

Health Plan Financial and Statistical Report (HPFSR) Data Submission Portal Instructions

2024

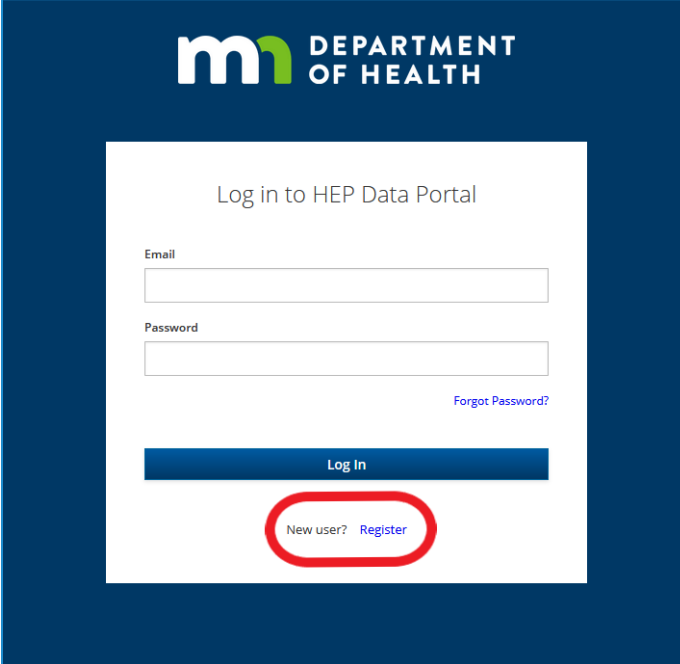
The Minnesota Department of Health, Health Economics Program (HEP) provides a secure portal for updating company demographics and contact information as well as submitting data and associated files. Please follow these instructions for registering and/or logging into the portal to submit the Health Plan Financial and Statistical Report (HPFSR).

Steps for registration

1. Save the completed HPFSR report file(s). Be sure the MDH assigned Health Plan ID is in cell D4 of the Company Information tab of the Excel file or in the file name of any PDF files.
 - a. The MDH Health Plan ID can be found on the reporting notification email or on the Health Plan ID tab of the Excel workbook.
 - b. Do NOT encrypt or password protect the Excel file.
 - c. Do not use the company's NAIC ID.
 - d. Contact MDH (see Tips below) if the company has not yet been assigned an MDH Health Plan ID.
2. Open a browser window and navigate to the [HEP Data Portal \(https://hepdataportalui.web.health.state.mn.us\)](https://hepdataportalui.web.health.state.mn.us).

HPFSR PORTAL INSTRUCTIONS

3. New users should click **Register** to create an account.



Log in to HEP Data Portal

Email

Password

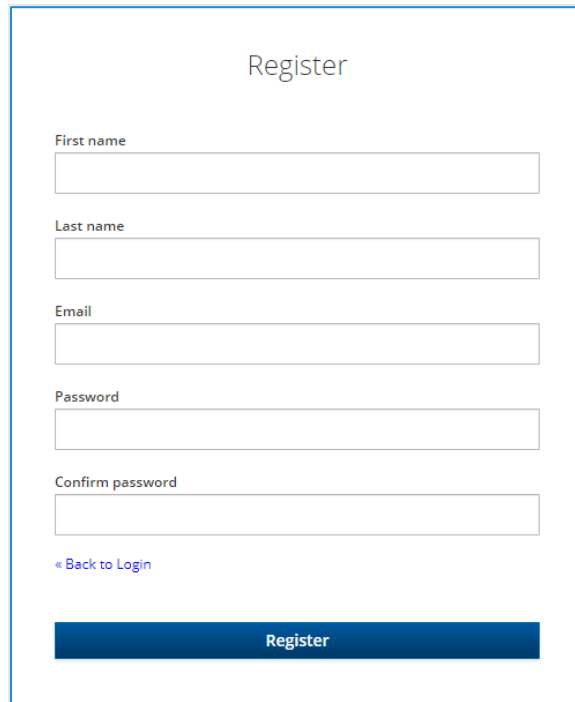
[Forgot Password?](#)

[Log In](#)

New user? [Register](#)

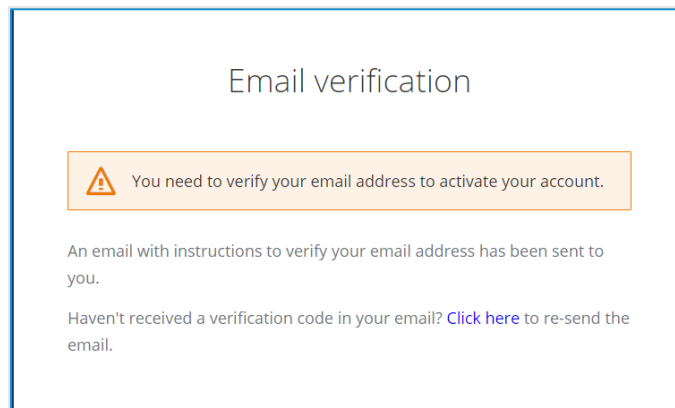
4. If registering a non-person email address, see Tips below before proceeding.
5. If you have logged into the portal before, enter your user ID (previously registered email address) and password, and then click **Log In**. Continue at step 14.
6. For new users, the following page will display after clicking the **Register** link. Enter First Name, Last Name, Email (user ID), Password, and Confirm Password.
 1. Passwords should be at least 12 characters and contain the following:
 - a. An upper case letter
 - b. A lower case letter
 - c. A number
 - d. A special character (ex: & % * \$!)

7. Click **Register**.



The screenshot shows a registration form titled "Register". It contains five input fields: "First name", "Last name", "Email", "Password", and "Confirm password". Below the "Confirm password" field is a blue link that says "← Back to Login". At the bottom of the form is a dark blue button with the text "Register" in white.

8. The initial registration will require a one-time email verification.



The screenshot shows an "Email verification" page. At the top, it says "Email verification". Below that is a warning box with an orange border and a warning icon (a triangle with an exclamation mark). The text inside the warning box says: "You need to verify your email address to activate your account." Below the warning box, there is a paragraph: "An email with instructions to verify your email address has been sent to you." Below that is another paragraph: "Haven't received a verification code in your email? [Click here](#) to re-send the email."

9. Navigate to the user ID email account and open the email with subject line, "Verify Email."

10. Click **Link to Email Address Verification**.

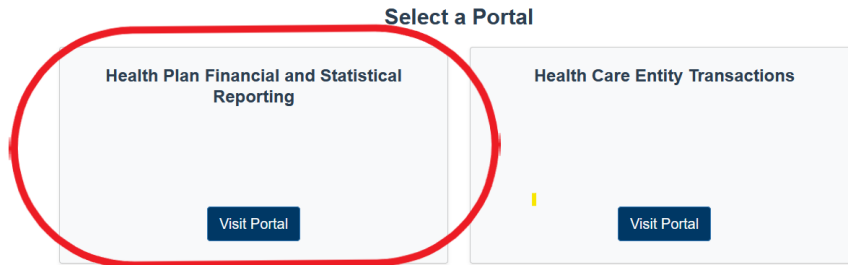
11. At the window that says, "Confirm validity of email address...", go to **Click here to proceed**.

12. At the "Your email address has been verified" window, click **Back to Application**.

13. Enter your User ID Email and Password, and then click **Log In**.

HPFSR PORTAL INSTRUCTIONS

14. You will now be prompted to select a portal. Choose the **Health Plan Financial and Statistical Reporting**.



15. You will now be logged into your secure portal **Dashboard**.

16. We strongly recommend reading the **User Tips** linked at the top of your screen.

17. At your Dashboard screen click **Continue**.

18. Search for your company using your Health Plan ID, NAIC number, or partial or full company name.

19. Choose your plan and click **Confirm**.

20. At the Health Plan Demographics screen add or update any relevant demographics for your company. Note that a mailing address is required. Click **Save** and then **Next**.

21. At the Contact Information screen, you must first **select an action** for the Preparer before the editing option, if needed, is available.

The image shows a 'Preparer' screen with a header 'Preparer'. Below the header, there are two fields: 'Health Plan ID: 99521' and 'Company Name: Insurance Company'. At the bottom, there is a dropdown menu with the text 'Select an action for this contact:' and a downward arrow.

Actions include:

No changes

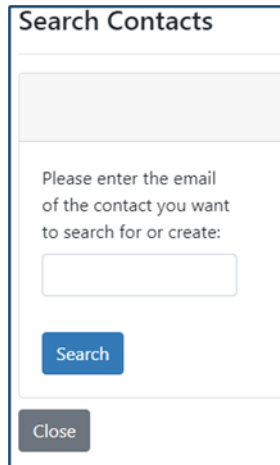
Edit [Preparer Name]

Search for a preparer

Add a new preparer

22. If choosing to search for or add a new preparer enter the email address.

HPFSR PORTAL INSTRUCTIONS



Search Contacts

Please enter the email of the contact you want to search for or create:

Search

Close

23. If the contact is already in the data base you will be prompted to select them and can further edit as needed. If not, you will return to the Contact screen to enter the new preparer's information.
24. Courtesy Contacts (up to two) are optional. Either the prior years' information will populate for editing or the prompt for adding a contact will appear.

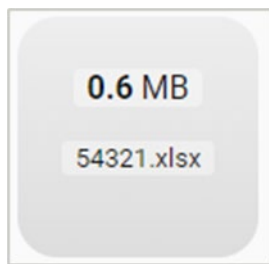
Add Courtesy Contact 1
(Optional)

25. When the preparer's information and any optional courtesy contact information is final click **Save** then **Next** to go to the File Upload screen.
26. Click **Please Select File** to open a file explorer window to navigate to and select file(s) to be uploaded. Use the **Ctrl** key on the keyboard to select multiple files.

Or open a Windows Explorer window, navigate to, and select the file(s) to be uploaded then drag them to the **Please Select File** section of the portal.

27. The uploaded file(s) will appear as shown. A white circle with a checkmark, like a watermark, will briefly appear and then disappear once the file has successfully uploaded. There will also be text noting a successful upload.

Completed. Please check the results below:
The following file(s) uploaded successfully:
54321.xlsx;



28. If there is a problem with the file and it is not successfully uploaded, a message will display noting the reason it was unsuccessful and the name of the file.
29. Check the file size (max 2MB), type (PDF or Excel only), and/or ID (MDH Health Plan ID must be in cell D4 of the Company Information tab). Contact MDH for further help.

The following file(s) NOT uploaded due to
Invalid plan ID:
test for upload 99521.xlsx;

30. Click **Home** to return to the **Upload file** link.
31. Click **Log out** link to end the session and log out.
32. You may return to the portal to upload additional files as needed.

Tips

- When registering a non-person email account that may be used by multiple staff or for multiple affiliated companies it is helpful to use generic registration information in lieu of one individual's information and document the login fields internally. For example:
 - First Name: Acme
 - Last Name: Insurance
 - Email: statutoryreporting@acmecompany.com
 - Password: [document the password internally for access by multiple users]

HPFSR PORTAL INSTRUCTIONS

- Forgotten passwords can be re-set by following the prompts on the login in page.
- Files cannot be downloaded from this portal.
- For questions, please contact MDH staff at health.drmreport@state.mn.us or 651-201-3572.

Minnesota Department of Health
625 Robert St
PO Box 64975
St. Paul, MN 55164-0975
health.drmreport@state.mn.us
www.health.state.mn.us

12/23/2024

To obtain this information in a different format, call: 651-201-4520.