

**be well nm**<sup>®</sup>



NEW MEXICO HEALTH INSURANCE EXCHANGE

# Plan Year 2024 beWellnm Assister Training Navigation Guide

For Agents, Brokers, and Enrollment Counselors

## TABLE OF CONTENTS

|   |    |
|---|----|
| Section 1: Overview of Certification Process.....                               | 3  |
| Section 2: Introduction to Assistors .....                                      | 4  |
| Agent and Brokers.....  | 4  |
| Enrollment Counselors .....   | 4  |
| Section 3: Welcome to the beWellnm LMS .....                                    | 5  |
| Section 4: Requesting Certification .....                                       | 6  |
| A. New Assistors .....  | 6  |
| B. Returning Assistors.....   | 6  |
| C. Returning Assistors Not Certified in 2023 with an Existing LMS Account ..... | 7  |
| D. Important Tip for Agents and Brokers .....                                   | 7  |
| Section 5: Creating an LMS Profile .....  | 8  |
| A. LMS Invitation .....   | 8  |
| B. Logging into the LMS .....   | 8  |
| C. Course Assignments for Plan Year 2024.....                                   | 9  |
| D. Resetting Usernames and Passwords.....                                       | 10 |
| E. Tips to Ensure Communications are Received .....                             | 11 |
| Section 6: Training Expectations.....   | 12 |
| Section 7: Navigating the LMS.....  | 13 |
| A. Navigating the Home Page .....   | 13 |
| B. Locating Training .....  | 14 |
| C. Viewing Lessons.....   | 15 |
| D. Completing Lessons .....   | 15 |
| E. The Final Exam, Agreement, and Assessment.....                               | 16 |
| Section 8: Printing a Certificate.....  | 17 |
| Section 9: Establishing Portal and Scheduling Tool Access.....                  | 18 |
| A. General .....  | 18 |
| B. Agent/Broker Portal Set Up Expectations .....                                | 18 |
| C. Enrollment Counselor Set Up Expectations.....                                | 18 |
| D. Scheduling Tool.....   | 19 |

Section 10: Contact us.....21

## SECTION 1: OVERVIEW OF CERTIFICATION PROCESS

Agents, brokers, and enrollment counselors (referred to herein as “assisters”) will complete the following steps:

1. Submit a [beWellnm Assister Certification Request Form](#) to request certification for plan year 2024 (new assisters only).
2. BeWellnm will review the request form for certification eligibility criteria.
3. If found eligible, assisters will receive an email from [partners@nmhix.com](mailto:partners@nmhix.com) with instructions to create a Learning Management System (LMS) account.
  - Returning assisters do not need to request certification and can instead log directly into the LMS to begin the annual training course.
4. Complete training. All assisters complete the same training course.
5. Take and pass the training exam with a score of 80% or better. Assisters have unlimited time and attempts to pass the exam.
6. Receive and print the certificate.
7. Register with the beWellnm Broker Portal or Assister Portal, as applicable.
  - Agents and Brokers: Register with the [Broker Portal](#). Agents and brokers will be listed as “Pending” until their certification has been verified by beWellnm. Their account will then be activated. This process can take up to 72 hours to complete.
  - Enrollment Counselors: Register with the [Assister Portal](#). BeWellnm will establish an Assister Portal account for enrollment counselors upon certification. If the enrollment counselor attempts to register before that time, they will receive an error message. Enrollment counselors will receive a link to activate their account and register.
8. Set up an assister profile and establish calendar access with the beWellnm [Scheduling Tool](#).
  - Not all assisters use this tool (see section 9D for more information).
9. Begin helping consumers!

## SECTION 2: INTRODUCTION TO ASSISTERS

BeWellnm has an assister network consisting of agents, brokers, and enrollment counselors (agents, brokers, and enrollment counselors are referred to in this document collectively as “assisters”). Assisters must complete the annual Assister Certification Training to be designated as “certified” through beWellnm. This navigation guide applies to all assisters who wish to be certified through beWellnm. All assisters complete the same training.

### Agent and Brokers

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 get payments (commissions) from insurance companies for selling health insurance plans.

### Enrollment Counselors

Enrollment counselors may be employed by beWellnm or may be employed by, or available at, hospitals, clinics, and schools. They help consumers through the eligibility and 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).

## SECTION 3: WELCOME TO THE BEWELLM LMS

This navigation guide will help assisters understand how to use beWellnm's Learning Management System (LMS). It provides step-by-step instructions for how to:

- Set up an LMS user profile and account (or log in to an existing account)
- Navigate to the LMS to locate and complete the annual Assister Certification Training and the exam.
- Review and sign an agreement with beWellnm.
- Obtain a copy of a certificate.

## SECTION 4: REQUESTING CERTIFICATION

### A. New Assisters

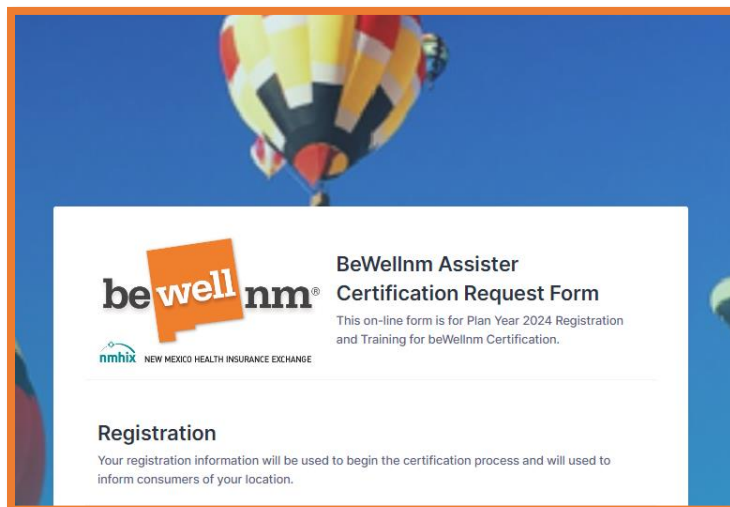
A “new assister” is someone who:

- Has never been certified by beWellnm to assist consumers in the New Mexico Marketplace; and
- Has never successfully registered with the beWellnm LMS.

At this time, beWellnm is only accepting applications for new agents and brokers who meet the following criteria:

- has a valid state or non-resident New Mexico insurance license; and
- is located in New Mexico; or
- has a business and physical address in Arizona, Colorado, Oklahoma, Texas, or Utah.

Enrollment Counselors must work for a New Mexico organization and pass a background check.



New Assisters should begin by completing the [beWellnm Assister Certification Request Form](#). The information collected in this form will be reviewed for eligibility for certification. Once eligibility is confirmed, the assister will receive an email invitation to register with the LMS account.

### B. Returning Assisters

A “returning assister” is someone who completed the 2023 certification process and previously setup an account in the beWellnm eligibility and enrollment system portal.

Returning assisters can use their existing credentials to log into the [LMS](#). Assisters will be automatically enrolled in the required 2024 trainings.

### C. Returning Assistants Not Certified in 2023 with an Existing LMS Account

Assistants who did not successfully certify for 2023 but who have an existing LMS account must submit an updated [beWellnm Assister Registration Form](#) for account reactivation and course enrollment. All requests will be reviewed against beWellnm's certification eligibility criteria.

### D. Important Tip for Agents and Brokers

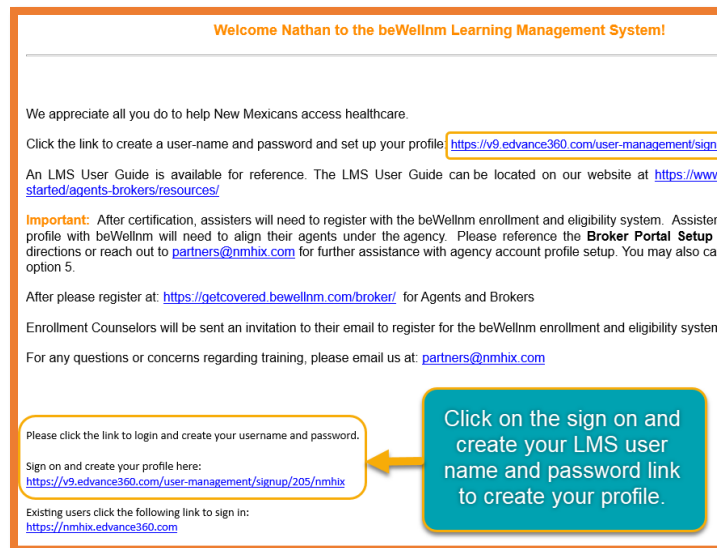
Agents and brokers should submit their individual National Producer Number (NPN) and not an agency NPN. Inputting the wrong NPN will cause delays in setting up beWellnm portal access and receiving commissions from carriers. If an assistant is an agency owner, they should reach out to [partners@nmhix.com](mailto:partners@nmhix.com) for help with an agency setup.



## SECTION 5: CREATING AN LMS PROFILE

### A. LMS Invitation

Once new assisters have submitted their training request using the [beWellnm Assister Certification Request Form](#), they will receive an invitation from the beWellnm LMS email address, [partners@nmhix.com](mailto:partners@nmhix.com), to set up a new user profile.



Returning assisters who were certified in 2023 can log in to the LMS with their existing credentials.

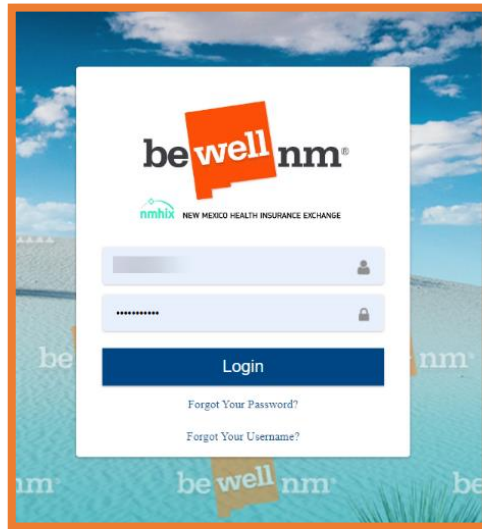
### B. Logging into the LMS

Assisters should access the LMS at: <https://nmhix.edvance360.com/>.

New assisters will receive an email containing their login information. They should click on the link and enter their temporary password. They will then be prompted to update this information to their own secure password.

Assisters who were certified in 2023 can log in with their existing credentials. They will automatically be enrolled in the 2024 training course.

Assisters have access to the LMS and training course 24 hours a day, 7 days a week. Assisters should retain their username and password so that they can easily access the LMS for next year's certification.

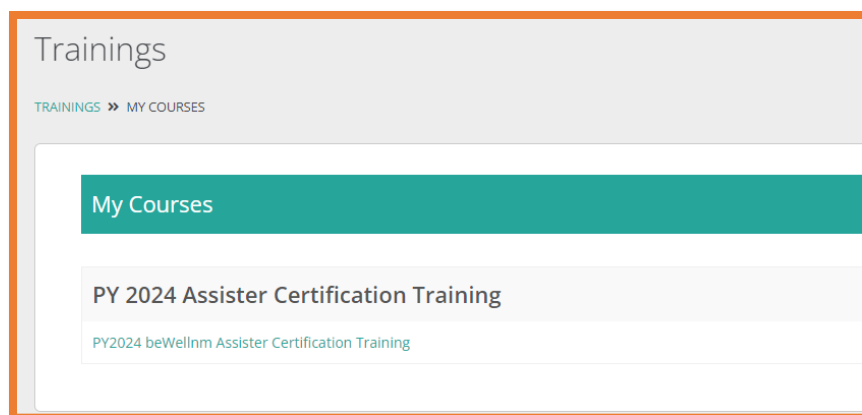


Users should email [partners@nmhix.com](mailto:partners@nmhix.com) for help with the following issues only:

1. My password/username reset email did not arrive or the reset did not work.
2. I have no trainings available in the LMS.
3. I have another training question or technical issue regarding the LMS.

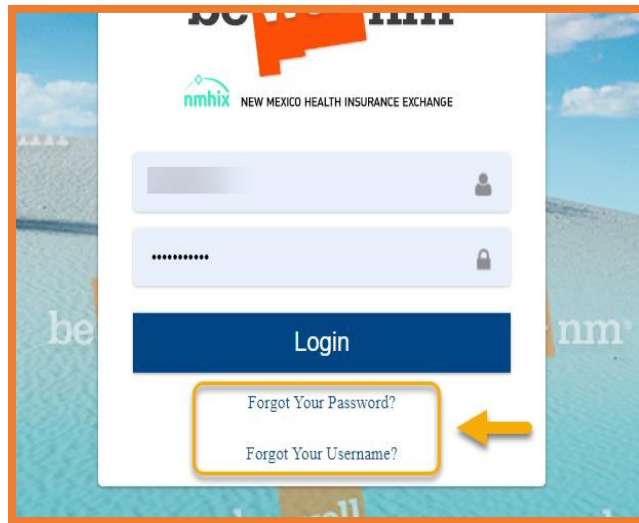
### C. Course Assignments for Plan Year 2024

Below is a list of lessons that assisters are required to complete. All new and returning assisters will complete the same course.



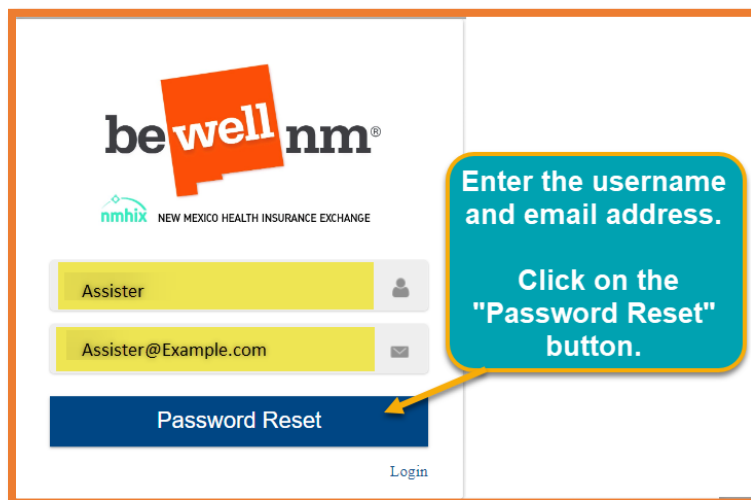
## D. Resetting Usernames and Passwords

If a returning assister does not remember their username or password, they should click “Forgot Your Username?” or “Forgot Your Password?” on the Login page.

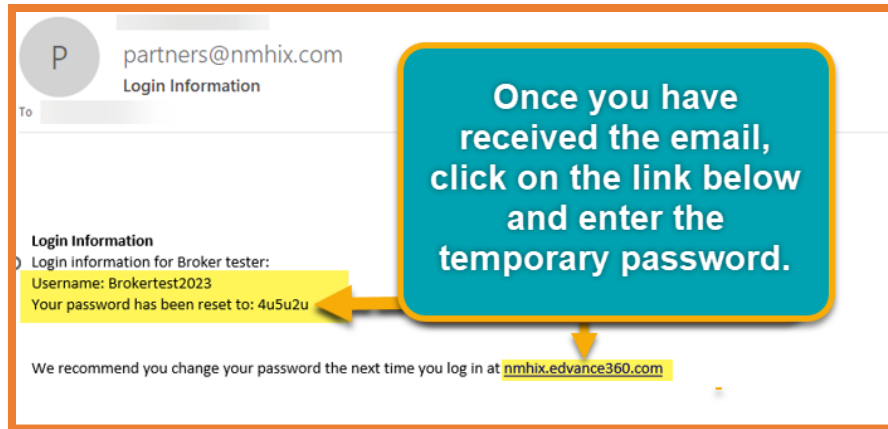


Assisters who have forgotten their username will enter their email address and click on the “Find Username” button. They will receive an email from [partners@nmhix.com](mailto:partners@nmhix.com) with their username.

Assisters who have forgotten their password should enter their username and email address, then click on the “Password Reset” button.



Once an assister receives the email, they should click on the link provided in the email and enter the provided temporary password.



Assisters will then be prompted to change their password from the temporary password to one of their choosing.

#### E. Tips to Ensure Communications are Received

Assisters should add [partners@nmhix.com](mailto:partners@nmhix.com) to their safe sender list to avoid missing certification communications and updates. All LMS and certification questions will go to [partners@nmhix.com](mailto:partners@nmhix.com).

A whitelist may help assisters struggling to receive beWellnm communications. A whitelist is a mechanism which explicitly allows some identified entities to access a particular privilege, service, mobility, or recognition. It is a list of people and entities allowed when everything is denied by default.

Agencies and organizations may have a Secure Firewall that may prevent/block some of the communications from beWellnm. There may be issues displaying certain screens, such as slide presentations.

The following issues indicate that an assister may need to whitelist beWellnm:

- they have not received the Password Reset Request
- they are not receiving any emails from [partners@nmhix.com](mailto:partners@nmhix.com) or from any NMHIX domain.
- they logged in successfully, but the lesson presentations are not working.

Assisters should contact organization's IT department for help with these issues, or to whitelist beWellnm. Assisters may also try logging in from a personal computer while on a home network as a work-around option.

## SECTION 6: TRAINING EXPECTATIONS

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.

Assisters must view all lessons in the course and click the “Mark Complete” button after each lesson to obtain full credit.

Assisters must score at least an 80% on the exam to pass. They will have unlimited time and unlimited attempts to achieve this score.

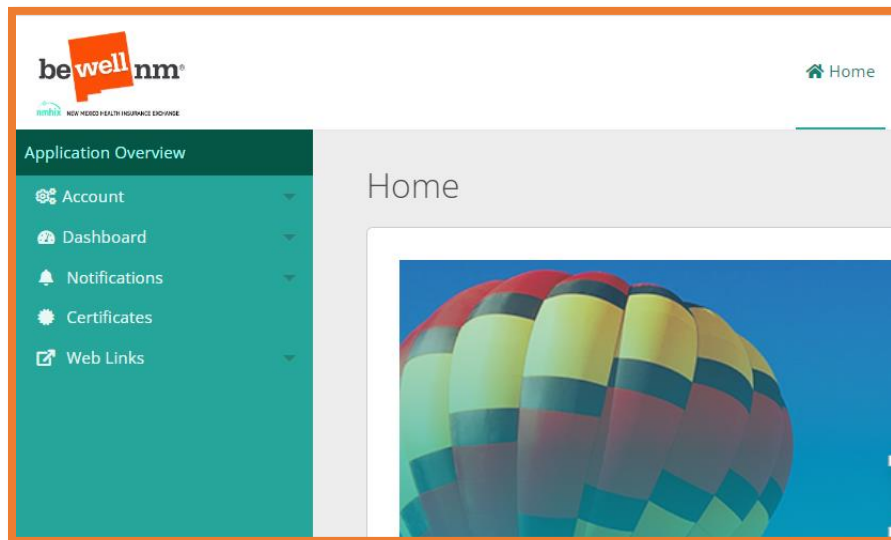
Assisters must complete the certification process, including the annual Assister Certification Training, every year to be able to assist consumers on the New Mexico Health Insurance Exchange for the applicable plan year. Training from previous years will not count for the current plan year.

## SECTION 7: NAVIGATING THE LMS

### A. Navigating the Home Page

The “Home” tab display is where assisters can update passwords and demographic information and use other applications that are helpful. Assisters will find the following tabs on the left navigation pane:

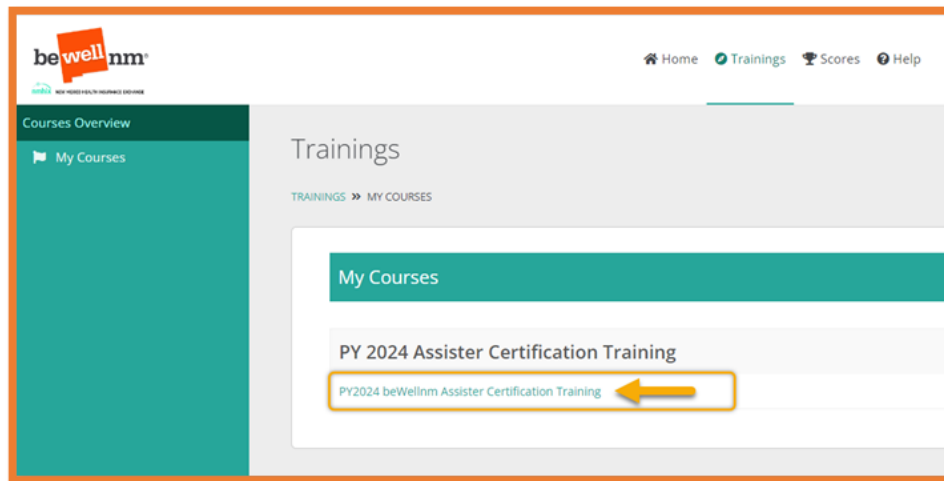
- Account: This tab can be used to update your profile, change your password, and access settings you can use to personalize your account.
- Dashboard: This tab displays your dashboard and widgets you can turn on and off to personalize your account. Widgets allow users to update settings for the calendar, course progress, and displayed courses.
- Notifications: This tab allows assisters to view course alerts history, course announcements, and community announcements, as appropriate for each assister.
- Certificates: This tab is where assisters can view and print their certificates.
- Web Links: This tab contains quick access links to sites and resources assisters may find helpful.



## B. Locating Training

1. Click on “Trainings.”
2. Click on “My Courses.”
3. Click on the desired course hyperlink to begin reviewing the course.

Note: Course titles may change year to year.



## C. Viewing Lessons

1. Click on “Lessons.”
2. Click on the name of the lesson to begin reviewing the lesson.

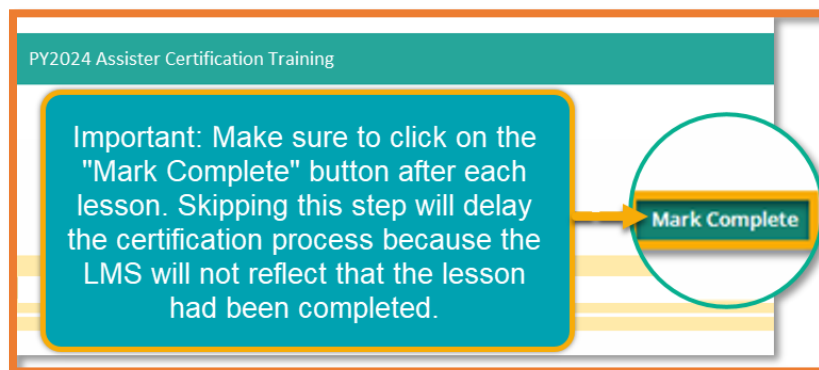
**NOTE:** Lesson titles may change year to year.



## D. Completing Lessons

Assisters must click on the “Mark Complete” button at the end of each lesson and section to get full credit for the lesson.

Note: Skipping this step will delay the certification process. If an assister does not click on the “Mark Complete” button for all lessons in the LMS, the system will not reflect that the course has been completed and will not generate a certificate, even if they pass the exam.





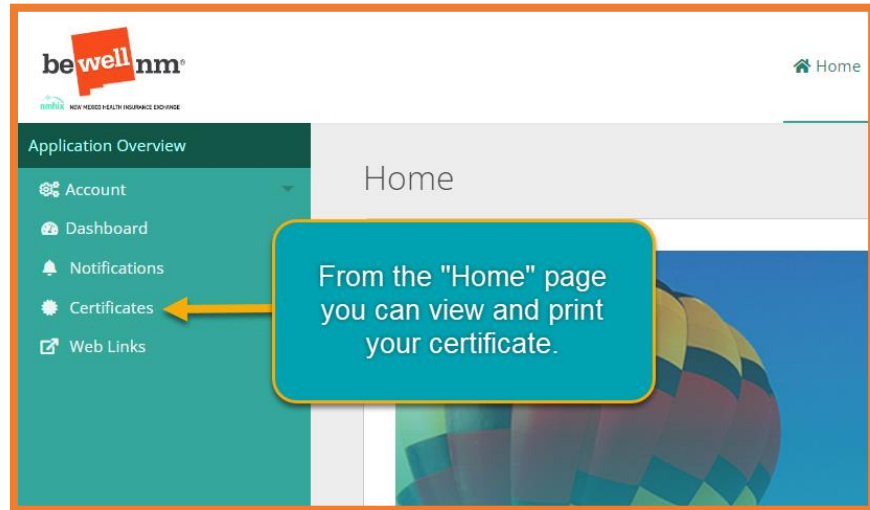
## E. The Final Exam, Agreement, and Assessment

All questions on the exam are one of three question types: true/false, multiple choice, or multiple answer. There are 50 questions on the exam. Assisters must score 80% or higher. Assisters have unlimited time and unlimited attempts to achieve this score.

The screenshot displays two sections of a training interface. The top section, titled "Assister Training Final Exam", contains an "Instructions" box with the following text: "This exam will consist of 50 true/false, multiple choice, and multiple answer questions. For each question, select the best answer, and you must complete the exam in one sitting (e.g., you cannot stop in the middle of the exam and return to it later). Remember, you must score a minimum of 80% to pass. Good luck!". Below the instructions is a button labeled "Test: Assister Training Final Exam" with the subtext "Pass Test to Mark This Item Complete.". A callout box with a blue background and white text points to this button, stating: "Click on the 'Test' button to begin the Assister Training Final Exam.". The bottom section, titled "Assister Training Evaluation", contains an "Instructions" box with the text: "BeWellnm staff are committed to continuously improving their assister training. Please fill out the following assessment". Below this is a button labeled "Survey: Assister Certification Training Evaluation" with the subtext "Complete Survey to Mark This Item Complete.". A second callout box with a blue background and white text points to this button, stating: "Click on the 'Survey' button to take the Assister Certification Training Evaluation.".

After the assister passes the exam, they will review and sign a certification agreement with beWellnm. Assisters should also complete the Assister Certification Training Evaluation and provide feedback on about their experience with the annual Assister Certification Training. This evaluation allows beWellnm to continue to improve the training experience for assisters.

## SECTION 8: PRINTING A CERTIFICATE



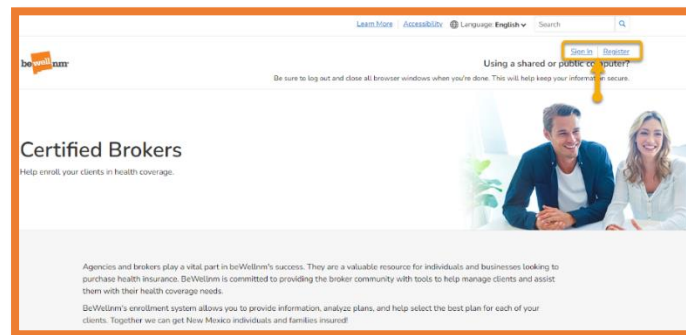
Upon completing the lessons by clicking “Mark Complete” and achieving the minimum score on the final exam (80%), the LMS will generate a certificate. BeWellnm recommends that assisters print a copy of their certificate; they may be asked by other organizations, carriers, and/or consumers for a copy. BeWellnm also recommends that assisters display this certificate in their office as it helps consumers know that the assister is certified by beWellnm.

## SECTION 9: ESTABLISHING PORTAL AND SCHEDULING TOOL ACCESS

### A. General

After an assister has their certificate, they will need to register with either the beWellnm Broker Portal or Assister Portal, depending on their role.

Agents and Brokers will use the [Broker Portal](#) and Enrollment Counselors will use the [Assister Portal](#).



Some assisters will also need to set up profiles and ensure calendar access in the [Scheduling Tool](#).

### B. Agent/Broker Portal Set Up Expectations

New agency owners and independent brokers must register at <https://getcovered.bewellnm.com/broker/>.

Important: Agency owners must register their agents and send an invitation from the agency. Agents will see a “Pending” status in the beWellnm eligibility and enrollment system portal until they have completed training and been certified by beWellnm.

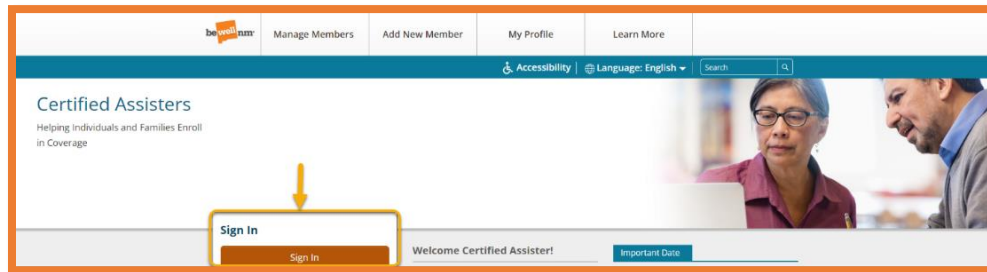
New independent brokers will also see a “Pending” status in the beWellnm eligibility and enrollment system portal until their certification is complete.

Returning brokers need no additional set up and may sign in using their existing credentials.

### C. Enrollment Counselor Set Up Expectations

New enrollment counselors will receive an invitation email to register with the Assister Portal of the beWellnm eligibility and enrollment system once they have been certified by beWellnm.

Once the enrollment counselor registers using the invitation link, they can log in at: <https://getcovered.bewellnm.com/assister/>



Important: If an enrollment counselor attempts to create a beWellnm ID before completing registration using the invitation link, an error will display on the screen.

Returning enrollment counselors will login with their credentials from the previous plan year.

#### D. Scheduling Tool

Once the annual Assister Certification Training and Portal set up is complete, assisters should set up their profiles in the beWellnm [Scheduling Tool](#) and establish calendar access.

Assister credentials will be sent to the email address on file with the beWellnm LMS. If an assister does not receive the email invitation, they should contact [brokers@nmhix.com](mailto:brokers@nmhix.com). A temporary password will be included in the email that is sent. Once an assister logs in with their temporary password, they will be required to change their password.

Assisters should click on “Click Here to Login” to access their Scheduling Tool profile. They should enter their email address in the field provided followed by the temporary password from the access email, and then click the “Login” button. Assisters who have trouble logging in should contact beWellnm by clicking on the “Contact Us” link, and beWellnm will work to establish access.

Once assisters have successfully logged in using their email and temporary password, the system will prompt them to change their password. After resetting the password, assisters will be returned to the login screen where they can use their updated credentials to log in to the Scheduling Tool.

Assister profiles are used by the public and others to schedule appointments with the assister organization. Most information will come from the assister’s LMS profile, but

assistors can edit specific sections to provide better information to the public. The areas that can be updated are:

- Profile picture
- Company bio
- Appointment availability
- Hours of operation
- What to Know Before You Go

To update these sections, click the “Edit Section” or “Edit Profile Picture” links.

The Scheduling Tool calendaring system allows assistors to quickly enter their availability. The tool allows assistors to set up their weekly availability and then apply the templated weeks to their calendar. To set up the weekly template:

1. Click the “Edit Schedule Template” link.
2. To add availability, click a time slot. Appointments are added in 1-hour increments. Once a time slot has been selected, a popup window will ask whether the appointment will be in-person, virtual, or both. Assistors should make the selection that is most appropriate for their operation.
3. Click the “Create Time Slot” button to save changes and add this time block to the template.
4. Assistors can modify or delete a time slot by clicking on the time slot and changing the appointment type, or by clicking the red “Delete” button to remove the time slot completely.
5. To add the weekly template to a calendar, click the “Add Schedule Template to Week.” Once the template is added, assistors can edit time slots by clicking on the desired time slot to modify or delete it.

Note: The Scheduling Tool is only used by assistors who are not serving Tribal communities. Not all assistors are set up and registered for this tool.

## SECTION 10: CONTACT US

### General Assistance:

For general assistance call our Customer Engagement Center at: 1-833-862-3935.

Assisters can also access the [beWellnm Glossary of Health Insurance Terms](#).

### Training and LMS Assistance:

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

### Resources:

For issues or questions related to the Broker Portal, please email [brokers@nmhix.com](mailto:brokers@nmhix.com).

For general assistance, please call our Customer Engagement Center designated broker line at: 1-833-862-3935 and press option 5.

Agent and Broker Resources:

- [Getting Started for Agents and Brokers](#)
- [Knowledge Base Articles](#)

Enrollment Counselor Resources:

- [Getting Started for Enrollment Counselors](#)
- [Knowledge Base Articles](#)