” If URL has a (‘) single quote – "URL value does not meet required specifications. Please remove all ' (single quote) characters from URL." If URL has a (<) less than – "URL value does not meet required specifications. Please remove all < (less than) characters from URL." If URL has a (>) greater than – "URL value does not meet required specifications. Please remove all > (greater than) characters from URL." If URL has (--) consecutive hyphens – "URL value does not meet required specifications. Please remove all -- (two consecutive hyphen) characters from URL." If URL format is invalid – “URL format is invalid. Please conform to appropriate format. Acceptable format - https://host.name-here.com/path?q=query.”

Validation	Error Message
New URL did not pass structural validations.	If URL has Unicode characters that are not allowed – "URL value does not meet required specifications. Please only use Unicode characters mentioned in user guide." Allowed Unicode characters: • ~ • ` • ! • @ • # • $ • % • ^ • & • * • (•) • _ • + • - • = • [•] • \ • { • } • | • ; • : • " • . • / • ?
Market and Product Type combination do not match respective URL ID	“Market and Product Type combination do not match respective URL ID. Please update Product and/or Market Type combination or URL ID.”

Validation	Error Message
Required URL IDs do not have a corresponding URL submitted	If Network URL was submitted and there are Network IDs without corresponding URLs – "A Network URL value is required for all Network IDs. Please submit a Network URL for this Network ID." If Formulary URL was submitted and there are Formulary IDs without corresponding URLs – "A Formulary URL value is required for all Formulary IDs. Please submit a Formulary URL for this Formulary ID." If Summary of Benefits and Coverage URL was submitted and there are QHP Plan Variant IDs without corresponding URLs – "A Summary of Benefits and Coverage URL value is required for all Medical Plan Variant IDs. Please submit a Summary of Benefits and Coverage URL for this Plan Variant ID." If Network URL was submitted and a Transparency in Coverage URL has not been submitted – "A Transparency in Coverage URL value is required for the Issuer ID. Please submit a Transparency in Coverage URL for this Issuer ID."

4.2.3 Search & Update URLs

Users are able to view URL data currently stored in the system and make quick updates via a search results table. The search results table will only appear after the user has entered search parameters (e.g. selecting a URL type in the dropdown and typing in a URL ID) and clicked the magnifying glass. URL updates submitted via the search results table will undergo the same validations performed on the **Issuer URL Template** file.

4.2.3.1 Search & Update URLs – Choose URL Type Dropdown

The **Search & Update URLs** dropdown is populated with the six URL types (**Transparency in Coverage, Payment**, **SBC**, **Network**, **Plan Brochure**, and **Formulary**). Users may only review and update one **URL Type** at a time. Multiselect is not available in the dropdown.

Figure 12 shows the dropdown populated with the six **URL Type** options.

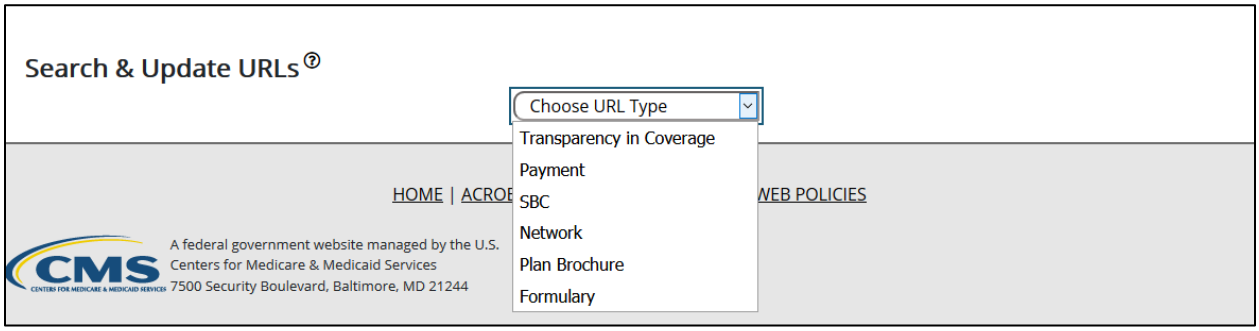


Figure 12: Search & Update URLs Dropdown

4.2.3.2 Search & Update URLs – Search Field

Once a **URL Type** is selected in the dropdown, a field will appear where the user can begin entering search parameters for specific URL IDs. Selecting **Transparency in Coverage** as the **URL Type** will automatically generate the table to begin submitting and updating the Transparency in Coverage URL. In order to search for **Payment**, **Plan Brochure**, and **SBC** URLs, the user should enter the Plan ID they would like to view URL data for. For **Formulary** URLs, the user should enter a Formulary ID. For **Network** URLs, the user should enter a Network ID.

Users may choose to enter a partial string of their URL ID to find a specific URL or leave the search field blank to return all URLs of the selected type. Once the user has entered the desired search parameters, they must select the magnifying glass to return search results.

Figure 13 shows the search field after URL type is selected.

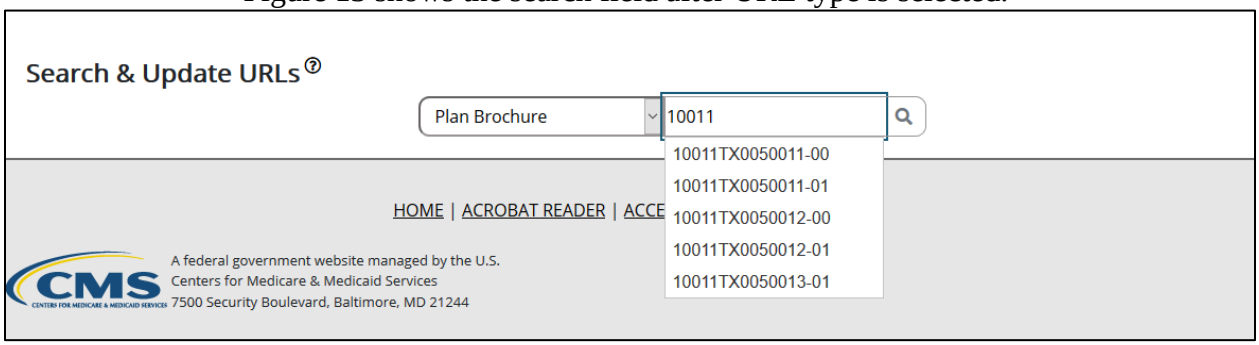


Figure 13: Search & Update URLs Search Field

4.2.3.3 Search & Update URLs – Transparency in Coverage URL Display

The search results table will automatically generate after users select **Transparency in Coverage** in the dropdown. Users may use the ***New URL*** column in the search results table to submit URL updates. New URLs must begin with “http://” or “https://” and cannot contain commas or spaces.

The search results table will contain the following columns when searching for **Transparency in Coverage** URL as shown in Figure 14:

- **URL Type**
- **Issuer ID**
- **Current URL**
- **New URL**

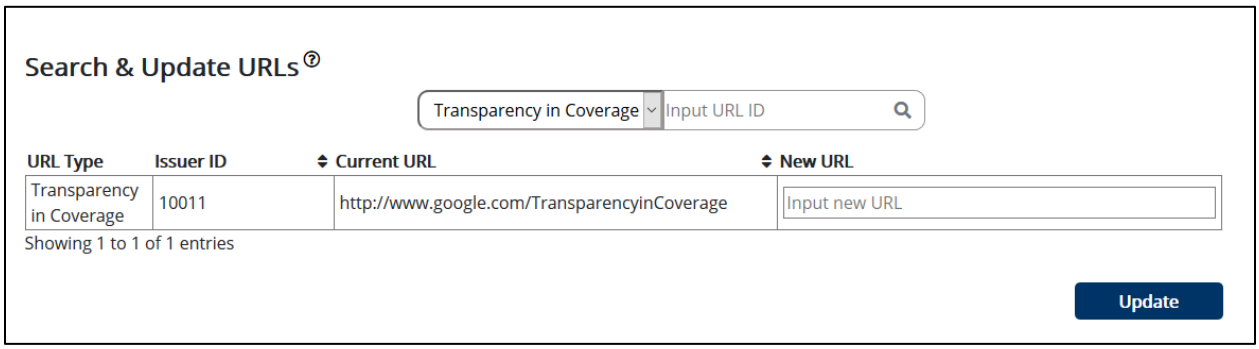


Figure 14: Transparency in Coverage URL Type Search Results

4.2.3.4 Search & Update URLs – Payment, Plan Brochure, or SBC URLs Display

The search results table will be generated after a search is performed. Users may use the ***New URL*** column in the search results table to submit URL updates. Multiple URL IDs may be updated simultaneously.

The search results table will contain the following columns when searching for **Payment, Plan Brochure, or SBC** URLs as shown in Figure 15:

- **URL Type**
- **Plan ID** or **Plan Variant ID**
- **Current URL**
- **New URL**

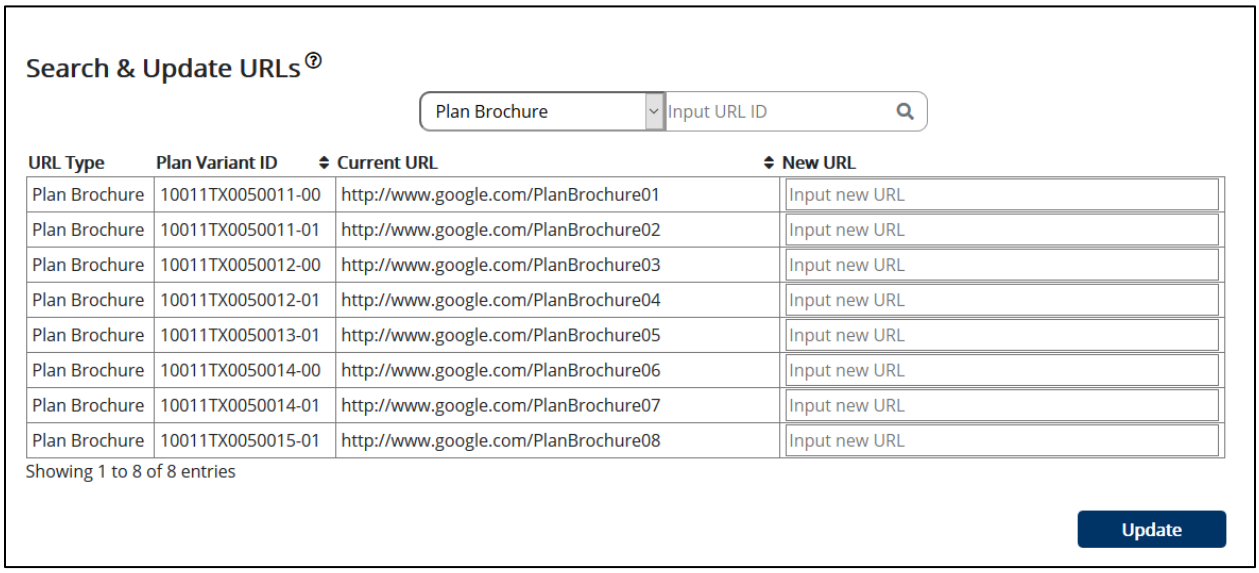


Figure 15: Payment, Plan Brochure, or SBC URL Type Search Results

4.2.3.5 Search & Update URLs – Formulary URLs Display

When a user performs a search for **Formulary** URLs, the search results table will display the following columns, as shown in Figure 16:

- **URL Type**
- **Formulary ID**
- **Market Type**
- **Current URL**
- **New URL**

NOTE: Issuers who submit QHP templates via the HIOS PM Modules will not see the **Market Type** column when searching for Formulary IDs.

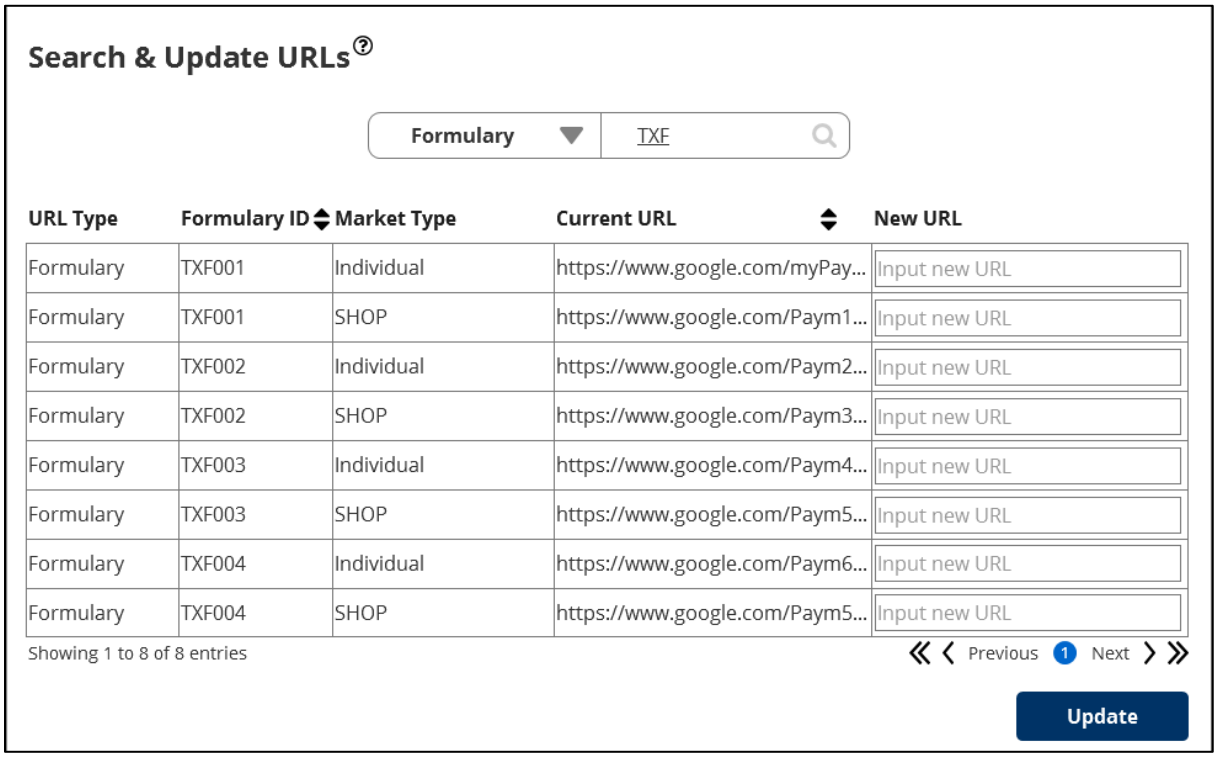


Figure 16: Formulary URL Type Search Results

4.2.3.6 Search & Update URLs – Network URLs Display

When a user performs a search for **Network** URLs, the search results table will display the following columns, as shown in Figure 17:

- **URL Type**
- **Network ID**
- **Market Type**
- **Product Type**
- **Current URL**
- **New URL**

NOTE: Issuers who submit via the HIOS PM Modules will not see the **Market Type** and **Product Type** columns when searching for Network IDs.

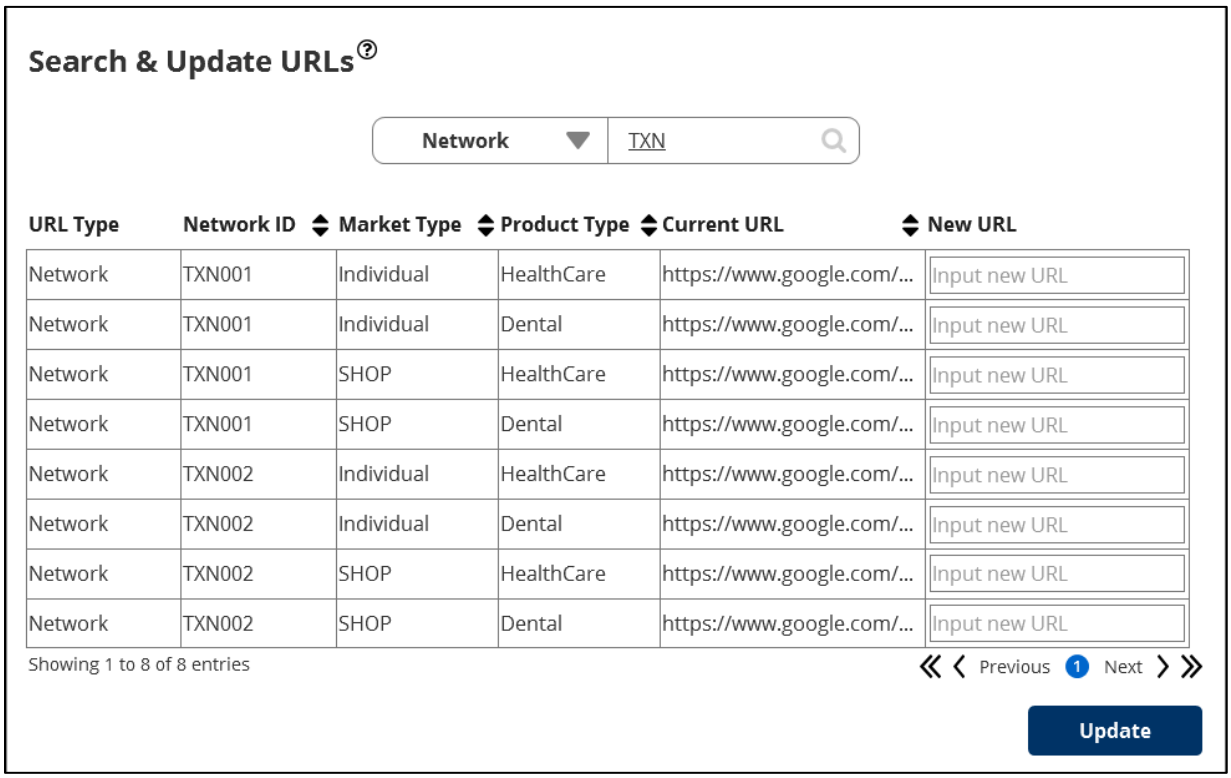


Figure 17: Network URL Type Search Results

4.2.3.7 Search & Update URLs – No Results Found

If no results are found for the search criteria, the table will display a message of "No records to display".

Figure 18 below shows the **Search & Update URLs** section when a search did not return any results.

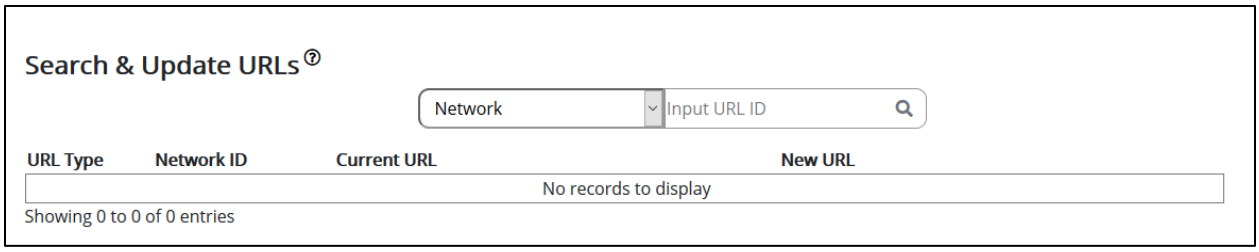


Figure 18: Search & Update URLs No Results

4.2.3.8 Update URLs – Confirmation Pop-Up

Select the ***Update*** button to submit URL updates. A confirmation pop-up will appear listing the URL updates entered in the search results table to confirm the changes they are about to submit.

The user may select the ***Update URLs*** button to begin validation and storage of the URLs or the ***Cancel*** button if they determine further updates are needed, as shown in Figure 19.

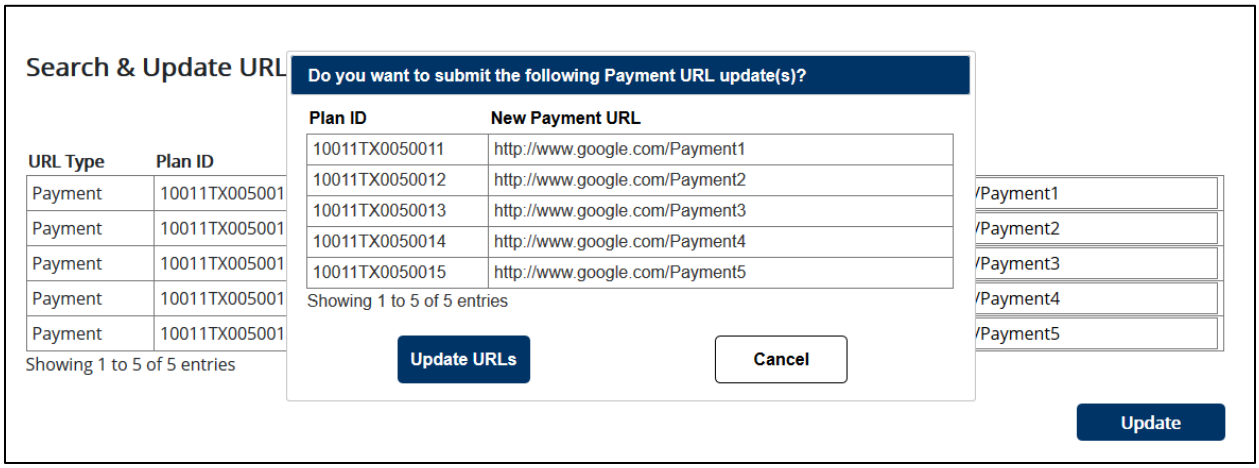


Figure 19: URL Update Confirmation Pop-Up

4.2.3.9 Update URLs – Updates Successful

A **Success Banner** will appear when the URL updates have passed validation and been saved. The page will refresh, and URLs entered in the **New URL** column will now appear in the **Current URL** column to show the changes were saved successfully, as shown in Figure 20. For additional troubleshooting support for the **Search & Update URLs** section, please refer to section 5.1.3.

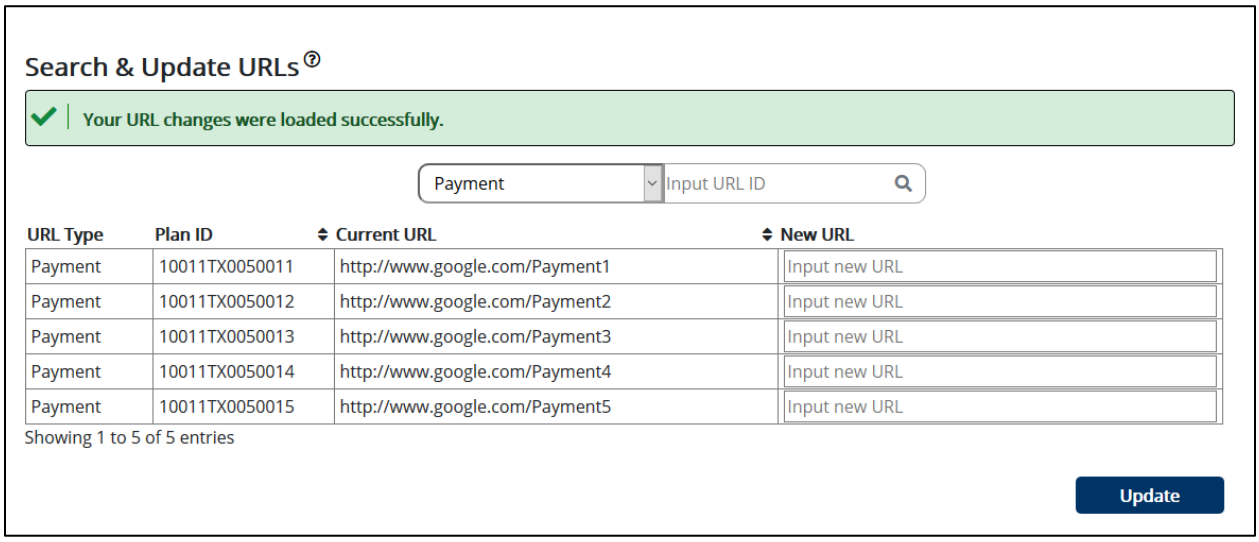


Figure 20: URL Updates Successful Banner

5 Troubleshooting & Support

The *Supplemental Submission Module* provides detailed error messaging to assist the user with troubleshooting and resolving issues. Further details are provided below.

5.1 URL Data Page – Troubleshooting and Support

5.1.1 Download Issuer URL Template File Error Messages

The user can receive an error when attempting to generate an **Issuer URL Template** file in the **Download Issuer URL Template File** section, as shown in Figure 21.

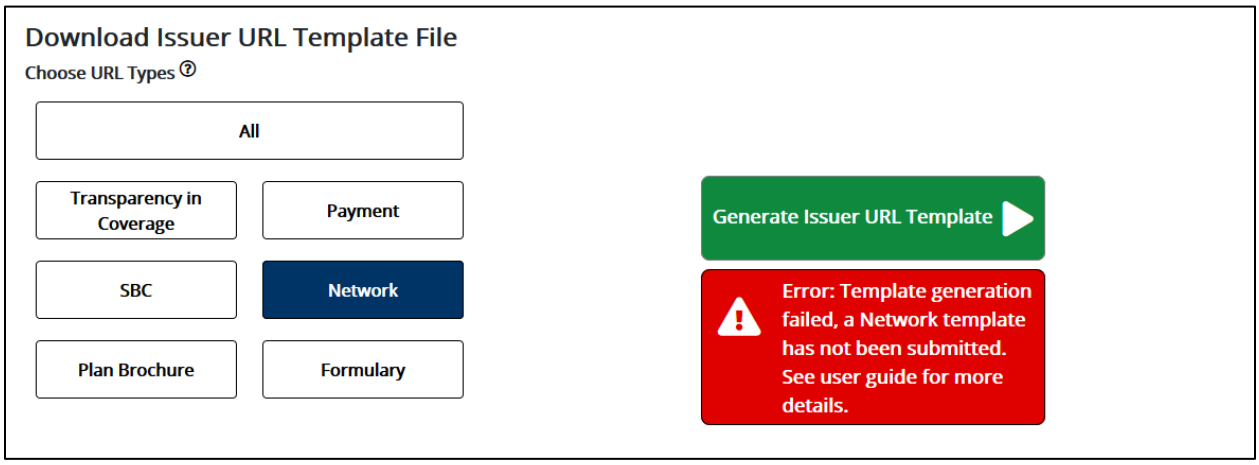


Figure 21: Issuer URL Template Generation Error

Table 6 provides a list of possible error messages the user may encounter in the **Download Issuer URL Template File** section, as well as corrective actions to resolve the issue.

Table 6: Download Issuer URL Template Error Messages

Error Message	Corrective Action
Error: Template generation failed. Please retry or contact the Help Desk.	Please refresh the browser and if the error persists, contact the Help Desk for more details. Contact information is listed in section 5.3.
Error: Template generation failed. Please select at least one URL type and retry.	The user should select at least one URL Type in order to successfully generate an **Issuer URL Template.**
Error: Template generation failed, a PB template has not been submitted. See user guide for more details.	The user should confirm that a valid Plans and Benefits template has either been submitted to the *Benefits and Service Area Module* or transferred by the State via *SERFF*.
Error: Template generation failed, a Network template has not been submitted. See user guide for more details.	The user should confirm that a valid Network template has either been submitted to the *Benefits and Service Area Module* or transferred by the State via *SERFF*.

Error Message	Corrective Action
Error: Template generation failed, a Prescription Drug template has not been submitted. See user guide for more details.	The user should confirm that a valid Prescription Drug template has either been submitted to the *Benefits and Service Area Module* or transferred by the State via *SERFF*.

5.1.2 Upload Issuer URL Template File Error Messages

The user can receive an error message when attempting to upload an **Issuer URL Template** file. Refer to Table 7 for a list of the possible error messages, as well as the corrective action required to allow the user to submit successfully.

Table 7: Upload Issuer URL Template Error Messages

Error Message	Corrective Action
Error: Invalid file type selected. Please select a .csv file.	The user will receive this error message when the document uploaded is not a .csv file. Please select only a .csv file and reupload.
Error: Invalid file name. The file name must contain only alphanumeric characters, hyphens, underscores, and/or periods.	The user should update the file name to only include the acceptable characters listed in the error message. See section 4.2.2.1 for the list of acceptable characters.
Error: Invalid file name. Please restrict file name to less than 100 characters.	The user should update the file name to be less than or equal to 100 characters in length, then re-upload.
Error: The uploaded template did not have an Issuer ID or was invalid.	The user should confirm that the first row of the Issuer URL Template contains a valid HIOS Issuer ID, and that the ID matches the Issuer ID chosen from the Summary page.
Error: This template has data that is inconsistent with your privileges.	The user will receive this error message when the **Issuer URL Template** uploaded contains a HIOS Issuer ID that does not match the Issuer ID selected on the Summary page. The user should either select the appropriate HIOS Issuer ID from the Summary page or correct the HIOS Issuer ID in the **Issuer URL Template**, then re-submit.

Error Message	Corrective Action
Error: Invalid .csv format. Please conform .csv to the proper format.	There are 3 possible causes for this error: 1. The first row of the **Issuer URL Template** does not contain the **HIOS Issuer ID**. Please update the **Issuer URL Template** to add the **HIOS Issuer ID**. 2. Column headers are not within the 2nd, 3rd, or 4th rows of the .csv file. Please update the **Issuer URL Template** to have the headers in the same row and within the 2nd, 3rd, or 4th rows. 3. File does not contain the 6 necessary column headers: a. URL Type b. URL ID c. Market Type d. Product Type e. Current URL f. New URL Please update the **Issuer URL Template** to contain all 6 column headers in exact order.
Error: No new URLs entered. Please enter at least one URL in the New URL column and resubmit.	File does not contain a value in the New URL column. The user should enter at least one URL update and re-submit for validation.
Error: Encountered issues saving to database. Please try again in a few minutes. If this error persists, please contact CMS Support.	The user should wait a few minutes and retry upload of **Issuer URL Template.** If this problem persists, the user should then contact CMS Support.

5.1.3 Search & Update URLs Error Messages

When the user attempts to submit an invalid URL through the search results table, an Error Banner will appear. The banner will contain the message “Please correct the following errors:” followed by the list of errors as shown in Figure 22.

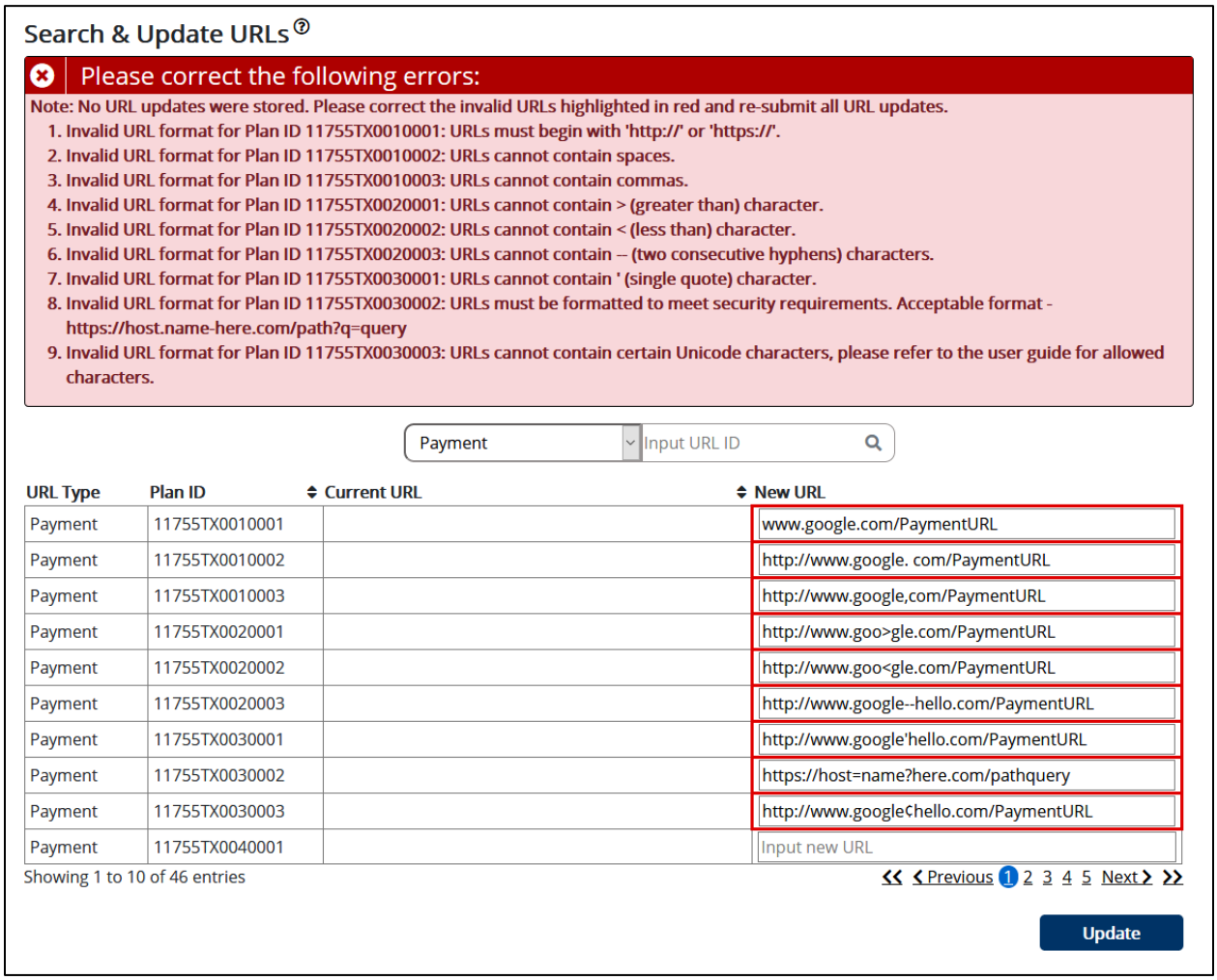


Figure 22: URL Updates Errors Banner

Table 8 describes the validations for URLs submitted through the **New URLs** column of the search results table.

Table 8: Search & Update URLs – Validations and Error Messages

Validation	Banner Error Message
URLs entered must begin with either “http://” or “https://”	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs must begin with ‘http://’ or ‘https://’
URLs entered cannot contain a space within the string	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs cannot contain spaces.
URLs entered cannot contain a comma within the string	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs cannot contain commas.
All Network IDs must have a new or current Network URL value	A Network URL value is required for all Network IDs. Please submit a Network URL for Network ID [Network ID].

Validation	Banner Error Message
Issuer ID must have a new or current Transparency in Coverage URL value when submitting Network URLs	A Transparency in Coverage URL value is required for the Issuer ID. Please submit a Transparency in Coverage URL for Issuer ID [Issuer ID] before updating Network URLs.
All Formulary IDs must have a new or current Formulary URL value	A Formulary URL value is required for all Formulary IDs. Please submit a Formulary URL for Formulary ID [Formulary ID].
All Medical Plan Variant IDs must have a new or current Summary of Benefits URL value	A Summary of Benefits and Coverage URL value is required for all Medical Plan Variant IDs. Please submit a Summary of Benefits and Coverage URL for Plan Variant ID [Plan Variant ID].
URLs entered cannot contain more than 600 characters within the string	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs must be less than or equal to 600 characters.
URLs entered cannot contain > greater than symbol within the string	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs cannot contain > (greater than) character.
URLs entered cannot contain > less than symbol within the string	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs cannot contain < (less than) character.
URLs entered cannot contain two consecutive hyphens -- within the string	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs cannot contain -- (two consecutive hyphens) characters.
URLs entered cannot contain ‘ single quote within the string	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs cannot contain ‘ (single quote) character.
URLs must be formatted to meet security requirements	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs must be formatted to meet security requirements. Acceptable format - https://host.name-here.com/path?q=query.”

Validation	Banner Error Message
URLs entered cannot contain certain Unicode characters	Invalid URL format for [Formulary, Network, Plan, or Plan Variant] ID [URL ID]: URLs cannot contain certain Unicode characters, please refer to the user guide for allowed characters." Allowed Unicode characters: • ~ • ` • ! • @ • # • $ • % • ^ • & • * • (•) • _ • + • - • = • [•] • \ • { • } • | • ; • : • " • . • / • ?

5.2 Special Considerations

Upload of the **Issuer URL Template** file is restricted in the following ways:

1. Users will only be able to choose one **Issuer URL Template** file per submission for validation and storage.
2. Users will only be able to submit one **Issuer URL Template** file every 8 seconds.
3. The uploaded **Issuer URL Template** file size cannot exceed 5 MB.
4. The uploaded **Issuer URL Template** must be in .csv format.

5.3 Support

Table 9 provides details to contact the Help Desk should users require further assistance.

Table 9: Points of Contact

Contact	Organization	Phone	Email	Role	Responsibility
Marketplace Service Desk (MSD)	CMS	1-855-CMS-1515 (1-855-267-1515)	CMS_FEPS@cms.hhs.gov	Help Desk support	Initial user support & problem reporting

Appendix A: Using the Issuer URL Template in Excel

This appendix provides user instructions on how to open the **Issuer URL Template (.csv)** file in Excel, adjust the column widths to view all pertinent information, and use filters to easily find and update URL data in the file.

How to open the .csv file as an Excel sheet:

1. Navigate to the URL Data page and generate an **Issuer URL Template** file. Select the ***Download Issuer URL Template*** button.

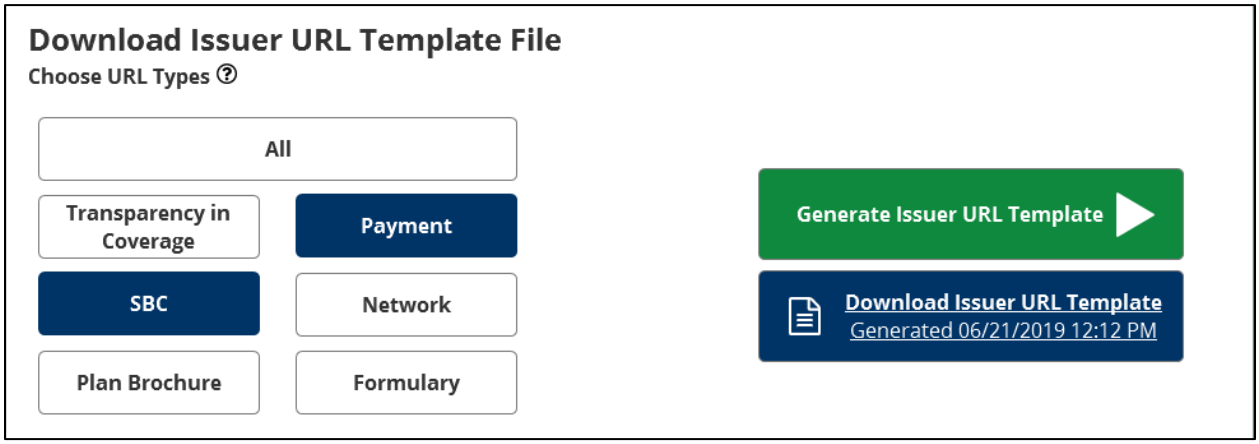


Figure 23: Generated Issuer URL Template File

2. If working in Google Chrome, begin by finding the file and moving it to a secure location.

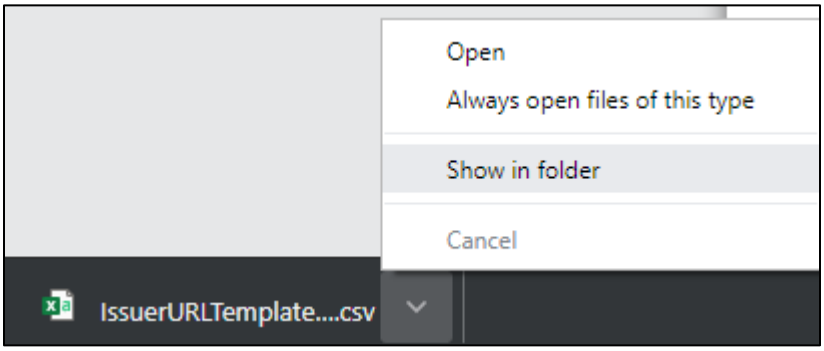


Figure 24: Opening as Excel from Google Chrome Download 1 of 2

For mouse users, open the **Context Menu** by right clicking on the file. For keyboard users, open the **Context Menu** by pressing **Shift + F10**. Navigate to the ***Open with*** field and select ***Excel***.

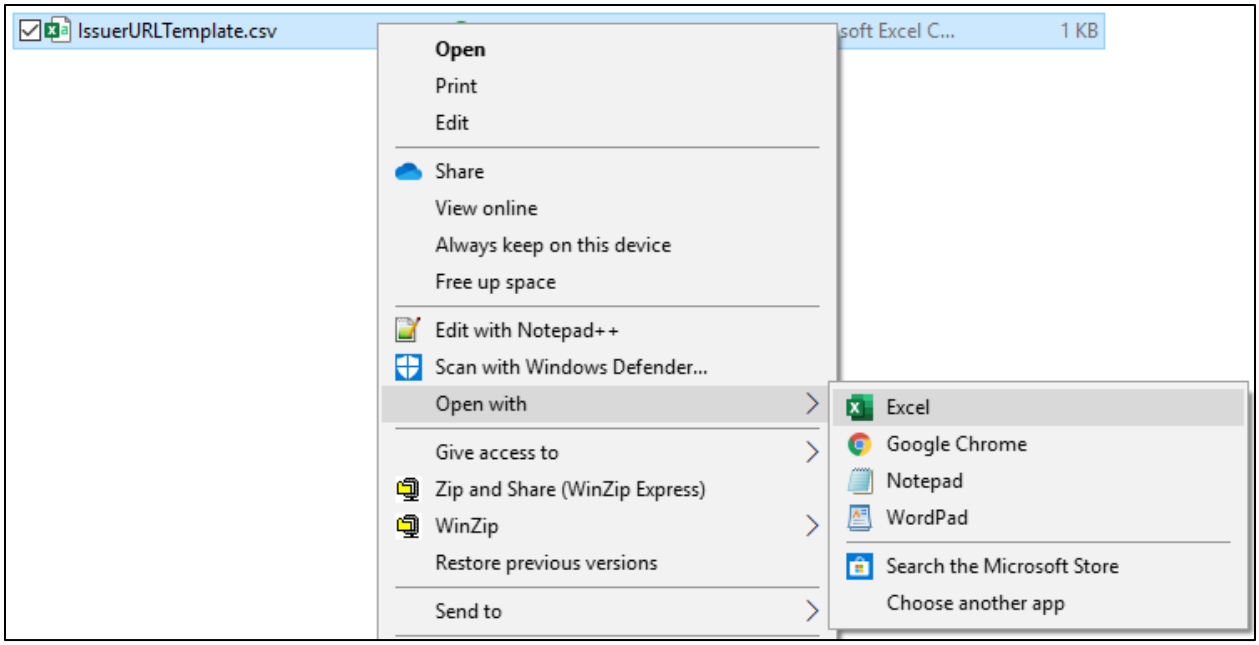


Figure 25: Opening as Excel from Google Chrome Download 2 of 2

3. If working in Mozilla Firefox, select the ***Open with*** radio button and select ***Excel***.

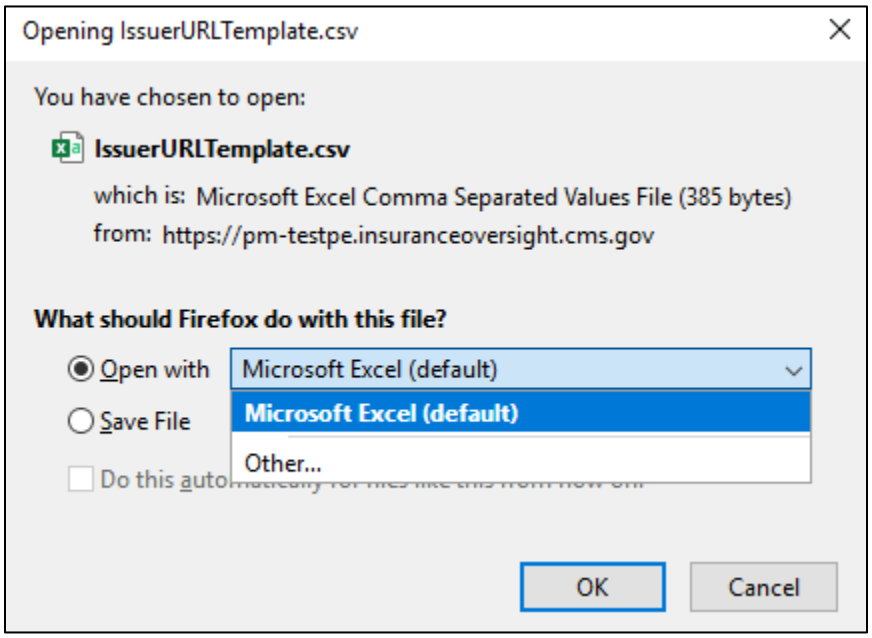


Figure 26: Opening as Excel from Mozilla Firefox Download

4. If working in Internet Explorer, select the ***caret*** to the right of the **Save** button. A dropdown will appear with the following options: **Save**, **Save as**, and **Save and open**. Select the ***Save as*** option.

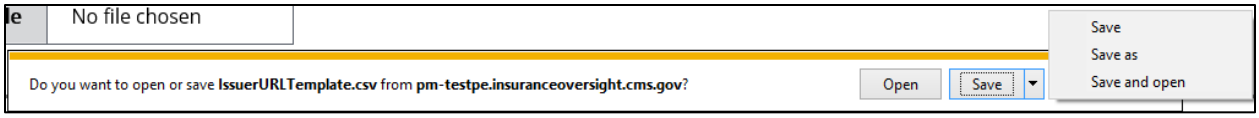


Figure 27: Opening as Excel from Internet Explorer Download 1 of 3

Once ***Save as*** is selected, the file explorer will appear on your computer. Change the **Save as type:** file to ***Excel Comma Separated Value File (*.csv)***.

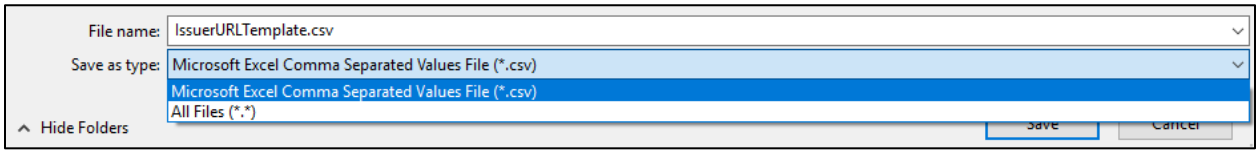


Figure 28: Opening as Excel from Internet Explorer Download 2 of 3

Once the file is saved to a secure location, verify the file is saved as a .csv file type and open the file.

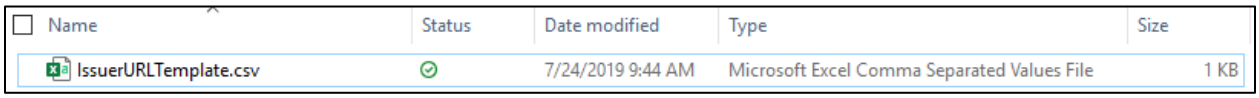


Figure 29: Opening as Excel from Internet Explorer Download 3 of 3

How to expand columns to view data more easily:

1. Open the downloaded **Issuer URL Template** file in Excel.

	A	B	C	D	E	F	G	H	I	J	K	L
1	HIOS Issue	32378										
2	GENERATED 2019-07-24T09:44:55											
3	URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column)											
4	URL Type	URL ID	Market Ty	Product Ty	Current UI	New URL						
5	Payment	32378IN0C	N/A	N/A	google.com							
6	Payment	32378IN0C	N/A	N/A	google.com							
7	Payment	32378IN0C	N/A	N/A	google.com							
8	Payment	32378IN0C	N/A	N/A	google.com							
9	Payment	32378IN0C	N/A	N/A	google.com							
10	Payment	32378IN0C	N/A	N/A	google.com							
11	Payment	32378IN0C	N/A	N/A	google.com							
12	Payment	32378IN0C	N/A	N/A	google.com							
13	Payment	32378IN0C	N/A	N/A	google.com							
14	Payment	32378IN0C	N/A	N/A	google.com							
15	Payment	32378IN0C	N/A	N/A	google.com							
16	Payment	32378IN0C	N/A	N/A	google.com							
17	Payment	32378IN0C	N/A	N/A	google.com							
18	Payment	32378IN0C	N/A	N/A	google.com							
19	Payment	32378IN0C	N/A	N/A	google.com							
20	Payment	32378IN0C	N/A	N/A	google.com							
21												

Figure 30: Issuer URL Template Default View

2. Directions for mouse users.
3. Navigate to the Excel column labels **B**, **C**, **D**, and **E.**

   Mouse users can double click the grey line to the right of each letter to Auto-Fit the column to the maximum text length in the file.

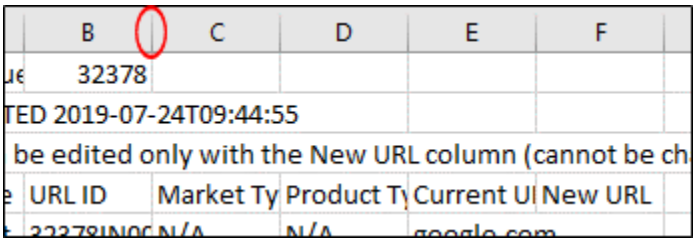


Figure 31: Columns to Adjust

Directions for keyboard users.

1. Select any cell in the Excel sheet.
2. Expand the selection to the current region (using **Ctrl** + **Shift** + **8**)
3. Type **Alt** + **H** to select the Home tab of the Excel ribbon.
4. Type **O** to select the Format.
5. Type **I** to select “autofit column width”.

	A	B	C	D	E	F	G	H	I	J	K	L
1	HIOS Issue	32378										
2	GENERATED 2019-07-24T09:44:55											
3	URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column)											
4	URL Type	URL ID	Market Ty	Product Ty	Current Ul	New URL						
5	Payment	32378IN0060001	N/A	N/A	google.com							
6	Payment	32378IN0060002	N/A	N/A	google.com							
7	Payment	32378IN0060003	N/A	N/A	google.com							
8	Payment	32378IN0060004	N/A	N/A	google.com							
9	Payment	32378IN0060005	N/A	N/A	google.com							
10	Payment	32378IN0060006	N/A	N/A	google.com							
11	Payment	32378IN0070001	N/A	N/A	google.com							
12	Payment	32378IN0070002	N/A	N/A	google.com							
13	Payment	32378IN0070003	N/A	N/A	google.com							
14	Payment	32378IN0070004	N/A	N/A	google.com							
15	Payment	32378IN0070005	N/A	N/A	google.com							
16	Payment	32378IN0070006	N/A	N/A	google.com							
17	Payment	32378IN0080001	N/A	N/A	google.com							
18	Payment	32378IN0080002	N/A	N/A	google.com							
19	Payment	32378IN0090001	N/A	N/A	google.com							
20	Payment	32378IN0090002	N/A	N/A	google.com							

Figure 32: One Column Width Set to Fit Text

How to set up filters in the **Issuer URL Template**:

Mouse Users:

1. Select all the data starting from the Column Headers row down to the last row of data. (e.g. in Figure 33, Rows 4-20 and Columns A-E would be selected.)
2. Select the **Data** tab.
3. Click on the ***Filter*** button.
4. The filter dropdown will be applied for each column.
5. Click on the arrows now present next to the Column Headers and select/deselect desired filter options.

Keyboard Users:

1. Select all the data starting from the Column Headers row down to the last row of data. (e.g. in Figure 33, Rows 4-20 and Columns A-E would be selected.)
2. Type **Alt + A** to select the Home tab of the Excel ribbon.
3. Type **T** to select the ***Filter*** button in the Cells sub-area.
4. The filter dropdown will be applied for each column.
5. Navigate to the desired Column Header Filter and press **Left Alt + ↓ shortcut.**
6. The filter dropdown will appear pre-populated with the applicable data for that column. Use the dropdown to select/deselect desired options to filter.

	A	B	C	D	E	F	G	H
1	HIOS Issuer ID:	32378						
2	GENERATED 2019-07-24T09:44:55							
3	URLs can be edited only with the New URL column (cannot be changed by making edits to the Current URL column)							
4	URL Type	URL ID	Market Type	Product Type	Current URL	New URL		
5	Payment	32378IN0060001	N/A	N/A	google.com			
6	Payment	32378IN0060002	N/A	N/A	google.com			
7	Payment	32378IN0060003	N/A	N/A	google.com			
8	Payment	32378IN0060004	N/A	N/A	google.com			
9	Payment	32378IN0060005	N/A	N/A	google.com			
10	Payment	32378IN0060006	N/A	N/A	google.com			
11	Payment	32378IN0070001	N/A	N/A	google.com			
12	Payment	32378IN0070002	N/A	N/A	google.com			
13	Payment	32378IN0070003	N/A	N/A	google.com			
14	Payment	32378IN0070004	N/A	N/A	google.com			
15	Payment	32378IN0070005	N/A	N/A	google.com			
16	Payment	32378IN0070006	N/A	N/A	google.com			
17	Payment	32378IN0080001	N/A	N/A	google.com			
18	Payment	32378IN0080002	N/A	N/A	google.com			
19	Payment	32378IN0090001	N/A	N/A	google.com			
20	Payment	32378IN0090002	N/A	N/A	google.com			
21								

Figure 33: Issuer URL Template File with Expanded Columns and Filters

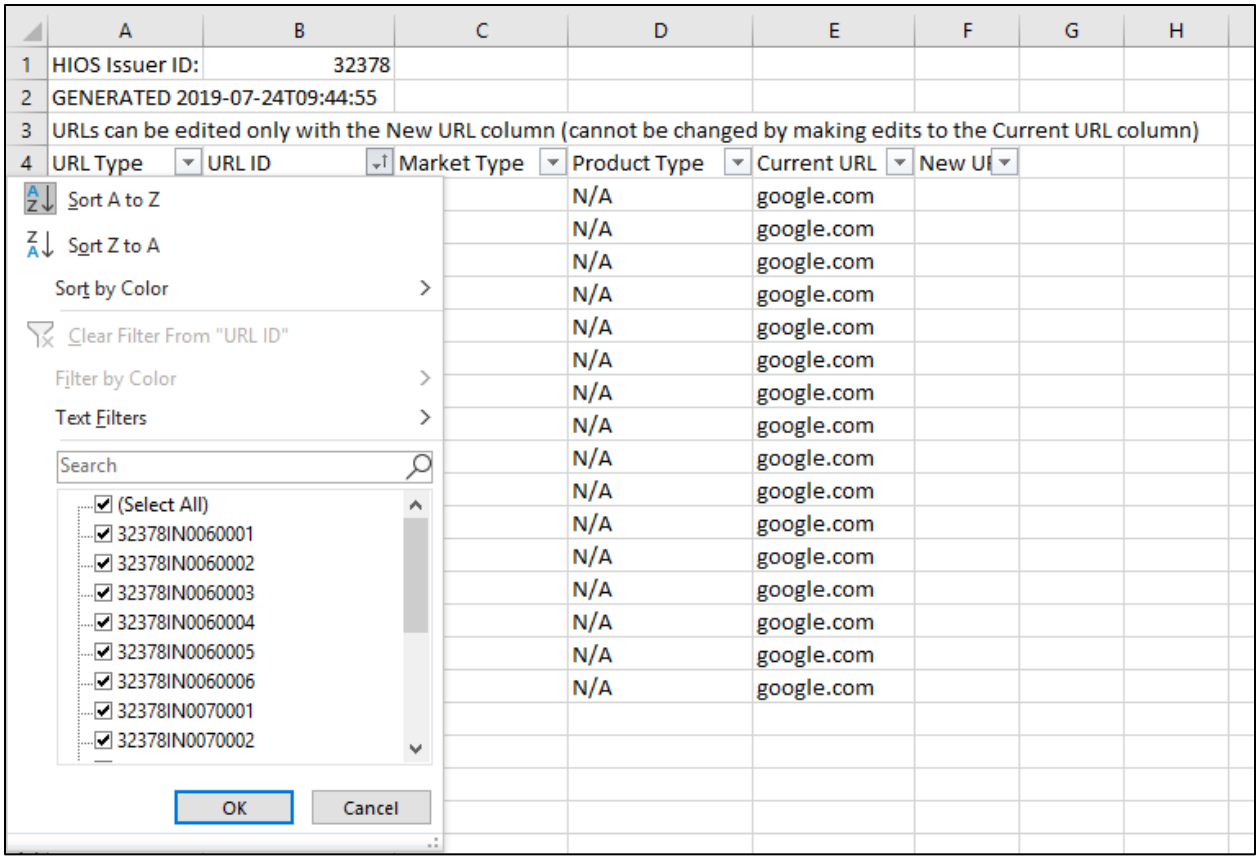


Figure 34: Filter Dropdown

Appendix B: Acronyms and Abbreviations

Table 10: Acronyms and Abbreviations

ACRONYM	Literal Translation
CCIIO	Center for Consumer Information and Insurance Oversight
CMS	Centers for Medicare & Medicaid Services
FFE	Federally-Facilitated Exchange
HHS	Health and Human Services
HIOS	Health Insurance Oversight System
ID	Identifier
MSD	Marketplace Service Desk
PM	Plan Management
QHP	Qualified Health Plan
SBC	Summary of Benefits and Coverage
SERFF	System for Electronic Rates and Form Filing
UI	User Interface
URL	Uniform Resource Locator

Appendix C: Glossary

Table 11: Glossary

Term	Definition
User	An individual who accesses the application. A user's access is controlled by assigned roles and entitlements (responsibilities).

Appendix D: Referenced Documents

The Center for Consumer Information and Insurance Oversight (CCIIO) has provided additional information detailing specific policy and submission criteria for each section of the *Supplemental Submission Module* on the CCIIO webpage. Please use the following link for more information: https://www.qhpcertification.cms.gov/s/QHP