

Voice of the Assister

May 26, 2026

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Passcode: BeWellVOA26!



Agenda

- **Periodic Data Matching**
- **PY27 Certification**
- **Support Request Process**
- **Ongoing Reminders**

Periodic Data Matching (PDM)

- Went live in April.
- Identifies members with potential data discrepancies or conflicting coverage status.
- Impacted members will receive a notification and have 30 days to respond.
 - If no response, coverage may be updated effective June 1.
- Will appear in the member secured inbox.



PY27 Certification

- Certification period: July 1 – Aug 31.
- All returning partners are required to complete annual training to maintain active status on the BeWell platform and avoid suspension and loss of Book of Business.

Improved Learner Tracks

Learning Track 1: New Brokers/ECs

1. ACA & BeWell Fundamentals
2. Eligibility and Enrollment Rules
3. Application and System Training
4. Security & Data Privacy
5. Plan Year Updates
6. Final Assessment

Learning Track 2: Returning Brokers/ECs

1. "Fast Track" Exam (Opt-out)
2. Application & System Training
3. Security & Data Privacy
4. Plan Year Updates
5. Final Assessment

NEW COURSE: ICHRA

(Individual Coverage Health Reimbursement Arrangements)

Broker Requirements

- Must remain in good standing with licensing requirements.
- Be appointed with at least 2 carriers participating on the Exchange.
- Must hold an active resident or approved bordering state license:
 - Texas
 - Arizona
 - Colorado
 - Utah
 - Oklahoma

Enrollment Counselor Requirements

- Need to be associated with an approved organization:
 - Hospitals/Clinic
 - Nonprofits
 - Community organizations
 - School and tribale organizations

TimeTap

- An appointment scheduling tool that allows consumers to book directly with participating brokers/agents.
- Intended to improve accessibility and scheduling efficiency for consumers seeking assistance.
- TimeTap **is not** a lead generation tool and does not distribute or assign leads.
 - ***Note: Participation in TimeTap does not guarantee appointment volume or consumer engagement.***

TimeTap

- Eligibility to be listed will reopen during the certification period
- To be eligible for a TimeTap listing, certified brokers must:
 - Have been certified with BeWell for a minimum of 2 years
 - Maintain a book of business greater than 10 active enrollments.



Support Request Process

- Support Requests should be used as the primary method for reporting issues and escalations.
- Creates a centralized and trackable process for issue management and follow up.
- Helps identify recurring trends and opportunities for training or process improvement.
- Improves visibility and efficiency in resolving issues across teams.

Ongoing Reminders

- VOA meetings: last Tuesday of each month





Bewell

New Mexico's
Health Insurance
Marketplace