



Centers for Medicare & Medicaid Services

Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey) Website

Issuer User Guide

Version 2.0

11/15/2024

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Introduction

The Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey) website is a secure online website developed by the Centers for Medicare and Medicaid Services (CMS) to support QHP Enrollee Survey operations.

The QHP Enrollee Survey website has three objectives:

- Enable QHP issuers to attest to the survey eligibility criteria or report ineligibility status.
- Enable QHP issuers with eligible reporting units to report survey vendor selection to CMS and confirm sample frame validation.
- Enable QHP survey vendors to securely submit survey data.

All QHP issuers with eligible and/or ineligible reporting units are required to sign in to the [QHP Enrollee Survey website](#) to perform the following activities by the deadline established by CMS.

QHP issuers with **eligible** reporting units must:

1. Attest to the QHP Enrollee Survey eligibility criteria for each eligible reporting unit.
2. Authorize contracted HHS-approved vendor to collect data on their behalf.
3. Confirm sample frame validation.

QHP issuers with **ineligible** reporting units must:

1. Report ineligibility status for each ineligible reporting unit.

Issuers will be notified when registration opens to access the [QHP Enrollee Survey website](#) to complete the above steps.

Existing QHP issuer users will be able to sign in to the [QHP Enrollee Survey website](#) with their previously registered CMS's Identity Management System (IDM) account.

New QHP issuer users must take the following steps to access the website:

1. Register a CMS IDM account. For detailed steps on how to register an account, see [Section 1 \(QHP Issuers Without an Existing IDM Account: Register a New User Account in CMS's IDM System\)](#).
2. Request the QHP Survey Issuer role. For detailed steps on how to request the Issuer role, see [Section 2 \(QHP Issuers Without the QHP Enrollee Survey Role Assigned: Request the QHP Enrollee Survey Issuer Role\)](#).
 - After receiving a confirmation email that the role request is approved, issuers will be able to sign in to the QHP Enrollee Survey website. For steps on how to sign in to the website, see [Section 3 \(All QHP Issuers: Sign In to QHP Enrollee Survey Website\)](#).

Issuers can find answers to the commonly asked questions related to account setup, QHP Enrollee Survey website access, or the attestation process on the [Frequently Asked Questions \(FAQ\)](#) page of the QHP Enrollee Survey website. If you cannot find an answer to your question on the FAQ page, please contact the QHP Enrollee Survey Project Team at QHP_Survey@air.org.

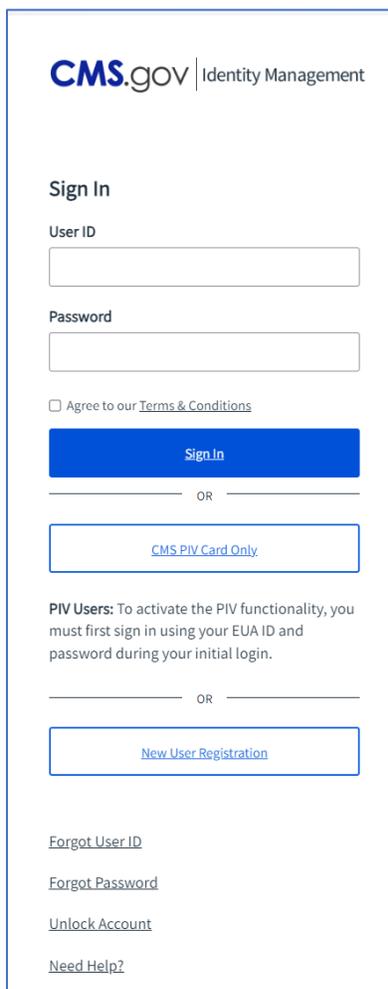
Section 1: QHP Issuers Without an Existing IDM Account – Register a New User Account in CMS’s IDM System

This section provides step-by-step instructions on how to register and create a new user ID and password through the CMS IDM system.

Note: If you have registered in CMS IDM before and already have an existing CMS IDM account, please skip the steps in this section. Do not create a duplicate IDM account.

1. Navigate to <https://home.idm.cms.gov/>.

The **Sign In** page (Figure 1) appears.



The screenshot shows the CMS.gov Identity Management Sign In page. At the top, it says "CMS.gov | Identity Management". Below that is the "Sign In" heading. There are two input fields: "User ID" and "Password". Below the password field is a checkbox labeled "Agree to our Terms & Conditions". A blue "Sign In" button is positioned below the checkbox. Below the button is a horizontal line with "OR" in the center. Underneath is a button labeled "CMS PIV Card Only". Below this is a paragraph of text: "PIV Users: To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login." Below the text is another horizontal line with "OR" in the center. Underneath is a button labeled "New User Registration". At the bottom of the page, there are four links: "Forgot User ID", "Forgot Password", "Unlock Account", and "Need Help?".

Figure 1: CMS IDM Sign In Page

2. Click the **New User Registration** button.

The **Personal** tab (Figure 2) of the IDM Self-Service registration page appears.

1 Personal 2 Contact 3 Credentials

* Optional fields are labeled as (Optional).

First Name

Middle Name (Optional)

Last Name

Suffix (Optional)

Date Of Birth
MM/DD/YYYY

E-mail Address

Confirm E-mail Address

[View Terms & Conditions](#)

I agree to the terms and conditions

Figure 2: IDM System User Registration Form – Personal Tab

3. Enter the Name, Date of Birth, and E-mail Address information into the respective fields of the IDM system User Registration form. **You must use the email address where you received the QHP Enrollee Survey attestation process e-mail.**
4. Read the IDM system Terms and Conditions, click the checkbox to acknowledge agreement with the Terms and Conditions, and then click the **Next** button.
The **Contact** tab (Figure 3) of the IDM Self-Service registration page appears.

Figure 3: IDM System User Registration Form – Contact Tab

5. If the home address is located inside the US, keep the default “US Address” setting. If the home address is located outside of the United States, click the **Foreign Address** radio button.
6. Enter the Home Address and Phone Number information into the respective fields and then click the **Next** button.

The **Credentials** tab (Figure 4) of the IDM Self-Service registration page appears.

The screenshot shows a three-step registration process. Step 1 is 'Personal', Step 2 is 'Contact', and Step 3 is 'Credentials', which is currently selected. A note at the top of the form states: '* Optional fields are labeled as (Optional)'. The form contains the following fields:

- User ID: A text input field.
- New Password: A text input field with a visibility toggle icon (an eye).
- Confirm Password: A text input field with a visibility toggle icon (an eye).
- Security Questions: A dropdown menu.
- Answer: A text input field.

At the bottom of the form, there are three buttons: a red 'Cancel' button, a yellow 'Back' button, and a green 'Submit' button.

Figure 4: IDM System User Registration Form – Credentials Tab

7. Enter the desired user ID and password into the respective fields of the User registration form. Passwords that are used to access the IDM system must conform to the following CMS guidelines:
 - Passwords must be at least 15 characters in length.
 - Passwords must include an uppercase letter.
 - Passwords must include a lowercase letter
 - Passwords must include a number (0 - 9).
 - Passwords must not contain a space.
 - Passwords must not be one of the user's last six passwords.
 - Passwords must not contain parts of the user's First Name, Last Name, or User ID.
 - 24 hours must have elapsed since the last password change.
8. Click the **Security Questions** list box and choose a challenge question from the list that appears.
9. Type the security question answer into the Security Questions **Answer** field.
10. Click the **Submit** button to submit the account registration request.

The system displays a message that indicates the account was successfully created.

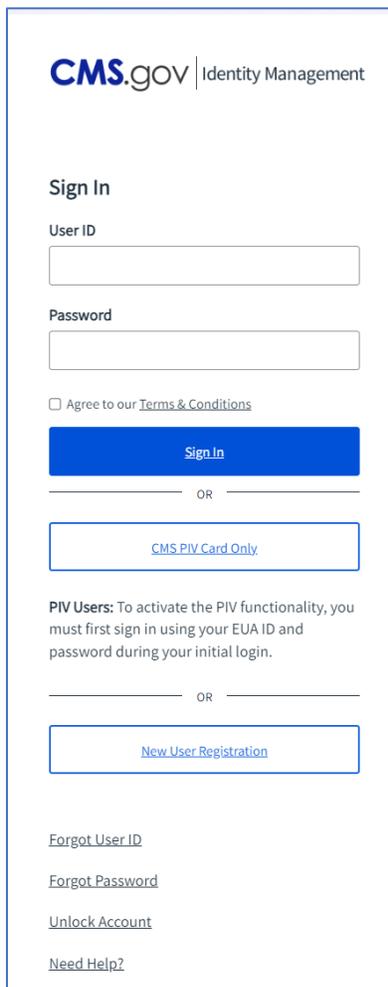
Section 2: QHP Issuers Without the QHP Issuer Role Assigned – Request the QHP Issuer Role

To access the Issuer Dashboard on the QHP Enrollee Survey website to complete the attestation process, issuers must request the “QHP Survey Issuer” role by signing in to the CMS IDM system.

Note: If you already have the “QHP Survey Issuer” role and have signed in to the [QHP Enrollee Survey website](#) before, please skip the steps in this section. To check if you already have the Issuer role, sign in to [CMS IDM](#), and click on the **Manage My Roles** button located on the IDM Self-Service dashboard to view your assigned roles and to verify that you have the “QHP Survey Issuer” role.

This section provides the steps that users must follow to sign in to the IDM system to request the QHP Issuer role.

1. Navigate to <https://home.idm.cms.gov/>.
The **Sign In** page (Figure 5) appears.



The screenshot shows the CMS.gov Identity Management Sign In page. At the top, it displays the CMS.gov logo and 'Identity Management'. Below this is the 'Sign In' section, which includes a 'User ID' input field, a 'Password' input field, and a checkbox for 'Agree to our Terms & Conditions'. A blue 'Sign In' button is positioned below the password field. Below the button is a horizontal line with 'OR' in the center. Underneath is a button labeled 'CMS PIV Card Only'. Below this is a paragraph for 'PIV Users' stating that they must first sign in with their EUA ID and password during their initial login. Another horizontal line with 'OR' in the center follows. Below that is a button labeled 'New User Registration'. At the bottom of the page, there are four links: 'Forgot User ID', 'Forgot Password', 'Unlock Account', and 'Need Help?'.

Figure 5: CMS IDM Sign In Page

2. Enter the user ID and password, created while registering an account, into the respective fields.
3. Read the Terms & Conditions, click the check box to acknowledge agreement, and then click the **Sign In** button.
4. In the Verify with Email Authentication window (Figure 6) that appears, if you have multiple registered Multi-factor Authentication (MFA) devices, select an MFA factor by clicking on the drop-down arrow next to the mail icon.

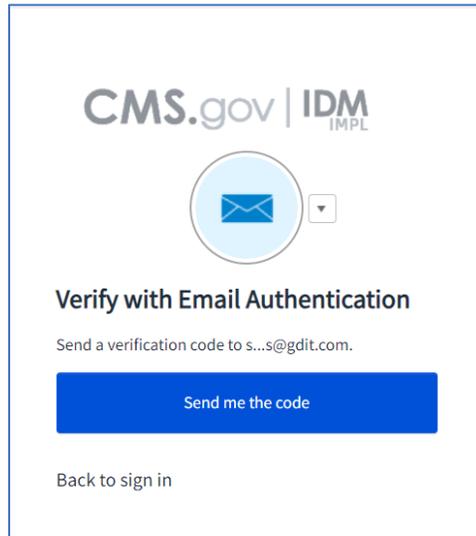


Figure 6: Verification Code Request

Note: All users who sign in to CMS IDM for the first time after creating an account will be prompted to register at least one MFA device. Users may add multiple MFA devices to their IDM account. Users will be prompted to authenticate with an MFA device that is registered to their account each time they sign into the IDM system.

5. Follow the directions for the chosen MFA factor (MFA device).
6. If you chose email as the authentication factor, click the **Send me the code** button in the Verify with Email Authentication window (Figure 6) to request a one-time verification code via email.
7. Enter the verification code received into the **Verification code** field (Figure 7).

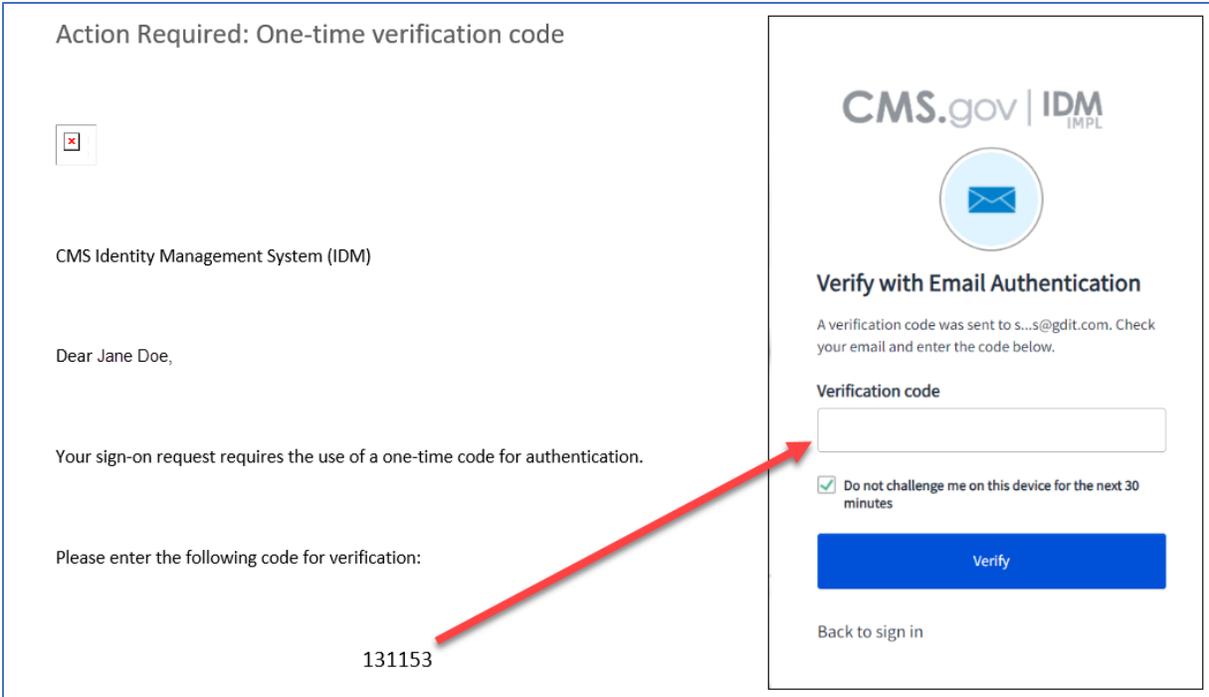


Figure 7: One-time Verification Code Email and the Verification Code Window

- 8. Click the **Verify** button.
You will be taken to the IDM Self-Service dashboard.

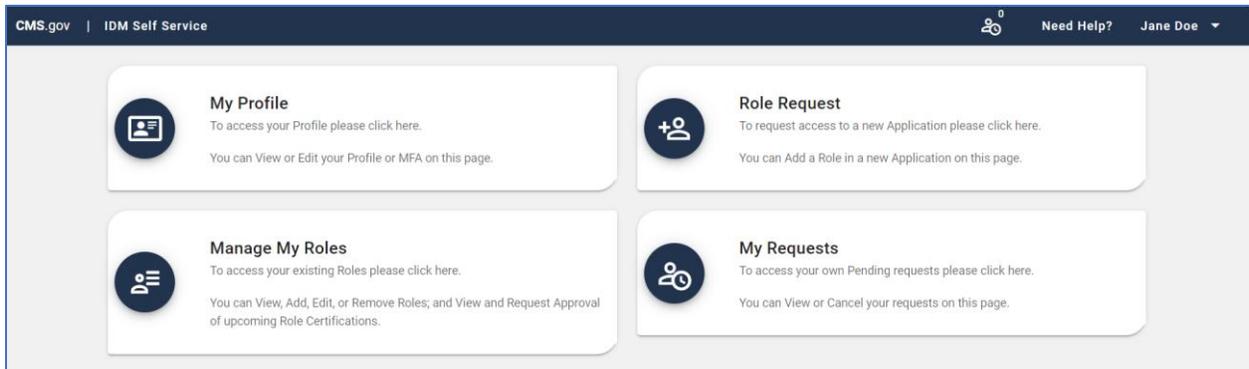


Figure 8: IDM Self-Service Dashboard

- 9. Click on the **Role Request** button located on the IDM Self-Service dashboard (Figure 8).
The **Role Request** window (Figure 9) appears.

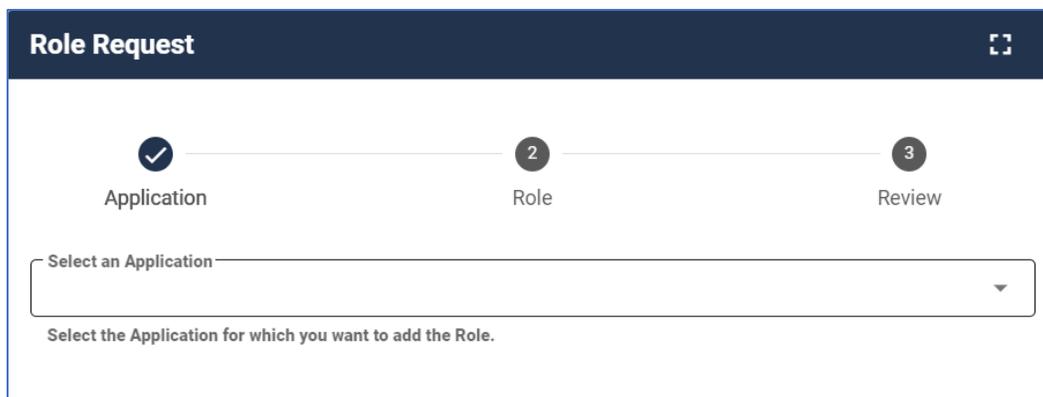


Figure 9: Role Request Page

- From the **Select an Application** drop-down list (Figure 9), select the “Qualified Health Plan Enrollee Satisfaction Survey” application.

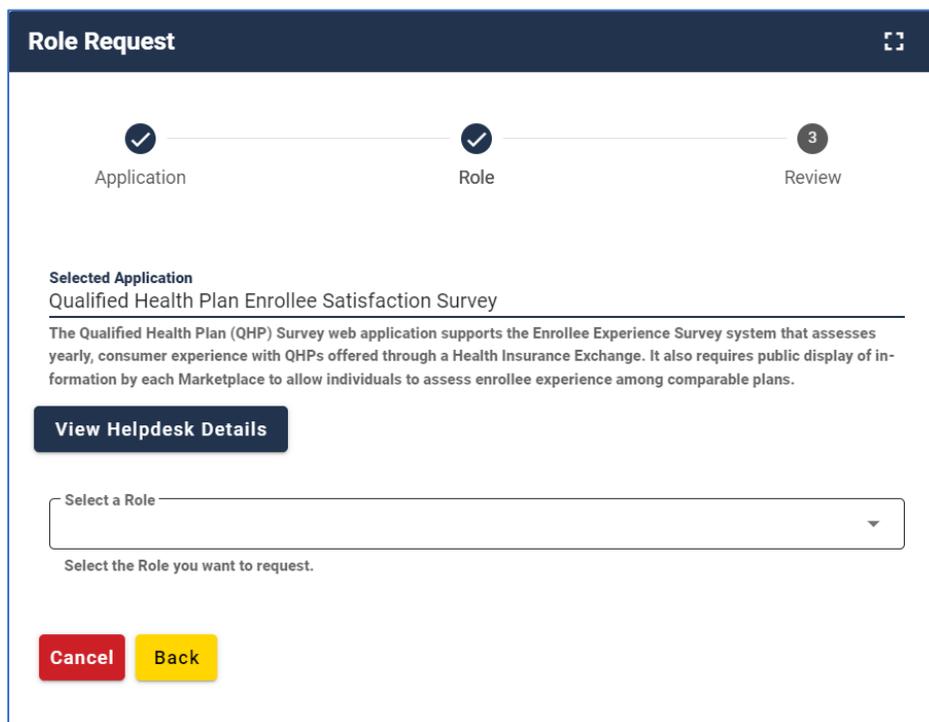


Figure 10: Role Request – Selecting the QHP Application

- From the **Select a Role** drop-down list (Figure 10), select the “QHP Survey Issuer” role (Figure 11).

The screenshot shows a web form titled "Role Request" with a dark blue header. Below the header, there are three sections: "End User", "Approver", and "Help Desk". The "End User" section has a light blue highlight on the "QHP Survey Issuer" option. The "Approver" section has "QHP Survey Approver" selected. The "Help Desk" section has "QHP Survey Support" selected. Below these sections is a "Select a role" dropdown menu with a downward arrow. Underneath the dropdown is the text "Select the Role you want to request." At the bottom of the form are two buttons: a red "Cancel" button and a yellow "Back" button.

Figure 11: Role Request – Selecting the QHP Issuer Role

Upon selecting the QHP Survey Issuer role, the initial Remote Identity Proofing (RIDP) page (Figure 12) will be displayed.

Role Request

Application Role RIDP Review

Remote Identity Proofing

Identity Verification - What to Expect

To complete this role request, it is important to note that Experian, a trusted and reliable agent, needs to collect further details about you.

Please ensure that you have entered your full legal name, current home address, your personal primary phone number, date-of-birth, and your personal e-mail address correctly to ensure a seamless and secure process.

For additional information or assistance, we encourage you to visit the Experian Customer Assistance website: <http://www.experian.com/help>

Experian identity verification is limited to US addresses and US territories only. If you have a foreign address please call your [Tier 1 Help Desk](#) to verify your identity.

[View Terms & Conditions](#)

I agree to the terms and conditions

Cancel Back Next

Figure 12: Role Request – Initial RIDP Page

12. Review the **Identity Verification** description statement.
13. Click the **View Terms & Conditions** link and review the RIDP terms and conditions.
14. Click the **I agree to the terms and conditions** check box to acknowledge agreement with the terms and conditions.
15. Click the **Next** button.
The **Identity Verification** form (Figure 13) appears.

Role Request
☰

✓
Application

✓
Role

✓
RIDP

4
Review

Remote Identity Proofing

We collect your PII (Personal Identifiable Information) for identity verification only. Please ensure the information you enter is accurate.

All fields are required, except those marked as "Optional"

Legal First Name

Legal Last Name

Middle Name (Optional)

Suffix (Optional) ▼

Date Of Birth
MM/DD/YYYY

Social Security Number
000-00-0000 👁

Personal E-mail Address

Confirm Personal E-mail Address

Home Address Line 1

Home Address Line 2 (Optional)

City

State ▼

Zip Code
00000

Zip Code Extension (Optional)
0000

Save home address to my profile

Personal Phone Number (Mobile is preferred)
000-000-0000

Cancel

Back

Submit

Figure 13: Identity Information Verification Form

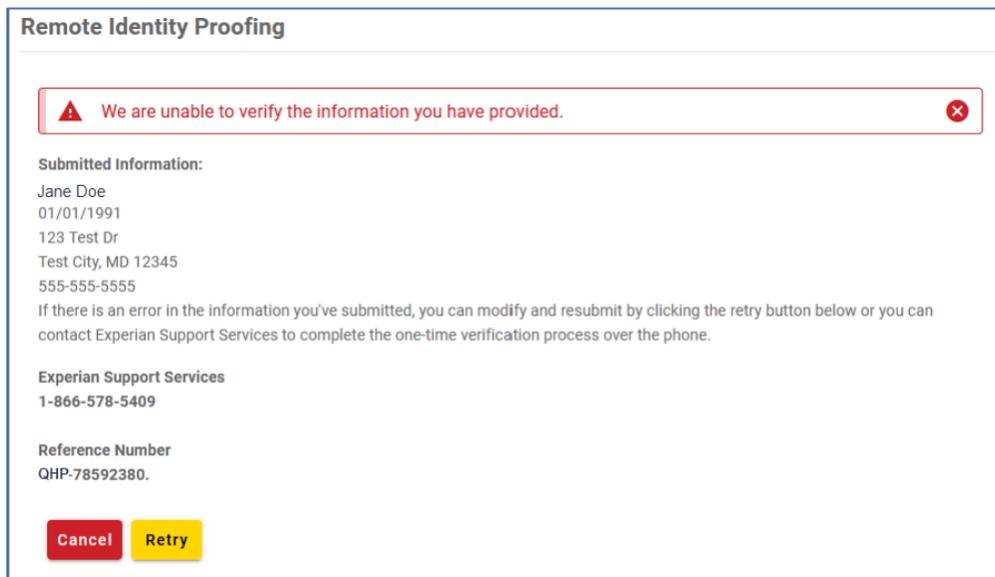
16. Enter your Name, Date of Birth, and Email Address information into the respective fields.
17. Enter your Social Security Number (SSN) into the Social Security Number field. Note that this information is *not* stored in the CMS system and is only used for this identity proofing step.
18. Enter your Home Address information and Phone Number information into the respective fields. Note that you must enter your personal information in all fields, such as personal email address,

personal phone number, and home address. Do not enter any business information. Any information you enter is *not* stored in the CMS IDM system and is only used for this identity proofing step.

19. Click the **Submit** button.

The RIDP process begins. Users that successfully complete Online Proofing will see a confirmation message on the screen, after which they can resume the role request process.

If the RIDP Online Proofing process is unsuccessful, the system will display an error message. Users must contact Experian using the contact information and Reference Number provided in the error message and perform Phone Proofing. If Phone Proofing is successful, users can sign in to the IDM system and initiate the role request procedure again. If the Phone Proofing RIDP process is unsuccessful, users may contact the Application Help Desk at QHP_Survey@air.org and inquire about the Manual Proofing process.



Remote Identity Proofing

▲ We are unable to verify the information you have provided.

Submitted Information:
Jane Doe
01/01/1991
123 Test Dr
Test City, MD 12345
555-555-5555

If there is an error in the information you've submitted, you can modify and resubmit by clicking the retry button below or you can contact Experian Support Services to complete the one-time verification process over the phone.

Experian Support Services
1-866-578-5409

Reference Number
QHP-78592380.

Cancel **Retry**

Figure 14: RIDP Online Proofing Error Message

Once the RIDP process is successfully completed, the Role Request page will display a text box titled “Reason for Request.”

The screenshot shows a web form titled "Role Request" with a progress indicator at the top showing three steps: "Application", "Role", and "Review". The "Review" step is currently active. Below the progress bar, the form contains the following fields:

- Application:** Qualified Health Plan Enrollee Satisfaction Survey
- Application Description:** The Qualified Health Plan (QHP) Survey web application supports the Enrollee Experience Survey system that assesses yearly, consumer experience with QHPs offered through a Health Insurance Exchange. It also requires public display of information by each Marketplace to allow individuals to assess enrollee experience among comparable plans.
- Role:** QHP Survey issuer
- Role Description:** Role assigned to survey issuers
- Reason for Request:** A large text input field with a character count of "0 / 600" at the bottom right.

At the bottom of the form, there are three buttons: a red "Cancel" button, a yellow "Back" button, and a green "Submit Role Request" button.

Figure 15: Role Request – Entering the Reason for Request

20. Enter a brief justification statement into this field to provide a justification for the role request.

21. Click the **Submit Role Request** button.

The Role Request page displays a Request ID and a message informing you that the request was successfully submitted.

Once you receive a confirmation email that the role request is approved, you will be able to Sign In to the QHP Enrollee Survey website.

Section 3: All QHP Issuers – Sign In to QHP Enrollee Survey Website

This section provides the steps that users must follow to sign in to the QHP Enrollee Survey website.

1. Navigate to <https://qhpsurvey.cms.gov/>.
The **Home** page (Figure 16) is displayed.

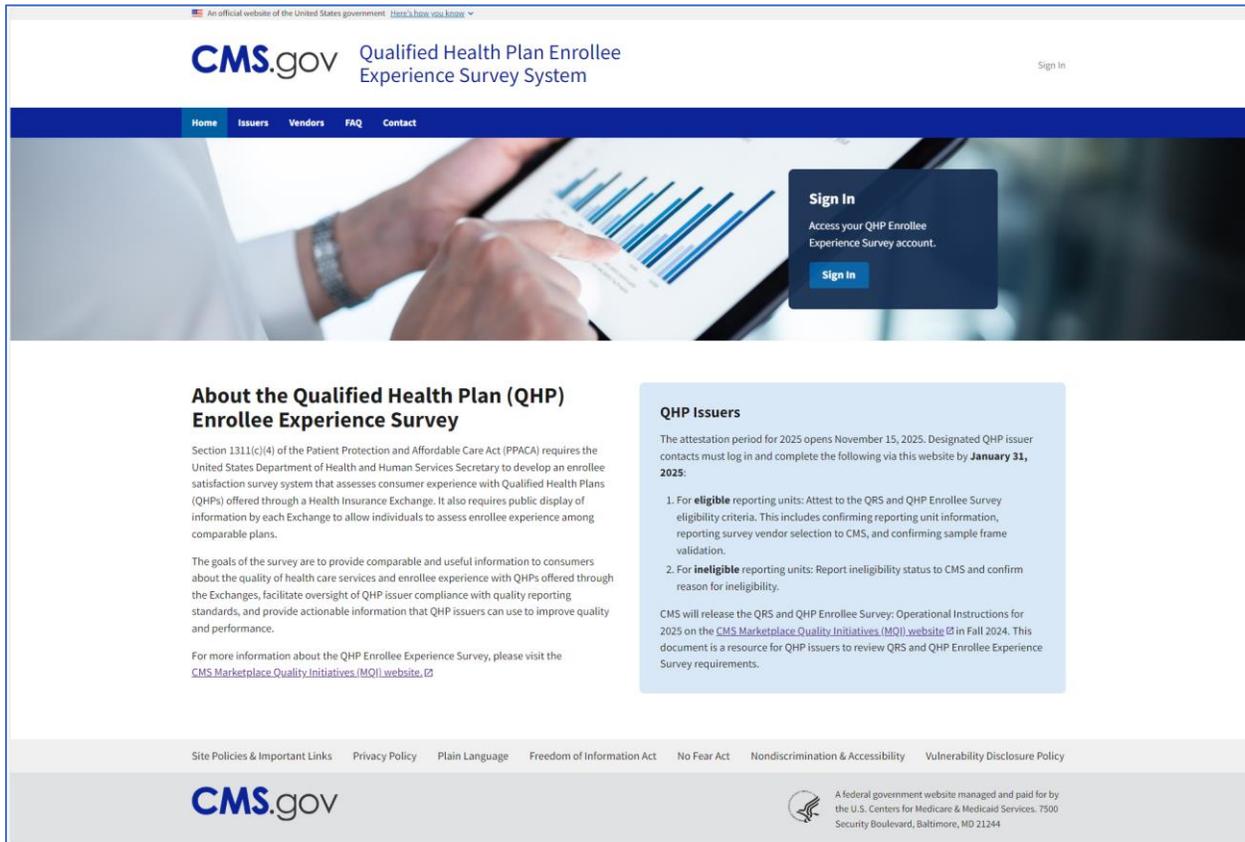


Figure 16: QHP ESS Website Home Page

2. Click on the **Sign in** button in the Sign In box or the Sign In link at the top right of the page to access your QHP Enrollee Survey website account.
The IDM **Sign In** page (Figure 17) appears.

CMS.gov | Identity Management

Sign In

User ID

Password

Agree to our [Terms & Conditions](#)

Sign In

OR

[CMS PIV Card Only](#)

PIV Users: To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login.

OR

[New User Registration](#)

[Forgot User ID](#)

[Forgot Password](#)

[Unlock Account](#)

[Need Help?](#)

Figure 17: CMS IDM Sign In Page

3. Enter your User ID and Password.
4. Click the check box to acknowledge agreement, then click the **Sign In** button.
5. Follow the directions for the chosen MFA factor (MFA device) and then click on the **Verify** button.

The Issuer Dashboard (Figure 18) with a view of the Issuer and Reporting Unit information is displayed.

The screenshot shows the CMS.gov Issuer Dashboard. At the top, it says "An official website of the United States government" and "Here's how you know". The CMS.gov logo is on the left, and "Qualified Health Plan Enrollee Experience Survey System" is in the center. A user profile for "Jane Smith" is on the right with a "Sign Out" link. A navigation bar includes "Home", "Issuers", "Vendors", "FAQ", "Contact", and "Dashboard" (which is highlighted).

The main content area is titled "Dashboard" and contains several panels:

- Authorized Contact:** Lists Jane Smith with email Jane.Smith@acme.com. It provides instructions on how to contact for changes or questions.
- Instructions:** Explains the 2025 Quality Rating System (QRS) and QHP Enrollee Survey Operational Instructions. It states that instructions are available on the CMS Marketplace Quality Initiatives (MQI) website. It details the process of reviewing instructions, preparing reporting units, and submitting data. It also notes that additional questions may appear based on responses and that reporting units must be marked as "Complete/Eligible" or "Complete/Ineligible".
- Reporting Units:** A table listing reporting units with columns for Reporting Unit, Issuer, Attestation Status, Authorized Vendor, and Ineligibility Reason.

Reporting Unit	Issuer	Attestation Status	Authorized Vendor	Ineligibility Reason
12345-FL-HMO	ACME HEALTHCARE OF FLORIDA, INC.	Not Started		
12345-ID-HMO	ACME HEALTHCARE OF IDAHO, INC.	Not Started		
12345-IL-HMO	ACME HEALTHCARE OF ILLINOIS, INC.	In Progress		
- CSV Reports:** A section for downloading reports, including a button for "Attestations Eligibility Vendor Selection Report".
- Note:** A light blue box containing important information:
 - Qualified Health Plan (QHP) Enrollee Experience Survey enrollee response data must be submitted for each product type offered through an Exchange for two consecutive years (i.e., 2024 and 2025) that had more than 500 enrollees as of **July 1, 2024**, and more than 500 enrollees as of **January 1, 2025**.
 - The minimum enrollment threshold is determined by the total number of enrollees within the reporting unit, not by the number of survey-eligible enrollees.
 - Reporting units discontinued before June 15 of the ratings year (i.e., June 15, 2025) are exempt from QHP Enrollee Experience Survey requirements. For an eligible reporting unit impacted by a QHP issuer change in ownership (e.g., merger, acquisition) effective as of January 1 of the ratings year, the QHP issuer that assumes the reporting unit is responsible for meeting these requirements.
 - The Centers for Medicare & Medicaid Services (CMS) will **not** accept voluntary data submissions for reporting units that do not meet eligibility criteria as defined above.

Figure 18: Issuer Dashboard – View of Issuer and Reporting Unit Information

- Under the Reporting Units panel, click on the arrow to the left of the Reporting Unit ID to view the attestation questions/prompts to attest to reporting unit eligibility or ineligibility. Follow the question prompts to verify all required information (for example, general information; enrollment status as of July 1, 2024; enrollment status as of January 1, 2025; year plan began

operating; operational status in 2023, 2024, and 2025; and whether the reporting unit will discontinue prior to June 15, 2025).

- After following the prompts and providing the requested information, eligible reporting units will be prompted with a drop-down menu to select the appropriate survey vendor (or ineligible reporting units will be prompted with a drop-down menu to select the appropriate ineligibility reason). Issuers will also be able to enter additional comments, if needed.

Reporting Units

Reporting Unit	Issuer	↑	Attestation Status	Authorized Vendor	Ineligibility Reason
18558-IA-EPO	BLUE CROSS AND BLUE SHIELD OF IOWA		In Progress		

Did this reporting unit operate on an Exchange in 2024?
 No Yes

Will this reporting unit operate on an Exchange in 2025?
 No Yes

Will this reporting unit operate on an Exchange as the exact same product type in 2025 as it did in 2024?
 No Yes

Will this reporting unit be discontinued prior to June 15, 2025?
 No Yes

Did this reporting unit have an enrollment status greater than 500 as of July 1, 2024?
This count includes all enrollees, not just survey eligible enrollees, from both SHOP and individual markets.
 No Yes

Please enter the total number of enrollees in the QHP associated with this reporting unit as of July 1, 2024.
This count should include all enrollees, not just survey eligible enrollees, for both SHOP and individual markets.

Does reporting unit have an enrollment status greater than 500 as of January 1, 2025 for the exact same product type?
This count should include all enrollees, not just survey eligible enrollees, from both SHOP and individual markets.
 No Yes

Please enter the total number of enrollees in the QHP associated with this reporting unit as of January 1, 2025.
This count should include all enrollees, not just survey eligible enrollees, from both SHOP and individual markets.

What was the first year this reporting unit was operational for the exact same product type?

Has this reporting unit has been operational for at least three years for the exact same product type?
See Exhibit 1 in the 2025 Operational Instructions for definitions of operational, not operational, and discontinued. This field asks whether this reporting unit has been operational on the Exchange in 2023, 2024, and 2025 for the exact same product type. It does not ask whether this reporting unit has reported or submitted QRS clinical measure data and QHP Enrollee Survey response data to CMS for three consecutive years.
 No Yes

Based on your selection, this reporting unit is eligible. Please confirm your Authorized Vendor: *

Figure 19: Issuer Dashboard – Attestation Questions/Prompts

- Click on the **Save** button to save your responses to all the attestation questions. If you click **Cancel**, the attestation questions will be returned to their last saved state.

The Attestation Status and Eligibility Status columns of the Reporting Unit table will be updated accordingly to reflect the current state of the attestation process for the corresponding Reporting Unit ID.

Issuers must select each reporting unit and follow the question prompts to verify all required information for each of the reporting units.

Issuers also have the ability to export the data in the Reporting Units data table to a csv file.

9. To download a CSV report that includes saved responses for all Issuers and Reporting Units associated to your login, click the **Attestations Eligibility Vendor Selection Report** button (Figure 20) towards the bottom of the Dashboard page.



Figure 20: Issuer Dashboard – Button to Download CSV Report

For any questions regarding the attestation process, please contact QHP_Survey@air.org. You may also find answers to some of the commonly asked questions related to account setup, QHP Enrollee Survey website access, or the attestation process under the **FAQ** tab of the [QHP Enrollee Survey website](#).