



Agent/kynector Job Aid –

How to Use the Agent/kynector Portal

In this job aid, please find helpful tips and processes for getting the most out of the Agent/kynector portal. Included are the steps for the following processes:

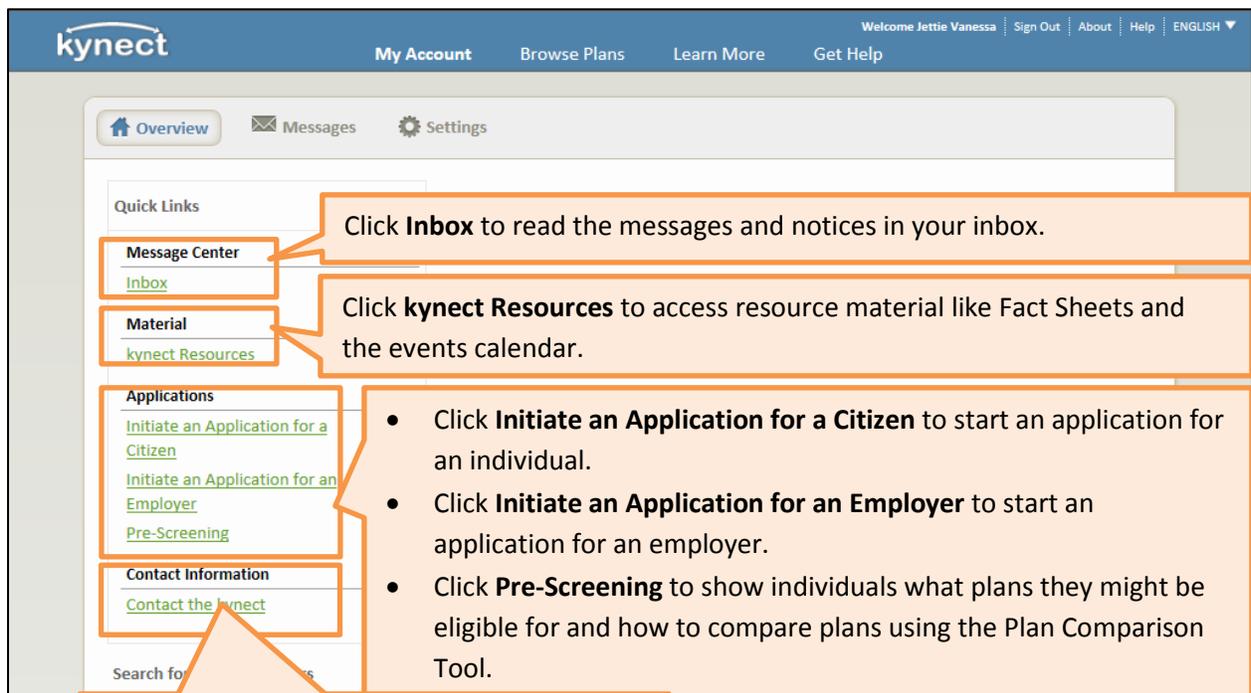
- Navigating the Agent/kynector portal
- Accessing your inbox to read your messages and notices
- Accessing Fact Sheets and other resource materials
- Starting an application as an individual and employer
- Using the pre-screening tool to show individuals plans they might be eligible for and how to use the Plan Comparison Tool
- Accessing contact information on kynect

For instructions on logging onto your Agent/kynector dashboard, please refer to the **Kentucky Online Gateway Quick Reference Guide**.

Step	Action
Quick Links Overview	

There are many helpful links to use under Quick Links. You can:

- Click **Inbox** to read the messages and notices in your inbox
- Click **kynect Resources** to access resource material like Fact Sheets and the events calendar. Fact Sheets are your first place to look for answers to quick questions.
- Click **Initiate an Application for a Citizen** to start an application for an individual
- Click **Initiate an Application for an Employer** to start an application for an employer
- Click **Pre-Screening** to show individuals what plans they might be eligible for and how to compare plans using the Plan Comparison Tool
- Click **Contact the kynect** to look up contact information



The screenshot shows the Kynect website's 'Quick Links' section. Callout boxes provide the following instructions:

- Message Center / Inbox:** Click **Inbox** to read the messages and notices in your inbox.
- Material / kynect Resources:** Click **kynect Resources** to access resource material like Fact Sheets and the events calendar.
- Applications:**
 - Click **Initiate an Application for a Citizen** to start an application for an individual.
 - Click **Initiate an Application for an Employer** to start an application for an employer.
 - Click **Pre-Screening** to show individuals what plans they might be eligible for and how to compare plans using the Plan Comparison Tool.
- Contact Information / Contact the kynect:** Click **Contact the kynect** to look up contact information.

Please Note: Unless you want to complete an application for an individual or employer, please do **NOT** click on the Initiate Application links. You can help individuals see what plans they might be eligible for and how to use the Plan Comparison Tool using the **Pre-Screening Tool**. This way, unnecessary applications are not started and abandoned in kynect.



Step

Action

To see all of your details, click **View All** to the right of My Details.

The screenshot shows the 'My Account' page on the Kynect website. The top navigation bar includes the Kynect logo, 'My Account', 'Browse Plans', 'Learn More', and 'Get Help'. A user greeting 'Welcome Jettie Vanessa' and links for 'Sign Out', 'About', 'Help', and 'ENGLISH' are also present. Below the navigation, there are tabs for 'Overview', 'Messages', and 'Settings'. The main content area is divided into two columns. The left column, titled 'Quick Links', contains sections for 'Message Center' (with an 'Inbox' link), 'Material' (with a 'kynect Resources' link), 'Applications' (with links for 'Initiate an Application for a Citizen', 'Initiate an Application for an Employer', and 'Pre-Screening'), and 'Contact Information' (with a 'Contact the kynect' link). The right column, titled 'My Details', displays the following information: 'Your ID: 2250', 'Organization: Glenn E Martin Insurance', and 'Coverage Area: LAUREL'. A 'View All' link is positioned to the right of the 'My Details' section. An orange callout box with a pointer highlights this 'View All' link and contains the text: 'Click **View All** to see all of your details.' At the bottom of the page, there is a search bar labeled 'Search for Your Customers' and another 'View All' link.

Here, you can see all of your personal and organization information, such as email address, phone number, and address



Updating Your Account

1. You can make any necessary updates through the Kentucky Online Gateway (KOG) portal using the link provided.

The screenshot shows the "My Account" page in the Kynect portal. The top navigation bar includes the Kynect logo, "My Account", and "Browse". A user greeting "Welcome Jettie Vanessa" and links for "Sign Out", "About", "Help", and "ENGLISH" are visible. Below the navigation, there are tabs for "Overview", "Messages", and "Settings". The main content area is titled "My Information" and contains a message: "Your personal and organization information is managed through the Kentucky Online Gateway portal. [Please use that channel for making any necessary updates, including password changes.](#)" Below this message are two columns of information: "Contact Information" and "Organization Information".

Contact Information		Organization Information	
Email Address	UAT2_N_ASSISTER_02@keups.net	kynector ID	203
Primary Number	(876) 219-9001	kynector Organization Name	Glenn E Martin Insurance
Primary Phone Type	Not Provided	Email Address	enquir2@glenninsurance.com
Secondary Number	Not Provided	Phone Number	(879) 219-6027
Secondary Phone Type	Not Provided	kynector Organization Physical Address	1167 Centre Parkway Ste. 182 Lexington KY 40517
Mailing Address	3306 Clays Mill Road Suite 104 Lexington KY 40503	kynector Organization Mailing Address	Not Provided
Preferred Method of Contact	Not Provided		

2. After accessing KOG through the link displayed above, click **My Info** to edit your information. After you save your updated information, there will be a link redirecting you to kynect.



Viewing Your Individuals

1. To see a list of all the individuals you are assigned to, click **View All** to the right of **Search for Your Customers**. Scroll down to see the list and details, such as application status, associated with your individuals.

A screenshot of the Kynect web application interface. The top navigation bar includes the Kynect logo, "My Account", "Browse Plans", "Learn More", and "Get Help". A user greeting "Welcome Jettie Vanessa" and links for "Sign Out", "About", "Help", and "ENGLISH" are on the right. Below the navigation bar, there are tabs for "Overview", "Messages", and "Settings". The main content area is divided into two columns. The left column, titled "Quick Links", contains sections for "Message Center" (with an "Inbox" link), "Material" (with a "kynect Resources" link), "Applications" (with links for "Initiate an Application for a Citizen", "Initiate an Application for an Employer", and "Pre-Screening"), and "Contact Information" (with a "Contact the kynect" link). Below these links is a "Search for Your Customers" input field. The right column, titled "My Details", shows user information: "Your ID: 2250", "Organization: Glenn E Martin Insurance", and "Coverage Area: LAUREL". A green "View All" link is positioned at the top right of this section. An orange callout box with a pointer to the "View All" link contains the text: "Click **View All** to see a list of all the individuals you are assigned to." Another "View All" link is visible at the bottom right of the page.



Step **Action**

2. Here, you can see a list of all of the individuals you are assigned to as an Agent or kynector. The details shown include Customer Name, Application/Case Number, Phone number, Email, Application Status, Application Submitted Date, Last Updated Referrals, and who they were assisted by. You can click on the Customer Name to access his or her application.

Customer First Name

Customer Last Name

Customer Role
Individuals & Employees

Status

Submitted Date

Assisted By

View a list of all of the individuals you are assigned to as an Agent or kynector. Click the individual's name to view more information.

Customer Name App / Case Number	Phone	Email	Status	Submitted Date	Last Updated	Assisted By Referrals
SAGAR PAHWA 200004378	Not Available	Not Available	Partial Application	12/20/2014	12/20/2014	Evan Lilie Referrals
STREET CITY 200007737	Not Available	askdjK@gmail.com	Partial Application	12/15/2014	12/15/2014	Evan Lilie Referrals
JANET STIN 200007726	Not Available	janet@ymail.in	Partial Application	12/15/2014	12/15/2014	Evan Lilie Referrals
TESTSL TESTSL 200004491	Not Available	Not Available	Partial Application	11/05/2014	11/05/2014	Evan Lilie Referrals
SHANE DAVE 200007849	Not Available	Not Available	Partial Application	09/12/2014	09/12/2014	Evan Lilie Referrals
DAVID DAVID 200007819	Not Available	david@yahoo.com	Partial Application	09/12/2014	09/12/2014	Evan Lilie Referrals



Step

Action

Your Messages

Click on the Messages tab to read your messages and notices.

The screenshot shows the Kynect website's "Messages" tab. The top navigation bar includes the Kynect logo, "My Account", "Browse Plans", "Learn More", "Get Help", and "FAQ". A user is logged in as "Evan Lillie". Below the navigation, there are three tabs: "Overview", "Messages" (which is highlighted with an orange box), and "Settings". A callout box with an orange border points to the "Messages" tab, containing the text: "Click the **Messages** tab to read your messages and notices." Below the tabs is the "Message Center" section, which includes a "Last 3 Months" filter dropdown. A table of messages is displayed with columns for "Subject", "From", and "Received". The messages listed are:

Subject	From	Received
WIC Referral Program Notification	KHBE System	09/10/2014 03:21 AM
Appeal Desk Review	KHBE System	09/10/2014 03:21 AM
Electronic Survey	KHBE System	09/10/2014 03:21 AM
Health Benefits Eligibility Notice	KHBE System	09/10/2014 03:21 AM
Request For Information (RFI)	KHBE System	09/10/2014 03:21 AM
Health Benefits Eligibility Notice	KHBE System	09/10/2014 03:21 AM
Notice of Privacy Practice	KHBE System	09/09/2014 03:34 AM
Request For Information (RFI)	KHBE System	09/09/2014 03:34 AM
Request For Information (RFI)	KHBE System	09/09/2014 03:34 AM
Health Benefits Eligibility Notice	KHBE System	09/09/2014 03:34 AM

At the bottom of the message list, there is a pagination control showing "1" selected, followed by numbers 2 through 10, and a right-pointing arrow.



Step

Action

Click on the Settings tab to View Your Settings

The screenshot shows the "My Information" page on the Kynect website. At the top, there is a navigation bar with the Kynect logo, "My Account", "Browse Plans", "Learn More", "Get Help", and "FAQ". On the right side of the navigation bar, it says "Welcome Evan Lile" and includes links for "Sign Out", "About", "Help", and "ENGLISH". Below the navigation bar, there are three tabs: "Overview", "Messages", and "Settings". The "Settings" tab is highlighted with an orange box, and an orange callout box with a white background and black text points to it, containing the instruction: "Click the Settings tab to view your settings." Below the tabs, the "My Information" section is displayed. It contains a paragraph of text: "Your personal and organization information is managed through the Kentucky Online Gateway portal. [Please use that channel for making any necessary updates, including password changes.](#)" Below this text are two columns of information: "Contact Information" and "Organization Information".

Contact Information		Organization Information	
Email Address	SYS2_S_ASSISTER_07@keups.net	kynector ID	1050
Primary Number	(876) 219-6731	kynector Organization Name	Alliance Assurance Agency LTD
Primary Phone Type	Not Provided	Email Address	info@AllianceAA.com
Secondary Number	Not Provided	Phone Number	(859) 219-6000
Secondary Phone Type	Not Provided	kynector Organization Physical Address	Not Provided
Mailing Address	333 Gardner Lane PO Box 627 Morgantown KY 42261	kynector Organization Mailing Address	117 North 4th Street PO Box 70 Wickliffe KY 42087
Preferred Method of Contact	Not Provided		



Step

Action

Uploading Verification Information

Select an individual you would like to upload documents for and click **Upload**.

A screenshot of the Kynect web application interface. The top navigation bar includes the Kynect logo, "My Account", "Browse Plans", "Learn More", "Get Help", and "FAQ". A user greeting "Welcome Joan Innocent" and links for "Sign Out", "About", "Help", and "ENGLISH" are on the right. Below the navigation bar is a secondary menu with icons for "Overview", "Applications", "Payments", "Plans & Programs", "Messages", "Assisters", and "Settings". The main content area is divided into sections: "Quick Links" (Message Center, Notifications & Alerts, Application, Contact Information, Other), "Current Benefits" (with a "Report Change in Circumstance" link), "Ongoing Applications" (showing Case Number 110698051, last updated Sep 18, 2014, and a progress bar with steps: Application, Results, Find a Plan, Enrollment), and "Request For Information" (with "View My Documents" and "Upload" links). An orange callout box points to the "Upload" link with the text "Click Upload to upload a document." Another orange box highlights the "Upload" link itself.

Step	Action										
<p>Request For Information and Uploaded Documents</p> <p>Below is a list of documents that have been submitted to kynect. This list only contains the documents that you have uploaded from the Personal Page. You can upload any needed information now, mail the information to 12 Mill Creek Park, Frankfort, KY 40601-9230, fax the information to 502-573-2997 ☎, or deliver the information in person to a local DCBS office. To find a local office near you please hit Help in the top right corner of your screen. Please note that kynect has 30 days to review your documents once they are submitted.</p> <table border="1"> <thead> <tr> <th data-bbox="240 604 375 632">Name of Person</th> <th data-bbox="423 604 602 632">Document Submitted</th> <th data-bbox="716 604 862 632">Document Status</th> <th data-bbox="894 604 1003 632">Upload Date</th> <th data-bbox="1073 604 1170 632">Comments</th> </tr> </thead> <tbody> <tr> <td colspan="5" data-bbox="240 653 667 680">No Document Submitted / No Document Required.</td> </tr> </tbody> </table> <p>Request For Information</p> <p>To submit a type of proof (information requested by kynect), please submit for approval. Each document uploaded will be subjected to a review.</p> <p>Name of Person: <input type="text" value="--Select--"/></p> <p>Type of Proof: <input type="text" value="--Select--"/></p> <p>Document Type: <input type="text" value="--Select--"/></p> <p><input type="text"/> Search</p> <p>Supported file Types: *.PDF, *.TIFF and *.TIF only. Maximum file size must not exceed 2 MB.</p> <p>Comments: <input type="text"/></p> <p>Upload Document</p> <p>Return To Personal Page</p>	Name of Person	Document Submitted	Document Status	Upload Date	Comments	No Document Submitted / No Document Required.					<ul style="list-style-type: none"> • Select the name of the individual you are uploading verification for • Select the type of proof you are providing • Select the document type <p>Click Upload Document</p>
Name of Person	Document Submitted	Document Status	Upload Date	Comments							
No Document Submitted / No Document Required.											