

2026 Medicare Supplement Data Call



State of New Mexico
Office of Superintendent of Insurance

Purpose of this Data Call

During the 2026 legislative session, New Mexico passed [Senate Bill 21](#), which establishes a 60-day annual open enrollment period beginning on the first day of the insured's birthday month.

To better understand the potential rate impacts in New Mexico, the Office of Superintendent of Insurance (OSI) is conducting a data call to perform an analysis.

Pursuant to NMSA 1978, Section 59A-2-12, the data submitted as a result of this Data Call will be deemed confidential by the Superintendent.

General Data Extraction Instructions

- All carriers must submit their completed results as a single pipe-delimited (.txt) file.
- The submission method is secure email: lifehealthdata@state.nm.us
- All data must be at the summary level.
- Carriers must provide data from 2022 to present.
- Carriers must summarize the data by: Pre-standardized Plan Year, Standardized Plan Year, Policy Type, Plan Type and state.
- Carriers must include all columns unless the explanation includes, "if available."
- Carrier must submit the data no later than October 21, 2026.

Required Columns and Definitions

1. **InsurerCarrierName** (Enter the legal entity name.)
2. **NAICCompanyCode** (Enter the number that the National Association of Insurance Commissioners (NAIC) assigns to each individual insurance company.)
3. **NAICGroupCode** (Enter the number that the NAIC assigns to a group of affiliated insurance companies.)
4. **PolicyType** (Enter the applicable policy type: Group or Individual.)
5. **PlanName** (Enter the plan name: Pre-Standardized, Plan A, Plan B, Plan C, Plan D, Plan F, Plan HD F, Plan G, Plan HD G, Plan K, Plan L, Plan M, Plan N and All Plans Combined.)
6. **StandardizedPlanYear** (Enter the plan year: 2020,2010,1990 and pre-standardized.)

7. **MostRecentRateChangeApproved** (Enter the most recently approved rate change for the reporting year: group to year, policy type and plan type, expressed as a decimal only percent (/ 100, no "%").)
8. **EffectiveDateLastRateChange** (Enter the date for the recently approved rate change for the reporting year: group to year, policy type and plan type. Use format mm/dd/YYYY.)
9. **LivesNM65OverOpenEnrollment** (If available, enter the number of covered lives in New Mexico age 65 or older who last enrolled during open enrollment.)
10. **LivesNM65OverGuaranteedIssue** (If available, enter the number of covered lives in New Mexico who were age 65 or older and enrolled because the plan they were enrolled in terminated: Employee Welfare Benefit Plan (group), Private Fee for Service (PFFS), Medicare Select Plan, Medicare PPO or HMO plan, Medicare Advantage Plan, Medicare Supplement Plan, Medicare Risk or Cost Plan.)
11. **LivesNM65OverSEP** (If available, enter the number of covered lives in New Mexico who were age 65 or older and enrolled because of a special enrollment period (SEP) such as a birthday rule, state mandated period or other SEP.)
12. **LivesNM65OverUnderwritten** (Enter the number of covered lives in New Mexico who were age 65 or over and were medically underwritten.)
13. **LivesNMUnder65** (Enter the number of covered lives in New Mexico under age 65.)
14. **LivesNMTotal** (Enter the total number of covered lives in New Mexico.)
15. **LivesNational65OverOpenEnrollment** (If available, enter the number of covered lives nationwide, age 65 or older who last enrolled during open enrollment.)
16. **LivesNational65OverGuaranteedIssue** (If available, enter the number of covered lives nationwide who were age 65 or older and enrolled because the plan they were enrolled in terminated: Employee Welfare Benefit Plan (group), Private Fee for Service (PFFS), Medicare Select Plan, Medicare PPO or HMO plan, Medicare Advantage Plan, Medicare Supplement Plan, Medicare Risk or Cost Plan.)
17. **LivesNational65OverSEP** (If available, enter the number of covered lives nationwide who were age 65 or older and enrolled because of a SEP such as a birthday rule, state mandated period or other SEP.)
18. **LivesNational65OverUnderwritten** (Enter the number of claims for policyholders nationwide who were age 65 or over and were medically underwritten.)
19. **LivesNationalUnder65** (Enter the number of claims for policyholders nationwide under age 65.)
20. **LivesNationalTotal** (Enter the total number of covered lives nationwide.)

21. **ClaimsNM65OverOpenEnrollment** (If available, enter the number of claims for policyholders in New Mexico age 65 or over who enrolled during open enrollment.)
22. **ClaimsNM65OverGuaranteedIssue** (If available, enter the amount of claims paid for policy holders in New Mexico with terminating coverage from: Employee Welfare Benefit Plan (group), Private Fee for Service (PFFS), Medicare Select Plan, Medicare PPO or HMO plan, Medicare Advantage Plan, Medicare Supplement Plan, Medicare Risk or Cost Plan.)
23. **ClaimsNM65OverSEP** (If available, enter the number of claims paid to policyholders in New Mexico who were in a SEP due to: birthday rule, state-mandated period, or other SEP.)
24. **ClaimsNM65OverUnderwritten** (Enter the number of claims for policyholders in New Mexico who were age 65 or over and were medically underwritten.)
25. **ClaimsNMUnder65** (Enter the number of claims for policyholders in New Mexico under age 65.)
26. **ClaimsNMTotal** (Enter the total amount of claims for policyholders in New Mexico.)
27. **ClaimsNational65OverOpenEnrollment:** (If available, enter the number of claims for policyholders in nationwide age 65 or over who enrolled during open enrollment.)
28. **ClaimsNational65OverGuaranteedIssue** (If available, enter the amount of claims paid for policy holders Nationwide with terminating coverage from: Employee Welfare Benefit Plan (group), Private Fee for Service (PFFS), Medicare Select Plan, Medicare PPO or HMO plan, Medicare Advantage Plan, Medicare Supplement Plan, Medicare Risk or Cost Plan.)
29. **ClaimsNational65OverSEP** (If available, enter the number of claims paid to policyholders nationwide who were in a SEP due to: birthday rule, state-mandated period, or other SEP.)
30. **ClaimsNational65OverUnderwritten** (Enter the number of claims for policyholders nationwide who were age 65 or over and were medically underwritten.)
31. **ClaimsNationUnder65** (Enter the number of claims for policyholders nationwide under age 65.)
32. **ClaimsNationalTotal** (Enter the total number of claims for policyholders nationwide.)
33. **PremiumsNM65OverOpenEnrollment** (If available, enter the amount of premiums for policyholders in New Mexico age 65 or over who enrolled during open enrollment.)
34. **PremiumsNM65OverGuaranteedIssue** (If available, enter the amount of premiums paid for policy holders in New Mexico with terminating coverage from:

- Employee Welfare Benefit Plan (group), Private Fee for Service (PFFS), Medicare Select Plan, Medicare PPO or HMO plan, Medicare Advantage Plan, Medicare Supplement Plan, Medicare Risk or Cost Plan.)
35. **PremiumsNM65OverSEP** (If available, enter the total premiums in New Mexico - 65 and Over SEP.)
 36. **PremiumsNM65OverUnderwritten** (Enter the amount of premiums for policyholders in New Mexico who were age 65 or over and were medically underwritten.)
 37. **PremiumsNMUnder65** (Enter the amount of premiums for policyholders in New Mexico under age 65.)
 38. **PremiumsNMTotal** (Enter the total amount of premiums for policyholders in New Mexico.)
 39. **PremiumsNational65OverOpenEnrollment** (If available, enter the total premiums nationwide - 65 and over open enrollment.)
 40. **PremiumsNational65OverGuaranteedIssue** (If available, enter the amount of premiums paid for policy holders Nationwide with terminating coverage from: Employee Welfare Benefit Plan (group), Private Fee for Service (PFFS), Medicare Select Plan, Medicare PPO or HMO plan, Medicare Advantage Plan, Medicare Supplement Plan, Medicare Risk or Cost Plan.)
 41. **PremiumsNational65OverSEP** (If available, enter the number of premiums paid to policyholders nationwide who were in a SEP due to: birthday rule, state-mandated period, or other SEP.)
 42. **PremiumsNational65OverUnderwritten** (Enter the amount of premiums for policyholders nationwide who were age 65 or over and were medically underwritten.)
 43. **PremiumsNationalUnder65** (Enter the amount of premiums for policyholders nationwide under age 65.)
 44. **PremiumsNationalTotal** (Enter the total number of premiums for policyholders nationwide.)
 45. **TotalLivesAttainedAgeNM** (Enter the total number of policyholders covered under an attained age rated policy in New Mexico.)
 46. **TotalLivesIssueAgeNM** (Enter the total number of policyholders covered under an issue age rated policy in New Mexico.)
 47. **TotalLivesCommunityRatingNM** (Enter the total number of policyholders covered under a community rated policy in New Mexico.)
 48. **TotalLivesAttainedAgeNationwide** (Enter the total number of policyholders covered under an attained age rated policy nationwide.)
 49. **TotalLivesIssueAgeNationwide** (Enter the total number of policyholders covered under an issue age rated policy nationwide.)

50. **TotalLivesCommunityRatingNationwide** (Enter the total number of policyholders covered under a community rated policy nationwide.)
51. **Trend** (Enter the normalized trend assumption. Trend should be normalized for plan type and age.)
52. **ExpectedLifetimeLossRatio** (Enter the expected lifetime loss ratio at the time of initial pricing.)
53. **CurrentYearLifetimeLossRatio** (Enter the **current** expected lifetime loss ratio.)
54. **HistoricalLossRatio** (Enter the historical loss ratio experienced as of the most recent year.)
55. **OpenClosedBlock** (Indicate whether the plan is an open or closed block in the year.)
56. **OpenClosedBlockYear** (Enter the year the block was opened and, if applicable, closed.)

State Specific Data Extraction Instructions

OSI is also requesting data specific to states that have similar birthday rules to New Mexico:

- California
- Delaware
- Maryland
- Nevada
- Oklahoma
- Oregon
- Utah
- Wyoming
- Illinois
- Louisiana
- Utah

Required Columns and Definitions

1. **NAICCompanyCode** (Enter the number that the National Association of Insurance Commissioners (NAIC) assigns to each individual insurance company.)
2. **NAICGroupCode** (Enter the number that NAIC assigns to a group of affiliated insurance companies.)
3. **State** (Enter the applicable state.)
4. **PolicyType** (Enter the applicable policy type: Group or Individual.)

5. **PlanName** (Enter the plan name: Pre-Standardized, Plan A, Plan B, Plan C, Plan D, Plan F, Plan HD F, Plan G, Plan HD G, Plan K, Plan L, Plan M, Plan N and All Plans Combined.)
6. **StandardizedPlanYear** (Enter the plan year: 2020,2010,1990 and pre-standardized.)
7. **MostRecentRateChangeApproved** (Enter the most recently approved rate change for the reporting year: group to year, policy type and plan type, expressed as a decimal only: percent (/100, no "%".)
8. **EffectiveDateLastRateChange** (Enter the date for the recently approved rate change for the reporting year: group to year, policy type and plan type. Use format mm/dd/YYYY.)
9. **LivesApplicableState65OverOpenEnrollment** (If available, enter the number of covered lives in the applicable state age 65 or older who last enrolled during open enrollment.)
10. **LivesApplicableState65OverGuaranteedIssue** (If available, enter the number of covered lives in the applicable state who were age 65 or older and enrolled because the plan they were enrolled in terminated: Employee Welfare Benefit Plan (group), Private Fee for Service (PFFS), Medicare Select Plan, Medicare PPO or HMO plan, Medicare Advantage Plan, Medicare Supplement Plan, Medicare Risk or Cost Plan.)
11. **LivesApplicableState65OverSEP** (If available, enter the number of covered lives in the applicable state who were age 65 or older and enrolled because of a SEP such as a birthday rule, state mandated period or other SEP.)
12. **LivesApplicable State65OverUnderwritten** (Enter the number of covered lives in the applicable state who were age 65 or over and were medically underwritten.)
13. **LivesApplicableStateUnder65** (Enter the number of covered lives in the applicable state under age 65.)
14. **LivesApplicableStateTotal** (Enter the total number of covered lives in the applicable state.)
15. **ClaimsApplicableState65OverOpenEnrollment** (If available, enter the number of claims for policyholders in the applicable state age 65 or over who enrolled during open enrollment)
16. **ClaimsApplicableState65OverGuaranteedIssue** (If available, enter the amount of claims paid for policy holders in the applicable state with terminating coverage from: Employee Welfare Benefit Plan (group), Private Fee for Service (PFFS), Medicare Select Plan, Medicare PPO or HMO plan, Medicare Advantage Plan, Medicare Supplement Plan, Medicare Risk or Cost Plan.)

17. **ClaimsApplicableState65OverSEP** (If available, enter the number of claims paid to policyholders in the applicable state who were in a Special Enrollment Period (SEP) due to: Birthday Rule, State-Mandated Period, or other SEP.)
18. **ClaimsApplicableState65OverUnderwritten** (Enter the number of claims for policyholders in the applicable state who were age 65 or over and were medically underwritten.)
19. **ClaimsApplicableStateUnder65** (Enter the number of claims for policyholders in the applicable state under age 65.)
20. **ClaimsApplicableStateTotal** (Enter the total amount of claims for policyholders in the applicable state.)
21. **PremiumsApplicableState65OverOpenEnrollment** (If available, enter the amount of premiums for policyholders in the applicable state age 65 or over who enrolled during open enrollment.)
22. **PremiumsApplicableState65OverGuaranteedIssue** (If available, enter the amount of premiums paid for policy holders in the applicable state with terminating coverage from: Employee Welfare Benefit Plan (group), Private Fee for Service (PFFS), Medicare Select Plan, Medicare PPO or HMO plan, Medicare Advantage Plan, Medicare Supplement Plan, Medicare Risk or Cost Plan.)
23. **PremiumsApplicableState65OverSEP** (If available, enter Premiums in the applicable state - 65 and Over SEP.)
24. **PremiumsApplicableState65OverUnderwritten** (Enter the amount of premiums for policyholders in the applicable state who were age 65 or over and were medically underwritten.)
25. **PremiumsApplicableStateUnder65** (Enter the amount of premiums for policyholders in the applicable state under age 65.)
26. **PremiumsApplicableStateTotal** (Enter the total amount of premiums for policyholders in the applicable state.)
27. **TotalLivesAttainedAgeApplicableState**(Enter the total number of policyholders covered under an attained age rated policy in the applicable state.)
28. **TotalLivesIssueAgeApplicableState** (Enter the total number of policyholders covered under an issue age rated policy in the applicable state.)
29. **TotalLivesCommunityRatingApplicableState**(Enter the total number of policyholders covered under a community rated policy in the applicable state)
30. **Trend** (Enter the normalized trend assumption. Trend should be normalized for plan type and age.)
31. **ExpectedLifetimeLossRatio** (Enter the expected lifetime loss ratio at the time of **initial pricing**.)
32. **CurrentYearLifetimeLossRatio** (Enter the **current** expected lifetime loss ratio.)
33. **HistoricalLossRatio** (Enter the historical loss ratio experienced as of the most recent year.)

34. **OpenClosedBlock** (Indicate whether the plan is an open or closed block in the year.)
35. **OpenClosedBlockYear** (Enter the year the block was opened and, if applicable, closed.)