



NEW MEXICO HEALTH INSURANCE EXCHANGE

**Broker Portal**  
**Account Setup Guide**  
**New Users**

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## 1. Introduction

BeWellnm is New Mexico's marketplace for health and dental insurance. Agencies, Brokers, Sub Brokers, and Independent Brokers can use the beWellnm Broker Portal to help individuals apply for, and enroll in, health insurance coverage.

This guide is designed to help brokers navigate the Broker Portal registration and account setup process.

## 2. User Roles for Broker Portal

There are multiple levels of user access in the Broker Portal. Your security level is determined by your System Administrator. The following user roles exist in the Broker Portal:

### a. **Agency User**

An agency user is an organization employing multiple brokers who can help individuals apply for, and enroll in, health insurance coverage.

The agency user may also be a licensed broker.

***Agency users should use the agency's National Producer Number (NPN) to set up the agency.***

Since an agency user is responsible for setting up agency-associated brokers, they will need to use the broker NPN for the setup of brokers working for the agency.

The agency NPN should never be used to set up an agency-associated broker.

Agency users are responsible for sending the invitation to agency-associated brokers and sub brokers for profile creation.

### b. **Agency-Associated Broker**

An agency-associated broker is a licensed broker that is associated with the agency who can help individuals apply for, and enroll in, health insurance coverage.

Agency-associated brokers can set up sub brokers who assist them by sending an invitation. For the remainder of this guide, the agency-associated broker is referred to as a broker.

### c. **Sub Broker**

A sub broker is a person who works on behalf of a licensed broker/agency who can help an individual apply for, and enroll in, health insurance coverage.

Sub brokers do not have an NPN and can be created by and managed by the broker.

Brokers must send an invitation link for sub brokers to create a profile.

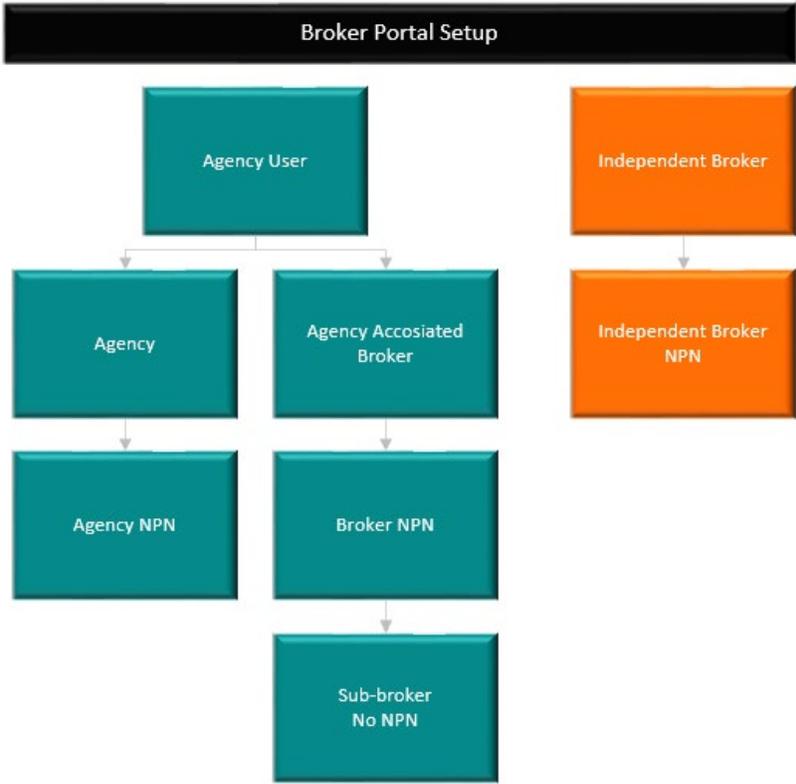
**d. Independent Broker**

An independent broker is a licensed broker who can help an individual apply for, and enroll in, health insurance coverage.

Independent brokers are not linked to any agency.

***Independent brokers will always use their NPN to register in the portal.***

Independent brokers cannot set up sub brokers.



### 3. Agency User Registration and Account Creation

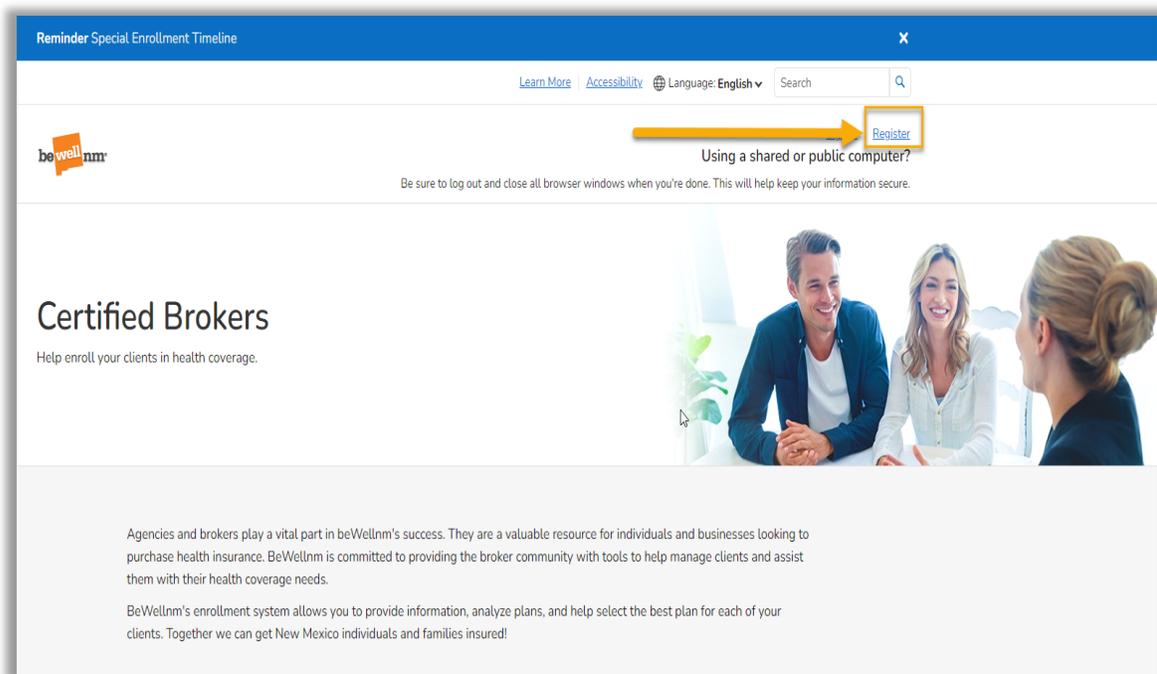
**Important: If you are an independent broker, please skip to page 44 for registration and account creation instructions.**

#### Important Information:

- Agency administrators will have multiple usernames: one for agency activities and one for broker activities.
- Carriers will only pay commissions for enrollments that have the broker's National Producer Number (NPN) on the enrollment application.
- Remember to set up your broker profile within the agency using only the broker NPN.

To register and create your beWellnm ID as an agency user, follow the steps listed below.

1. Access the Broker Portal at [getcovered.bewellnm.com](https://getcovered.bewellnm.com)
2. Click **Register**.



3. Click **Create beWellnm ID**.

Sign In With Your beWellnm ID

beWellnm ID or email address

Password

Sign In

Forgot beWellnm ID | Forgot Password

Additional options:

- Create beWellnm ID
- Manage your beWellnm ID
- What is beWellnm ID?



Note: Creating duplicate accounts/usernames may delay your setup.

4. Complete the required fields.  
Tip: Do NOT use your email address as your beWellnm ID
5. Click **I Agree**.

### Create beWellnm ID

beWellnm ID securely manages your account so that you can use one beWellnm ID and password to sign in to all integrated applications.

**i** Already have beWellnm ID? Sign in now

#### Profile Information

First name

Last name

Date of birth  
  
mm-dd-yyyy

#### Sign In Information

Your email address

Create beWellnm ID  
 ?

Your beWellnm ID must have:

- 6 to 50 characters
- At least one letter
- No spaces
- No letters with accents

Create password

Your password must have:

- Between 8 and 100 characters
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 number
- At least 1 special character

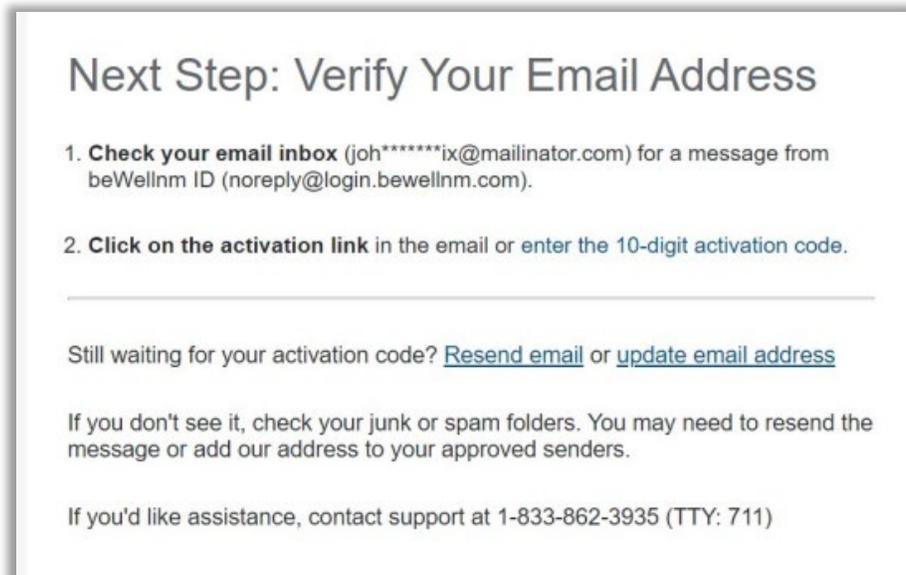
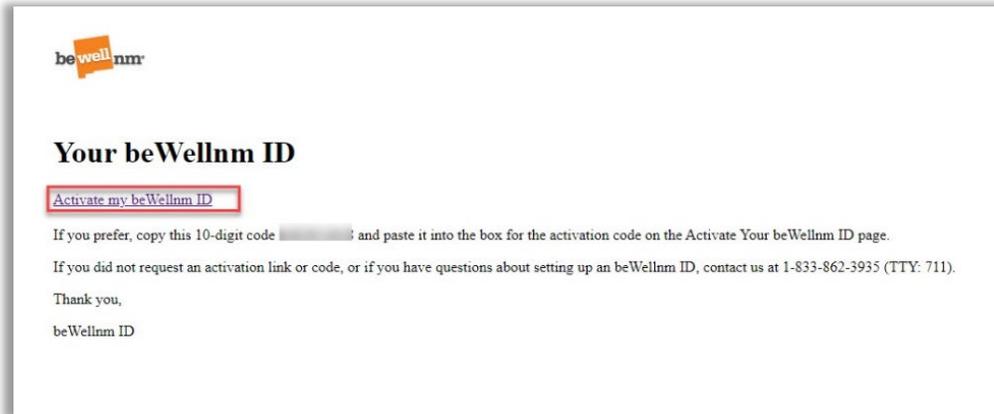
Type password again

You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the beWellnm ID service. If you do not agree, click Cancel and do not use any aspect of the beWellnm ID service.

**I Agree** Cancel

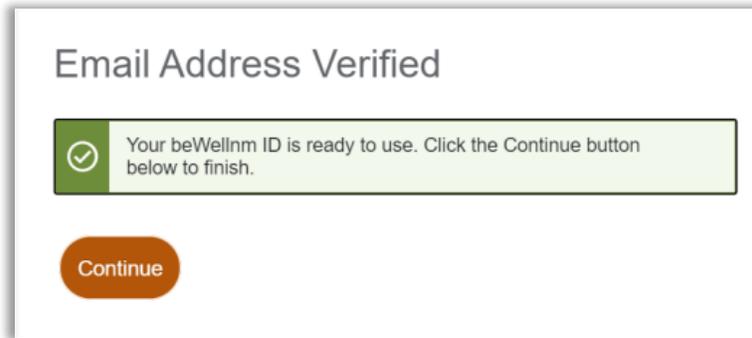
6. You will receive an email from noreply@beWellnm.com with a link to activate your beWellnm ID. Click on **Activate Your beWellnm ID**. The email will also include a 10-digit code that you can copy and paste on the Activate Your beWellnm ID page.

### Email Message and Instructions

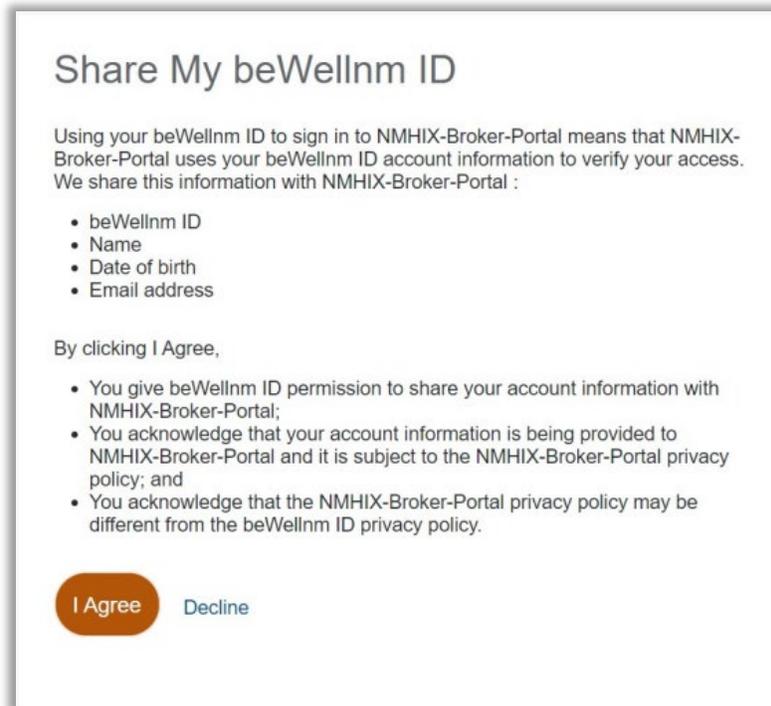


**Note:** If you're still waiting for your activation code, click on **Resend Email** or **update email address**. If you have not received the email, check your junk or spam folders. You may need to resend the message or add our address to your approved sender's list email settings.

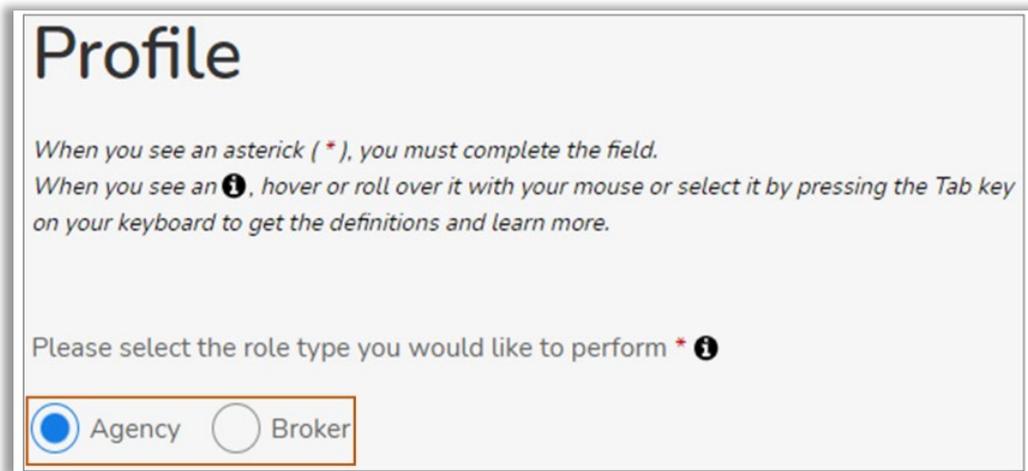
7. Click **Continue** to verify your Email Address.



8. Click **I Agree** to acknowledge the NMHIX Broker Portal Privacy Policy. You will then be directed to the **Profile** page.



9. Select the **Agency** role type.



**Profile**

*When you see an asterick (\*), you must complete the field.  
When you see an **i**, hover or roll over it with your mouse or select it by pressing the Tab key on your keyboard to get the definitions and learn more.*

Please select the role type you would like to perform \* **i**

Agency  Broker

10. Complete the **Agency Information**.

- Agency Name: *Name of the Agency*
- Agency Tax ID: *Agency Tax ID*
- National Producer Number (NPN): *NPN of the Agency (optional field).*
- *Do not enter the NPN of a broker who would also like to have an independent broker account on the beWellnm platform.*



**Agency Information**

Agency Name \*

\_\_\_\_\_

Agency Tax ID \*                      National Producer Number (NPN)

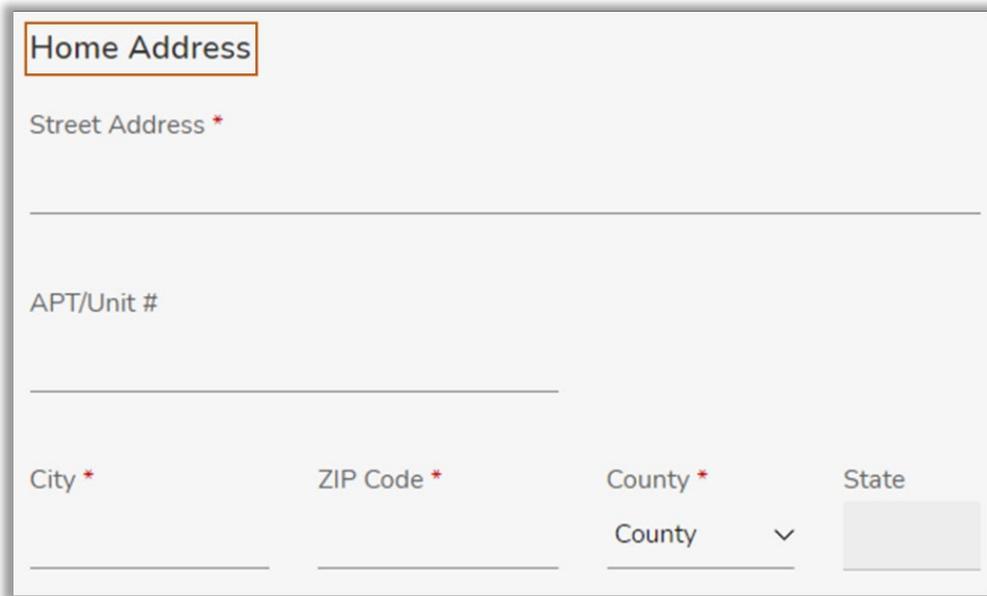
\_\_\_\_\_

11. Complete the **Agency Admin Information**.

### Agency Admin Information

First Name *	Middle Name	Last Name *	Suffix
<input type="text" value="R..."/>	<input type="text"/>	<input type="text" value="P..."/>	Suffix <input type="text" value=""/>
Email Address *		Username *	
<input type="text" value="...@yopmail.com"/>		<input type="text" value="...@yopmail.com"/>	
Social Security Number *	Date of Birth (MM/DD/YYYY) *		
<input type="text"/>	<input type="text"/>		
Spoken Languages *			
Select one or more <input type="text" value=""/>			

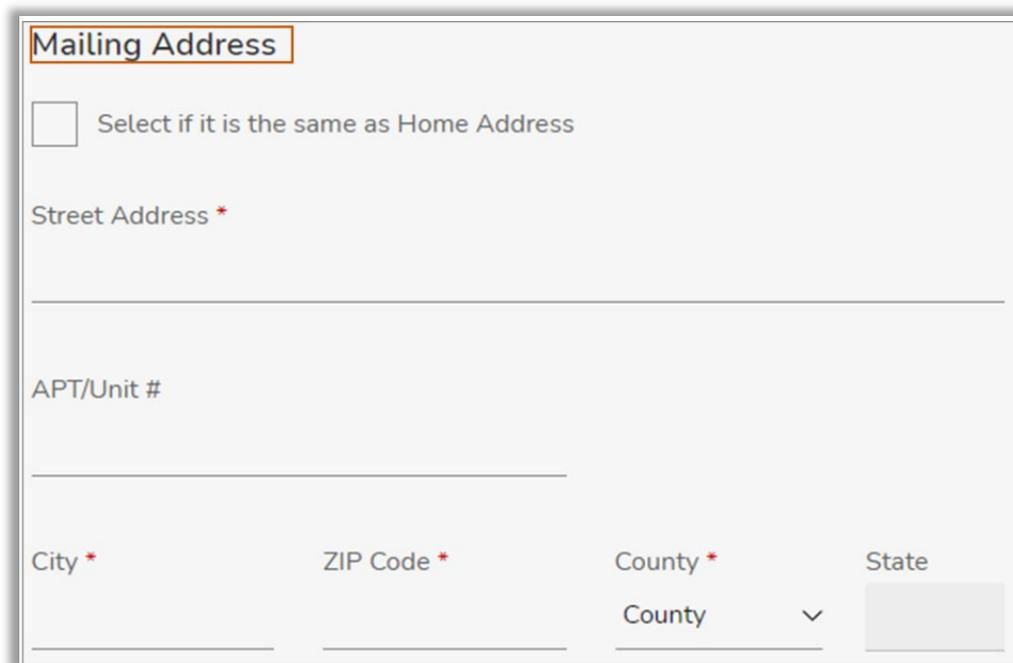
12. Complete the **Home Address** of Agency Admin.



The screenshot shows a form titled "Home Address" with a red border around the title. The form contains the following fields: "Street Address \*" (a large text input field), "APT/Unit #" (a text input field), "City \*" (a text input field), "ZIP Code \*" (a text input field), "County \*" (a dropdown menu with "County" and a downward arrow), and "State" (a text input field).

**Important!** You will need to provide your residential address to complete identity proofing. After you have completed identity proofing, you should return to your Broker Portal profile and update your “Home Address” to your business address. This is the address that consumers will see when searching for a broker in the consumer portal.

13. Complete the **Mailing Address** of Agency Admin or select the checkbox next to **Select if it is the same as Home Address**.



The screenshot shows a form titled "Mailing Address" with a red border around the title. The form contains the following fields: a checkbox labeled "Select if it is the same as Home Address", "Street Address \*" (a large text input field), "APT/Unit #" (a text input field), "City \*" (a text input field), "ZIP Code \*" (a text input field), "County \*" (a dropdown menu with "County" and a downward arrow), and "State" (a text input field).

14. Complete the **Contact Details** of Agency Admin.

**Contact Details**

Phone Number \*      Extension      Phone Type  
Cell

Fax Number

15. Click **Create Profile**.

*The U.S. Postal Service Address Search dialog box appears.*

16. Select the standardized address from the options listed and click **Continue**.

**U.S. Postal Service Address Search**

We searched the U.S. Postal Service with the information you entered. If the address(es) we found below match your address(es), please select it. If an address is wrong or not found, cancel and try to add more information to help match your address(es).

Robert Martin's Home Address:

You Entered:

1234 Main St  
Gallup, NM 87301      County: MCKINLEY

We Found:

1234 Main St  
GALLUP, NM 87301      County: MCKINLEY

**Continue**      Cancel

*An automated email is generated and sent to you upon your profile completion.*

17. Remote Identity Proofing (RIDP) - Agency Admin.

- Read the message that appears on the ID Proofing page before you access the RIDP questionnaire.

**Note:** By continuing, you agree to allow Experian (the RIDP agency) to access your personal information to prove your identity.

**ID Proofing**

[About Identity \(ID\) Proofing](#)

Before you can apply, you will need to prove your identity online through a process called Remote Identity Proofing (RIDP). By continuing, you agree to allow Experian - the ID proofing agency - to access your personal information to prove your identity.

Remember:

- Be sure to enter your correct legal name, current home address, primary phone number, date of birth and email address.
- Experian uses your consumer report profile to confirm your identity and creates something called a soft inquiry. Soft inquiries are visible only to you, the consumer, and no one else. Soft inquiries have no impact on your credit report, history, or score other than being recorded and maintained for 23 months. The soft inquiry will be called "CMS Proofing Services."
- Experian may ask personal questions to help prove your identity through RIDP.

What happens if your information can't be proven online

If your identity can't be proven online, you may need to send proof of your identity to beWellnm.

[Find places to get help](#)

You may need:

- ▶ Social Security Number
- ▶ Home Address

Estimated time for this section: 2 to 5 minutes

18. Click **Save and Continue**.

A questionnaire on the Identity Verification page appears.

- Select the correct answers from the questionnaire.

**Note:** The questions that appear on the questionnaire page are randomly selected based on information contained in each person's consumer report file.

19. Click **Save and Continue**.

- i) If the RIDP process does not pass, you are navigated back to the **My Profile** page. After three failed attempts you will receive a final error message indicating your identity cannot be verified online. To continue you need to send proof to beWellnm.
- ii) If you receive a message saying Pending Verification, your RIDP is successful; however, your information is not yet verified, and you will not be allowed to access the Broker Portal until your information is verified successfully. You will receive an email informing you of the pending account verification status.

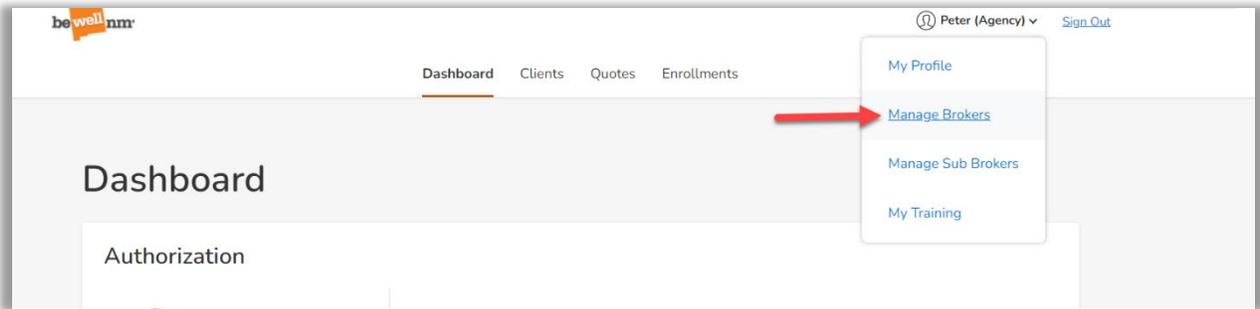
**Note: This information is verified through the 'Broker Certification Feed' or CSR portal user verifies the information.**

- iii) If the RIDP is successful and the account is verified, the agency user is navigated to the Dashboard of the Broker Portal.

## 4. Agency User Adding an Agency-Associated Broker

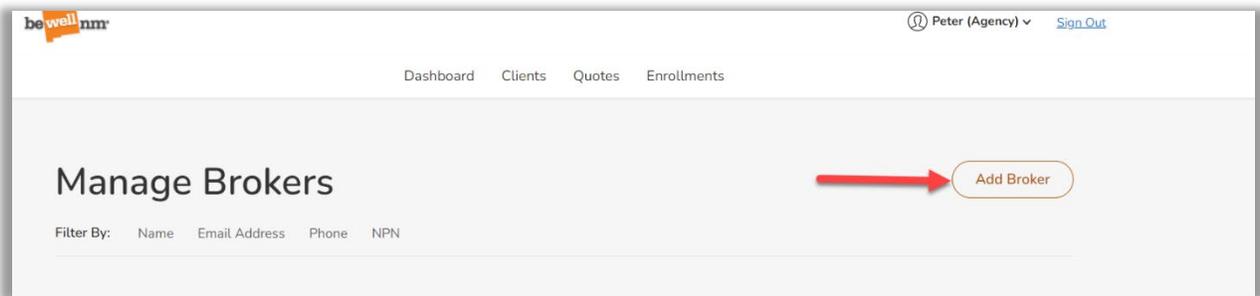
To add an Agency-Associated Broker, follow the steps listed below:

1. Login to the beWellnm Broker Portal using your Agency User credential.
2. Select the **My Profile** account dropdown and click **Manage Brokers**.



You are navigated to the **Manage Brokers** screen.

3. Click on **Add Broker**.



Provide the Broker Details.

Note: Provide the broker's NPN (not the agency's NPN). This NPN should not be registered with beWellnm; otherwise, an error message will be displayed informing you the NPN already exists.

The broker is added to the agency and an invitation email is sent to the broker.

Dashboard Clients Quotes Enrollments

## Add Broker

When you see an asterick (\*), you must complete the field.  
When you see an **o**, hover or roll over it with your mouse or select it by pressing the Tab key on your keyboard to get the definitions and learn more.

**Broker Information**

National Producer Number (NPN) \* Agency Tax ID \*  
543533534

**Basic Information**

First Name \* Middle Name Last Name \* Suffix  
Suffix

Email Address \* Date of Birth (MM/DD/YYYY) \*

**Mailing Address**

Street Address \*

APT/Unit #

City \* ZIP Code \* County \* State  
County

**Contact Details**

Phone Number \* Extension Phone Type  
Cell

Fax Number

**Add Broker**

4. You have the option to resend the invitation email to the broker.

The screenshot shows a web interface titled "Manage Brokers". At the top right is an "Add Broker" button. Below the title, there are filter options: "Filter By: Name Email Address Phone NPN". It indicates "1 Broker(s) Found" and "Show: 10". A table lists the broker information:

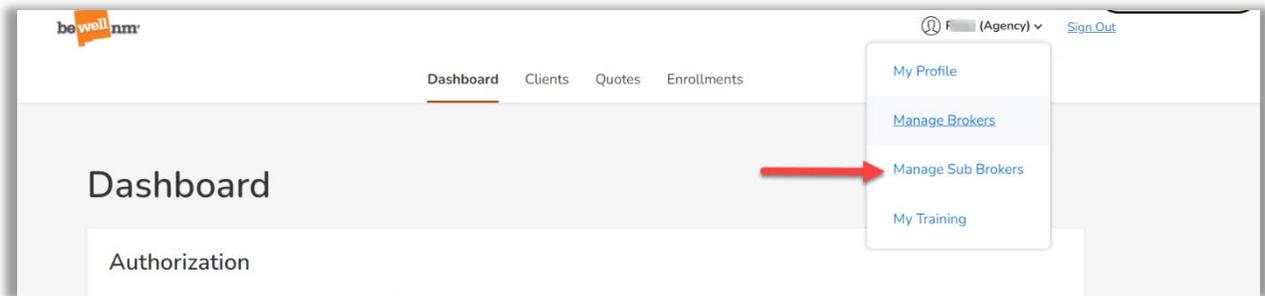
Name	Email Address	Phone	NPN	Actions
Jenny Broker	<a href="mailto:jenny.br@mailinator.com">jenny.br@mailinator.com</a>	(333) 333-3333	8877665544	⋮ View/Edit Details Send Invite

At the bottom of the table, there are navigation controls: "< 1 >". A red arrow points to the "Send Invite" button in the Actions column.

## 5. Agency User Adding a Sub Broker

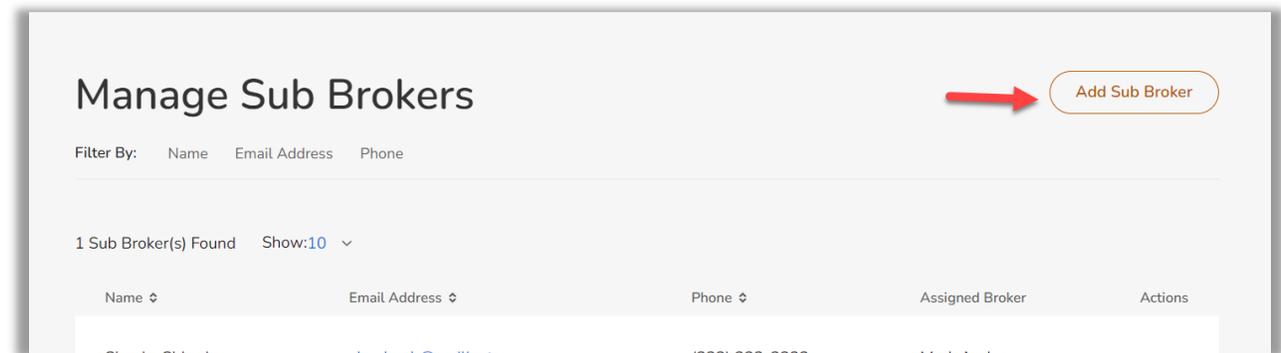
To add a Sub Broker, follow the steps listed below:

1. Login to the beWellnm Broker Portal using your agency user credential.
2. Click the **My Profile** dropdown and click **Manage Sub Brokers**.



You are navigated to the **Manage Sub Brokers** screen.

3. Click **Add Sub Broker**.



4. Provide the sub broker details, then click **Add Sub Broker**.

**Add Sub Broker**

When you see an asterick (\*), you must complete the field.  
When you see an **i**, hover or roll over it with your mouse or select it by pressing the Tab key on your keyboard to get the definitions and learn more.

**Basic Information**

First Name \*      Middle Name      Last Name \*      Suffix  
\_\_\_\_\_  
Suffix  
\_\_\_\_\_

Email Address \*      Date of Birth (MM/DD/YYYY) \*  
\_\_\_\_\_  
\_\_\_\_\_

**Mailing Address**

Street Address \*  
\_\_\_\_\_

APT/Unit #  
\_\_\_\_\_

City \*      ZIP Code \*      County \*      State  
\_\_\_\_\_  
\_\_\_\_\_  
County  
\_\_\_\_\_

**Contact Details**

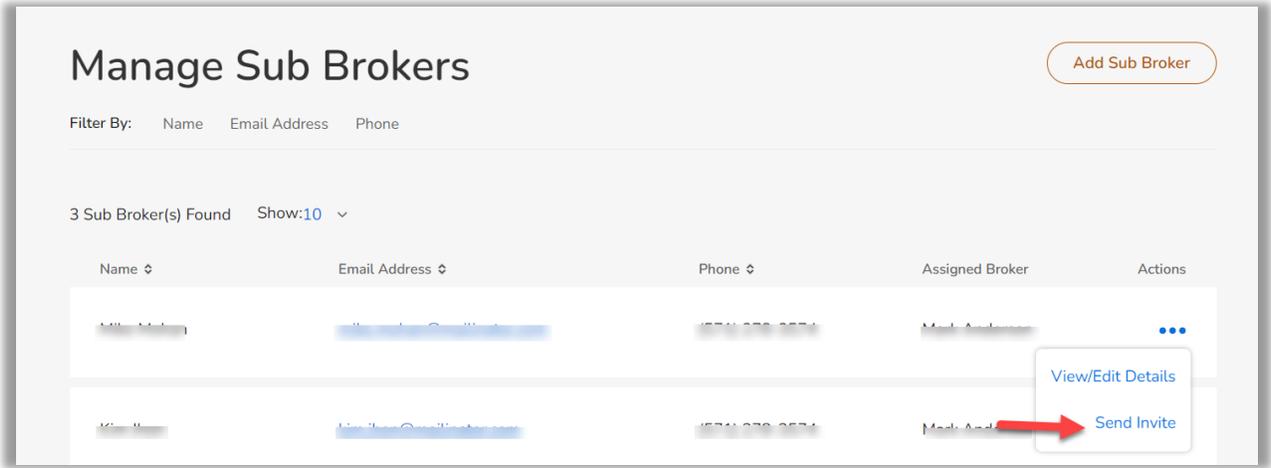
Phone Number \*      Extension      Phone Type  
\_\_\_\_\_  
\_\_\_\_\_  
Cell  
\_\_\_\_\_

Fax Number  
\_\_\_\_\_

**Add Sub Broker**

The sub broker is added to the broker and an invitation email is sent to the sub broker.

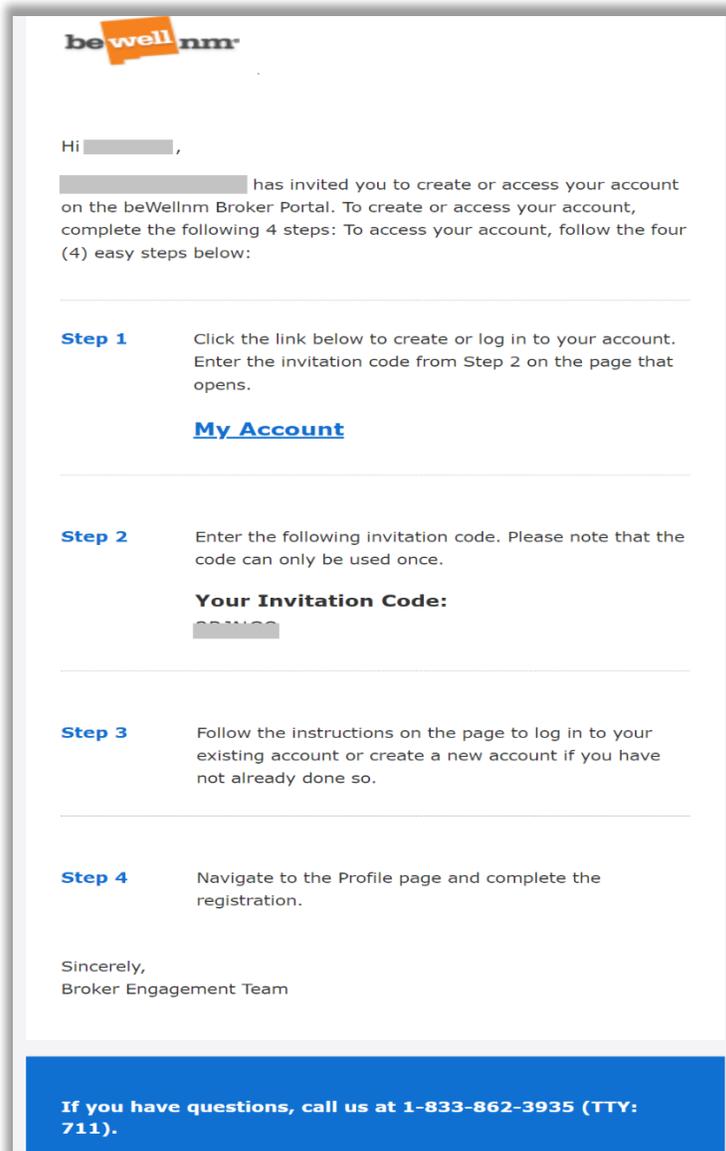
5. You have the option to resend the invitation email to the sub broker.



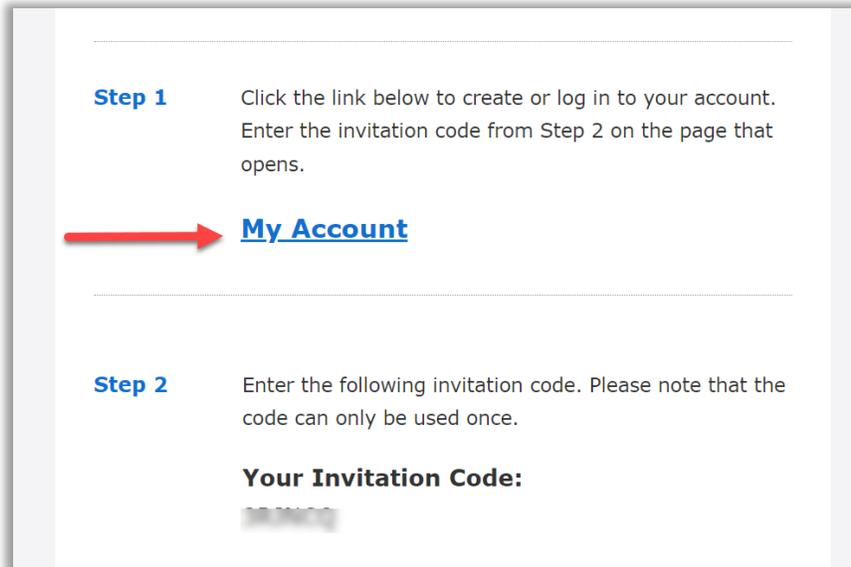
## 6. Agency-Associated Broker Registration and Account Creation

To register and create your beWellnm ID as an agency-associated broker user, follow the steps listed below.

1. Check your email. You should have received an invitation email from beWellnm (on behalf of the broker agency) to create a broker account.



2. To register and create a broker account, follow the instructions provided in the email. Click **My Account**.



3. You are navigated to the beWellnm ID registration page.



Warning: Creating duplicate accounts/usernames may delay your setup.

4. Enter the required fields.

Tip: Do NOT use your email address as your beWellnm ID

**Create beWellnm ID**

beWellnm ID securely manages your account so that you can use one beWellnm ID and password to sign in to all integrated applications.

**Already have beWellnm ID? Sign in now**

**Profile Information**

First name  
[Yellow input field]

Last name  
[Yellow input field]

Date of birth  
[Yellow input field]  
mm-dd-yyyy

**Sign In Information**

Your email address  
[Yellow input field]

Create beWellnm ID  
[Yellow input field] ?

Your beWellnm ID must have:

- 6 to 50 characters
- At least one letter
- No spaces
- No letters with accents

Create password  
[Yellow input field] [Eye icon]

Your password must have:

- Between 8 and 100 characters
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 number
- At least 1 special character

Type password again  
[Yellow input field] [Eye icon]

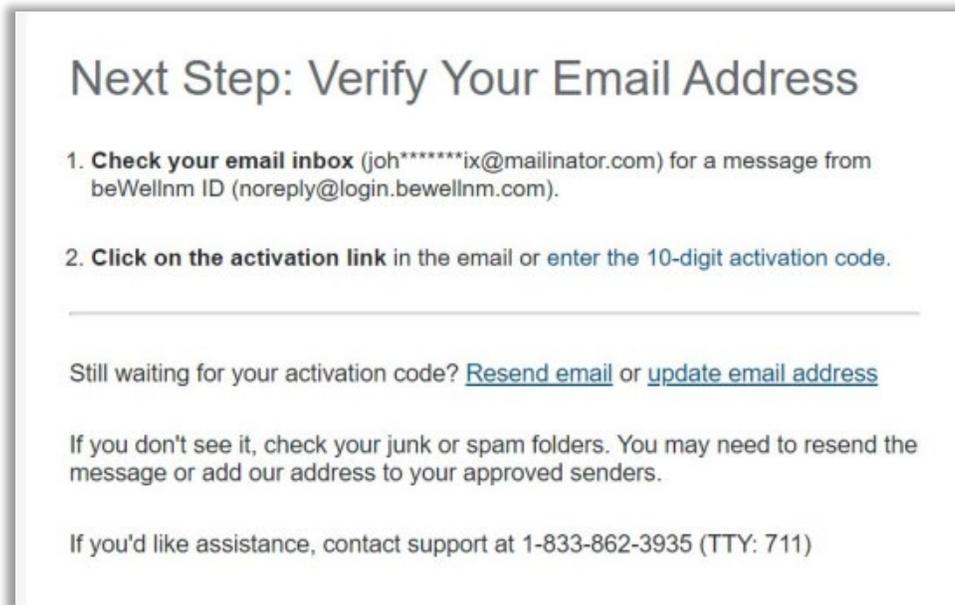
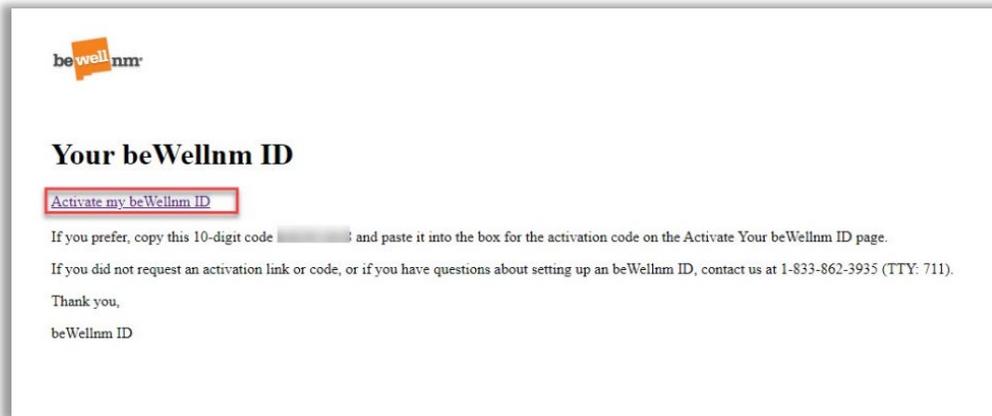
You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the beWellnm ID service. If you do not agree, click Cancel and do not use any aspect of the beWellnm ID service.

**I Agree** Cancel

Click **I Agree**.

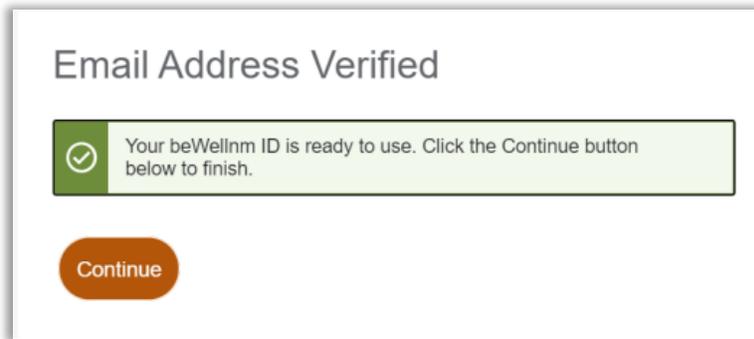
5. You will receive an email from [noreply@beWellnm.com](mailto:noreply@beWellnm.com) with a link to activate your beWellnm ID. Click on **Activate Your beWellnm ID**. The email will also include a 10-digit code that you can copy and paste on the **Activate Your beWellnm ID** page.

### Email Message and Instructions



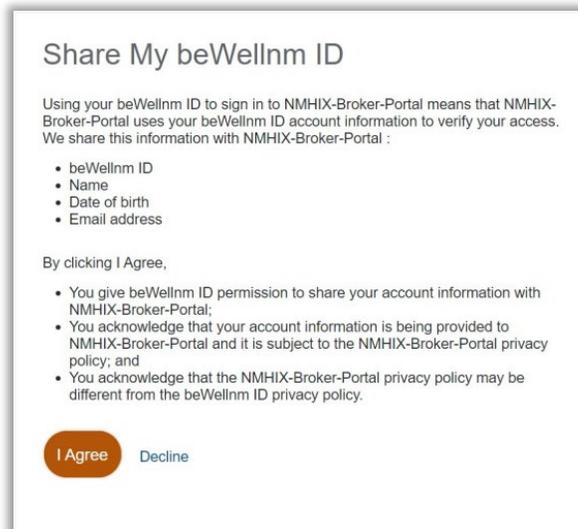
Note: If you're still waiting for your activation code, click on **Resend Email** or **update email address**. If you have not received the email, check your junk or spam folders. You may need to resend the message or add our address to your approved sender's list email settings.

6. Click **Continue** to verify your Email Address.



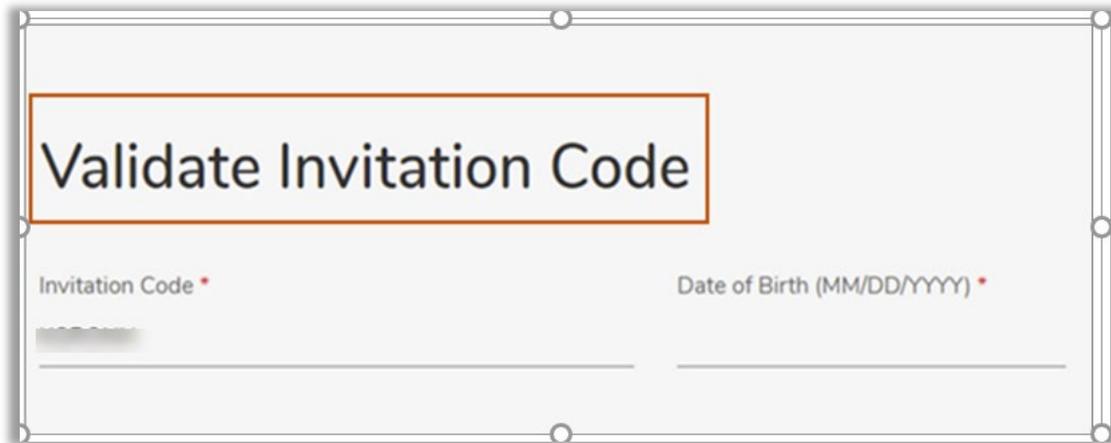
7. Click **I Agree** to acknowledge the NMHIX Broker Portal Privacy Policy.

Note: This will take the user to validate the invitation code page.



8. Enter your Date of Birth.

Note: The invitation code will be auto-populated with the code received in the invitation email.

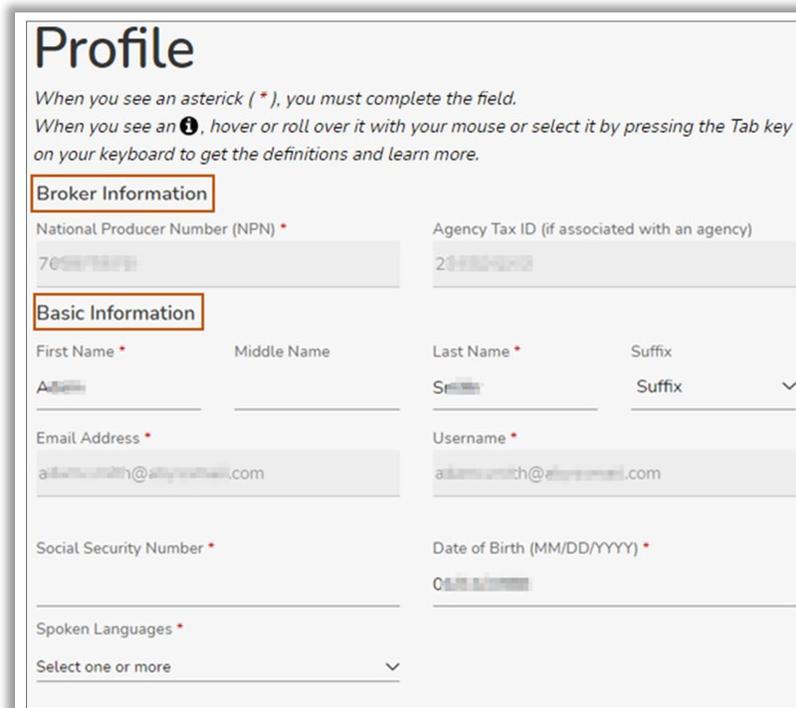


The screenshot shows a form titled "Validate Invitation Code" with a light gray background and a thin border. At the top, the title is enclosed in a brown rectangular box. Below the title, there are two input fields: "Invitation Code" on the left and "Date of Birth (MM/DD/YYYY)" on the right. Both fields have a red asterisk indicating they are required. The "Invitation Code" field contains a blurred, auto-populated value. Below the fields are horizontal lines representing the input area.

9. Click **Next**.

Note: This takes you to the Profile page where some of the fields are auto-populated.

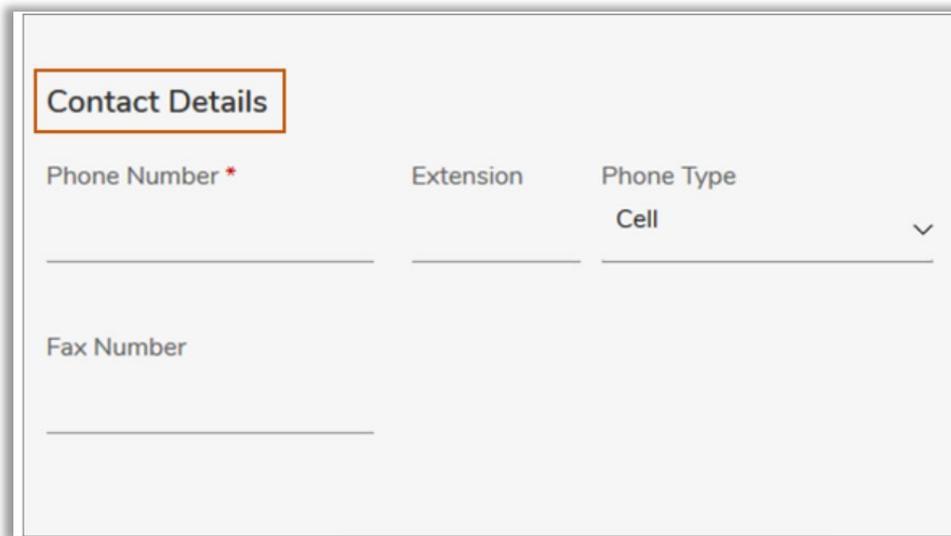
10. Enter the required fields on the **Profile** page.



The screenshot shows a "Profile" page with a light gray background. At the top, the title "Profile" is in a large, bold font. Below the title, there is a note: "When you see an asterick (\*), you must complete the field. When you see an ⓘ, hover or roll over it with your mouse or select it by pressing the Tab key on your keyboard to get the definitions and learn more." Below the note, there are two sections: "Broker Information" and "Basic Information", both enclosed in brown rectangular boxes. The "Broker Information" section has two fields: "National Producer Number (NPN)" and "Agency Tax ID (if associated with an agency)". The "Basic Information" section has four fields: "First Name", "Middle Name", "Last Name", and "Suffix". Below these are "Email Address" and "Username" fields. At the bottom, there are "Social Security Number" and "Date of Birth (MM/DD/YYYY)" fields, and a "Spoken Languages" dropdown menu.



13. Complete the required fields in **Contact Details**.



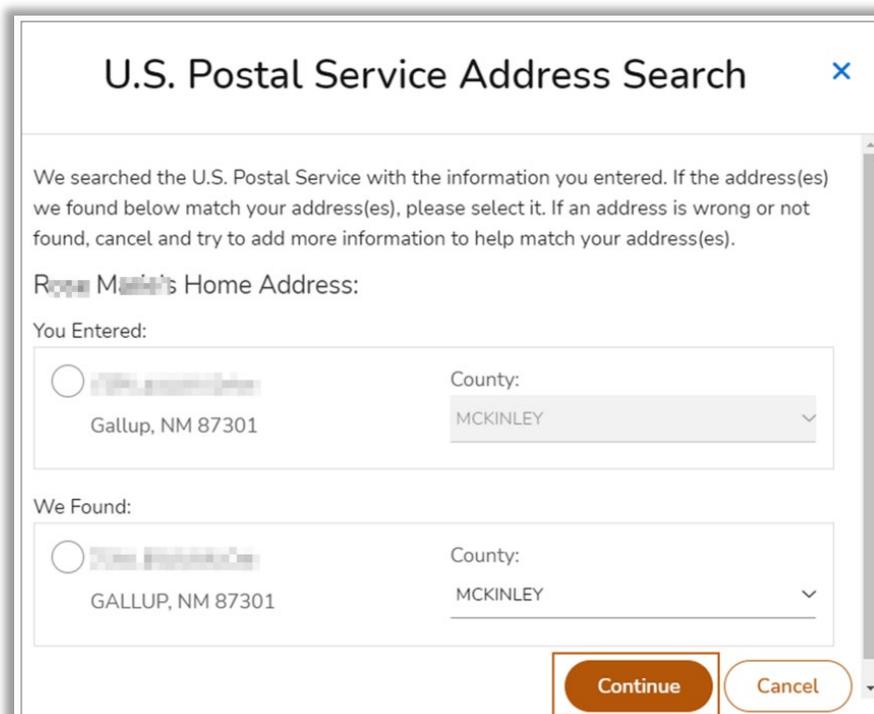
The screenshot shows a form titled "Contact Details" with a red border. It contains three input fields: "Phone Number \*", "Extension", and "Phone Type". The "Phone Type" dropdown menu is currently set to "Cell". Below these fields is a "Fax Number" input field.

14. Click **Create Profile**.

*The U.S. Postal Service Address Search dialog box appears*

15. Select the standardized address from the options listed and click **Continue**.

Note: An automated email is generated and sent to you upon your profile completion. After this, the next step is to verify your identity.



The screenshot shows a dialog box titled "U.S. Postal Service Address Search" with a close button (X) in the top right corner. The text inside reads: "We searched the U.S. Postal Service with the information you entered. If the address(es) we found below match your address(es), please select it. If an address is wrong or not found, cancel and try to add more information to help match your address(es)."

Below the text, it says "Rogee Martin's Home Address:" and "You Entered:". The "You Entered" section shows a radio button, a text field containing "Gallup, NM 87301", and a "County:" dropdown menu with "MCKINLEY" selected.

Below that, it says "We Found:". The "We Found" section shows a radio button, a text field containing "GALLUP, NM 87301", and a "County:" dropdown menu with "MCKINLEY" selected.

At the bottom right, there are two buttons: "Continue" (highlighted with a red border) and "Cancel".

## 16. Remote Identity Proofing (RIDP) Verification (Broker)

- Read the message that appears on the **ID Proofing** page before you access the RIDP questionnaire.

**Note:** By continuing, you agree to allow Experian (the RIDP agency) to access your personal information to prove your identity.

**ID Proofing**

[About Identity \(ID\) Proofing](#)

Before you can apply, you will need to prove your identity online through a process called Remote Identity Proofing (RIDP). By continuing, you agree to allow Experian - the ID proofing agency - to access your personal information to prove your identity.

Remember:

- Be sure to enter your correct legal name, current home address, primary phone number, date of birth and email address.
- Experian uses your consumer report profile to confirm your identity and creates something called a soft inquiry. Soft inquiries are visible only to you, the consumer, and no one else. Soft inquiries have no impact on your credit report, history, or score other than being recorded and maintained for 23 months. The soft inquiry will be called "CMS Proofing Services."
- Experian may ask personal questions to help prove your identity through RIDP.

What happens if your information can't be proven online

If your identity can't be proven online, you may need to send proof of your identity to beWellnm.

[Find places to get help](#)

You may need:

- ▶ Social Security Number
- ▶ Home Address

Estimated time for this section: 2 to 5 minutes

## 17. Click **Continue**.

The questionnaire on the **Identity Verification** page appears.

- a. Select the correct answers from the questionnaire.

Note: The questions that appear on the questionnaire page are randomly selected based on information contained in each person's consumer report file.

## 18. Click **Save and Continue**.

- a. If the RIDP process does not pass, you are navigated back to the **My Profile** page. After three failed attempts you will receive a final error message indicating your identity cannot be verified online, to continue you need to send proof to the beWellnm.
- b. If you receive a message saying Pending Verification, this means your RIDP is successful, however, your account is not yet verified, and you will not be allowed to access the Broker Portal until your information is verified successfully. You will receive an email informing you of the pending account verification status.

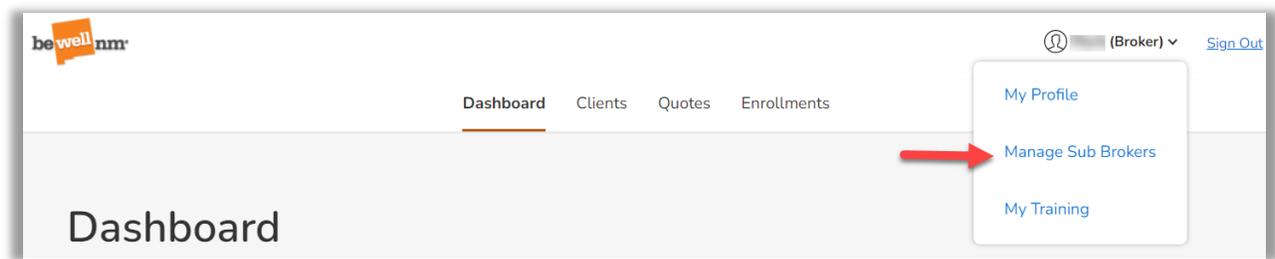
Note: This information is verified through the 'Broker Certification Feed' or CSR portal user verifies this information.

- c. If the RIDP is successful and the account is verified, the Associated Broker is navigated to the Dashboard of the Broker Portal.

## 7. Agency-Associated Broker Adding a Sub Broker

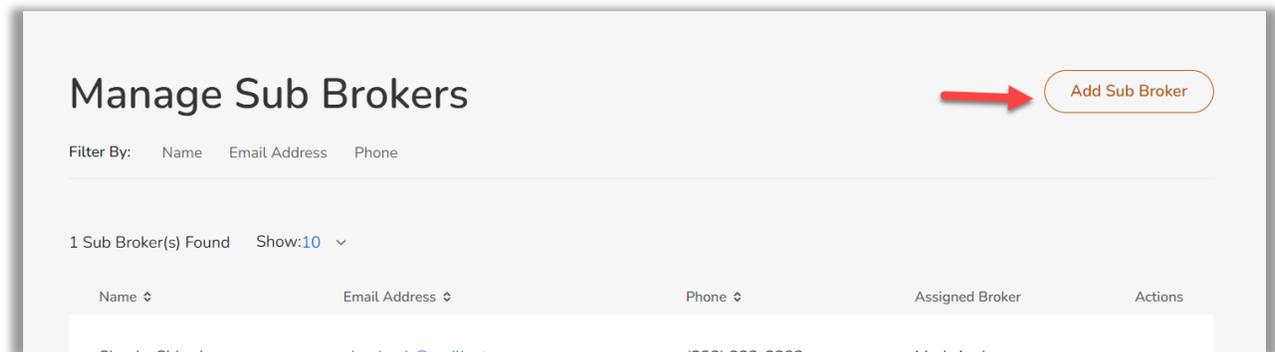
To add a sub broker under an agency-associated broker, follow the steps listed below:

1. Login to the beWellnm Broker Portal using your agency-associated broker credentials.
2. Click the broker's account dropdown and click on **Manage Sub Brokers**.



You are navigated to the **Manage Sub Brokers** screen.

3. Click **Add Sub Broker**.



4. Provide the sub broker details and click on the **Add Sub Broker**.

### Add Sub Broker

When you see an asterick (\*), you must complete the field.  
When you see an ⓘ, hover or roll over it with your mouse or select it by pressing the Tab key on your keyboard to get the definitions and learn more.

---

#### Basic Information

First Name *	Middle Name	Last Name *	Suffix Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Email Address *	Date of Birth (MM/DD/YYYY) *
<input type="text"/>	<input type="text"/>

#### Mailing Address

Street Address \*

APT/Unit #

City *	ZIP Code *	County *	State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

#### Contact Details

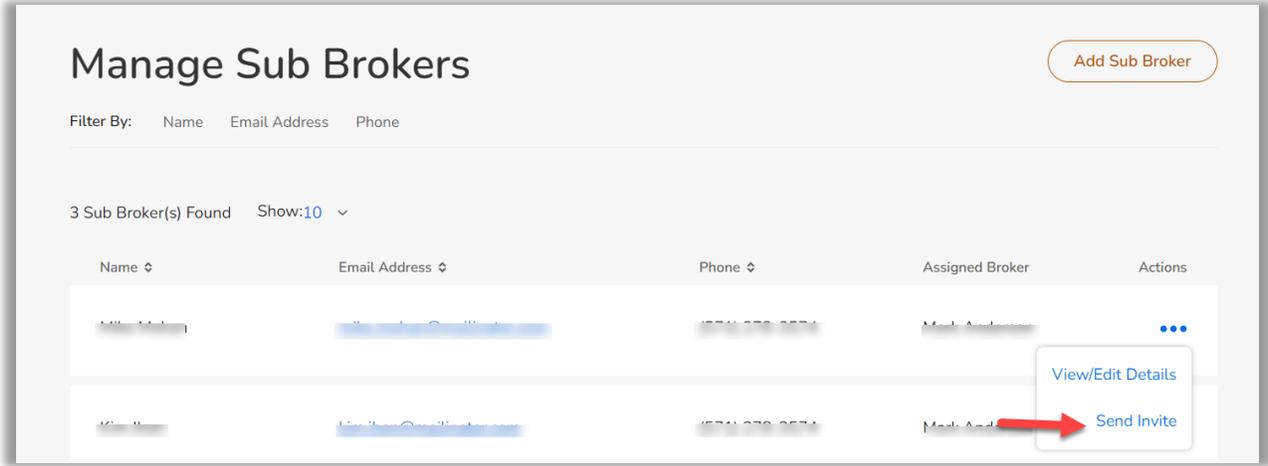
Phone Number *	Extension	Phone Type Cell
<input type="text"/>	<input type="text"/>	<input type="text"/>

Fax Number

**Add Sub Broker**

The sub broker is added to the agency-associated broker and an invitation email is sent to the sub broker.

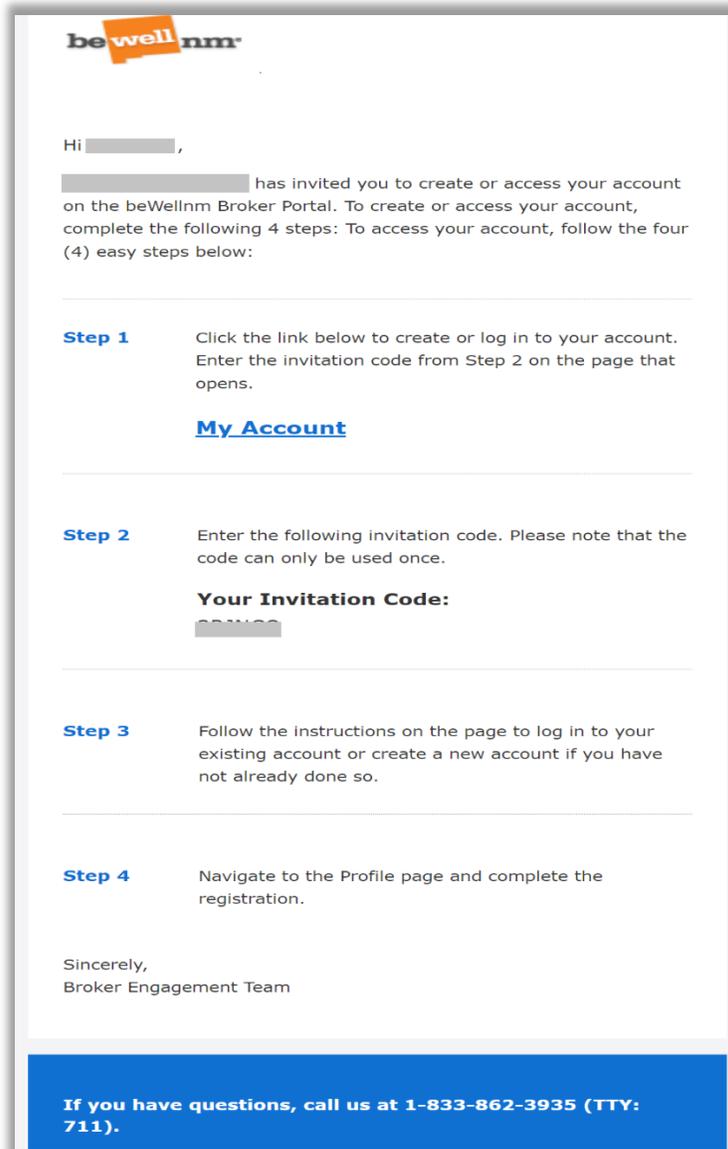
5. You have the option to resend the invitation email to the sub broker.



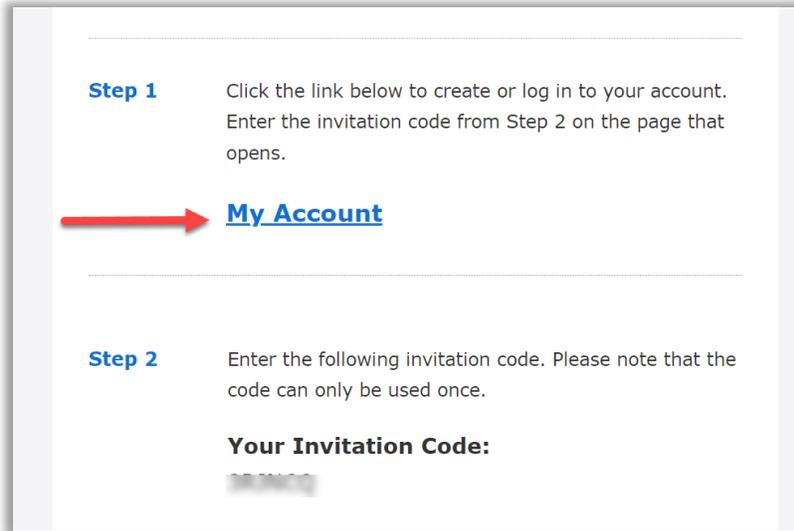
## 8. Agency Sub Broker Registration and Account Creation

To register on the beWellnm platform and create your beWellnm ID as an agency-associated sub broker user, follow the steps below:

1. Check your email; you have received an invitation email from beWellnm (on behalf of an agency broker) to create a sub broker account.



2. To register and create a sub broker account follow the instruction provided in the email. Click the **My Account** link.



3. You are navigated to the beWellnm ID registration page.



Warning: Creating duplicate accounts/usernames may delay your setup.

4. Enter in all required fields and click **I Agree**.  
Tip: Do NOT use your email address as your beWellnm ID

### Create beWellnm ID

beWellnm ID securely manages your account so that you can use one beWellnm ID and password to sign in to all integrated applications.

 Already have beWellnm ID? [Sign in now](#)

#### Profile Information

First name

Last name

Date of birth   
mm-dd-yyyy

#### Sign In Information

Your email address

Create beWellnm ID  

Your beWellnm ID must have:

- 6 to 50 characters
- At least one letter
- No spaces
- No letters with accents

Create password  

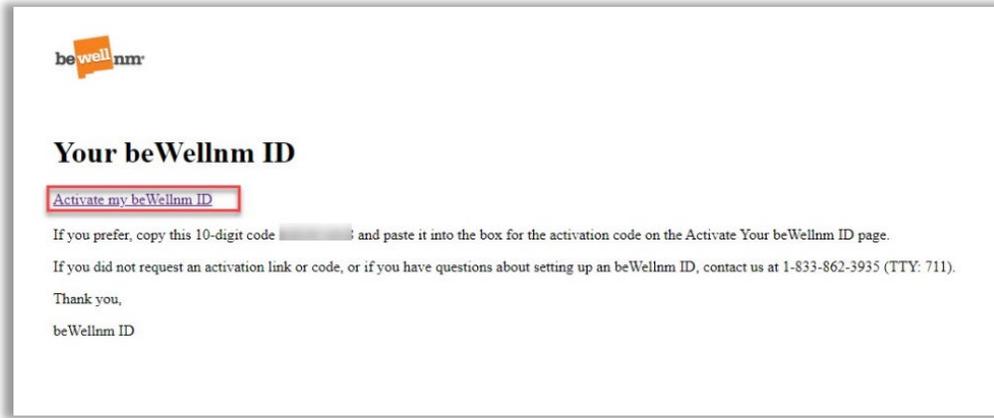
Your password must have:

- Between 8 and 100 characters
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 number
- At least 1 special character

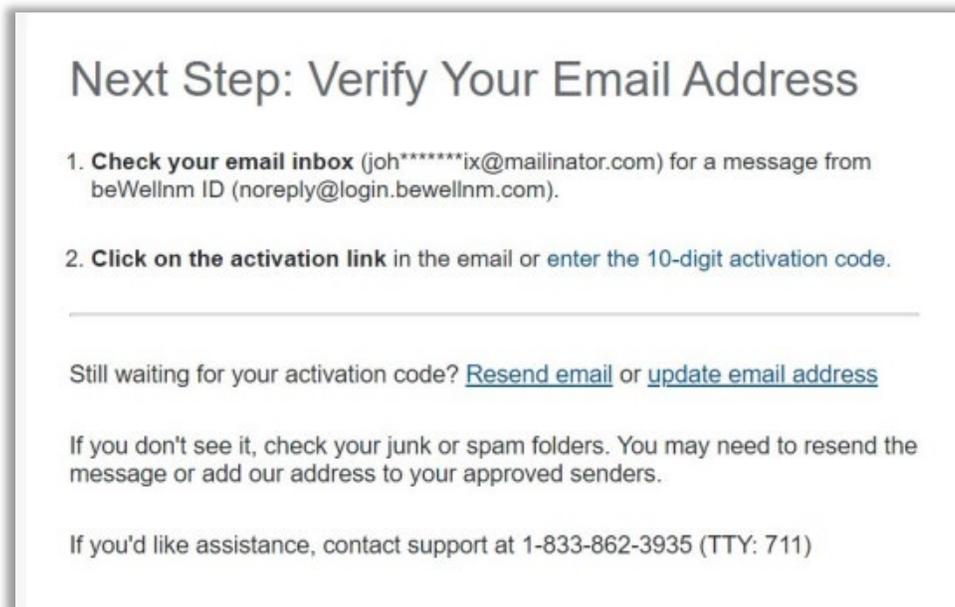
Type password again  

You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the beWellnm ID service. If you do not agree, click Cancel and do not use any aspect of the beWellnm ID service.

5. You will receive an email from noreply@beWellnm.com with a link to activate your beWellnm ID. Click on **Activate Your beWellnm ID**. The email will also include a 10-digit code that you can copy and paste on the Activate Your beWellnm ID page.



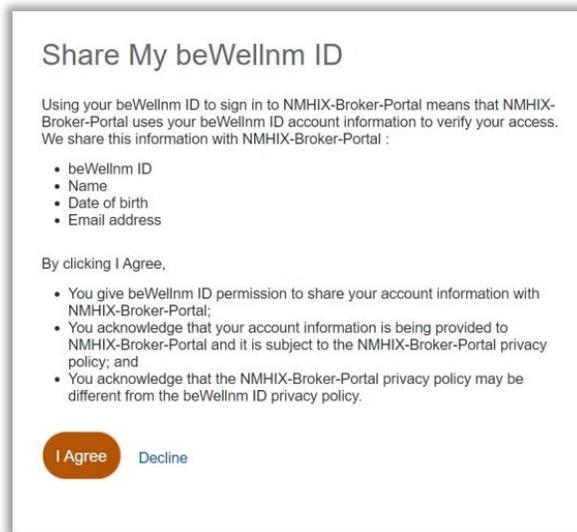
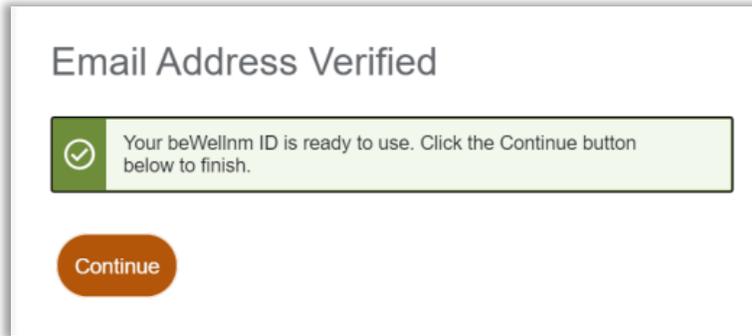
6. Verify your email address.



Note: If you're still waiting for your activation code, click on **Resend Email** or **update email address**.

If you have not received the email, check your junk or spam folders. You may need to resend the message or add our address to your approved sender's list email settings.

7. Click **Continue** to verify your email address.



8. Click **I Agree** to acknowledge the NMHIX Broker Portal Privacy Policy.  
Note: This will take the user to the invitation code validation page.

9. Enter your Date of Birth.

Note: The Invitation code will be auto-populated which was received in the invitation email.



The screenshot shows a form titled "Validate Invitation Code" with a red border. It contains two input fields: "Invitation Code" and "Date of Birth (MM/DD/YYYY)". Both fields have red asterisks indicating they are required. The "Invitation Code" field is partially filled with a blurred value.

10. Click **Next**.

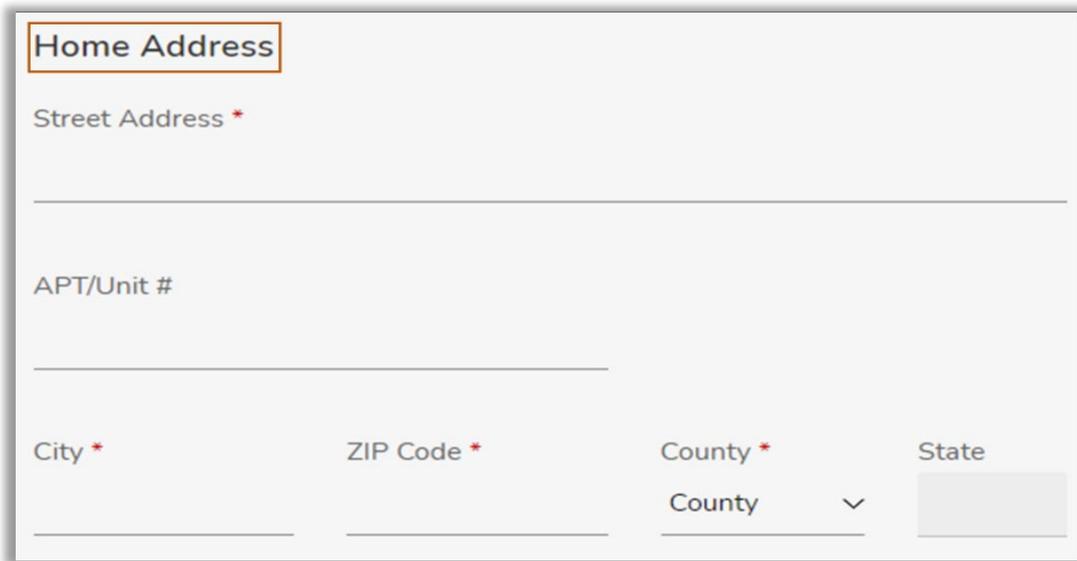
Note: This takes you to the **Profile** page where some of the fields are auto-populated.

11. Enter the required fields for the sub broker in the **Basic Information** on the **Profile** page.



The screenshot shows a form titled "Basic Information" with a red border. It contains several input fields: "First Name", "Middle Name", "Last Name", "Suffix", "Email Address", and "Date of Birth (MM/DD/YYYY)". "First Name", "Last Name", and "Email Address" have red asterisks. The "First Name" field is filled with "Jenny", "Last Name" with "Smith", and "Email Address" with "jenny.smith@outlook.com". The "Date of Birth" field is filled with "08/21/1978". The "Suffix" field has a dropdown arrow.

12. Complete the **Home Address** of the sub broker.



The screenshot shows a form titled "Home Address" with a red border. It contains the following fields: "Street Address \*" (a single-line text input), "APT/Unit #" (a single-line text input), "City \*" (a single-line text input), "ZIP Code \*" (a single-line text input), "County \*" (a dropdown menu with "County" and a downward arrow), and "State" (a single-line text input). The "State" field is currently empty and has a light gray background.

**Important!** You will need to provide your residential address to complete identity proofing. After you have completed identity proofing, you should return to your Broker Portal profile and update your "Home Address" to your business address. This is the address the consumer will see when searching for a broker.

13. Complete the required fields in **Mailing Address** for the sub broker or select the checkbox next to **Select if it is the same as Home Address**.



The screenshot shows a form titled "Mailing Address" with a red border. It contains the following fields: a checkbox labeled "Select if it is the same as Home Address", "Street Address \*" (a single-line text input), "APT/Unit #" (a single-line text input), "City \*" (a single-line text input), "ZIP Code \*" (a single-line text input), "County \*" (a dropdown menu with "County" and a downward arrow), and "State" (a single-line text input). The "State" field is currently empty and has a light gray background.

14. Complete the **Contact Details** for the sub broker.

**Contact Details**

Phone Number \*      Extension      Phone Type  
\_\_\_\_\_      \_\_\_\_\_      Cell      ▼

Fax Number  
\_\_\_\_\_

15. Click **Create Profile**.

*The U.S. Postal Service Address Search dialog box appears.*

16. Select the standardized address from the options listed and click **Continue**.  
Note: An automated email is generated and sent to you upon your profile completion. After this, the next step is to verify your identity.

## U.S. Postal Service Address Search ✕

We searched the U.S. Postal Service with the information you entered. If the address(es) we found below match your address(es), please select it. If an address is wrong or not found, cancel and try to add more information to help match your address(es).

**Royce M... Home Address:**

You Entered:

<input type="radio"/> [Redacted] Gallup, NM 87301	County: MCKINLEY
--	---------------------

We Found:

<input type="radio"/> [Redacted] GALLUP, NM 87301	County: MCKINLEY
--	---------------------

**Continue** **Cancel**

## 17. Remote Identity Proofing (RIDP) Verification (Sub Broker)

- Read the message that appears on the ID Proofing page before you access the IDP questionnaire.

Note: By continuing, you agree to allow Experian (the RIDP agency) to access your personal information to prove your identity.

**ID Proofing**

[About Identity \(ID\) Proofing](#)

Before you can apply, you will need to prove your identity online through a process called Remote Identity Proofing (RIDP). By continuing, you agree to allow Experian - the ID proofing agency - to access your personal information to prove your identity.

Remember:

- Be sure to enter your correct legal name, current home address, primary phone number, date of birth and email address.
- Experian uses your consumer report profile to confirm your identity and creates something called a soft inquiry. Soft inquiries are visible only to you, the consumer, and no one else. Soft inquiries have no impact on your credit report, history, or score other than being recorded and maintained for 23 months. The soft inquiry will be called "CMS Proofing Services."
- Experian may ask personal questions to help prove your identity through RIDP.

**What happens if your information can't be proven online**

If your identity can't be proven online, you may need to send proof of your identity to beWellnm.

[Find places to get help](#)

**You may need:**

- ▶ Social Security Number
- ▶ Home Address

**Estimated time for this section: 2 to 5 minutes**

## 18. Click **Continue**.

The questionnaire on the Identity Verification page appears.

- Select the correct answers from the questionnaire.  
Note: The questions that appear on the questionnaire page are randomly selected based on information contained in each person's consumer report file.

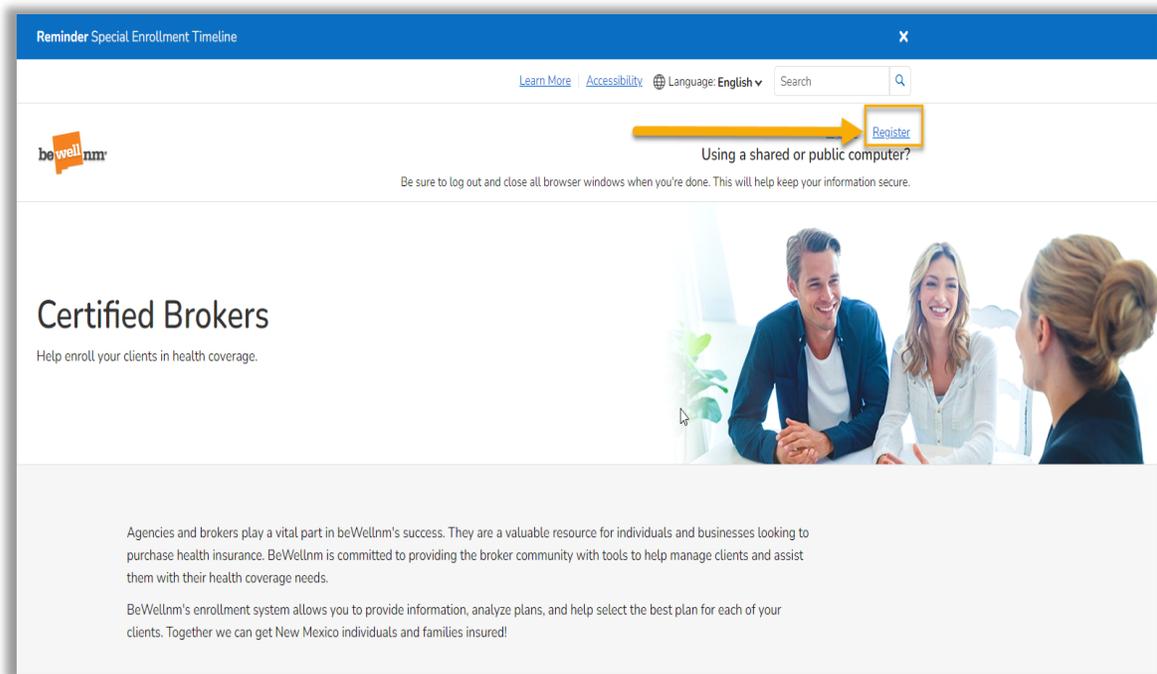
## 19. Click **Save and Continue**.

- a. If the IDP process does not pass, you are navigated back to the My Profile page. After three failed attempts you will receive a final error message indicating your identity cannot be verified online, to continue you need to send proof to the beWellnm.
- b. If you receive a message saying Pending Verification, this means your RIDP is successful, however, your account is not yet verified, and you will not be allowed to access the Broker Portal until your information is verified successfully. You will receive an email informing you of the pending account verification status.
  - i. If the RIDP is successful and the account is verified, the sub broker is navigated to the **Client** page of the Broker Portal.

## 9. Independent Broker Registration and Account Creation

To register and create your beWellnm ID as an independent broker user (not associated with an agency), follow the steps below.

1. Access the Broker Portal at [getcovered.bewellnm.com](https://getcovered.bewellnm.com)
2. Click **Register**.



3. Click **Create beWellnm ID**.

Sign In With Your beWellnm ID

beWellnm ID or email address

Password

Sign In

Forgot beWellnm ID | Forgot Password

Additional options:

- Create beWellnm ID
- Manage your beWellnm ID
- What is beWellnm ID?



Creating duplicate accounts/usernames may delay your setup.

4. Complete the required fields.

Tip: Do NOT use your email address as your beWellnm ID

**Create beWellnm ID**

beWellnm ID securely manages your account so that you can use one beWellnm ID and password to sign in to all integrated applications.

[i](#) Already have beWellnm ID? [Sign in now](#)

**Profile Information**

First name

Last name

Date of birth  
  
mm-dd-yyyy

**Sign In Information**

Your email address

Create beWellnm ID  
 ?

Your beWellnm ID must have:

- 6 to 50 characters
- At least one letter
- No spaces
- No letters with accents

Create password

Your password must have:

- Between 8 and 100 characters
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 number
- At least 1 special character

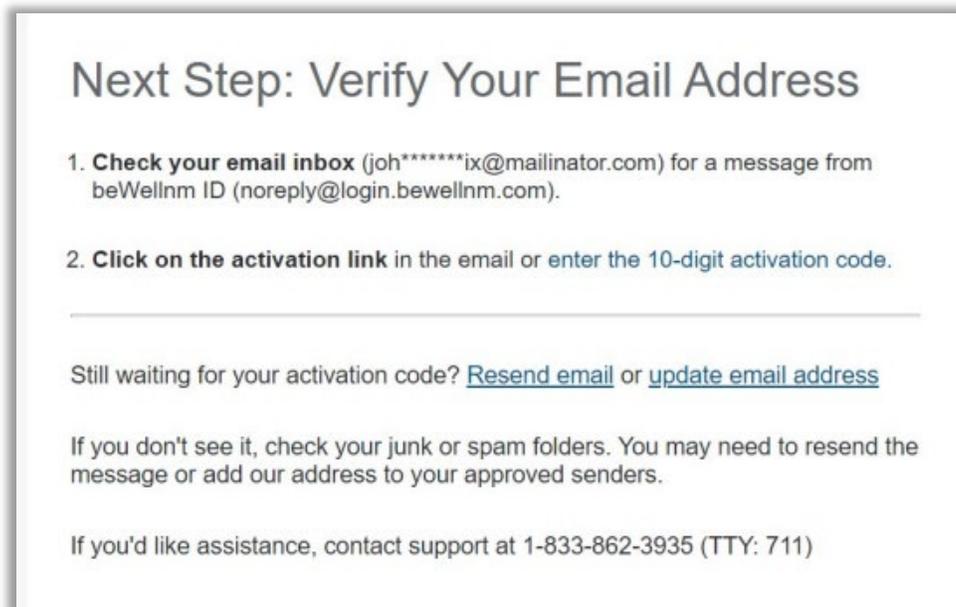
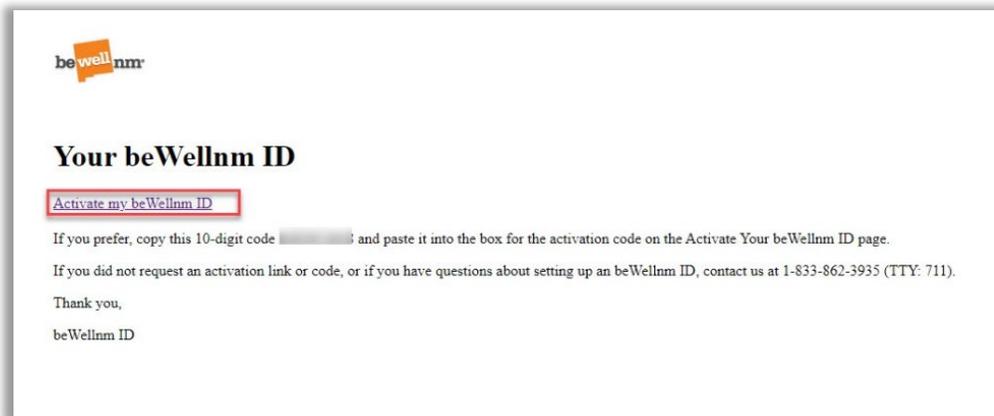
Type password again

You must agree to the [Terms of Use](#) and [Website Privacy Policy](#) to use the beWellnm ID service. If you do not agree, click Cancel and do not use any aspect of the beWellnm ID service.

4. Click **I Agree**.

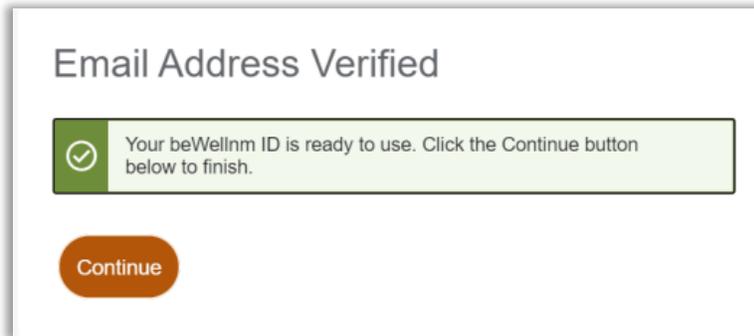
5. You will receive an email from [noreply@beWellnm.com](mailto:noreply@beWellnm.com) with a link to activate your beWellnm ID. Click on **Activate Your beWellnm ID**. The email will also include a 10-digit code that you can copy and paste on the Activate Your beWellnm ID page.

## Email Message and Instructions

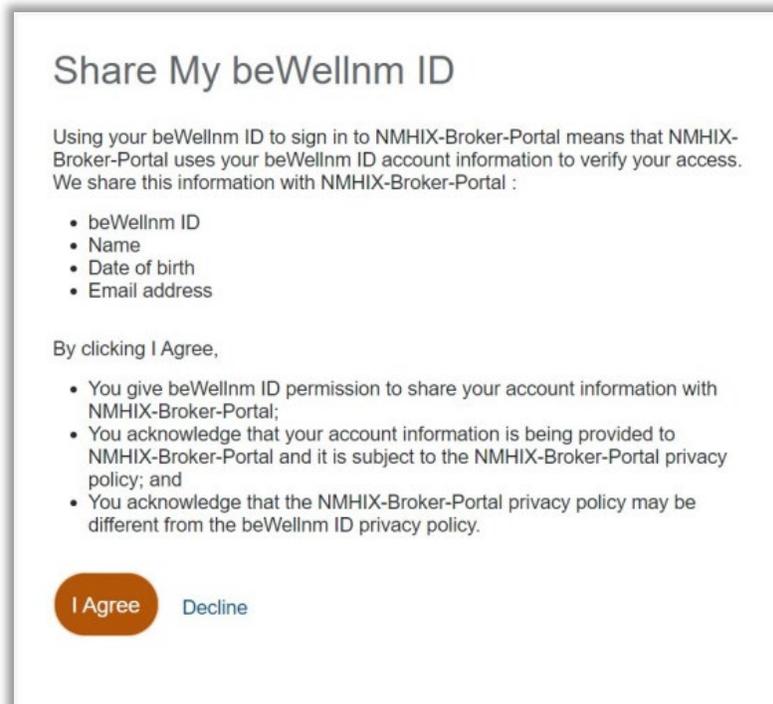


Note: If you're still waiting for your activation code, click on **Resend Email** or **update email address**. If you have not received the email, check your junk or spam folders. You may need to resend the message or add our address to your approved sender's list email settings.

6. Click **Continue** to verify your Email Address.



7. Click **I Agree** to acknowledge the NMHIX Broker Portal Privacy Policy. This takes you to the **Profile** page.



It is important to understand the difference between the role types of Agency Setup versus Broker Setup. How brokers set up their profiles will make a difference in the type of capabilities that will be provided to the user for account management. Please reference the following steps below for Broker setup.



If a broker is part of an agency, the agency must be set up first. Any broker who sets up their account and later needs to be added to an agency may experience a delay with setting up their account. Please reference page 4 to set up an agency.

**Note:** If you are unable to complete this process contact the Customer Engagement Center at 833-862-3935.

Non-Agency Independent Brokers please proceed with the Broker setup.

If the user selects **Broker**, follow the steps below:

1. Select the **Broker** Role Type.

**Profile**

When you see an asterick (\*), you must complete the field.  
When you see an **i**, hover or roll over it with your mouse or select it by pressing the Tab key on your keyboard to get the definitions and learn more.

Please select the role type you would like to perform \* **i**

Agency  Broker

2. Enter the **National Producer Number (NPN)** in the line provided in **Broker**

**Broker Information**

National Producer Number (NPN) \*

Complete the required fields.

### Profile

When you see an asterisk (\*), you must complete the field.  
When you see an , hover or roll over it with your mouse or select it by pressing the Tab key on your keyboard to get the definitions and learn more.

Please select the role type you would like to perform. \* 

Agency  Broker

#### Broker Information

National Producer Number (NPN) \*  
\_\_\_\_\_

#### Basic Information

First Name * John	Middle Name _____	Last Name * Doe	Suffix Suffix _____
----------------------	----------------------	--------------------	------------------------

Email Address * johndoenhix@mailinator.com	Username * johndoenhix
---	---------------------------

Social Security Number * _____	Date of Birth (MM/DD/YYYY) * _____
-----------------------------------	---------------------------------------

Spoken Languages \*  
Select one or more \_\_\_\_\_

---

#### Home Address

Street Address \*  
\_\_\_\_\_

APT/Unit #  
\_\_\_\_\_

City * _____	ZIP Code * _____	County * County _____	State _____
-----------------	---------------------	--------------------------	----------------

#### Mailing Address

Select if it is the same as Home Address

Street Address \*  
\_\_\_\_\_

APT/Unit #  
\_\_\_\_\_

City * _____	ZIP Code * _____	County * County _____	State _____
-----------------	---------------------	--------------------------	----------------

#### Contact Details

Phone Number * _____	Extension _____	Phone Type Cell _____
-------------------------	--------------------	--------------------------

Fax Number  
\_\_\_\_\_

**Create Profile**

If your mailing address is different from your home address please continue to fill in the required fields with the information.

3. Click **Create Profile**

*The U.S. Postal Service Address Search dialog box appears.*

4. Select the standardized address from the options listed.

**U.S. Postal Service Address Search** ×

We searched the U.S. Postal Service with the information you entered. If the address(es) we found below match your address(es), please select it. **If an address is wrong or not found, cancel and try to add more information to help match your address(es).**

John Doe's Home Address:

You Entered:

1005 Paseo Del Pueblo Sur  
Taos, NM 87571

County: TAOS

**We Found:**

1005 PASEO DEL PUEBLO SUR  
TAOS, NM 87571

County: TAOS

John Doe's's Mailing Address:

You Entered:

1005 Paseo Del Pueblo Sur

County:

**Continue** **Cancel**

5. Click **Continue**.

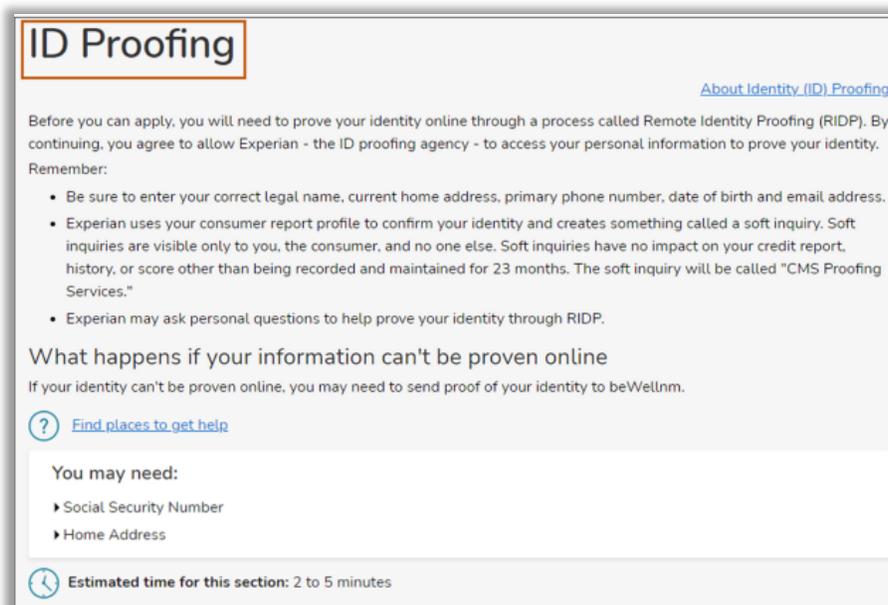
You will be asked several questions in support of the **Identify Proofing process**. Once you have completed the **ID Proofing**, you will see a **Verification Pending** screen, this is in support of the final step.

## Remote Identity Proofing

**Remote Identity Proofing (RIDP) Verification:** Before gaining access to the Broker portal, you need to prove your identity by answering some questions via a third-party survey. This helps protect your identity.

Follow the steps below to complete your RIDP verification: Note: If you are unable to complete this process contact the Customer Engagement Center to perform the Manual IDP at 833-862-3935.

Read the message that appears on the ID Proofing page before you access the IDP questionnaire. Note: By continuing, you agree to allow Experian (the IDP agency) to access your personal information to prove your identity



1. Click Save and Continue.

The questionnaire on the Identity Verification page appears.

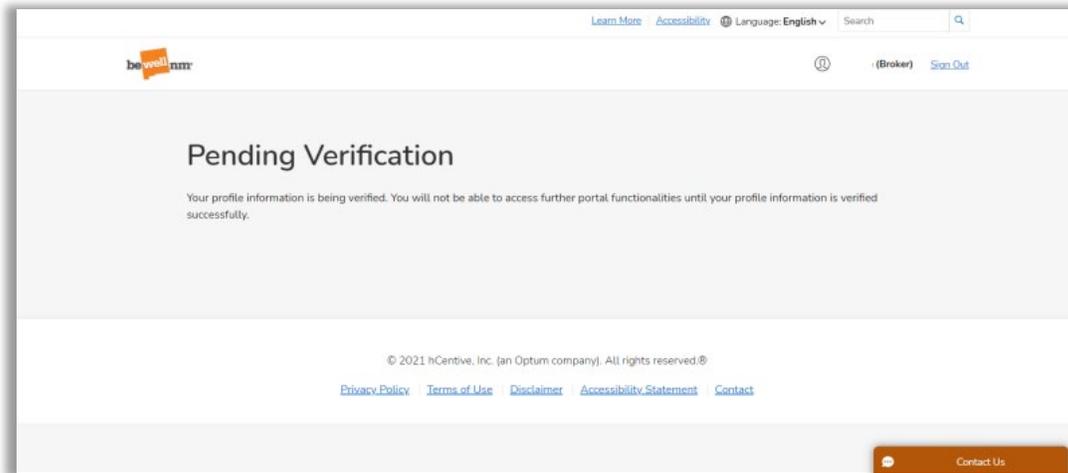
- i. Select the correct answers from the questionnaire.

Note: The questions that appear on the questionnaire page are randomly selected based on information contained in each person's consumer report file.

2. Click **Save and Continue**.

- i. If the RIDP process does not pass, you are navigated back to the My Profile page. After three failed attempts you will receive a final error message indicating your identity cannot be verified online, to continue you need to send proof of ID to the beWellnm.

- ii. If you receive a message saying Pending Verification, this means your IDP is successful, however, if your account is not yet verified you will not be allowed to access the Broker portal until your information is verified successfully. You will receive an email informing you of the pending account verification status.
- iii. If the IDP is successful and the account is verified the Broker is navigated to the Dashboard.



## Resources

For Broker Portal-related questions or issues please email [Brokers@NMHIX.com](mailto:Brokers@NMHIX.com)

Visit the beWellnm Broker Self-Help Center at [www.bewellnm.com](http://www.bewellnm.com)