

Evolve 2026 Carrier Kickoff

Thursday, September 5, 2024



Agenda

1.	Introduction to Evolve 2026	BeWell
2.	BeWell Introductions	BeWell
3.	GetInsured Introductions	GetInsured
4.	Transition Overview	BeWell
5.	Overview of Onboarding Process	GetInsured
6.	Timeline Review	GetInsured
7.	834 and RCNI Updates for Carriers	GetInsured
8.	EDI Testing Overview	GetInsured
9.	Documentation Overview	GetInsured
10.	Next Steps and Questions	BeWell





BeWell Team Introductions

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BeWell Team



Introductions



Jason Sparks VP, Implementation



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Kathryn Sullivan Carrier Ops Advisor



Janis Sachtjen Senior Product Manager, EDI & Recon



Kristen Stoll Carrier Operations Lead



Karthik Mruthyunjayan Senior Software Engineer

GetInsured Carrier Onboarding Team

Transition Overview



BeWell is transitioning system vendors to GetInsured beginning with Open Enrollment for Plan Year 2026 (October 2025 go-live). The transition project is named Evolve 2026.

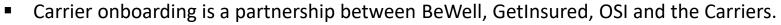
This presentation outlines the impact to carriers and onboarding plan for PY 2026.

Key Changes for Carriers

- Carriers will receive EDI files from GetInsured beginning in October 2025 for Plan Year 2026 coverage.
- Carriers will now manage premium billing for PY 2026 coverage, not BeWell.
- Carriers will continue to receive EDI files from the existing vendor for Plan Year 2025 coverage.
- There will be an overlap period from October 2025 Mid-2026 when carriers will receive files from both systems due to retroactive Plan Year 2025 changes
- 834 and RCNI specifications will change for carriers.
- Carriers will have access to a "PayNow" functionality.
- Carriers will have access to all enrollments in a Carrier-specific Portal.
- Dedicated Agents in the CEC to provide Carrier Support.

Overview of Onboarding Process





- Successful onboarding requires a shared commitment to open and frequent communication.
- We will provide Carriers with the resources needed to be successful: Documentation, Access to the GetInsured onboarding team, technology support, and a testing environment.

Activity	Responsible	Consulted	Informed
Share 834 Companion Guide, Reconciliation Guide, and all other documentation	BeWell	GetInsured	Carriers
Premium billing transition	BeWell/Carriers	Optum/NFP	GetInsured
Ask questions about companion guide and reconciliation guide	Carriers	GetInsured	BeWell
Share EDI test plans and testing documentation	GetInsured	Carriers	BeWell
Ask questions about EDI test plans	Carriers	GetInsured	BeWell
EDI connectivity testing	GetInsured/Carriers	BeWell	BeWell
Execute EDI 834 Testing	GetInsured/Carriers	BeWell	BeWell
Reconciliation Testing	GetInsured/Carriers	BeWell	BeWell
PayNow Testing	GetInsured/Carriers	BeWell	BeWell
Provider Directory Testing	GetInsured/Carriers	BeWell	BeWell
Load production plan data via SERFF	OSI/BeWell	GetInsured	Carriers
Verify plan and rate data in production	Carriers/BeWell	GetInsured	GetInsured

Timeline: High-Level Summary



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The Key Activities for Carrier Onboarding are provided below. The subsequent sections will detail all activities and key deadlines.

Phase	Key Activities	Dates
Kickoff and Preparation	 Technical, Testing, and Admin documentation provided to Carriers Carriers update their system according to the Companion Guide Weekly 1:1 Meetings with Carriers are initiated Premium billing transition planning discussions 	September 2024 – May 2025
Environment Setup	 Carriers Return Admin Forms and Rate data for Testing SFTP Connectivity Test Carrier Portal Access for Carriers Rate Data Loaded into Test Environment 	February – April 2025
EDI Testing	 EDI 834 Testing EDI Reconciliation Testing Self-Service PayNow Integration Testing 	May – September 2025
Production Readiness	 Carriers provide production SFTP setup and Carrier Profile forms Carrier Profiles created in production and credentials provided Production SFTP Access and Connectivity Test 	June – July 2025
Plan Management	 Carriers provide final plan and rate data Plan and rate data is loaded to system directly from SERFF Carriers and BeWell validate plan and rate data in production Carrier Provider Directory Testing 	August – November 2025





Timeline: Kickoff and Environment Setup

Activity	Start Date	End Date	Responsible Party
Kickoff and Preparation	n		
Carrier/BeWell/GetInsured Kickoff Meeting	Sept 2024	Sept 2024	BeWell
Baseline GetInsured 834 Companion Guide and RCNI Guide Shared with Carriers	Sept 2024	Sept 2024	BeWell
NM-specific 834 and RCNI Documentation Shared with Carriers	Sept 2024	Oct 2024	BeWell
Carriers confirm ability to align with new system's EDI by May 2025 after receipt and review of NM-specific documentation	Sept 2024	Oct 2024	Carriers
Identify key questions related to premium billing transition	Fri 9/27/24	Fri 9/27/24	Carriers
Carriers update their systems according to Companion Guide	Sept 2024	May 2025	Carriers
Biweekly 1:1 Meetings with Carriers initiated	Oct 2024	Oct 2024	GetInsured
Test Environment Setu	p		
Carrier Return Admin Forms and Testing Rate Data	Feb 2025	March 2025	Carriers
Carrier Portal IP Address Whitelisting	March 2025	April 2025	GetInsured
SFTP IP Address Allowlisting + SFTP Credential Creation	March 2025	April 2025	GetInsured
Setup Carrier Profiles in Carrier QA Environment & Provide Credentials	May 2025	May 2025	GetInsured
Load Rate Data into Test Environment	May 2025	May 2025	GetInsured
Carriers complete SFTP connectivity test in Carrier QA	May 2025	May 2025	Carriers/GetInsured
Carriers review rate data in test environment	May 2025	May 2025	Carriers





Timeline: EDI Testing

Activity	Start Date	End Date	Responsible Party
EDI Testing			
EDI Test Case Generation	May 2025	May 2025	GetInsured
Carrier EDI Testing	June 2025	July 2025	Carriers/GetInsured
Provider Directory Testing	July 2025	August 2025	Carriers/GetInsured
Carrier RCNI Testing	August 2025	August 2025	Carriers/GetInsured
PayNow Configuration and Carrier Self-Service Testing	August 2025	August 2025	Carriers/GetInsured
Test Scenario Sign-Off and Go/No-Go	September 2025	September 2025	BeWell

Timeline: Production Readiness and Plan Management





Activity	Start Date	End Date	Responsible Party
Production Readiness			
Provide production SFTP and Carrier Profile Admin Forms to Carriers	July 2025	July 2025	GetInsured
Carriers return production SFTP and Carrier Profile Form	July 2025	July 2025	Carriers
Set up Carrier Profiles in production & Provide Credentials	August 2025	August 2025	BeWell
Certify Carriers on platform	August 2025	August 2025	BeWell
SFTP IP Address Whitelisting + SFTP Credential Creation	September 2025	September 2025	GetInsured
Carriers complete SFTP connectivity test in production	September 2025	September 2025	Carriers/GetInsured
BeWell and GetInsured provide Ticketing System and Operational Training	September 2025	October 2025	BeWell/GetInsured
Carriers receive access to Enrollment and Ticketing System Portal	October 2025	October 2025	GetInsured
Plan Management			
GetInsured connects to production SERFF environment	July 2025	July 2025	GetInsured
Carriers provide final plan data to SERFF	August 2025	August 2025	Carriers
Plan and rate data is loaded to system directly from SERFF	August 2025	August 2025	BeWell/OSI
Carriers and BeWell validate plan and rate data in production	August 2025	September 2025	Carriers/BeWell
Carriers provide final Provider Directory Data	August 2025	September 2025	Carriers
Carrier Production Provider Directory Testing	September 2025	September 2025	GetInsured/Carriers

Timeline: Production Readiness and Plan Management





Activity	Start Date	End Date	Responsible Party
Operational Readiness			
CEC Launch	Oct 2025	Oct 2025	BeWell
Anonymous Shopping for PY 2026 Begins	Oct 2025	Oct 2025	BeWell
Open Enrollment Period	November 1, 2025	January 15, 2026	BeWell
Open Enrollment Deadline for 1/1/26 Coverage	December 31, 2025	December 31, 2025	BeWell
Open Enrollment Deadline for 2/1/26 Coverage	January 15, 2026	January 15, 2026	BeWell
Open Enrollment Ends	January 15, 2026	January 15, 2026	BeWell
Data Migration and Auto-Renewals			
Auto-Renewals Sent to Carriers	October 2025	October 2025	GetInsured
Daily 834 Files from GetInsured begin for PY 2026	November 2025	November 2025	GetInsured
Catch Up Auto-Renewals Sent to Carriers	November 2025	December 2025	GetInsured



834 Changes Overview

GetInsured will begin transacting EDI files with carriers beginning in Plan Year 2026.

- GetInsured has a standard 834 Companion Guide and Reconciliation Guide that will be shared with carriers following this meeting.
- There will be New Mexico-specific changes to these specifications that will be provided separately this fall.
- GetInsured will also be sharing a document outlining the differences between the current 834 and RCNI implementation and the future 834 and RCNI implementation.

Request for carriers to confirm their ability to align with new system's EDI for May 2025 Testing after the full documentation is provided this fall.





EDI Testing Overview

Activity	Purpose	Dates
Connectivity Testing	Carriers confirm the ability to send, receive, and delete files in the test SFTP server.	May 2025
834 Testing	Carriers complete 14 – 17 test cases to validate their ability to send and receive 834, TA1, and 999 transactions.	June – July 2025
RCNI Testing	Carriers transmit a test RCNI file with the enrollment data stored from the 834 test cases. The Exchange returns a discrepancy report to flag any enrollment errors in the RCNI file.	August 2025
PayNow Testing	Carriers configure and test their PayNow integration in their Carrier Portal via Self- Service.	August 2025

Connectivity Testing Overview



Carriers will complete an SFTP Connectivity Test in the Carrier QA environment prior to beginning 834 testing.

SFTP Folder Structure

- \succ /in: Transactions from Carriers \rightarrow NM
- \succ /out: Transactions from NM \rightarrow Carriers

Connectivity Test Steps

The purpose of the connectivity test is to confirm that Carriers have read, write, and delete capabilities in the Carrier QA environment.

- 1. GetInsured drops a "readme.txt" file to the /out folder of the Carrier's SFTP
- 2. Carriers delete the text file from the /out folder and move the text folder to the /in folder

EDI Testing Overview: 834 Testing Evolve 2026

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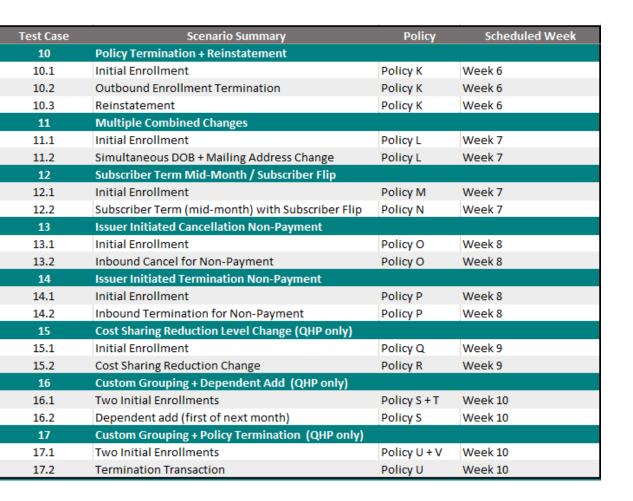
The 834 test plan provides multiple scenarios to ensure carriers are prepared for production. Transactions tested include:

- Initial Enrollment
- Child-Only Initial Enrollment
- Broker Change
- APTC Change
- Plan Change (Product Change)
- Dependent Add Mid-Month
- Dependent Term
- Dependent Re-Enrollment
- Dependent Term Mid-Month
- Parent Add to Child-Only Initial Enrollment
- Effective Date Change prospective
- Effective Date Change retroactive
- Policy Termination
- Policy Reinstatement
- Multiple Combined Demographic Changes
- Subscriber Mid-Month Term
- Subscriber Flip
- Carrier-initiated Nonpay Cancel
- Carrier-initiated Nonpay Term
- CSR Variant Level Change (QHP Only)
- Custom Grouping (QHP Only)

Test Case	Scenario Summary	Policy	Scheduled Week	Dates
1	Broker Designation Change			
1.1	Initial Enrollment	Policy A	Week 1	5/30 - 6/2
1.2	Broker Change	Policy A	Week 1	5/30 - 6/2
2	Prospective APTC Change			
2.1	Initial Enrollment	Policy B	Week 2	6/5 - 6/9
2.2	APTC Change	Policy B	Week 2	6/5 - 6/9
3	Plan Change (Product Change)			
3.1	Initial Enrollment	Policy C	Week 2	6/5 - 6/9
3.2	Plan Change	Policy D	Week 2	6/5 - 6/9
4	Dependent Add Mid-Month			
4.1	Initial Enrollment	Policy E	Week 3	6/12 - 6/16
4.2	Dependent Add (mid-month)	Policy E	Week 3	6/12 - 6/16
5	Dependent Term + Reenrollment			
5.1	Initial Enrollment	Policy F	Week 3	6/12 - 6/16
5.2	Dependent Term	Policy F	Week 3	6/12 - 6/16
5.3	Re-enrollment of Dependent	Policy F	Week 3	6/12 - 6/16
6	Dependent Term Mid-Month			
6.1	Initial Enrollment	Policy G	Week 4	6/19 - 6/23
6.2	Dependent Term	Policy G	Week 4	6/19 - 6/23
7	Child-Only Enrollment + Parent Add			
7.1	Child-Only Initial Enrollment	Policy H	Week 4	6/19 - 6/23
7.2	Parent Add to Child-Only Enrollment	Policy H	Week 4	6/19 - 6/23
8	Prospective Effective Date Change			
8.1	Initial Enrollment	Policy I	Week 5	6/26 - 6/30
8.2	Coverage Effective Date Change (prospective)	Policy I	Week 5	6/26 - 6/30
9	Retroactive Effective Date Change			
9.1	Initial Enrollment	Policy J	Week 5	6/26 - 6/30
9.2	Coverage Effective Date Change (retroactive)	Policy J	Week 5	6/26 - 6/30
10	Policy Termination + Reinstatement			
10.1	Initial Enrollment	Policy K	Week 6	7/3 - 7/7
10.2	Outbound Enrollment Termination	Policy K	Week 6	7/3 - 7/7
10.3	Reinstatement	Policy K	Week 6	7/3 - 7/7

EDI Testing Overview: 834 Transaction Testing

Test Case	Scenario Summary	Policy	Scheduled Week
1	Broker Designation Change		
1.1	Initial Enrollment	Policy A	Week 1
1.2	Broker Change	Policy A	Week 1
2	Prospective APTC Change		
2.1	Initial Enrollment	Policy B	Week 2
2.2	APTC Change	Policy B	Week 2
3	Plan Change (Product Change)		
3.1	Initial Enrollment	Policy C	Week 2
3.2	Plan Change	Policy D	Week 2
4	Dependent Add Mid-Month		
4.1	Initial Enrollment	Policy E	Week 3
4.2	Dependent Add (mid-month)	Policy E	Week 3
5	Dependent Term + Reenrollment		
5.1	Initial Enrollment	Policy F	Week 3
5.2	Dependent Term	Policy F	Week 3
5.3	Re-enrollment of Dependent	Policy F	Week 3
6	Dependent Term Mid-Month		
6.1	Initial Enrollment	Policy G	Week 4
6.2	Dependent Term	Policy G	Week 4
7	Child-Only Enrollment + Parent Add		
7.1	Child-Only Initial Enrollment	Policy H	Week 4
7.2	Parent Add to Child-Only Enrollment	Policy H	Week 4
8	Prospective Effective Date Change		
8.1	Initial Enrollment	Policy I	Week 5
8.2	Coverage Effective Date Change (prospective)	Policy I	Week 5
9	Retroactive Effective Date Change		
9.1	Initial Enrollment	Policy J	Week 5
9.2	Coverage Effective Date Change (retroactive)	Policy J	Week 5



RCNI and PayNow Testing Overview



RCNI Testing

- Carriers will transmit a test RCNI file using the data from Scenarios 1 17 (QHP) or Scenarios 1 14 (QDP) at the conclusion of the EDI 834 testing.
- GetInsured will return a discrepancy report based on the data.
- The RCNI Testing ensures Carriers are transmitting correctly formatted RCNI files and provides an additional check that the 834 transactions were processed correctly.

PayNow Integration Testing

- PayNow Integration testing is available via self-service for carriers.
- Carriers can configure their PayNow settings in their Carrier Portal and trigger a test SAML transaction based on the configurations.

Test Case	Scenario Summary	Policy	Scheduled Week
18	RCNI Testing		
18.1	RCNI File	N/A	Week 11 - Week 14
18.2	Discrepancy report	N/A	Week 11 - Week 14
19	PayNow Testing		
19.1	Self-service PayNow Integration Setup	N/A	Week 11 - Week 14

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The following slides describe the EDI, Reconciliation, Admin, and Testing documentation that will be provided to Carriers. The documentation is divided into the following sections:

Technical Documentation

- GetInsured 834 Companion Guide
- □ Exchange-Issuer Reconciliation Guide
- PayNow Redirect Test Harness
- BeWell 834 and Reconciliation

Configurations

- GetInsured EDI vs BeWell EDI
 Differences
- □ Use Cases the 2750 loops address
- Machine Readable Data Provider Directory Template

Testing Documentation

- EDI Test Plan
- □ EDI Testing Tracker
- **D** EDI Testing Word Doc Overview

Testing Admin Forms

- □ SFTP Request Form
- Carrier Profile Form
- PayNow Setup Form





Document	Description
834 Companion Guide	The Companion Guide outlines the EDI requirements for the State Based Exchange platform. This includes 834, TA1, and 999 transactions. The documentation includes requirements for the segments of each transaction as well as sample transactions for the major transaction types.
Exchange-Issuer Reconciliation Guide	The Exchange-Issuer Reconciliation Guide outlines the reconciliation process for the Exchange platform. The Exchange system leverages the FFM RCNI file approach. The document includes the specifications for the RCNI file and the discrepancy report as well as any variations between the FFM RCNI layout and the State RCNI layout.
PayNow Redirect Test Harness	The PayNow Redirect Test Harness provides an overview of the PayNow Redirect service to Carriers, the SAML attributes of the transaction, and a walkthrough of how to set up this feature in the production environment. This document also includes the IP Addresses that Carriers need to whitelist if they will be testing PayNow in the test environment instead of production (not common).
BeWell HBE 834 and Reconciliation Configurations	The 834 Companion Guide and Reconciliation Guide identify a small number of attributes that are configurable by state. The Configuration Guide is state-specific and outlines the EDI and RCNI configurations for the implementation.
GetInsured EDI vs NM EDI Differences	The GetInsured 834 and RCNI specifications closely mirror the FFM and existing NM EDI specifications. This document outlines the 834 and RCNI specifications for the GetInsured SBE platform that differ from the current NM EDI implementation.
Use Cases the 2750 loops address	The GetInsured SBE platform includes a customized 2750 loop in 834 files to provide Carriers an insight into financial spans throughout the year. This document provides detailed use cases addressed by the custom 2750 loops. The document includes general rules for the standard and custom 2750 loops, description of the creation of enrollment segments, and detailed use case examples.

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Document	Description
SFTP Request Form	Form for Carriers to input the details required to establish their SFTP to connect to the GetInsured system. A separate form is provided for the test and production environments. Information requested includes the carrier's name, HIOS ID, Tax ID, IP Addresses to be whitelisted, and the Carrier Point of Contact for SFTP support.
Carrier Profile Form	Form for Carriers to input their details to establish their Carrier Profile in the GetInsured portal. This form includes general carrier details required to set up the Carrier in the test environment as well as a section to provide Carrier Representative contact information. For the test environment Carrier Profile setup form, an additional tab called "EDI Testing Contacts" is included to collect the testing point of contact information. This includes the following: Note: The Carrier Representative Contact information includes a phone number. Carriers must list a phone number that accepts text messages in order to complete the account registration process.
PayNow Setup Form	Form for Carriers to input their PayNow integration setup details. Information collected includes their URL for the Payment Redirect Portal, IP Address for the Payment Redirect URL in the test environment, and a technical point of contact for PayNow integration. Note: Production testing of PayNow does not require IP Address whitelisting, so a separate form is not required for production.





Document	Description
EDI Testing Plan	Excel document with EDI test plan with a summary and detailed tab. The summary tab includes all test cases with the weeks when they will be completed. The detailed tab includes the steps to process each case, the expected outcomes, and the transactions required for each step.
EDI Testing Tracker	Excel document with all test cases for the testing teams to track progress. This document is shared between Carriers and GetInsured throughout the testing process when new transactions are dropped to ensure teams are on the same page with current progress. The tracker includes a summary page for all test scenarios and a detailed page for test details (i.e. file name and transaction control numbers).
EDI Testing Overview	 Word document that details the EDI and Reconciliation testing for Carriers. The document includes the following sections: Timelines, Roles & Responsibilities, Communication Protocols Environment Setup & Connectivity Testing EDI Testing: Methodology, Test Plan Overview, Transaction Cadence, Carrier Testing Tracker Test Case Descriptions with Summary, EDI Expected Outcomes, and Success Criteria for each test case RCNI and PayNow Testing Overview

Next Steps



BeWell will provide Carriers with the baseline GetInsured 834 Companion Guide and RCNI Guide as well as this slide deck following this call. The critical next steps in the next two months are the following:

- □ Next Week: BeWell and GetInsured will provide baseline GetInsured technical documentation and process for carriers to submit questions to BeWell regarding the transition
- □ October: Weekly 1:1 Onboarding Meetings are initiated
- **October:** BeWell and GetInsured will provide documentation with NM-specific customizations



Questions?

