



Centers for Medicare & Medicaid Services

Qualified Health Plan Enrollee Experience Survey (QHP Enrollee Survey) Website Vendor User Guide

**Version 3
March 2025**

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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 & 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 Enrollee Survey vendors are required to sign in to the [QHP Enrollee Survey website](#) to perform the following activities by the deadline established by CMS:

- Submit at least one interim data file for testing purposes between April 9–11, 2025.
 - Vendors must submit at least one unencrypted test ZIP file containing files for two reporting units, including at least 100 records across the two reporting units.
 - The test period enables vendors and the QHP Enrollee Survey Project Team to test data submission protocols, confirm appropriate coding of survey variables, and make any necessary adjustments prior to the beginning of the data submission period.
- Submit all final data files between May 9–16, 2025, in accordance with the file specifications provided in the Code and Submit Data section of the *QHP Enrollee Survey: Technical Specifications for 2025*.
 - The final data files must include responses from mail surveys received through May 2, 2025.
 - If vendors are still fielding the survey after May 2, 2025, they must accept and process data for all mail surveys received through the end of the protocol.
- Correct any errors returned by the QHP Enrollee Survey Project Team and submit revised data files between May 19–21, 2025.

Vendors will be notified when registration opens to access the [QHP Enrollee Survey website](#) ahead of test data submission.

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

New vendor users must take the following steps to access the website:

1. Register an account in CMS's [Identity Management \(IDM\)](#) system. For detailed steps on how to register an account, see [Section 1](#) (*QHP Vendors Without an Existing IDM Account: Register a New User Account in CMS's IDM System*).
2. Request the QHP Survey Vendor role. For detailed steps on how to request the Vendor role, see [Section 2](#) (*QHP Vendors Without the QHP Enrollee Survey Role Assigned: Request the QHP Vendor Role*).

- After receiving a confirmation email that the role request is approved, vendors 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 Vendors: Sign In to QHP Enrollee Survey website*).

Vendors can find answers to the commonly asked questions related to account setup, QHP Enrollee Survey website access, or the data submission 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.

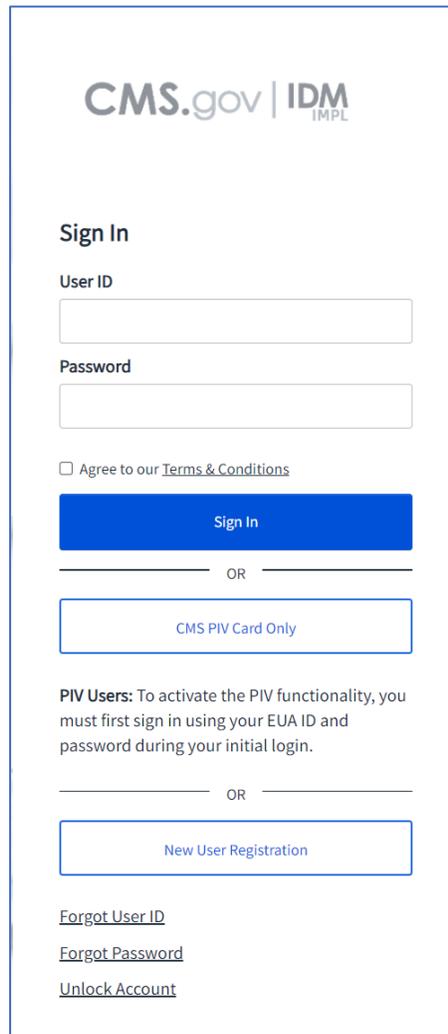
Section 1: QHP Vendors Without an Existing IDM Account – Register a New User Account in CMS’s Identity Management (IDM) System

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

Note: If you have registered in the 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.



CMS.gov | IDM
IMPL

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](#)

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. **Please use the e-mail address that was provided to the QHP Project Team ahead of data submission.**
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.

Section 2: QHP Vendors Without the QHP Enrollee Survey Vendor Role Assigned – Request the QHP Vendor Role

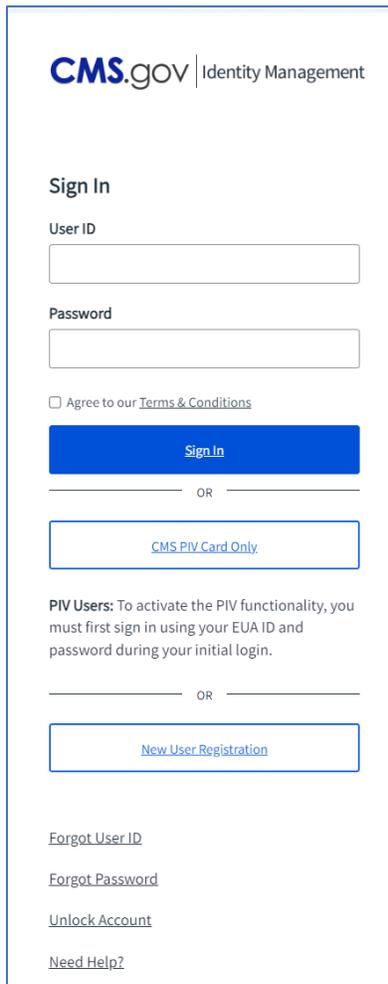
To access the Vendor Dashboard on the QHP Enrollee Survey website to upload data, vendors must request the “QHP Survey Vendor” role by signing into the CMS IDM system.

Note: If you already have the “QHP Survey Vendor” 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 Vendor 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 Vendor” role.

This section provides the steps that users must follow to sign into the IDM system to request the QHP Enrollee Survey Vendor 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" 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 section for "PIV Users" with a note: "To activate the PIV functionality, you must first sign in using your EUA ID and password during your initial login." Below this note is another horizontal line with "OR" in the center, followed by 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.

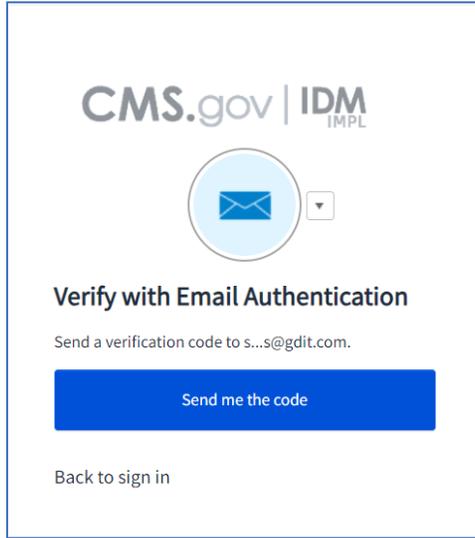


Figure 6: Verification Code Request

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).

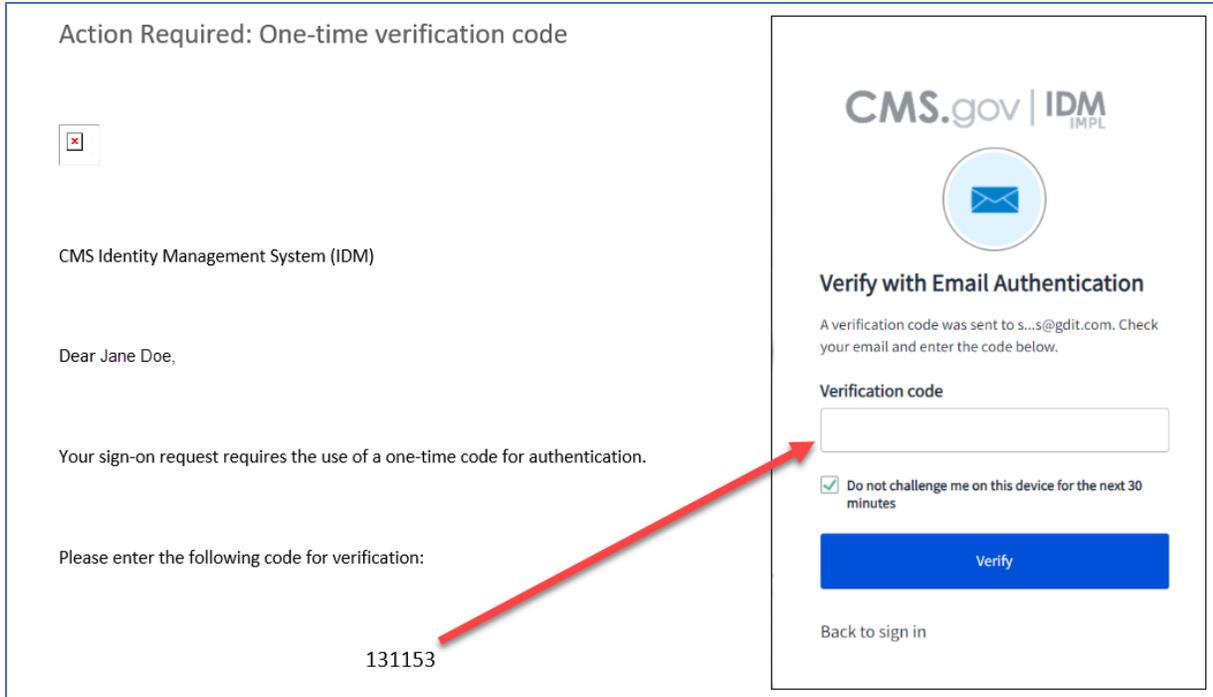


Figure 7: One-time Verification Code Email and the Verification Code Window

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

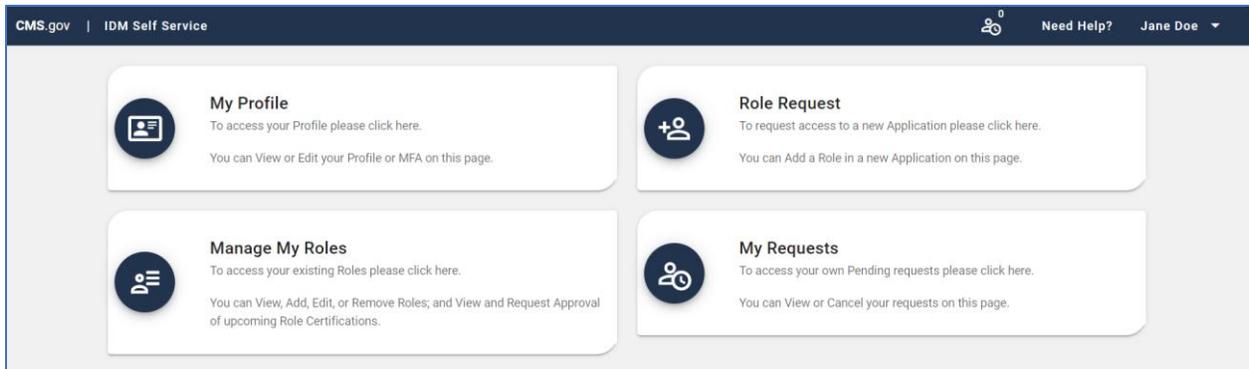


Figure 8: IDM Self Service Dashboard

- 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

- 10. From the **Select an Application** drop-down list (Figure 9), select the “Qualified Health Plan Enrollee Satisfaction Survey” application.
- 11. From the **Select a Role** drop-down list (Figure 10), select the “QHP Survey Vendor” role (Figure 11).

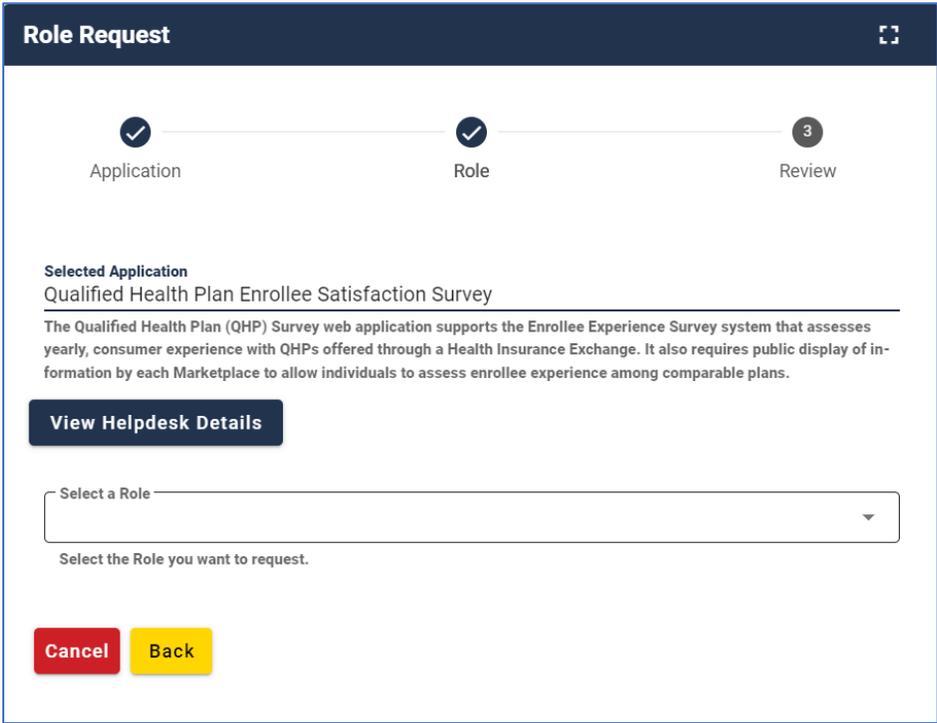


Figure 10: Role Request – Selecting the QHP Application

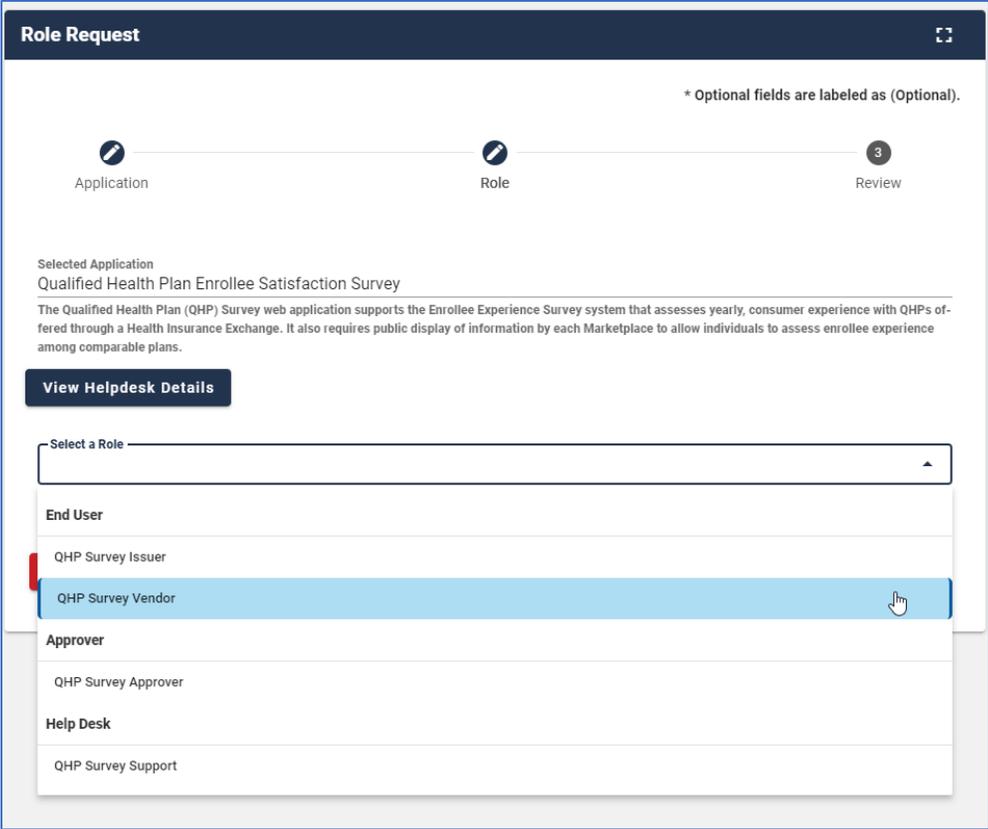


Figure 11: Role Request – Selecting the QHP Issuer Role

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

Role Request

Application ✓ Role ✓ RIDP ✓ Review 4

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 into the Social Security Number field. Note that this information is *not* stored in the CMS IDM 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 who 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 (Figure 14). Users receiving the error message 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 into the CMS 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 to inquire about the Manual Proofing process.

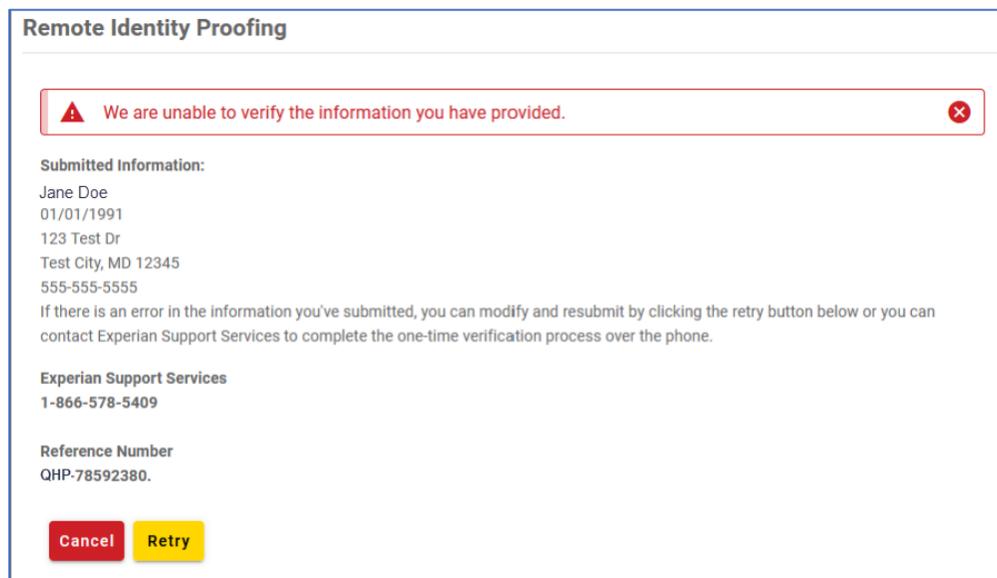


Figure 14: RIDP Online Proofing Error Message

Once the RIDP process is successfully completed, the Role Request page will display a text box titled "Reason for Request" (Figure 15).

Role Request

Application Role Review

Review

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 Vendor

Role Description: Role assigned to survey vendors

Reason for Request

0 / 600

Cancel Back **Submit Role Request**

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 Vendors – Sign In to QHP Enrollee Survey Website

This section provides the steps that vendor 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.

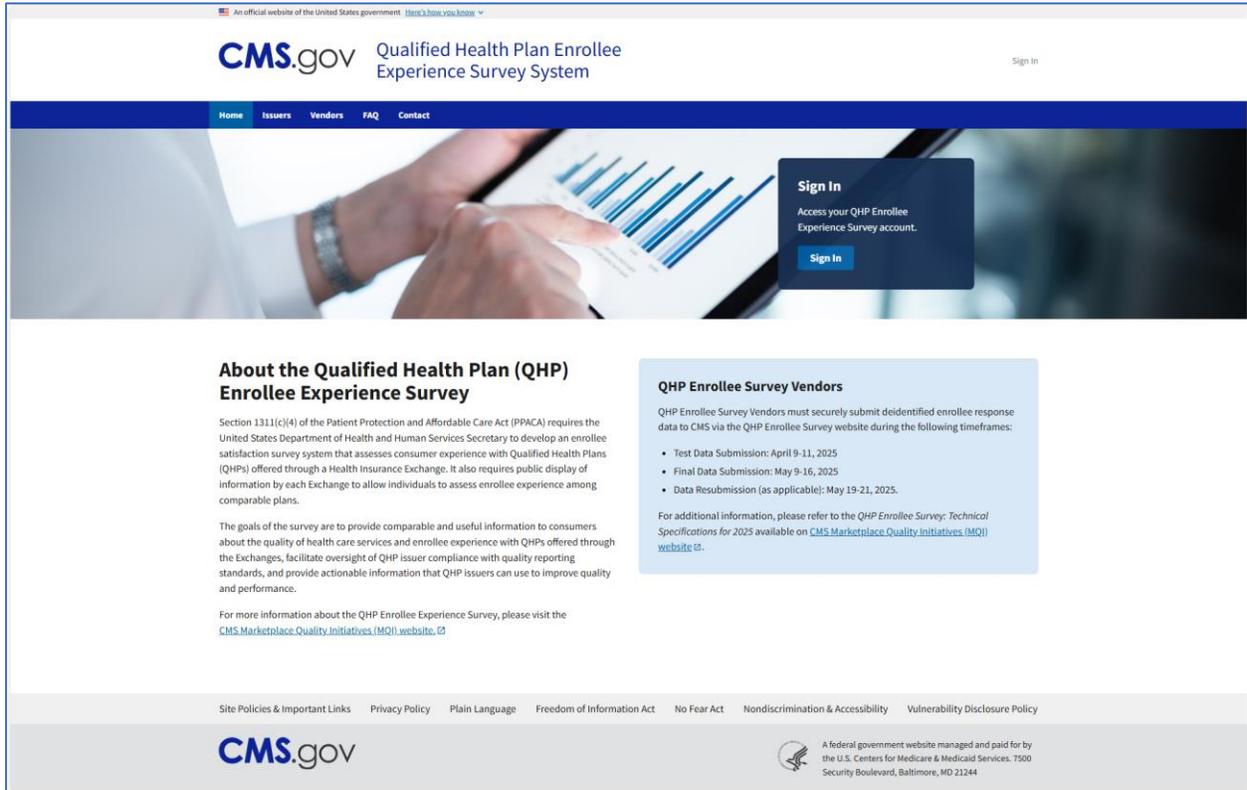


Figure 16: QHP ESS Website Home Page

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 **Vendor Dashboard** (Figure 18) will appear. This dashboard will display vendor contact information, an interface to upload survey files, and the ability to view uploaded vendor submissions.

The screenshot shows the Vendor Dashboard on the CMS.gov website. The dashboard is titled "Qualified Health Plan Enrollee Experience Survey System" and includes a navigation menu with links for Home, Issuers, Vendors, FAQ, Contact, and Dashboard. The main content area is divided into several sections:

- Vendor Information:** Displays contact information for the Test Vendor Company, including the name, email, and phone number.
- Upload TEST Survey File:** A section for uploading survey files. It includes a "File" field, a note that only CSV and ZIP files will be processed, a "Drag file here or" area, a "choose from folder" button, and "Upload" and "Cancel" buttons.
- Vendor Submissions:** A section containing a blue box with naming convention requirements for CSV and ZIP files. The CSV Files section states that CSV filenames must use the convention: <Reporting Unit ID>.csv. The ZIP Files section states that ZIP files should use the convention: <VendorName>_Submission_<Letter>.zip. For example, vendors should use <VendorName>_Submission_A.zip for the first ZIP file, <VendorName>_Submission_B.zip for the second ZIP file, and so on. A note at the bottom of this section says: "For technical assistance, please contact QHP_Survey@air.org."
- Survey CSV Files:** A section with a "Refresh" button and a message: "There are no records to display".
- Uploads:** A section with a message: "There are no records to display".
- CSV Report:** A section with a "Vendor Survey Submission Report" button and a message: "Report includes data for all uploaded CSV files for the current cycle."

The footer of the dashboard includes links for Site Policies & Important Links, Privacy Policy, Plain Language, Freedom of Information Act, No Fear Act, Nondiscrimination & Accessibility, and Vulnerability Disclosure Policy. The CMS.gov logo is also present in the footer.

Figure 18: Vendor Dashboard

- To upload survey files, review the naming convention requirements in the blue box. CSV files must use the following naming convention: <Reporting Unit-ID>.csv. Upload CSV files one at a time or upload multiple CSV files in a ZIP file. To assist with tracking multiple submissions, ZIP files should use the following naming convention: <VendorName>_Submission_<Letter>.<ZIP>. For example, vendors should use <VendorName>_Submission_A.<ZIP> for the first ZIP file, <VendorName>_Submission_B.<ZIP> for the second ZIP file, and so on.

Note: ZIP files must contain properly named CSV files. The Project Team will reject an entire ZIP file if any CSV files within the ZIP file violate the CSV naming convention.
- Uploaded files will appear in the Uploads pane. If you have uploaded a file that does not appear in the pane, please click Refresh.

Data submission files must include all variables specified in the Data Dictionary (Appendix G of the *QHP Enrollee Experience Survey: Technical Specifications for 2025*).

All data must be reported at the person level and include:

- All required variables associated with survey administration
- Final disposition codes and survey responses

All data included in the CSV files during data submission are considered final unless the Project Team requests revisions.

8. Initial validation results will be displayed on the vendor dashboard within the **Survey CSV Files** pane (Figure 19), which will show the following information:
 - Name of file
 - Status of submission (File Error, Pending/Failed/Passed Validation)
 - Submission type
 - Date submitted
9. Once the Analyst Review of the submitted files is complete, vendors will receive a notification indicating a change in file status:
 - Fail – Fatal discrepancies are identified; vendors must resubmit the failed data file within 3 business days.
 - Pass with Review – Warning discrepancies are identified; a review is required.

Vendors must confirm with the Project Team via email whether (a) the responses are marked appropriately or (b) the vendor plans to resubmit the file.
 - Pass – No further action is required.
10. All submitted survey files must pass this step by 11:59 p.m. ET on **May 16, 2025**. If the Project Team identifies errors, vendors will receive a Primary Data Validation Report and must resubmit data within 3 business days. All resubmissions must be received and accepted by 11:59 p.m. ET on **May 21, 2025**.

Dashboard

Vendor Information

Acme Health Services (AHS)

Contact:
Cassidy Shay
Email: cassidy.shay@gdit.com

For changes to contact information please contact us at QHP_Survey@air.org

Upload TEST Survey File

File *
Only CSV and ZIP files will be processed

Drag file here or
[choose from folder](#)

[Upload](#) [Cancel](#)

Vendor Submissions

CSV Files
CSV filenames must use the following naming convention:
<Reporting Unit ID>.csv.

ZIP Files
To assist with tracking multiple submissions, ZIP files should use the following naming convention:
<VendorName>_Submission_<Letter>.zip. For example, vendors should use <VendorName>_Submission_A.zip for the first ZIP file, <VendorName>_Submission_B.zip for the second ZIP file, and so on.
For technical assistance, please contact QHP_Survey@air.org.

Survey CSV Files

[Refresh](#)

Name	Status	Submission Type	Uploaded Date
> 12345-IA-PPQ.csv	Pending Validation	TEST	01/29/2024 12:10:51 PM EST
> 54321-IA-PPQ.csv	Pending Validation	TEST	01/29/2024 12:10:51 PM EST
> 99999-IA-PPQ.csv	Pending Validation	TEST	01/29/2024 12:10:51 PM EST

Rows per page: 25 | 1-3 of 3

Uploads

Name	Submission Type	Uploaded Date
GOOD_B.zip	TEST	01/29/2024 12:10:51 PM EST
BAD_A.zip	TEST	01/29/2024 11:52:27 AM EST
GOOD_B.zip	TEST	01/29/2024 11:51:33 AM EST
GOOD_B.zip	TEST	01/29/2024 11:33:57 AM EST
BAD_A.zip	TEST	01/29/2024 11:33:21 AM EST

Rows per page: 5 | 1-5 of 13

CSV Report

Report includes data for all uploaded CSV files for the current cycle.

[Vendor Survey Submission Report](#)

Figure 19: Vendor Dashboard Showing Sample Uploaded Files

11. To download a CSV report of your uploaded CSVs for the current upload period, click the **Vendor Survey Submission Report** button within the CSV Report pane (Figure 20).



Figure 20: Vendor Dashboard – Button to Download CSV Report

For any questions regarding the data submission 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](#).