BeWell New Mexico's Health Insurance Marketplace

Quick Reference Guide: Broker Digest Report

Introduction

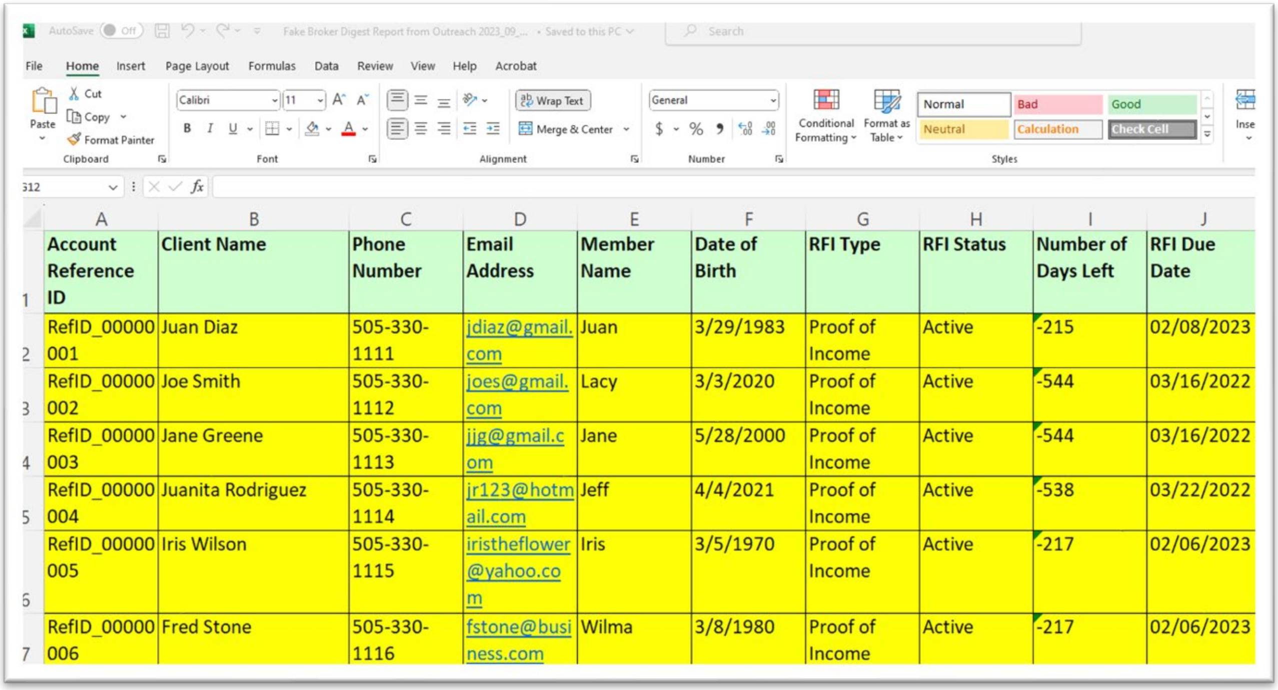
The Broker Digest report includes a list of the clients and corresponding notices expiring within a certain number of days. The report is password protected.

For brokers with an NPN: The password for opening the Broker Digest Report is a combination of your NPN followed by your date of birth (MMDDYYYY) with no spaces or dashes. For example, if your NPN is 12345678 and your DOB is 05/06/1978, then the password is 1234567805061978.

For brokers without an NPN: The password is your Agency Tax ID followed by your date of birth (MMDDYYYY) with no spaces or dashes. For example, if your Agency Tax ID is 11223344 and your DOB is 04/06/1965, then the password is 1122334404061965.

Step 1

Open the Digest Report in Excel:



Account Reference ID	Client Name	Phone Number	Email Address	Member Name	Date of Birth	RFI Type	RFI Status	Number of Days Left	RFI Due Date
RefID_00000001	Juan Diaz	505-330-1111	jdiaz@gmail.com	Juan	3/29/1983	Proof of Income	Active	-215	02/08/2023
RefID_00000002	Joe Smith	505-330-1112	joes@gmail.com	Lacy	3/3/2020	Proof of Income	Active	-544	03/16/2022
RefID_00000003	Jane Greene	505-330-1113	jjg@gmail.com	Jane	5/28/2000	Proof of Income	Active	-544	03/16/2022
RefID_00000004	Juanita Rodriguez	505-330-1114	jr123@hotmail.com	Jeff	4/4/2021	Proof of Income	Active	-538	03/22/2022
RefID_00000005	Iris Wilson	505-330-1115	iristheflower@yahoo.com	Iris	3/5/1970	Proof of Income	Active	-217	02/06/2023
RefID_00000006	Fred Stone	505-330-1116	fstone@business.com	Wilma	3/8/1980	Proof of Income	Active	-217	02/06/2023

Figure 1: Example Broker Digest Report in Excel – Outstanding RFI Tab

Step 2

Click on the “1” on the top left of the spreadsheet. This will highlight the entire row. While the row is highlighted, click on “Sort & Filter” in the ribbon at the top right. Then click on “Filter.”

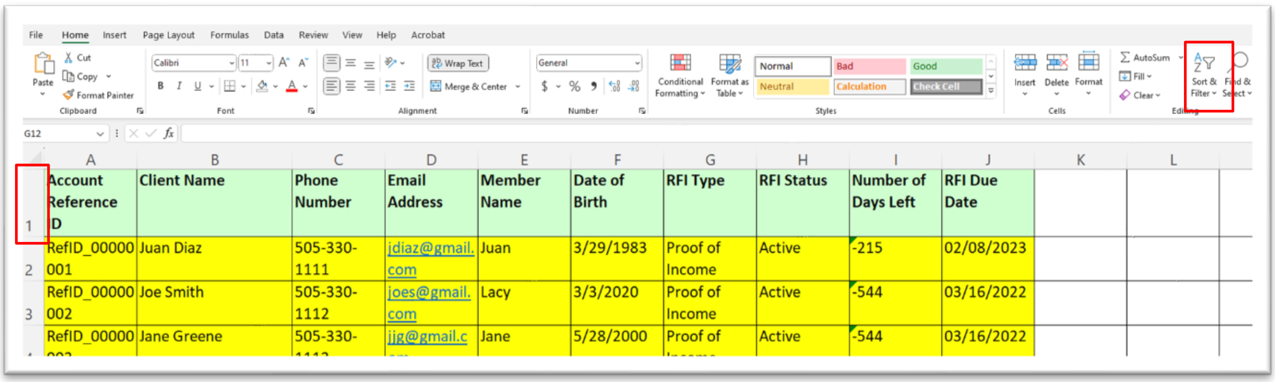


Figure 2: Example Broker Digest Report in Excel. Click on “1” and then “Sort & Filter.”

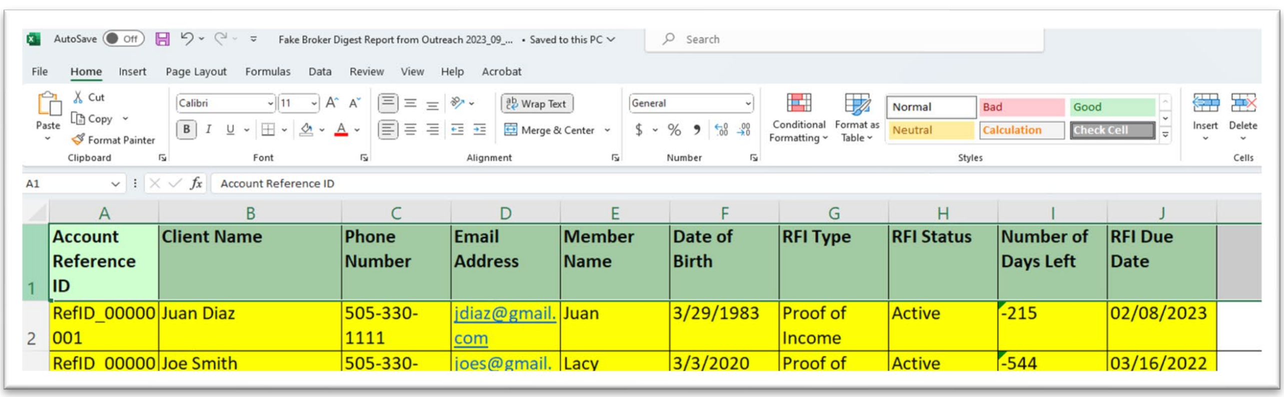


Figure 1: Example Broker Digest Report in Excel. This is what the spreadsheet looks like when “1” has been selected.

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Step 3

Once you have set the filters, you will be able to select how you view the data by the type of "RFI." Under the "RFI Type" column (currently column G), click on the downward arrow to the right of the column header text. A list of checkboxes will display. Un-check the checkbox next to the words "Proof of Income." Click "OK." This should then remove all the income RFIs from the Broker Digest list of RFIs, so you will only see other types of RFIs.

Account Reference ID	Client Name	Phone Number	Email Address	Member Name	Date of Birth	RFI Type	RFI Status	Number of Days Left	RFI Due Date
RefID_00000001	Juan Diaz	505-330-1111	jdiaz@gmail.com	Juan	3/29/1983	Proof of Income	Active	-215	02/08/2023
RefID_00000002	Joe Smith	505-330-1112	joes@gmail.com	Lacy	3/3/2020	Proof of Income	Active	-544	03/16/2022
RefID_00000003	Jane Greene	505-330-1113	jjg@gmail.com	Jane	5/28/2000	Proof of Income	Active	-544	03/16/2022
RefID_00000004	Juanita Rodriguez	505-330-1114	jr123@hotmail.com	Jeff	4/4/2021	Proof of SSN	Active	-538	03/22/2022
RefID_00000005	Iris Wilson	505-330-1115	iristheflower@yahoo.com	Iris	3/5/1970	Proof of Citizenship	Active	-217	02/06/2023
RefID_00000006	Fred Stone	505-330-1116	fstone@business.com	Wilma	3/8/1980	Proof of SSN	Active	-217	02/06/2023

Figure 4: Example Broker Digest Report in Excel. Click on the arrow on the bottom right of the cell containing the heading "RFI Type."

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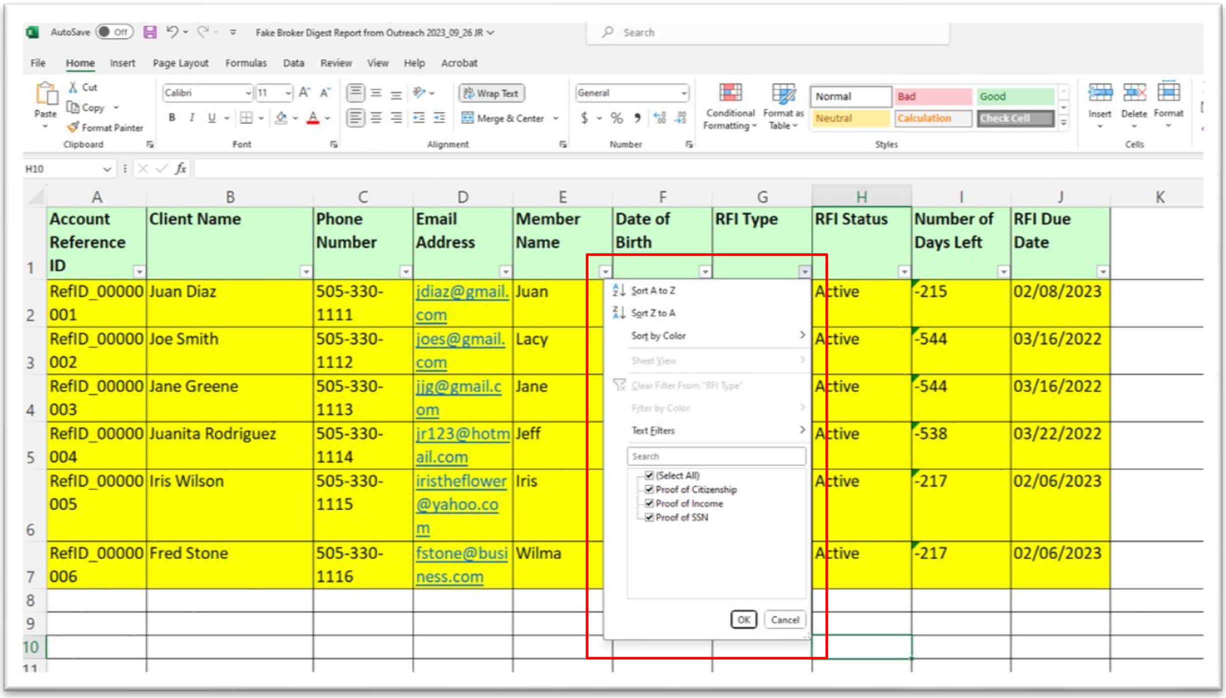
Fake Broker Digest Report from Outreach 2023_09_26 JR
Account Reference ID
Client Name
Phone Number
Email Address
Member Name
Date of Birth
RFI Type
RFI Status
Number of Days Left
RFI Due Date
RefID_00000 001
Juan Diaz
505-330-1111
jdiaz@gmail.com
Juan
Active
-215
02/08/2023
RefID_00000 002
Joe Smith
505-330-1112
joes@gmail.com
Lacy
Active
-544
03/16/2022
RefID_00000 003
Jane Greene
505-330-1113
jjg@gmail.com
Jane
Active
-544
03/16/2022
RefID_00000 004
Juanita Rodriguez
505-330-1114
jr123@hotmail.com
Jeff
Active
-538
03/22/2022
RefID_00000 005
Iris Wilson
505-330-1115
iristheflower@yahoo.com
Iris
Active
-217
02/06/2023
RefID_00000 006
Fred Stone
505-330-1116
fstone@business.com
Wilma
Active
-217
02/06/2023
Sort A to Z
Sort Z to A
Sort by Color
Text Filters
(Select All)
Proof of Citizenship
Proof of Income
Proof of SSN
OK
Cancel

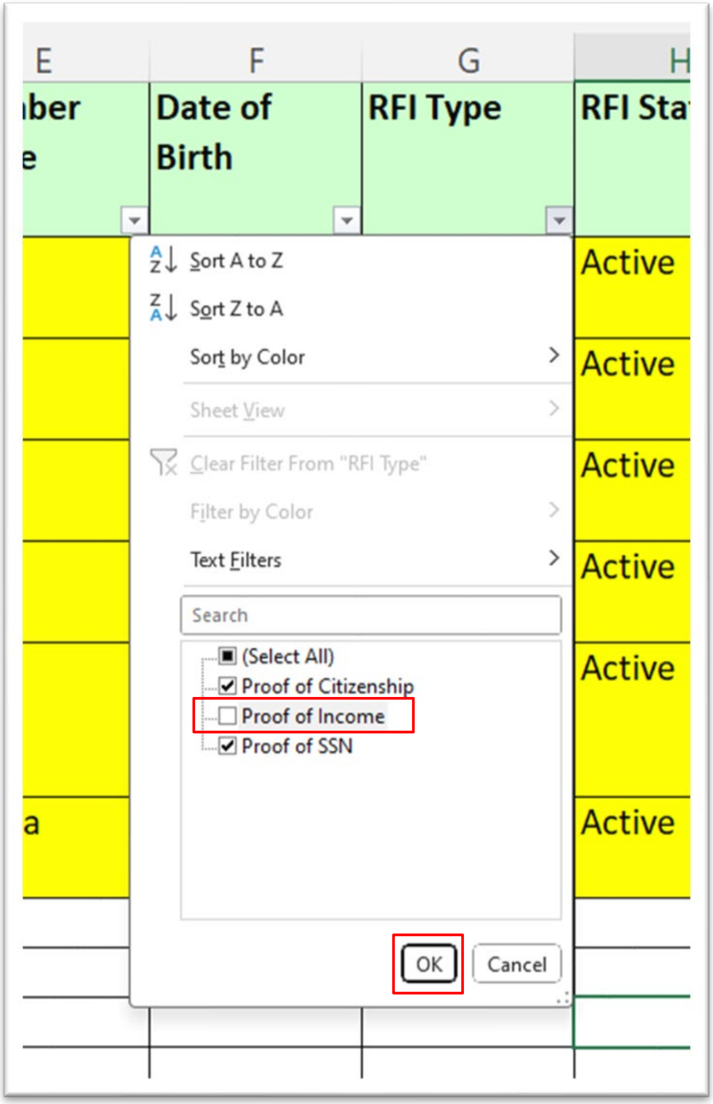

Figure 6: Click on the checkbox next to “Proof of Income,” to deselect that item, and then click “OK.”

Notification Types:

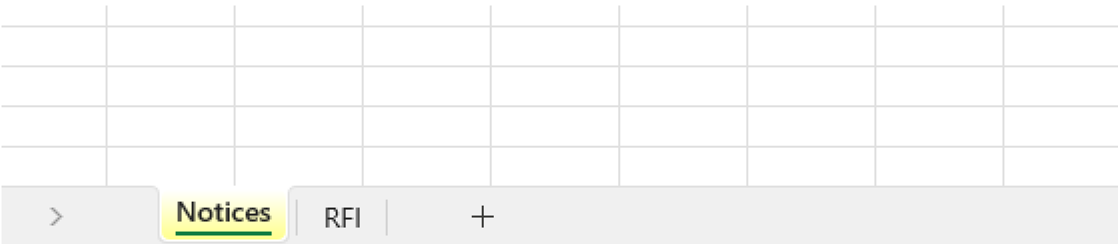

Figure 7: Indicates the Notification tab at the bottom of the report.

Late Payment Notice- Notifies the broker of a late payment notice that was sent to the consumer; includes notification date.

Preliminary Eligibility Determination Notice- Notifies the broker of the auto-generated eligibility notification; includes notification date.

Billing Statement – Notifies the broker of the latest billing statement generated; includes notification date.

Form-1095-A – Notifies the broker of the date that the 1095-A became available; includes notification date.

Special Enrollment Period Decision (SEP)- Notifies the broker of the auto-generated notice that is sent to the consumer informing them of the fact that they might qualify for a new SEP; includes notification date.

Eligibility Approval Notice- Notifies the broker of the auto-generated eligibility notice that the consumer receives stating that they are eligible for coverage; includes notification date.

Account Transfer Notice – Consumer notice that BeWell has been notified from HSD that they or a household member recently lost Medicaid coverage; includes notification date.

Request For Information (RFI)- Notifies the broker that the consumer has a pending notice requesting additional information that is needed; includes notification date.

Cancellation Notice – Notifies the broker that the consumer’s policy has been cancelled; includes notification date.

Communication Preference Change- Notifies the broker that the consumer has changed their communication delivery method to either electronic or mailed correspondence; includes notification da

RFI Types:

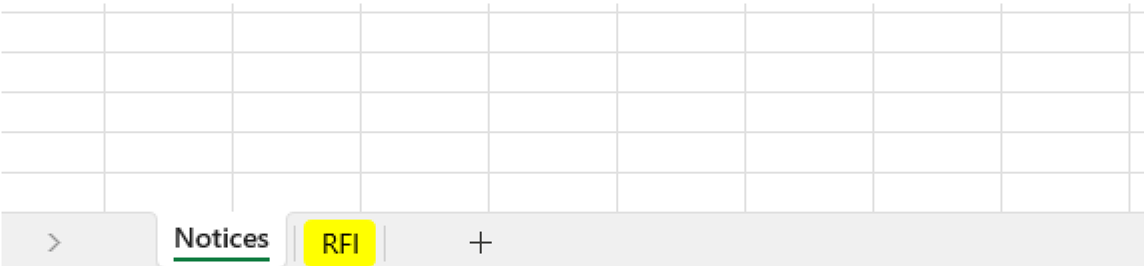

Figure 8: Indicates the RFI tab at the bottom of the report.

Proof of Income- Notifies the broker that the consumer still needs to provide their proof of income; includes the RFI due date.

Proof of U.S. Citizenship- Notifies the broker that the consumer still needs to provide their proof of citizenship documentation; include the RFI due date.

Proof of Identity- Notifies the broker that the consumer still needs to provide proof of their identity and that manual IDP is still required; includes the RFI due date.

Proof of Immigration- Notifies the broker that the consumer still needs to provide a copy of their immigration documentation; includes the RFI due date.