Agent Portal
Quick Reference Guide

September 2015

Kentucky's Healthcare Connection

This Quick Reference Guide is designed to help Agents navigate the features of the new Agent Portal. The Agent Portal is only available to Agents. kynectors continue to have access to their same dashboard. To access this guide and additional training materials available to Agents, visit the TRIS site at http://tris.eku.edu/khbe/default.aspx.

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1. Agent Portal Overview

The Agent Portal is the portal that you access when you sign into kynect using your Kentucky Online Gateway (KOG) credentials. This portal provides Agents with the ability to search for and view client information, initiate new client applications, and manage day-to-day business.

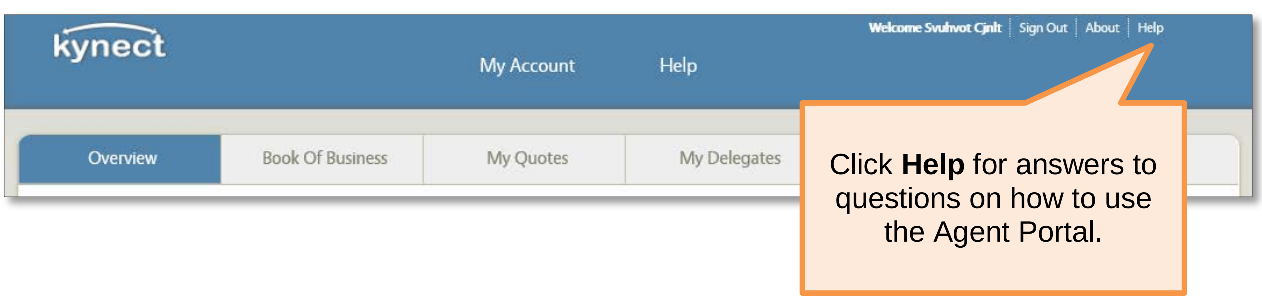
As of August 2015, the Agent Portal has been completely revamped. In addition to a new look, the Agent Portal now provides Agents with increased search capabilities, basic and advanced proposal options, prospective client tracking, an Agent Delegate feature, and access to additional links and resources.

These updates provide Agents with greater functionality, making it easier for them to take care of their business and focus on the individuals they are helping.

The following pages in this guide are organized by the different tabs of the Agent Portal:

Overview	**Book of Business**	**My Quotes**
My Delegates	**Messages**	**Settings**

All Agents also have access to Online Help throughout the module for answers to their questions. Online Help is located in the upper right-hand corner of each screen:



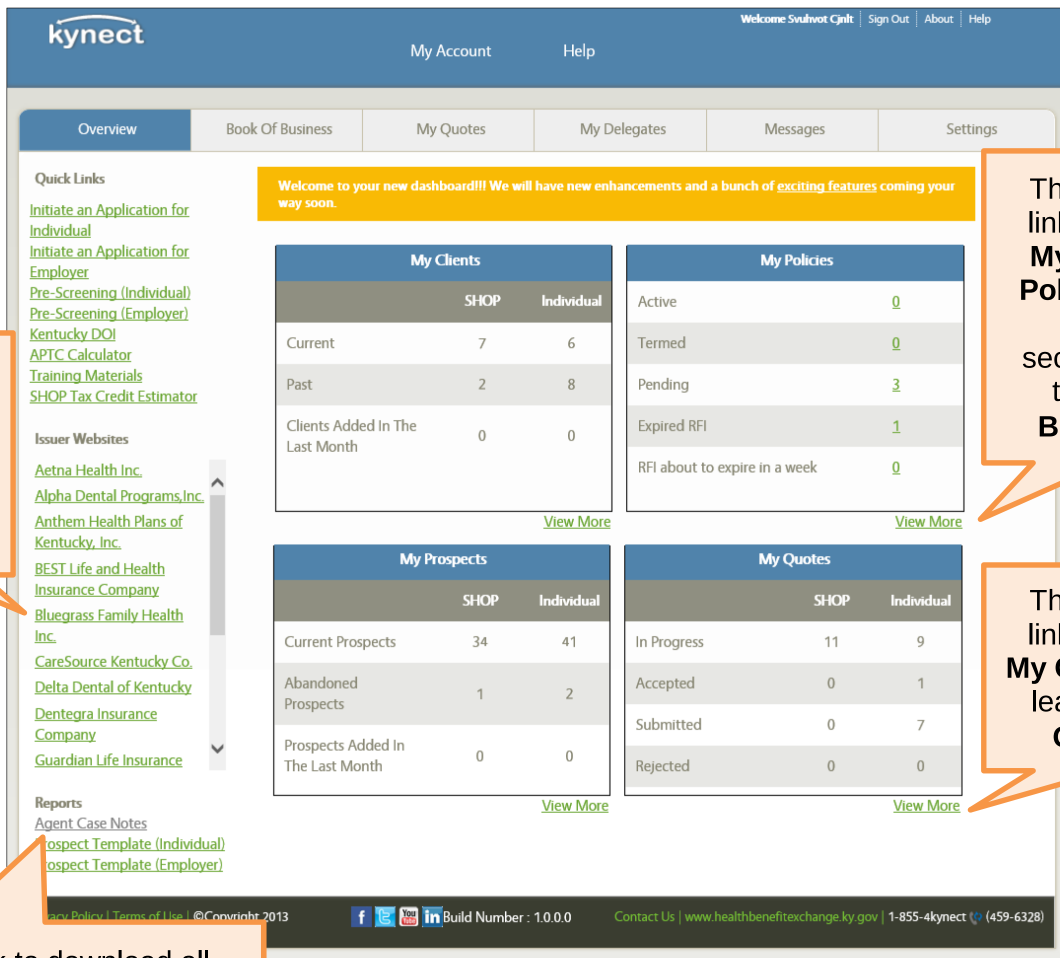
2. Overview Tab

The **Agent Portal Dashboard** screen is the landing page that appears when you sign into kynect using your Kentucky Online Gateway (KOG) credentials. This screen is on the **Overview** tab.

You will notice that this screen looks very different from the previous landing page. Most notably are the four main sections in the middle of the screen and the bar along the top with new tabs.

The first three new sections on the screen are the **My Clients**, **My Policies**, and **My Prospects** sections. These sections include information on current, potential, and past clients. The fourth section is the **My Quotes** section. This section displays information on the proposals that you have created for your clients, including those that are **Accepted**, **In Progress**, and **Submitted**.

When you click on the **View More** link beneath any of these sections, you are taken to screens that provide additional information related to that particular section.



New links have been added along the left-hand navigation.

The **View More** link beneath the **My Clients**, **My Policies**, and **My Prospects** sections leads to the **Book of Business** tab.

The **View More** link beneath the **My Quotes** section leads to the **My Quotes** tab.

Click to download all **Agent Case Notes** that you have created for your clients to Excel

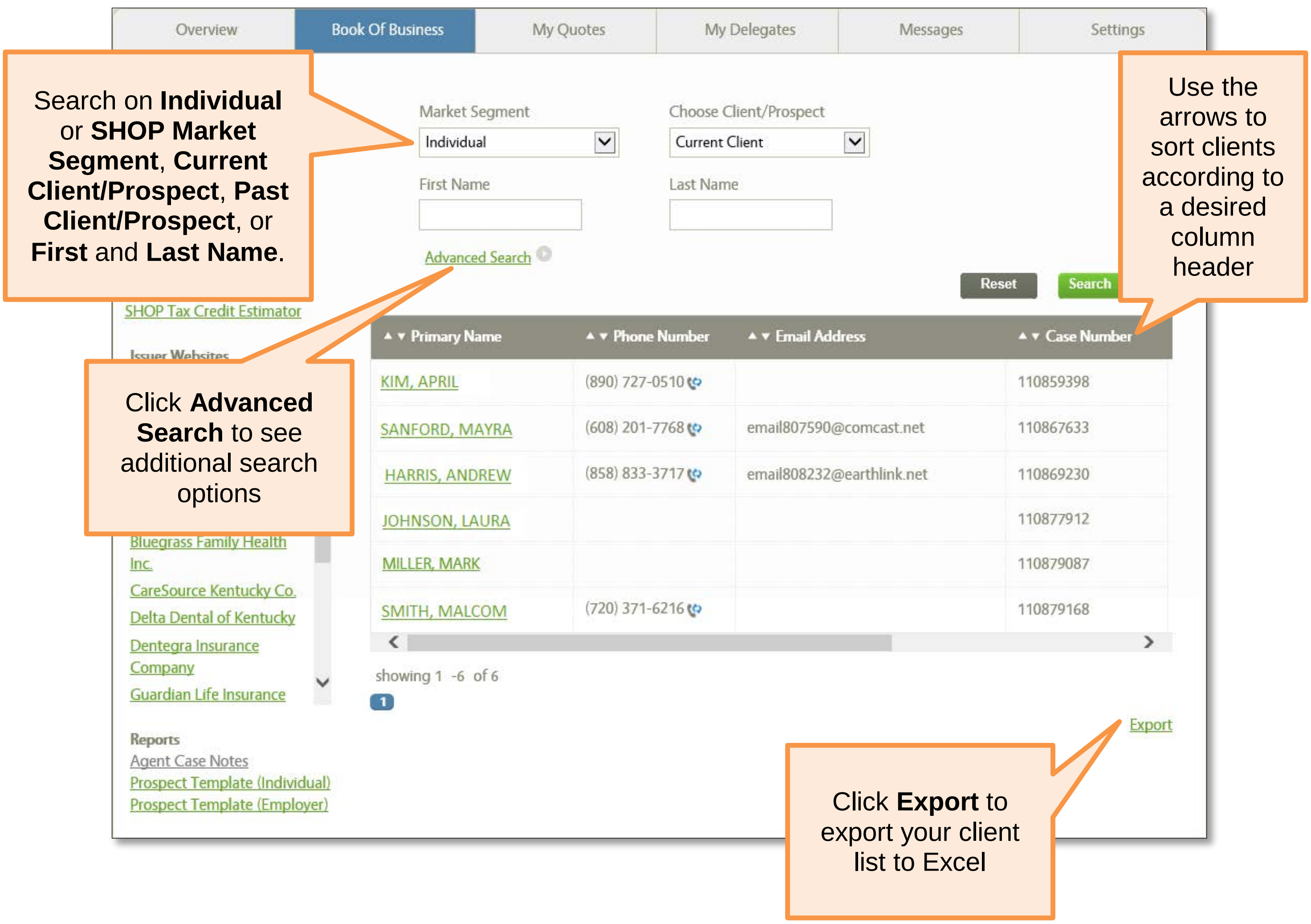
3. Book of Business Tab

My Clients

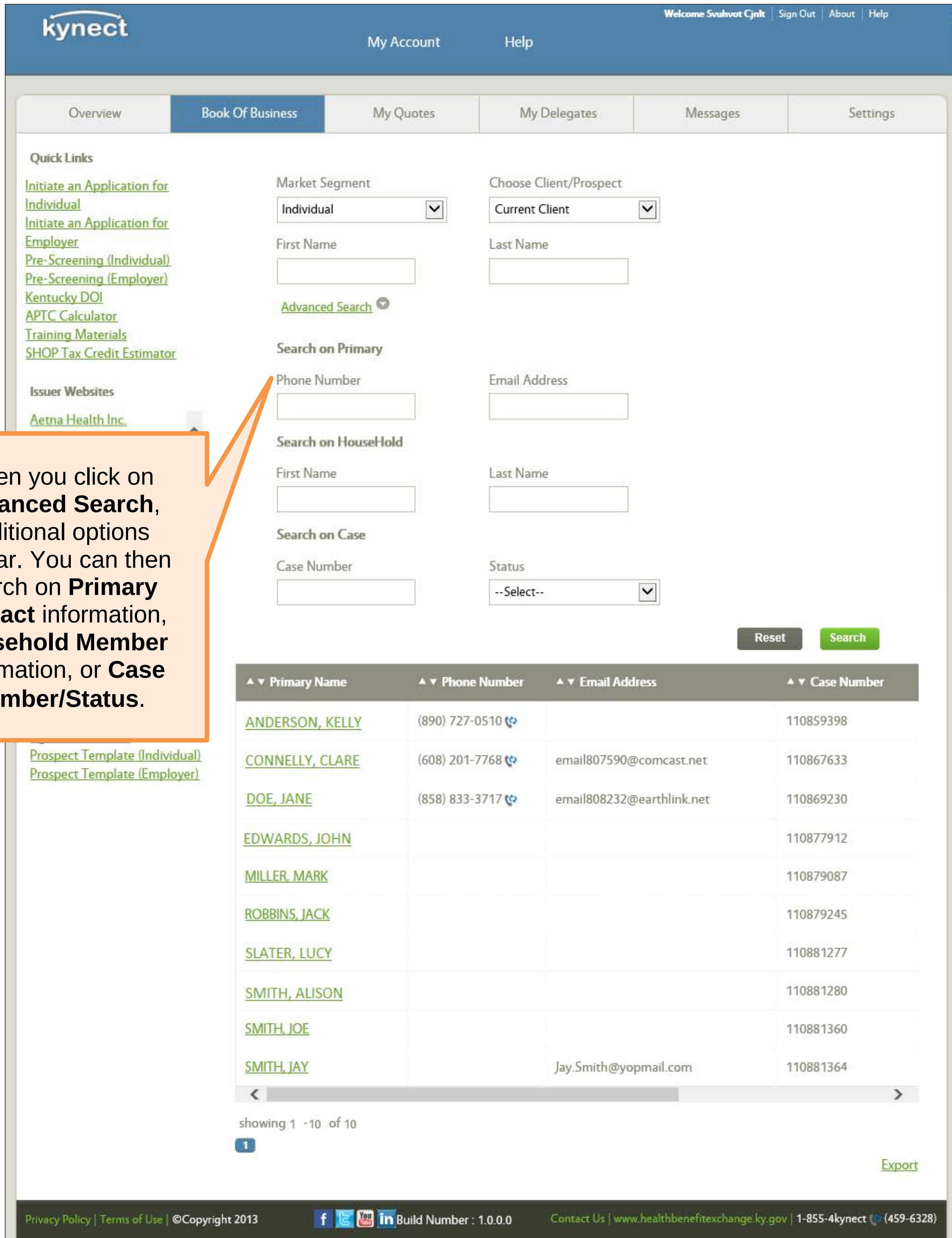
The **Book of Business** tab builds upon what was previously the **Search for Your Customers** feature. Depending on the **View More** link that you click, you will see a different view that is customized according to the clients in that section and provides you with the ability to search on specific client criteria.

When you click on the **View More** link underneath the **My Clients** section, you are taken to the below screen in the **Book of Business** tab. This screen is also the view that you see when you click directly on the **Book of Business** tab along the upper navigation. This screen provides you with information on clients that have submitted an application and created a case in kynect. This includes both current and past Individual and SHOP Market clients.

On this screen, you can use basic and advanced search features. You can also sort these clients according to the column headers and export the list to Excel.



Advanced Search



When you click on **Advanced Search**, additional options appear. You can then search on **Primary Contact** information, **Household Member** information, or **Case Number/Status**.

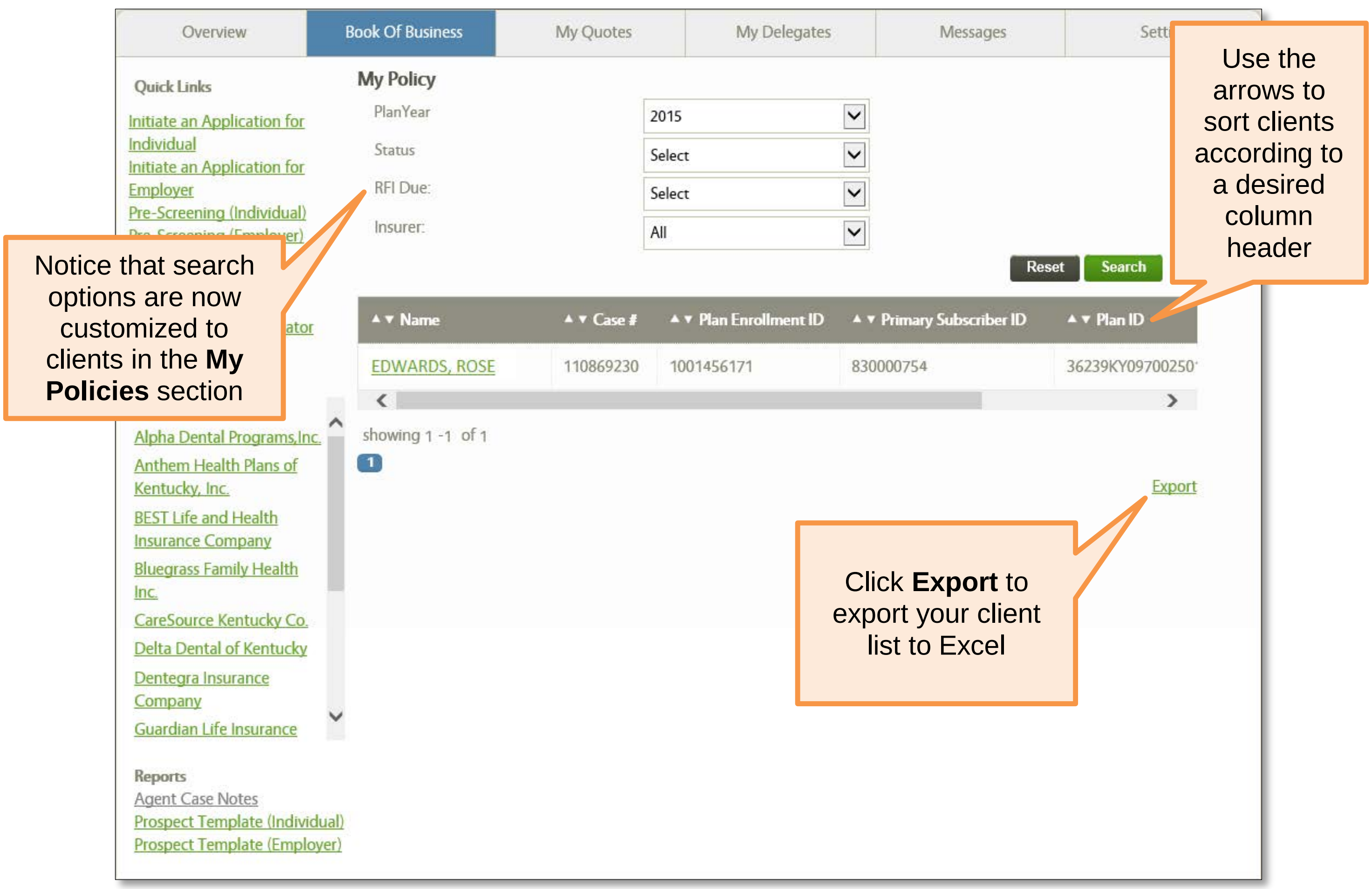
My Policies

When you click on the **View More** link underneath the **My Policies** section, you are taken to the below screen in the **Book of Business** tab. Note that this screen looks different than the screen that you saw when you clicked on **View More** underneath the **My Clients** section.

The **My Policies** section provides you with information on clients that have completed their applications, received their eligibility determinations, and enrolled in coverage. This includes active, terminated, and pending clients, as well as those who need to complete a Request for Information.

During Open Enrollment, you can also view information on clients that will be passively renewed into their same plan, clients that need to actively review and renew their coverage, and clients with enrollments that will be terminated.

As before, you can use the below screen on the **Book of Business** tab to search, sort, and export policy clients.

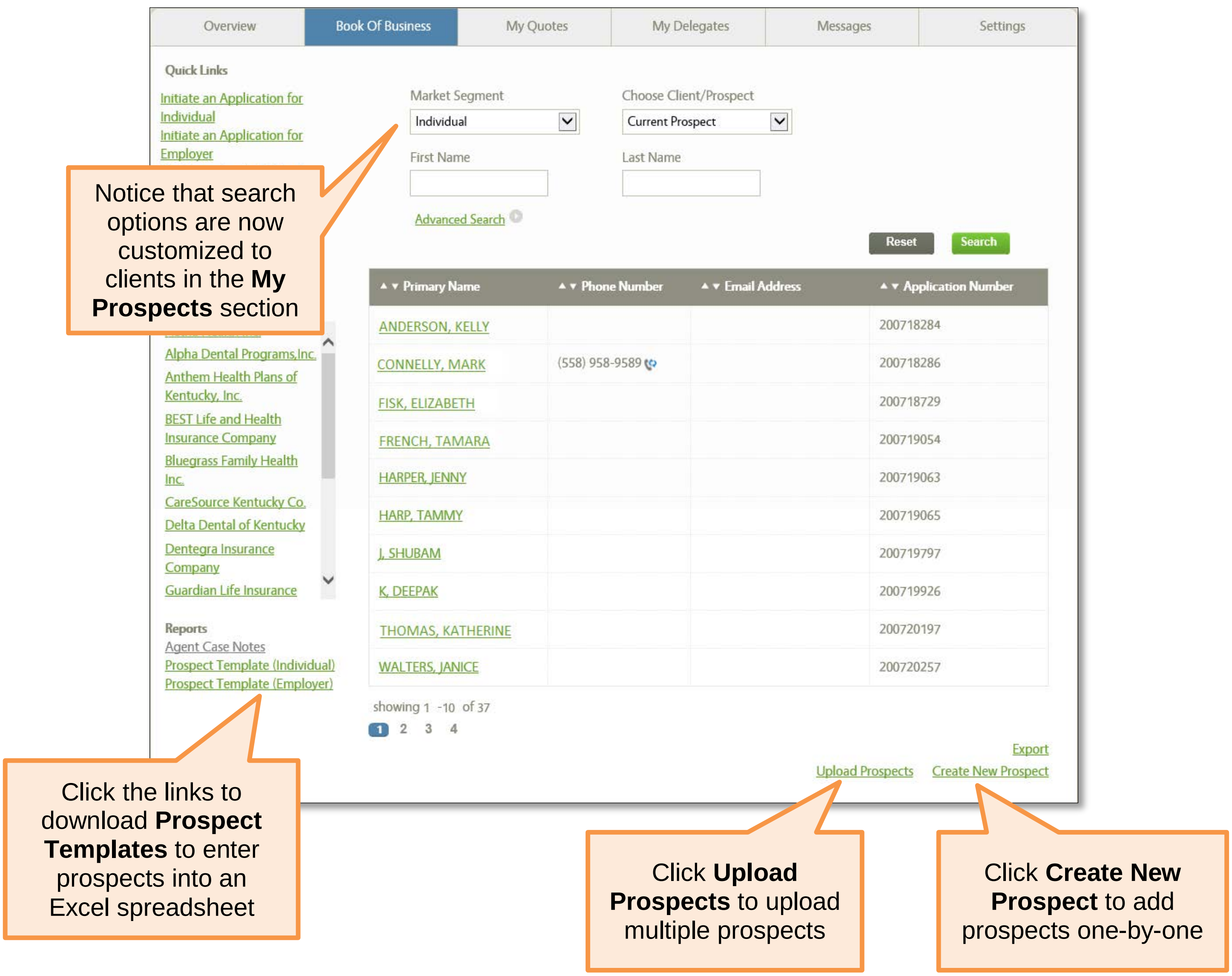


My Prospects

When you click on the **View More** link underneath the **My Prospects** section, you are taken to the below screen in the **Book of Business** tab. Note that this screen again looks different compared to the other screens that you have seen when you have clicked on **View More**.

The **My Prospects** section includes both clients that have initiated an application with you and clients that you are currently tracking through the use of a prospect template. This feature makes it easier for you to manage all current and prospective opportunities with clients.

As before, you can use the below screen on the **Book of Business** tab to search, sort, and export prospective clients. You can also upload multiple prospects at once using the **Upload Prospects** link or add prospects one-by-one using the **Create New Prospect** link.



Adding Prospects to the Agent Portal

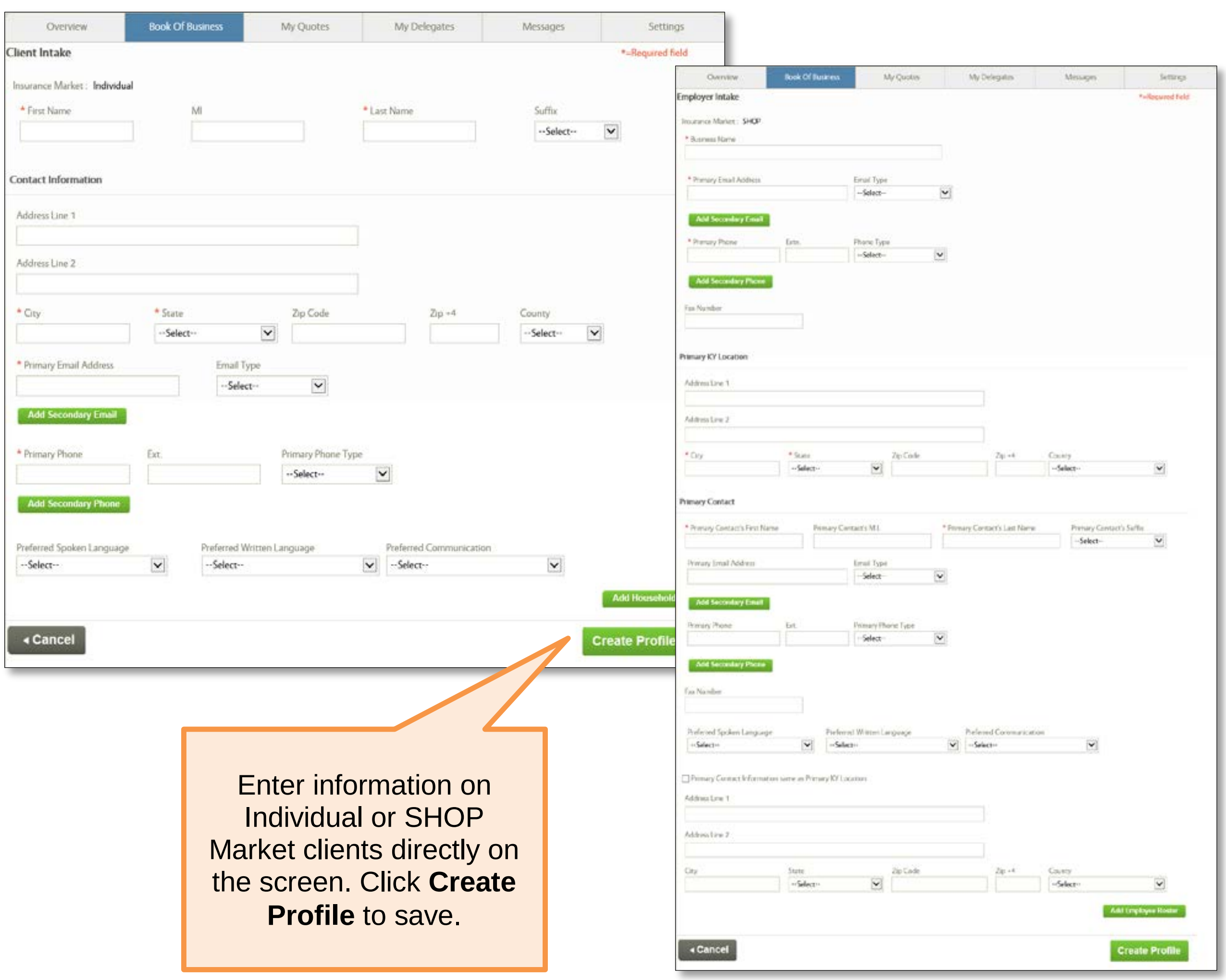
There are two ways that you can enter clients that have not yet initiated an application into the Agent Portal:

1. Use and upload an Excel prospect template
2. Enter client information directly on the screen

The first option, using and uploading an Excel prospect template, allows you to enter multiple prospective clients into the Agent Portal at the same time. The second option, entering the client information directly on the screen, allows you to enter prospective clients into the Agent Portal one at a time. Both options are available for Individual and SHOP Market prospective clients.

If the client that you have entered decides to initiate an application, you can transfer the profile information directly to the application. You can then edit the information if needed or continue on with the application process.

Below are the screens that you see when you enter prospective Individual or SHOP Market client information directly into the Agent Portal.

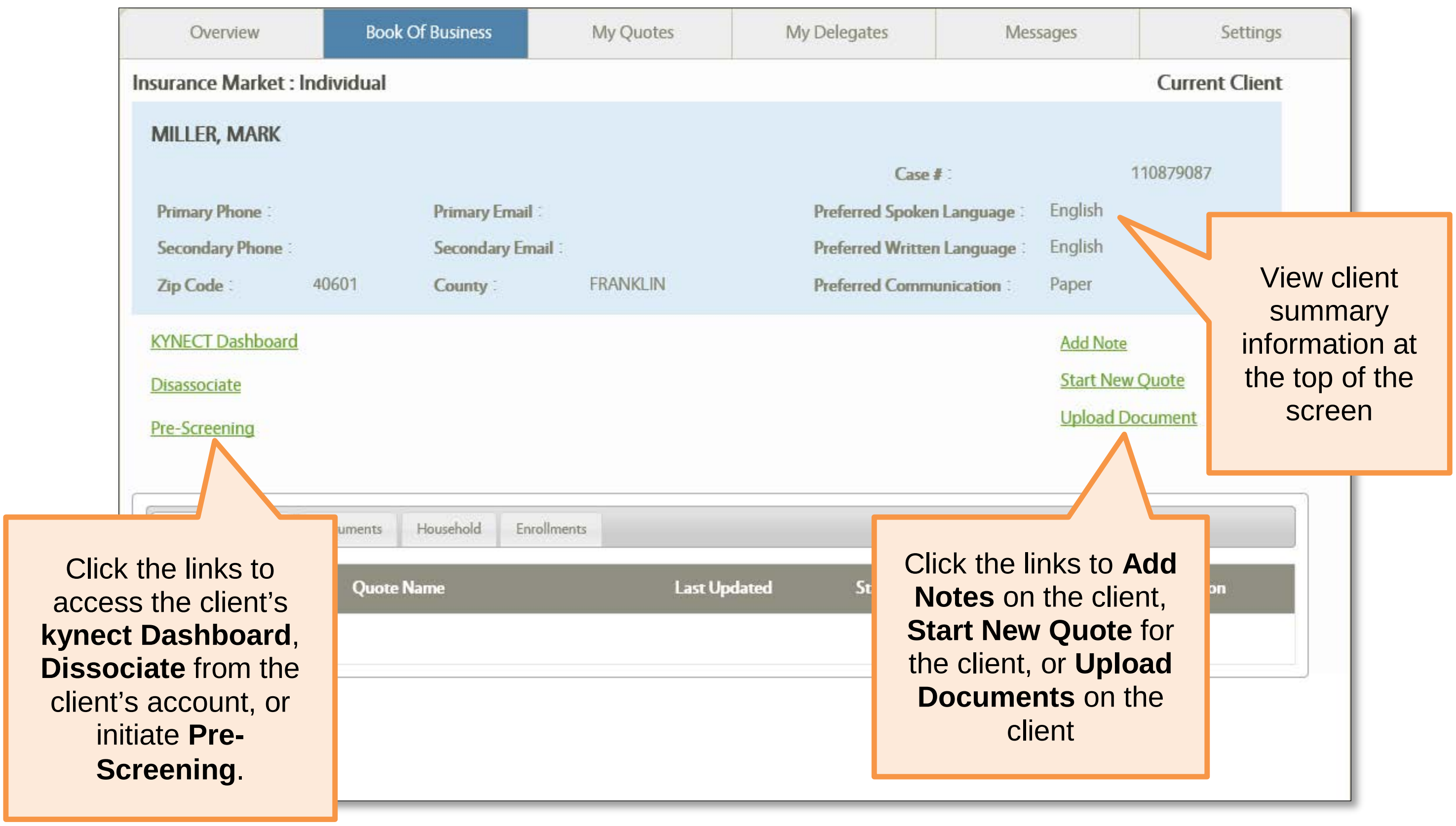


Client Profile Screen

When you click on the name of a client, a new **Client Profile** screen displays. This screen provides a summary of information about the selected client, such as **Zip Code**, **County**, and **Primary** and **Secondary Contact** information.

From the **Client Profile** screen, you can then take a variety of actions. While actions for Individual and SHOP Market clients differ, some of these actions include:

- **Access the kynect Dashboard** – access Individual or Employer Dashboards
- **Add client notes and documents** – add case notes for clients or upload client documents
- **Generate proposals for the client** – initiate Individual Advanced Quotes, Employer Quick Group Estimates, or Employer Advanced Quotes
- **Initiate Pre-Screening** – access the Pre-Screening Tool to view potential eligibility and plan options
- **Dissociate from the client's account** – remove yourself as the Agent of Record on a client's account



4. My Quotes Tab

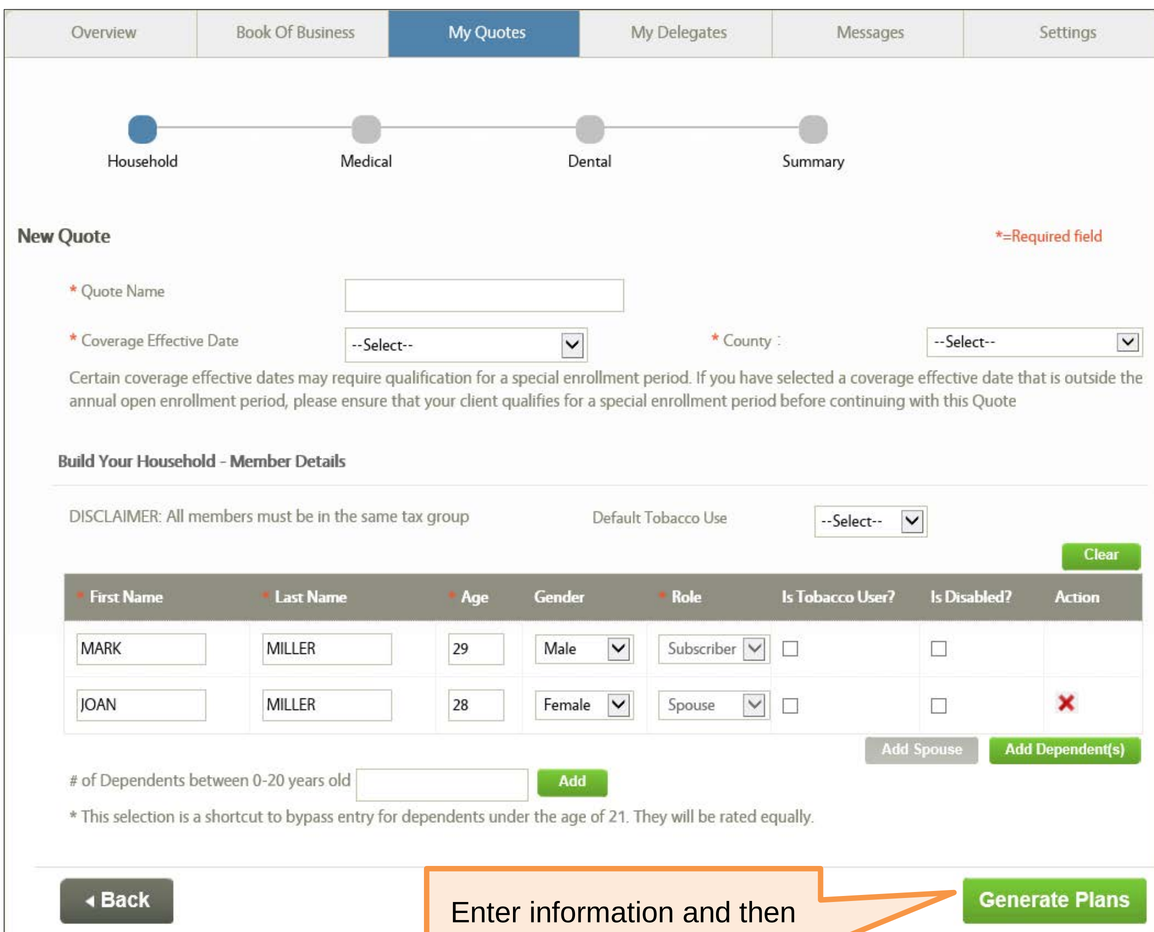
The **My Quotes** tab allows you to track quotes or proposals that you have created for your clients. Proposals are initiated from the **Client Profile** screen. There are three types of proposals that you can generate:

1. Individual Advanced Quote
2. Quick Group Estimate for Employers
3. Employer Advanced Quote

You follow the same process when creating each of the different types of proposals:

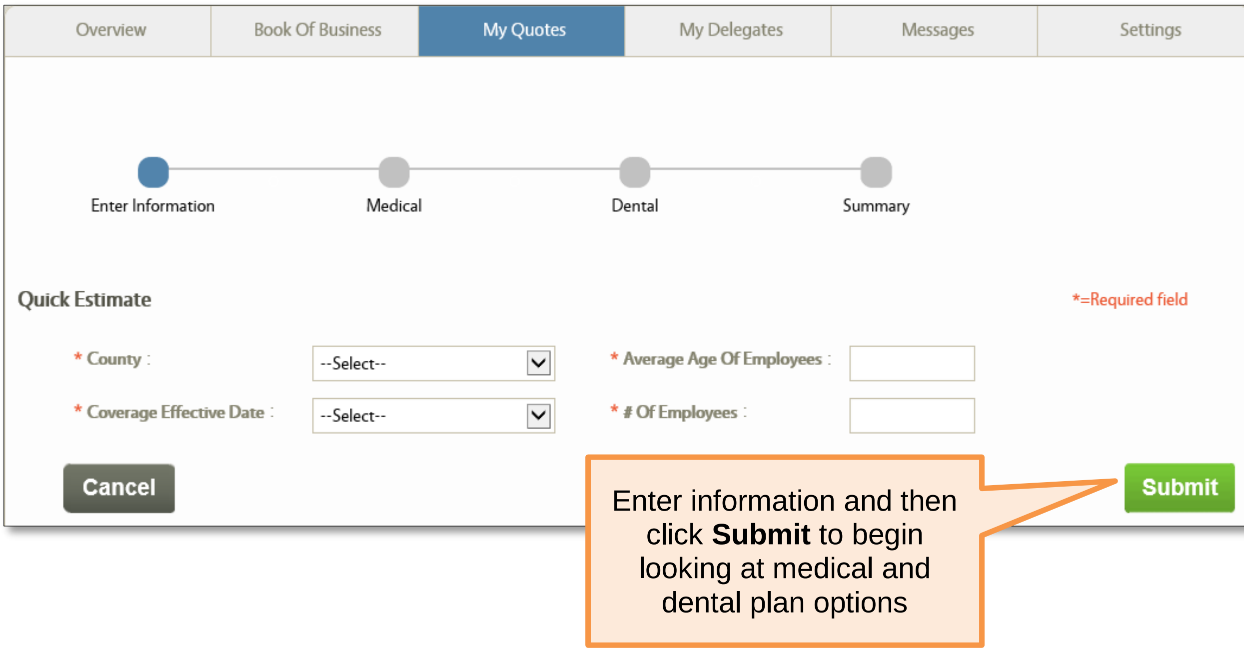
1. Click on the desired quote type from the **Client Profile** screen.
2. Fill in the information about the individual or the employer. This can be basic or advanced information depending on the proposal you select.
3. You can then go shopping for medical or dental options based on the information you input.
4. Finally, you receive a summary on the proposal that you can download as a PDF or that you can send directly to the client through kynect.

Below is the screen where you begin to enter information for an **Individual Advanced Quote**.

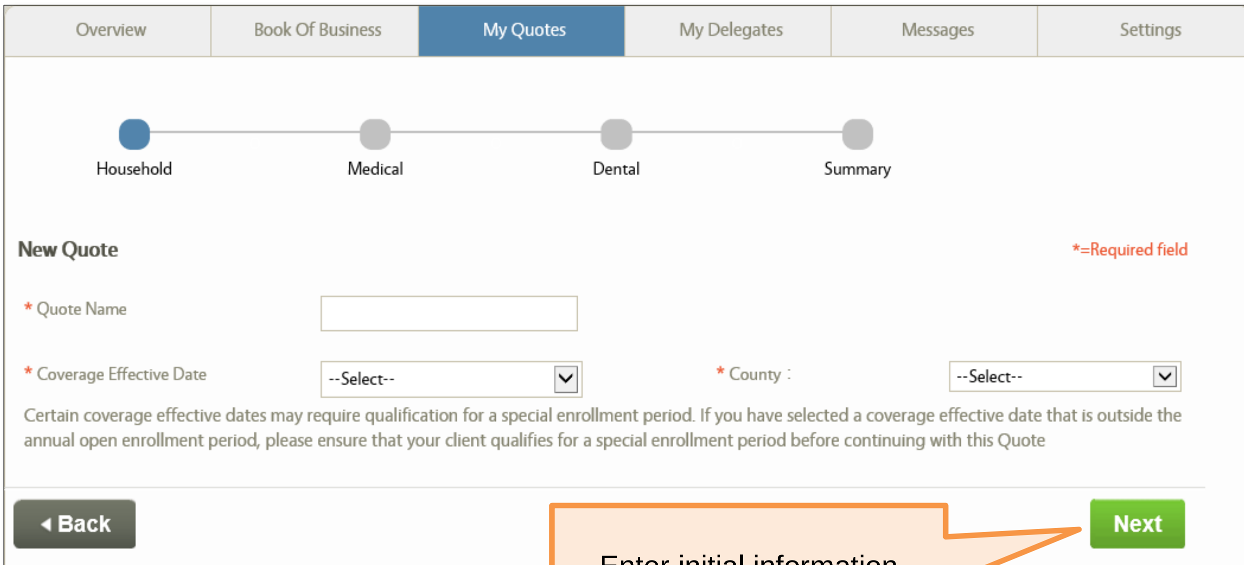


Enter information and then click **Generate Plans** to begin looking at medical and dental plan options

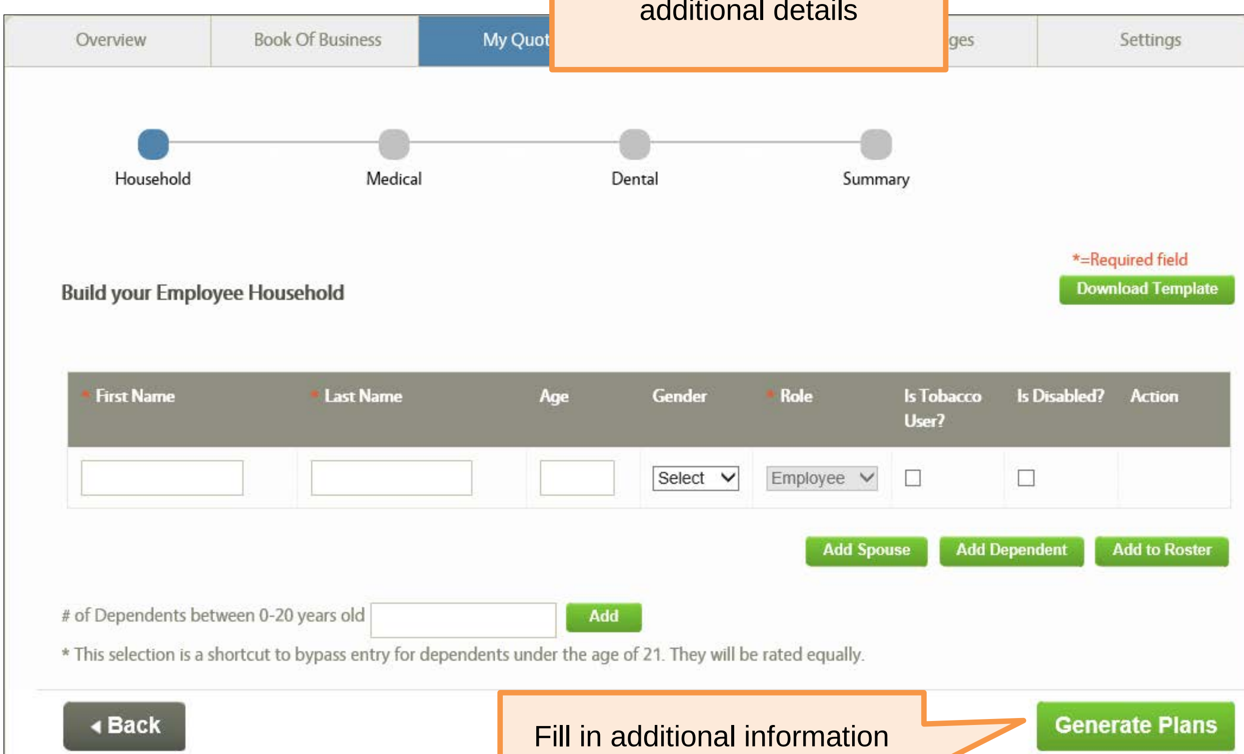
Below is the screen where you begin to enter information for an **Employer Quick Group Estimate**.



Below are the screens where you begin to enter information for an **Employer Detailed Household Estimate**.



Enter initial information and then click **Next** to add additional details



Fill in additional information and click **Generate Plans** to begin looking at medical and dental plan options

There are additional quotes that you can initiate for your clients. Below is a table that includes the quotes mentioned in this section and all other quotes you can create. It is important to note that the Individual Pre-Screening, Employer Pre-Screening, and Employee Pre-Screening options are not saved and cannot be sent to clients directly through kynect.

Quote Name	Purpose	Location	Can you send to clients?
Individual Pre-Screening	Enter basic information about an individual, receive a potential eligibility determination, and view potential plan options	Access through the **Individual Pre-Screening** link on the **Agent Portal Dashboard** landing page or **Individuals and Families** tab on kynect.ky.gov	No, Pre-Screening information is not saved in kynect.
Individual Advanced Quote	Enter information about an individual and view potential plan options	Begin from the individual's **Client Profile** screen	Yes, you can send to a client directly through kynect. This will appear as new message in their **Message Center** inbox.
Employee Pre-Screening: Employee Detailed Household Estimate	Enter employee household information and view employer plan options	Access through the **Employer Pre-Screening** link on the **Agent Portal Dashboard** landing page or **Individuals and Families** tab on kynect.ky.gov	No, Pre-Screening information is not saved in kynect.
Employer Pre-Screening: Quick Group Estimate	Enter basic information about an employer and view potential plan options	Access through the **Employer Pre-Screening** link on the **Agent Portal Dashboard** landing page or **Small Businesses** tab on kynect.ky.gov	No, Pre-Screening information is not saved in kynect.
Agent Portal Quick Group Estimate	Enter basic information about an employer and view potential plan options	Begin from the employer's **Client Profile** screen	Yes, you can send to a client directly through kynect. This will appear as new message in their **Message Center** inbox.
Agent Portal Employer Advanced Quote	Enter detailed information on an employer and their employees and view potential plan options	Begin from the employer's **Client Profile** screen	Yes, you can send to a client directly through kynect. This will appear as new message in their **Message Center** inbox.

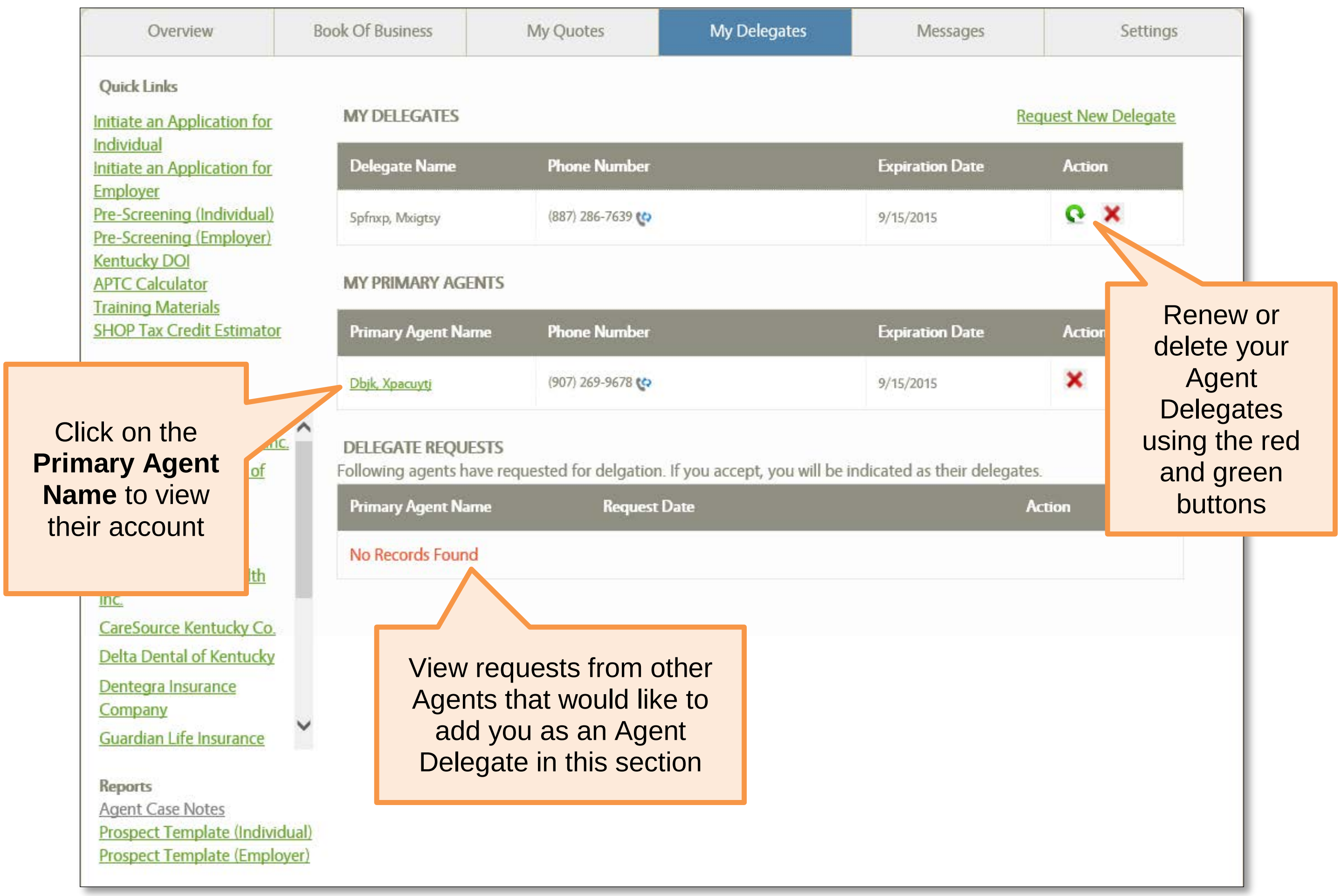
5. My Delegates Tab

The **My Delegates** tab provides you with the ability to add Agent Delegates to your account. Agent Delegates are licensed and certified Agents who have access to your Agent Portal account and can take action for your clients on your behalf.

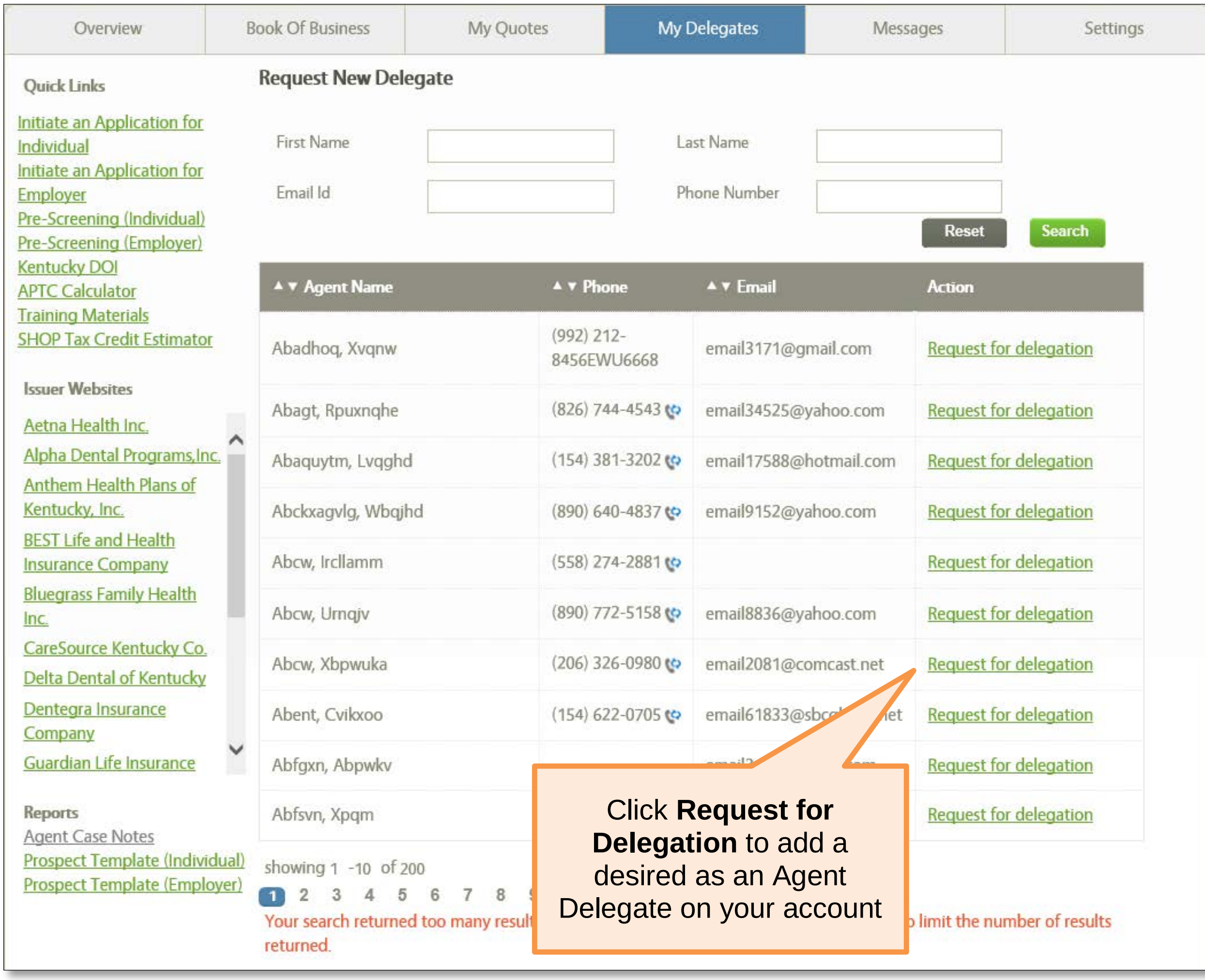
Agent Delegates can initiate applications for clients, view current client information, and make changes to client accounts if needed. Agent Delegates can do almost everything that a primary Agent can do, except remove the primary Agent from the account and receive compensation for the actions that they take on behalf of the primary Agent's clients.

You can add up to 3 other Agents to be Delegates on your account.

Below is the screen that you see when you click on the **My Delegates** tab.



When you click on the **Request New Delegate** link, you see the below screen. On this screen, you can search for and add new Agents to be Delegates on your account. When you click the **Request for Delegation** link, a popup will appear to ask you to confirm the request. You can then click **OK** and the request will be sent to the selected Agent.

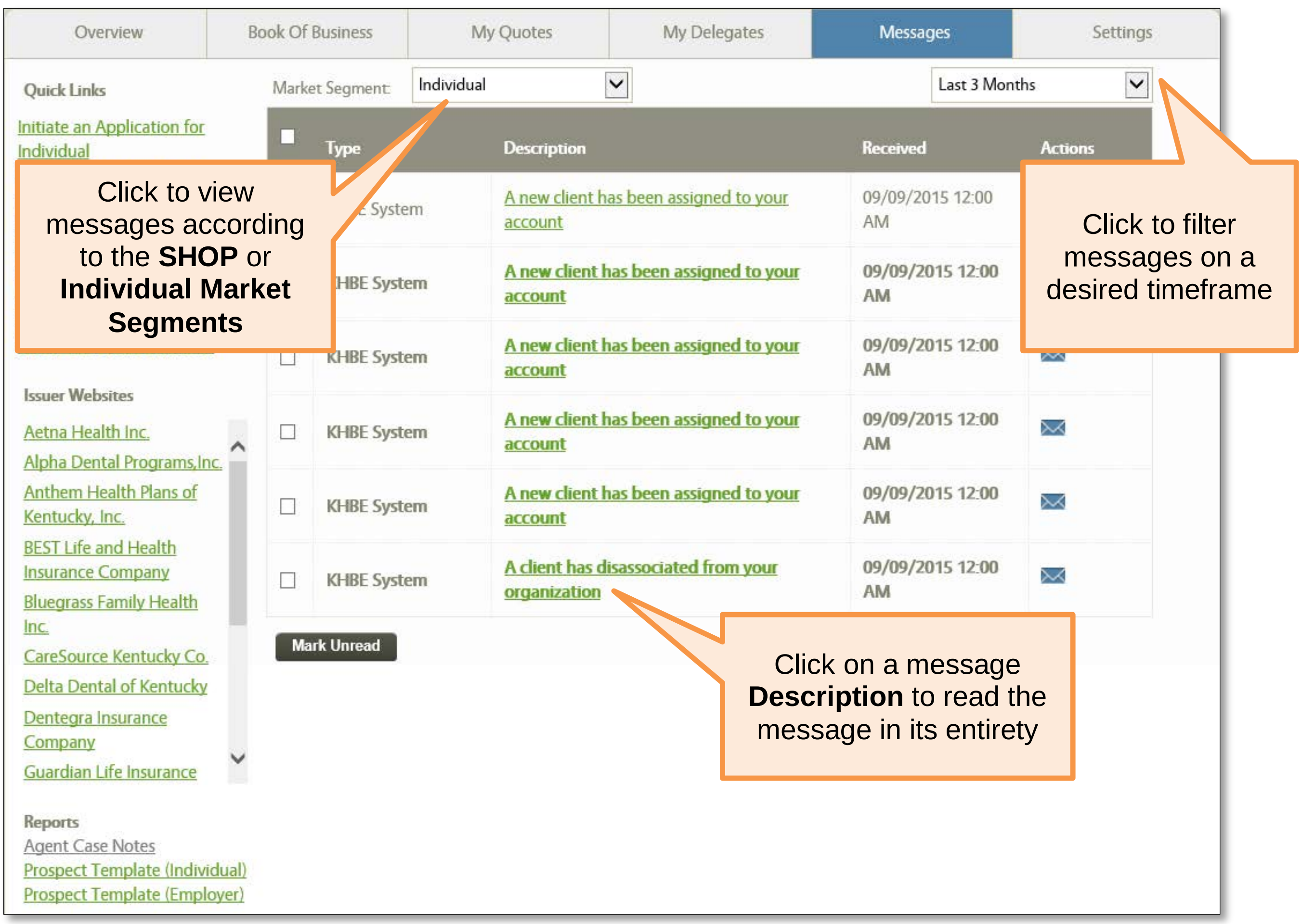


6. Messages Tab

On the **Messages** tab, Agents can view messages from the Kentucky Office of Health Benefit and Information Exchange (KOHBIE). Agents can also mark messages as unread or use the dropdown in the top right-hand corner to search for messages from the:

- Last 1 Month
- Last 3 Months
- Last 6 Months
- Last 9 Months
- Last Year
- All Time

Finally, Agents can filter messages according to the **Individual** and **SHOP Market Segments**.



7. Settings Tab

The final tab is the **Settings** tab. On the **Settings** tab, Agents can view and edit their information.

Agents can view **DOI Information** such as:

- DOI Agent ID number
- Email
- Primary Phone and Phone Type
- Business Address

Agents can edit **Additional Information** such as:

- Spoken Languages
- Method of Contact
- Hours Available