2022

Health Plan Financial and Statistical Report

(HPFSR)

Health Economics Program

Data Submission Portal

Instructions

Health Economics Program
Division of Health Policy
Minnesota Department of Health

The Minnesota Department of Health, Health Economics Program (HEP) is now providing a secure portal for updating company demographics and contact information as well as uploading reports 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). Note that Internet Explorer is not recommended. Please choose another browser.

1. Save the completed HFPSR Excel report file(s) using the MDH assigned Health Plan ID in the file name if possible.
   a. Do NOT encrypt or password protect the Excel file.
   b. Do not use the company's NAIC ID.
   c. The MDH Health Plan ID can be found on the reporting notification email or on the 'Health Plan ID' tab of the Excel workbook.
   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 https://hepdataportalui.web.health.state.mn.us.
3. New users should click 'Register' to create an account.
4. If registering a non-person email address, see the important tips below before proceeding.
5. If you have logged into the portal before, enter your user ID (previously registered email address) and password 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.
   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: & % * $!)

Register

First name

Last name

Email

Password

Confirm password

« Back to Login

Register

7. Click 'Register'.
8. The initial registration will require a one-time email verification.

Email verification

⚠ You need to verify your email address to activate your account.

An email with instructions to verify your email address has been sent to you.

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.
14. You will now be logged into your secure portal Dashboard.
15. We strongly recommend reading the User Tips linked at the top of your screen.
16. At your Dashboard Home screen click 'Continue'.
17. Search for your company using your Health Plan ID, NAIC number, or partial or full company name.
18. Choose your plan and confirm.
19. 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'.
20. At the Contact Information screen you must first select an action for the Preparer before editing, if needed, is available.

Preparer

Health Plan ID: 99521   Company Name: Insurance Company

Select an action for this contact: [dropdown ⌄]

Actions include:
    No changes
    Edit [Preparer Name]
    Search for a preparer
    Add a new preparer

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

Search Contacts

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

[   ]

[Search]

[Close]

22. 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.
23. 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)

24. When the preparer's information and any optional courtesy contact information is final click 'Next' to go to the File Upload screen.
25. 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 and drag them to the 'Please Select File' section of the portal.

26. The uploaded file(s) will appear as shown. A white circle with a checkmark similar to 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;

0.6 MB

54321.xlsx
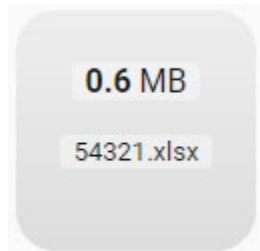
27. If there is a problem with the file and it is not successfully uploaded, a message will display noting the reason it was unsuccessful and the name of the file.

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

28. Click 'Home' to return to the 'Upload file' link.
29. Click 'Log out' link to end the session and log out.
30. 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]
- If the file being submitted is an update to the original report it is helpful to include a version or date along with the ID in the file name.
- 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 or 651-238-1968.