



New Mexico's Transition to a State Based Exchange

Topic: Plan Management Module and Carrier On-Boarding

Overview for Carriers – Plan Management Module and Carrier On-Boarding

- ❑ 1:00pm EDT: Attendees Gather
- ❑ 1:03pm EDT: Meeting Start
- ❑ 2:25pm EDT: Wrap up and Next Steps

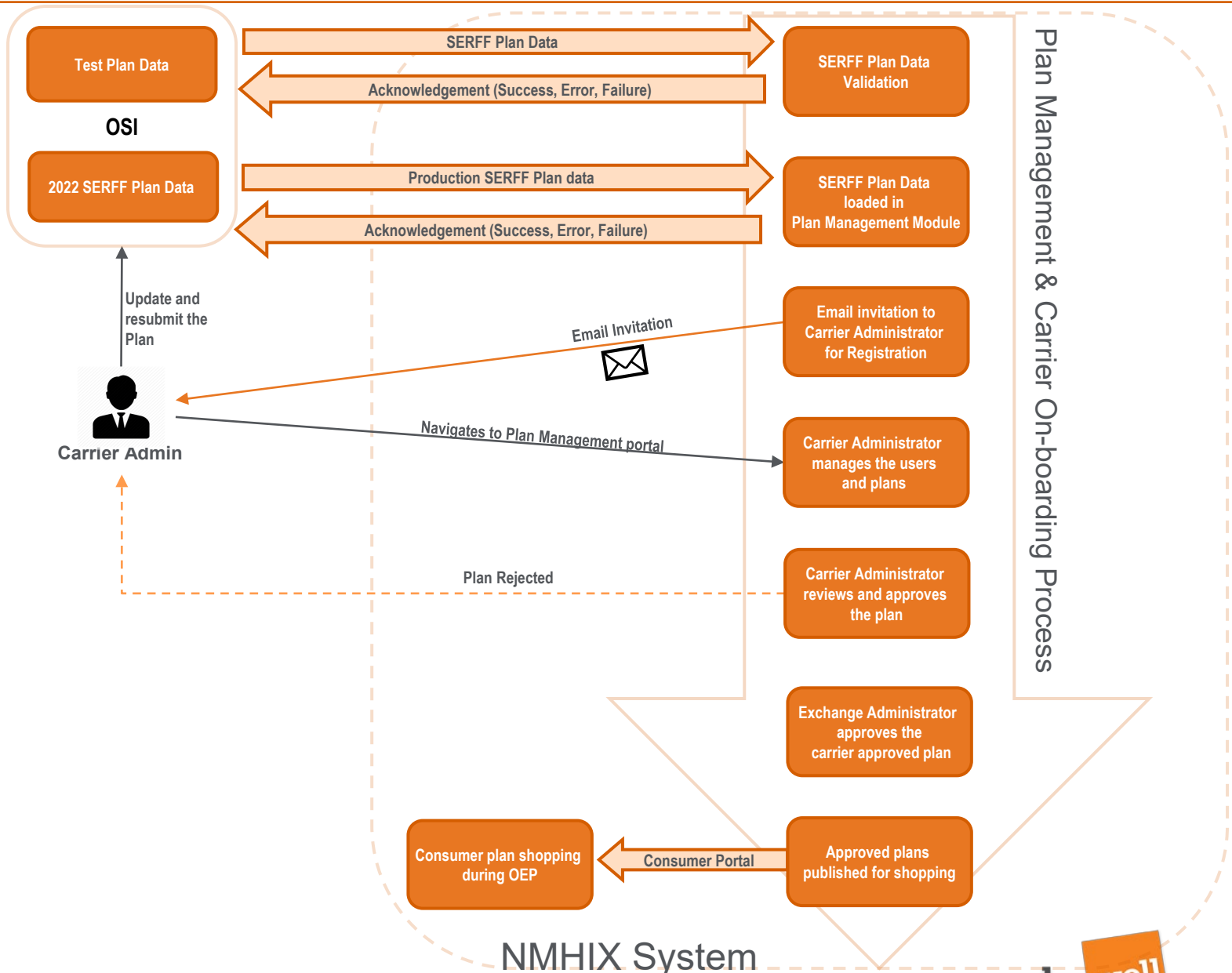
- ❑ Acronyms used in this presentation
 - NMHIX – New Mexico Health Insurance Exchange
 - OSI – Office of Superintendent of Insurance
 - SERFF – System for Electronic Rate and Form Filings

- ❑ Q&A – Send your questions in the Chat Box.
 - We'll try to accommodate as many as we can during the session, in between or towards the end. If not, we'll respond back to unanswered questions offline.

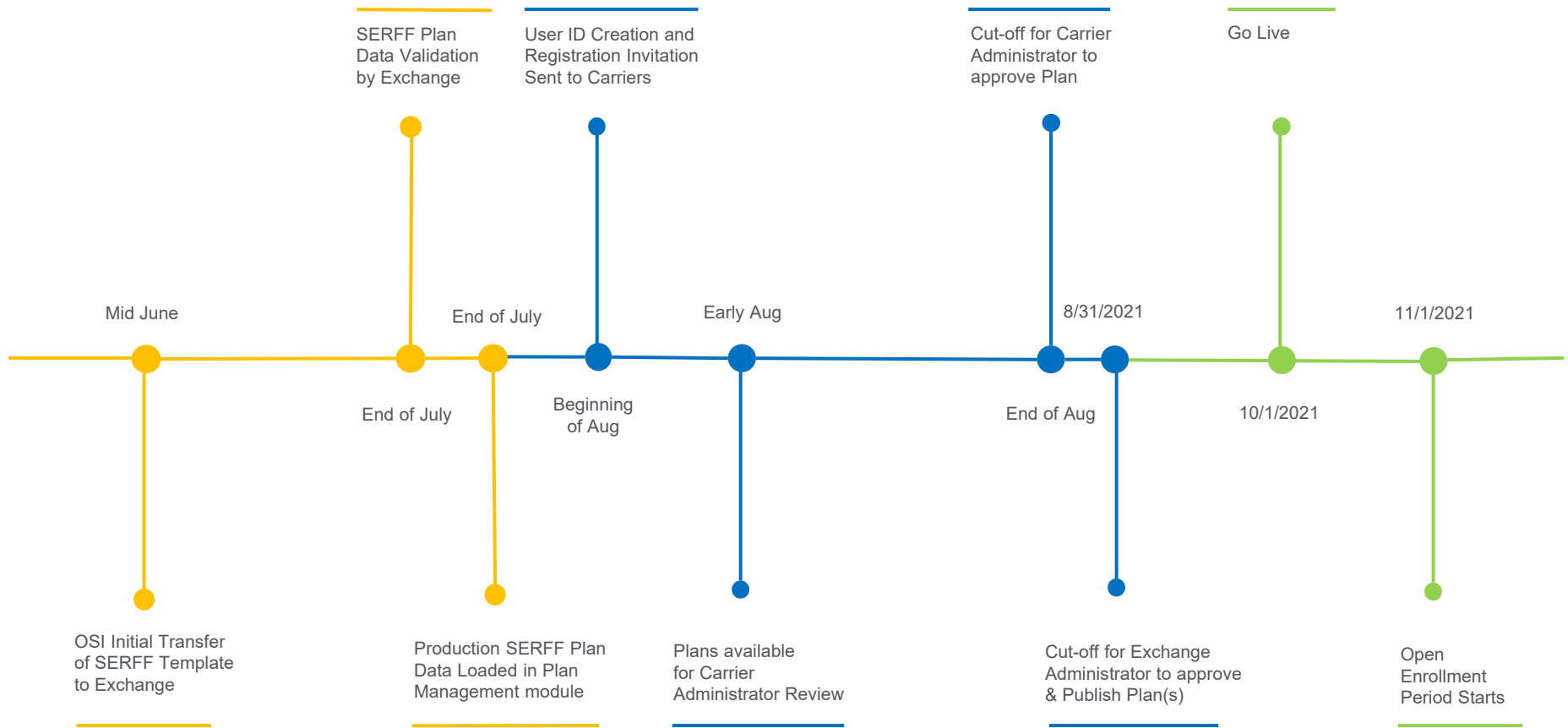
Executive Summary

- ❑ As New Mexico is transitioning to an SBE for 2022 plan year, carriers will need a platform where they can check their plan, rate and benefit information before it is published and made available to consumers for shopping on the beWellnm exchange.
- ❑ The Plan Management Module will be used by the Carriers and Exchange administrators as a platform to review the SERFF plan data and provide approval to push the plan data to the production environment.
- ❑ The Plan Management Module involves coordination with several entities to support the SERFF plan data review and approval processes:
 - Carriers
 - OSI
 - NMHIX
- ❑ This session will provide an overview of:
 - Functioning of Plan Management Module (for Carriers)
 - Carrier On-Boarding Process
 - Plan Review & Approval Process
 - Plan Data Consumption, Review and Approval Timeline
 - Plan Management Module (for Carriers) User Interface

Plan Management & Carrier On-boarding Process



Proposed Approval Process Timeline*



*Note: Dates are estimated. Final dates would be published by OSI/beWellnm. The timeline does not reflect the OSI QHP certification and any potential data correction windows.

Plan Management Module (For Carrier) – Live Demo

- ❑ Live Demonstration of the Plan Management Portal

Plan Management Module (For Carrier) – Next Steps

- ❑ Optum team will circulate the username and password to all carriers
- ❑ Carriers are requested to validate the 2022 plans which are uploaded in the UAT environment from 07/19/2021 to 07/30/2021.
- ❑ Once the plan data is available in production environment, new username and password will be shared with Carriers to review and approve the plans in the production environment.

Questions and Upcoming Meetings

- ❑ You may also send questions to: PlanManagement@nmhix.com

- ❑ Additional information: <https://bewellnm.com/state-based-exchange>
 - Questions and Answers from previous meetings are posted here (Select “Carriers” on the dropdown menu.)

Appendix

- Plan Management Portal Screens for Offline Review

Plan Management Module (For Carrier) - Login



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Welcome to
CARRIER ADMIN PORTAL

Webinsure State is the first suite of products which caters to end-to-end requirements for online State Based Exchange Insurance marketplaces.

Login to your Account

Enter Username

Enter Password






Remember Me!

[Forgot Password](#)

Don't have an Account? [Please Register](#)









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Plan Management Module (For Carrier) - Dashboard









- 
-  Dashboard
-  User Administration
-  Plan Administration
-  Issuer Management

Dashboard







Current Status of Medical Plans

Status	Number of Plans	Action
Uploaded	3	
Approved - Issuer	0	
On-hold Issuer	0	
Rejected - Issuer	0	
Approved	0	
On-hold	0	
Rejected	0	
Published	2	




Current Status of Dental Plans

Status	Number of Plans	Action
Uploaded	0	
Approved - Issuer	0	
On-hold Issuer	0	
Rejected - Issuer	0	
Approved	0	
On-hold	0	
Rejected	0	
Published	1	

Current Status of Issuers

Status	Number of Issuers	Action
Uploaded	0	
Invited	0	
Activated	0	
Suspended	0	
Activated - Published	2	
Suspended - Published	0	

Current Status of Users

Status	Number of Users	Action
Suspended	0	
Invited	2	
Activated	3	

Plan Management Module (For Carrier) – Plan List

-
- Dashboard
- User Administration
- Plan Administration
- Plans
- Rating Areas
- Network List
- Service Area List
- Prescription Drug List
- Plan Rates List
- Business Rules List
- Issuer Management

Plans

Show Status

Medical
 Dental

Plan List

<input type="checkbox"/>	Issuer Name	State	HIOS Plan ID	Plan Type	Plan Name	Market Coverage	Status	Effective Start Date	Action
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010003	POS	Test Gold Plan	Individual	Uploaded	01/01/2021	
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010004	EPO	Test Platinum Plan	Individual	Uploaded	01/01/2021	
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010005	EPO	Test Catastrophic Plan	Individual	Uploaded	01/01/2021	

← Previous 1 Next →

Feature	Action
	Approve a plan
	Reject a plan
	View plan details
	Test a plan
	Place a plan on hold

Plan Management Module (For Carrier) - View Plan - Summary

ADMIN PORTAL

Plan Year: 2021

dcarrier2

- [Dashboard](#)
- [User Administration](#)
- [Plan Administration](#)**
 - [Plans](#)
 - [Rating Areas](#)
 - [Network List](#)
 - [Service Area List](#)
 - [Prescription Drug List](#)
 - [Plan Rates List](#)
 - [Business Rules List](#)
- [Issuer Management](#)

Plan Details

[Back to Plan List](#)

Issuer Name	State	HIOS Plan ID	Plan Type	Plan Marketing Name	Market Coverage	Status	Effective Start Date	Action
Optum Issuer	NM	55455NM0010003	POS	Test Gold Plan	Individual	Uploaded	01/01/2021	Like Share Print Download

- Summary
- Benefits
- Cost Sharing Variance
- Rates
- Service Area
- Network/Providers
- Prescription Drug
- Documents
- Business Rule
- Version History

Summary

HIOS Plan ID	55455NM0010003	Issuer State	NM
TIN	82-2885824	Level of Coverage	Gold
Plan Marketing Name	Test Gold Plan	Market Coverage	Individual
HIOS Product ID	55455NM001	Dental Only Plan	No
HPID		Network ID	NMN001
Service Area ID	NMS001	Formulary ID	NMF001
New/Existing Plan	New	Unique Plan Design	No
QHP/Non QHP	On the Exchange	Notice Required for Pregnancy	Yes
Is a Referral Required for Specialist ?	No	Specialist Requiring a Referral	
Plan Level Exclusion		Limited Cost Sharing Plan Variation - Est Advanced Payment	\$20
Child Only Offering	Allows Adult and Child-Only		
Child Only Plan ID		Wellness Program Offered	Yes
Disease Management Programs Offered		New Enrollments Allowed	Yes
EHB Percent of Total Premium	99.77%	Does this plan offer Composite Rating?*	No
Design Type	Not Applicable	Plan Type	POS

Plan Dates

Plan Effective Date	01/01/2021	Plan Expiration Date	12/31/2021
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Stand Alone Dental Plans Only

EHB Apportionment for Pediatric Dental		Guaranteed vs. Estimated Rate	
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Geographic Coverage

Out of Country Coverage	No	Out of Country Coverage Description	
Out of Service Area Coverage	No	Out of Service Area Coverage Description	
National Network	No		

URL's

URL for Enrollment Payment	
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Plan Management Module - Test Plan

- Dashboard
- User Administration
- Plan Administration
 - Plans**
 - Rating Areas
 - Network List
 - Service Area List
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 - Plan Rates List
 - Business Rules List
- Issuer Management

Plans

Show 10 | Status | Uploaded

Medical Dental

Plan List

<input type="checkbox"/>	Issuer Name	State	HIOS Plan ID	Plan Type	Plan Name	Market Coverage	Status	Effective Start Date	Action
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010003	POS	Test Gold Plan	Individual	Uploaded	01/01/2021	
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010004	EPO	Test Platinum Plan	Individual	Uploaded	01/01/2021	
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010005	EPO	Test Catastrophic Plan	Individual	Uploaded	01/01/2021	

-- Previous | 1 | Next --

Plan Management Module (For Carrier) -Test Plan Parameter

ADMIN PORTAL

Plan Year: 2021 -

dcarrier2 -

- Dashboard
- User Administration
- Plan Administration
- Issuer Management

Plan Details

[Back to Plan List](#)

Issuer Name	State	HIOS Plan ID	Plan Type	Plan Marketing Name	Market Coverage	Status	Effective Start Date	Action
Optum Issuer	NM	55455NM0010003	POS	Test Gold Plan	Individual	Uploaded	01/01/2021	

Test Plan

Zip

Effective Date

County

Cost Sharing Reduction (CSR) Variant

Primary Applicant

Date of Birth

Smoker

[+ Add Dependent](#)

[Test Plan Results](#)


Plan Management Module (For Carrier) - Test Plan Results

- Dashboard
- User Administration
- Plan Administration
- My Documents

Plan Details

[Back to Plan List](#)

[Show Test Plan](#)

Monthly Premium	Carrier Details	Plan Details	Annual Deductible	Maximum Out Of Pocket
\$ 242.2		Core Care Bronze 1 HMO/Bronze	Individual \$6,800 Family \$6800 /Person \$13600 /Group	Individual \$8,150 Family \$8150 /Person \$16300 /Group

General Details

	In Network (Tier1)	In Network (Tier2)	Out of Network
Combined Medical and Drug EHB Deductible - Individual	\$6,800	-	Not Applicable
Combined Medical and Drug EHB Deductible - Family/Group	\$13600	-	Not Applicable
Maximum Out of Pocket for Medical and Drug EHB Benefits (Total) - Family/Group	\$16300	-	Not Applicable
Combined Medical and Drug EHB Deductible - Family/Person	\$6800	-	Not Applicable
Maximum Out of Pocket for Medical and Drug EHB Benefits (Total) - Individual	\$8,150	-	Not Applicable
Maximum Out of Pocket for Medical and Drug EHB Benefits (Total) - Family/Person	\$8150	-	Not Applicable

Mental Health and Substance Use Disorder Services, including Behavioral Health Treatment

Emergency Services

Pediatric Services, Including Oral and Vision Care

Prescription Drugs

Preventive and Wellness Services and Chronic Disease Management

Ambulatory Patient Services

Hospitalization

Maternity and Newborn Care

Rehabilitative and Habilitative Services and Devices

Laboratory Services

Other

Additional Details

Plan Management Module (For Carrier) - Approve Plan Option

ADMIN PORTAL

Plan Year: 2021 -

dcarrier2 -

- Dashboard
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- Issuer Management

Plans

Show 10 ▾ Status ▾ Uploaded

Medical Dental

Plan List

<input type="checkbox"/>	Issuer Name	State	HIOS Plan ID	Plan Type	Plan Name	Market Coverage	Status	Effective Start Date	Approve
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010003	POS	Test Gold Plan	Individual	Uploaded	01/01/2021	
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010004	EPO	Test Platinum Plan	Individual	Uploaded	01/01/2021	
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010005	EPO	Test Catastrophic Plan	Individual	Uploaded	01/01/2021	

← Previous 1 Next →

Plan Management Module (For Carrier) - Approve Plan

ADMIN PORTAL

Plan Year: 2021 -

dcarrier2 -

- Dashboard
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- Service Area List
- Prescription Drug List
- Plan Rates List
- Business Rules List
- Issuer Management

Plans

Show 10 ▾ Status ▾ Uploaded

Medical Dental






Plan List

<input type="checkbox"/>	Issuer Name	State	HIOS Plan ID	Plan Type	Plan Name	Market Coverage	Status	Effective Start Date	Action
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010003	POS	Test Gold Plan	Individual	Uploaded	01/01/2021	
<div><h3>Approve Plan</h3><p>Are you sure you want to approve?</p><p>* Comments</p><p>Test Gold Plan is reviewed and tested successfully.</p><p>No <input checked="" type="button" value="Yes"/></p></div>									
<input type="checkbox"/>	Optum Issuer	NM	55455NM0010004	EPO	Test Platinum Plan	Individual	Uploaded	01/01/2021	


Plan Management Module (For Carrier) - Approved Plan Status

ADMIN PORTAL

Plan Year: 2021 - dcarrier2 -

- 
-  Dashboard
-  User Administration
-  Plan Administration
- Plans**
- Rating Areas
- Network List
- Service Area List
- Prescription Drug List
- Plan Rates List
- Business Rules List
-  Issuer Management

Plans

 Show 10 ▾ Status ▾ Approved - Issuer

Medical Dental

Plan List

<input type="checkbox"/>	Issuer Name	State	HIOS Plan ID	Plan Type	Plan Name	Market Coverage	Status	Effective Start Date	Action
<input type="checkbox"/>	 Optum Issuer	NM	55455NM0010003	POS	Test Gold Plan	Individual	Approved - Issuer	01/01/2021	

← Previous 1 Next →

Plan Management Module (For Carrier) - Updated Dashboard

- Dashboard
- User Administration
- Plan Administration
- Issuer Management

Dashboard

Current Status of Medical Plans

Status	Number of Plans	Action
Uploaded	2	
Approved - Issuer	1	
On-hold Issuer	0	
Rejected - Issuer	0	
Approved	0	
On-hold	0	
Rejected	0	
Published	2	

Current Status of Dental Plans

Status	Number of Plans	Action
Uploaded	0	
Approved - Issuer	0	
On-hold Issuer	0	
Rejected - Issuer	0	
Approved	0	
On-hold	0	
Rejected	0	
Published	1	

Current Status of Issuers

Status	Number of Issuers	Action
Uploaded	0	
Invited	0	
Activated	0	
Suspended	0	
Activated - Published	2	
Suspended - Published	0	

Current Status of Users

Status	Number of Users	Action
Suspended	0	
Invited	2	
Activated	3	