

**be well nm**<sup>®</sup>



NEW MEXICO HEALTH INSURANCE EXCHANGE

beWellnm  
Assister Certification  
Guide

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## INTRODUCTION

BeWellnm has an assister network consisting of certified agents, brokers, and enrollment counselors (referred to collectively in this document as “assisters”). This guide provides a high-level overview of the assister certification process.

Agents and brokers are trained insurance professionals who help consumers enroll in a health insurance plan. Agents may work for a single health insurance company; brokers may represent several companies. Both must be licensed in New Mexico and have signed agreements with beWellnm to sell Marketplace health plans. They may also get payments (“commissions”) from insurance companies for selling health insurance plans.

Enrollment counselors may be employed by beWellnm or may be available at hospitals, clinics, schools, and other locations. They help consumers through the enrollment process free of charge. They also provide referrals for consumers who have needs beyond the Marketplace, such as those who need tax professionals or services from the Department of Insurance (DOI) or Social Security Administration (SSA).

## THE CERTIFICATION PROCESS

Note: At this time, beWellnm is only accepting certification requests from new\* agents and brokers who have a valid New Mexico or nonresident insurance license and either (1) are located in New Mexico; or (2) have a business and physical address in Arizona, Colorado, Oklahoma, Texas, or Utah.

\*A new agent or broker is someone who has never been certified by beWellnm to assist consumers in the New Mexico Marketplace and has never successfully registered with the beWellnm Learning Management System (LMS) used for the annual Assister Certification Training.

Annual certification includes the following steps:

### Step 1: BeWellnm Assister Certification Request Form

New Assisters: New assisters should submit a [beWellnm Assister Certification Request Form](#) to request certification and access to the LMS to complete the Assister Certification Training.

Returning Assisters\*: Returning assisters may use their existing credentials to log into the LMS. They will be automatically enrolled in the required training course.

\*A returning assister is someone who previously completed the annual certification process and previously setup an account in the beWellnm eligibility and enrollment system portal.

### Step 2: Eligibility Determination

BeWellnm will review the information on the beWellnm Assister Certification Request Form for eligibility for certification. Once eligibility is confirmed, assisters will receive an email invitation to register with the LMS. As part of the eligibility determination, beWellnm will confirm the licensure and NPN of brokers and conduct background checks on enrollment counselors.

### Step 3: Complete Training

Once eligibility is approved, new assisters will receive an email from with instructions for setting up an account in the LMS. Returning assisters can log directly into the LMS using their current credentials.

Once an assister has set up a profile and is logged into the LMS, they will have access to the required training. Assisters do not have to complete the lessons or exam within a certain time. They can save their work and log out until they are ready to proceed.

Note: For plan year 2024, all assisters will complete the same training course.

Assisters must complete the annual Assister Certification Training every year to be able to assist consumers on the New Mexico Health Insurance Exchange for the applicable plan year. Training from previous years will not count for the new plan year.

#### Step 4: Final Exam

Assisters must pass the exam in the LMS with a score of 80% or better. Assisters will have unlimited time and unlimited attempts to achieve this score.

#### Step 5: Certificate

After eligibility is confirmed and the assister has completed the annual training and successfully passed the exam, the LMS will generate a certificate.

#### Step 6: Portal Registration and Account Set Up

After the assister has their certificate, they will need to register on the appropriate beWellnm Portal, depending on their role.

Agents and brokers should visit the [Broker Portal](#) and register.

Enrollment Counselors will use the [Assister Portal](#). Once they complete the training, beWellnm will set up their Assister Portal account. Note: If they attempt to do so on their own, they will get an error message. When this is complete, they will receive a link to activate your account and register.

#### Step 7: Begin Helping Consumers!

Assisters are now ready to begin helping consumers on the New Mexico Health Insurance Exchange. BeWellnm greatly appreciates its assister community and the service that assisters provide to New Mexicans!

## CONTACT US

### General Assistance:

For general assistance:

- call the beWellnm Customer Engagement Center at 1-833-862-3935
- email [brokers@nmhix.com](mailto:brokers@nmhix.com) (for questions related to the Broker Portal or Assister Portal)

### Training and LMS Questions and Assistance:

For issues or questions related to the LMS or the certification training, please email [partners@nmhix.com](mailto:partners@nmhix.com).

### Resources:

Agent and Broker Resources:

- Getting Started: <https://www.bewellnm.com/getting-started/agents-brokers/>
- <https://nfpnewmexico.force.com/knowledgebase/s/>

Enrollment Counselor Resources:

- Getting Started: <https://www.bewellnm.com/getting-started/enrollment-counselors/>

[Glossary of Health Insurance Terms](#)