

# BeWell Issuer Rep - Plan Preview

August 14, 2025

Evolve2026



### Plan Preview and Validation

Issuers will review and validate plan information beginning the week of 8/18/2025 and prior to the plans being available in production. BeWell will be providing credentials to access the environment prior to notifying Issuers to begin review. Please update your Issuer Profile form based on this presentation, if necessary.

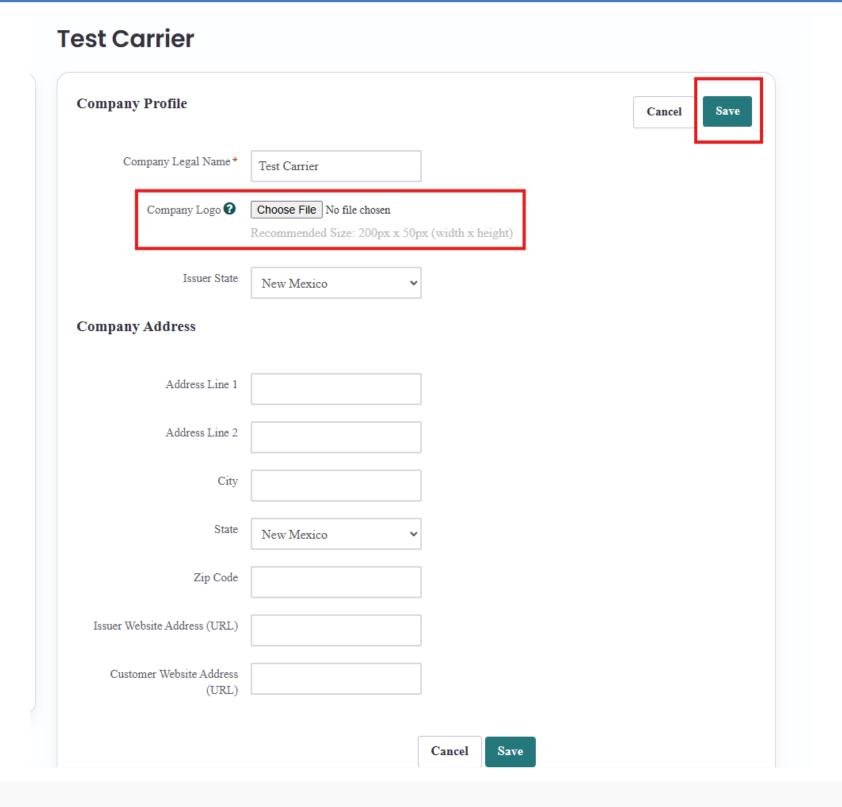
Issuer Representatives have access to two main features to review and validate plan information:

- (1) Plans Tab: Issuer Representative uses this to view each Plan Number individually to review rate, benefit, network, service area, and other specific plan details.
- (2) Anonymous Shopping: Issuer Representative can preview plans as they would appear in the consumer anonymous shopping flow in production. <u>Issuers can only see plans from their own company.</u>



## Account Activation and Logo Upload

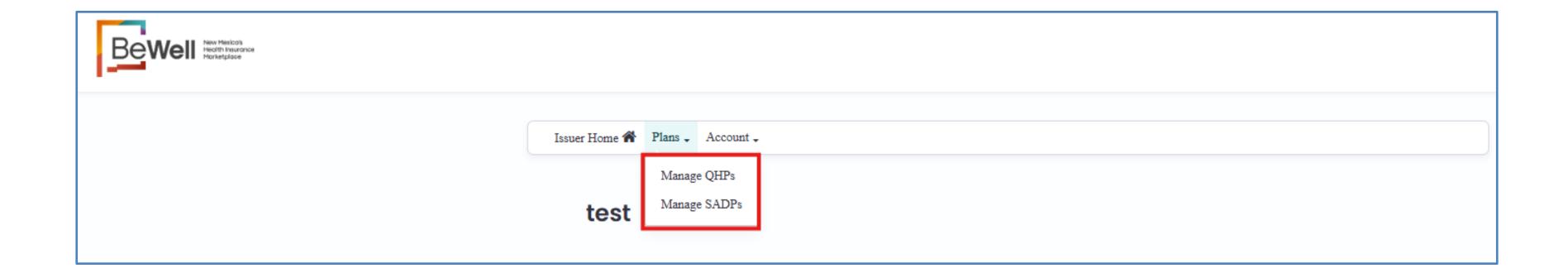
- Upon receipt of your activation email, you will need to confirm your contact information, set a password, and agree to the terms.
- The first step to complete is to upload your carrier logo for plan shopping. Navigate to the Company Profile menu option. Click "Edit" and then choose your logo file to upload.
- It does not have to be the recommended size but does need to be either .jpeg or .png format. If your logo looks distorted, resizing it close to the recommended size will solve the issue.





The Plan Management Module allows Issuer Representatives to review each Plan Number individually from the Plans tab.

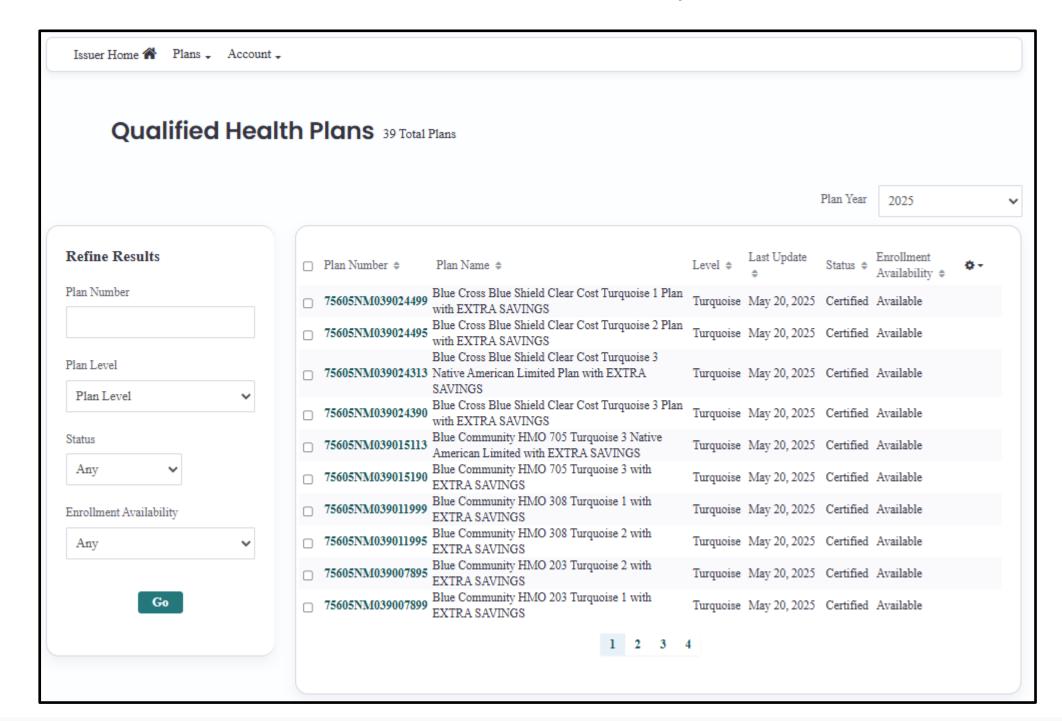
- Issuer Representatives can view all Plan Numbers for their company by selecting "Plans" and then "Manage QHPs" or "Manage SADPs" as appropriate.
- This allows issuers to view all plans for their company at the Plan Number (HIOS Plan Number) level.





The Plan Management Module allows Issuer Representatives to review each Plan Number individually from the Plans tab.

- Issuer Representatives can filter all plans for the given plan year and filter by Plan Number, Plan Metal level, Status, and Enrollment Availability.
- Issuer Representatives select a Plan Number to view the details of that specific plan. NOTE: Each CSR variant is listed separately.



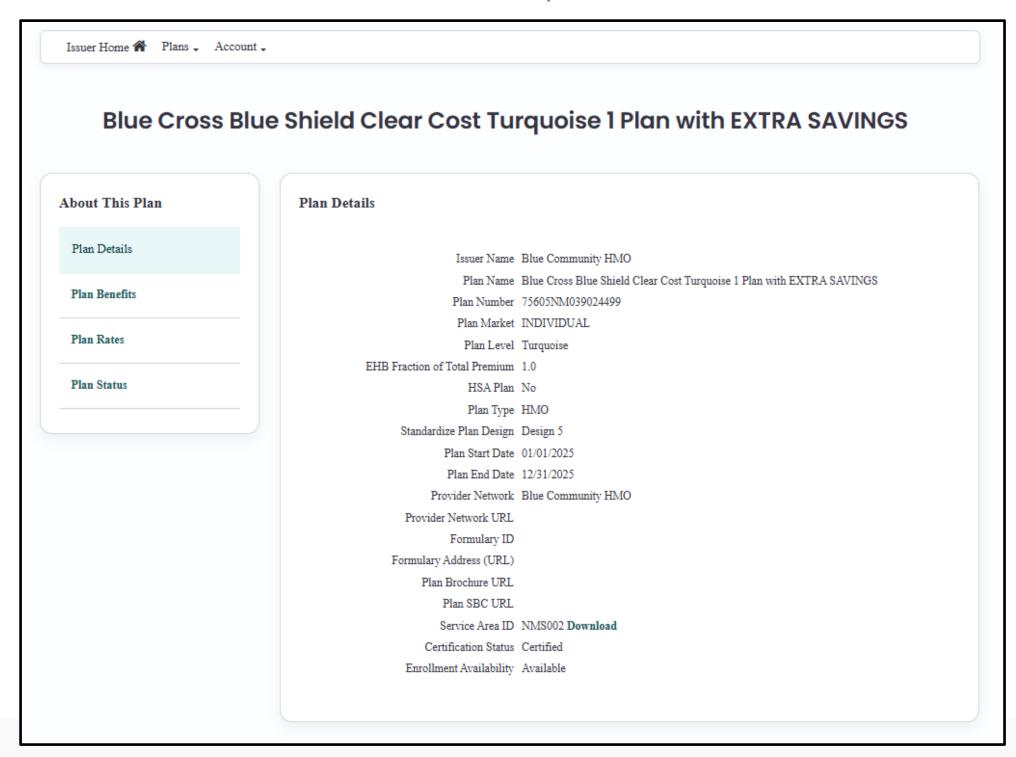
Issuers can view the plan details for each Plan Number and download the Benefits and Rates for each plan.

#### **Plan Level Details**

- Issuer Name
- Plan Name
- Plan Number
- Plan Market
- Plan Metal Level
- EHB Premium
- HSA Plan
- Plan Type
- Standardize Plan Design
- Plan Start/End
- Provider Network Name
- Provider Network, Formulary, Plan Brochure, Plan SBC URL
- Formulary ID, Service Area ID

#### **Downloadable Excel Documents**

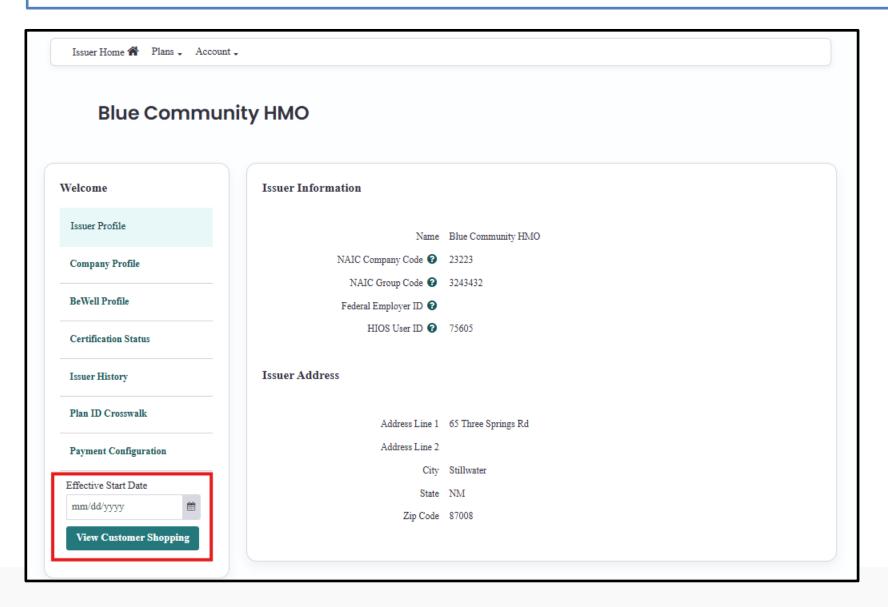
- Plan Benefits
- Plan Rates

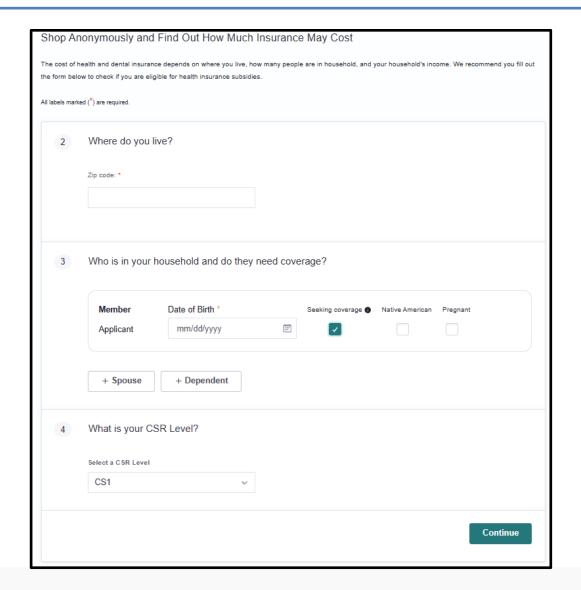




In addition to the Plan Number Level, Issuer Representatives can preview plans from a consumer standpoint prior to go-live.

- Issuer Representatives can access the Anonymous Shopping view by navigating to the bottom lefthand corner of the main page to the "View Consumer Shopping" option. Remember to use 1/1/2026 as the Effective Start Date.
- Issuer Representatives then input a ZIP Code, Birthdate and CSR Level to view plans for their company.





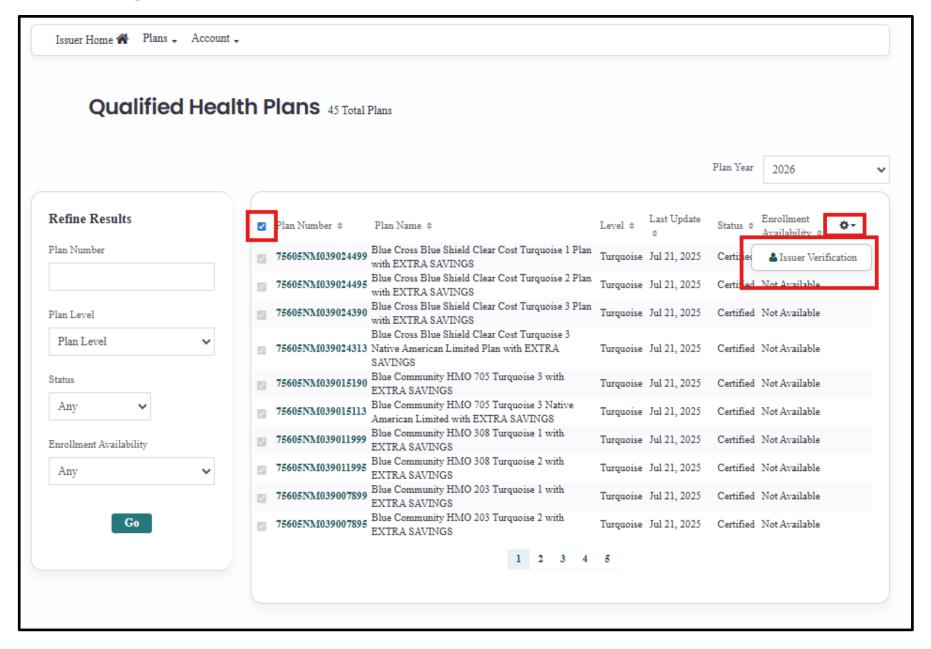


During Plan Preview, Issuers should review and confirm the following information:

- Plan name
- Rates
- Benefits
- Service Area
- Formulary
- URLs
- Provider Directory (completed)
- Issuer Name and information (phone numbers)
- Logo

If any discrepancies are found, please send an email with the plan information, expected display, and confirmation the SERFF template includes the correct information to BeWell and NMcarriers@Getinsured.com.

Once your review is complete, please mark all plans as verified by either selecting one, some, or all the plans loaded and then selecting the "Issuer Verification" icon:





## Demo/Questions



## Thank you!