



BeWell Assister Certification Guide

PY2025

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Introduction

BeWell 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 BeWell to sell Marketplace health plans. They may also get payments (“commissions”) from insurance companies for selling health insurance plans. Brokers are responsible for contracting with participating health insurance companies. BeWell does not assist with or participate in broker contracts with health insurance companies.

Enrollment counselors may be employed by BeWell 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 services from the Department of Insurance (DOI) or Social Security Administration (SSA).

The Certification Process

Note: At this time, BeWell is only accepting certification requests from new¹ 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 physical address in Arizona, Colorado, Oklahoma, Texas, or Utah.

The annual certification includes the following steps:

Step 1: BeWell Assister Certification Request Form

New Assisters: New assisters should submit a BeWell Assister Certification Request Form to request certification and access to the LMS to complete the Assister Certification Training.

Returning Assisters²: Returning assisters may use their existing credentials to log into the LMS. They will be automatically enrolled in the required training course.

Step 2: Eligibility Determination

BeWell will review the information on the BeWell 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, BeWell will confirm the licensure and NPN of brokers and conduct background checks on enrollment counselors.

Step 3: Complete Training Modules

Once eligibility is approved, new assisters will receive an email 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 modules or exam within a certain time. They can save their work and log out until they are ready to proceed. **Note:** For plan year 2025, all assisters will complete the same training.

Assisters must complete the annual Assister Certification Training every year to be able to assist consumers on the New Mexico Health Insurance Marketplace for the

¹ A new agent or broker is someone who has never been certified by BeWell to assist consumers in the New Mexico Marketplace and has never successfully registered with the BeWell Learning Management System (LMS) used for the annual Assister Certification Training.

² A returning assister is someone who previously completed the annual certification process and previously set up an account in the BeWell eligibility and enrollment system portal.



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 BeWell Portal, depending on their role, Agency Broker or Independent Broker.

BeWell offers two account setup types for Agencies and Independent Brokers.

Agency Registration –Only the Agency Principal Agent can register the Agency using the Agency NPN at the [Broker Portal](#). The principal Agent is responsible for creating accounts and sending invitations to their Agents to complete the registration process and Identity Proof their accounts. It is important to remember that all created Agent accounts under the Agency must use the Agents Individual NPN to establish with BeWell once Certification has been completed through the BeWell Learning Management System (LMS). Principal Agents must do the same to set themselves up under the Agency using their own individual NPN and a different Email address than what was used to create the Agency. Carriers will not pay commissions to an Agency NPN. Please reach out to partners@nmhix.com for Agency registration assistance.

***If you are an Agency Broker, please reach out to your principal Agent to assist with creating the Broker account under the Agency. If you incorrectly register, this will cause a delay in broker portal activation.**

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

Enrollment Counselors will use the [Assister Portal](#). Once they complete the training, BeWell will set up their Assister Portal account. Enrollment Counselors must wait for an e-mail invitation to register with a link to activate their account and register. **Note:** If an Enrollment Counselor attempts to register on their own, they will receive an error message.

Step 7: Begin Helping Consumers!

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

Contact Us

General Assistance

- call the BeWell Customer Engagement Center at 1-833-862-3935.
- email contactcenter@nmhi.com for technical issues related to the Broker Portal or Assister Portal.

Training, Certification, and LMS Questions and Assistance

For issues or questions related to the LMS or the certification training, please email partners@nmhix.com.

Resources

Agent and Broker Resources:

- [Broker Resources](#)

Enrollment Counselor Resources:

- [Enrollment Counselors Resources](#)

[Glossary of Health Insurance Terms](#)