



# **Agent Portal Dashboard and SHOP Employee Roster Updates**

**August 2015**



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## Agent Portal

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This Quick Reference Guide is for Agents to help you navigate the new features of the Agent Portal implemented in August 2015. To access this guide, click the Help button at the top right of any Agent Portal screen. This guide is supplemental to all training materials available to Agents on TRIS at <http://tris.eku.edu/khbe/default.aspx>. The Agent Portal is only available to Agents. kynectors continue to have access to their same dashboard.

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## Agent Portal

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### 1. Agent Portal Dashboard Updates

As of August 2015, there will be updates to the kynect **Agent dashboard**. Though the look of the dashboard will change, the updates give greater functionality to Agents, making it easier for them to focus on the individuals they are helping.

The following pages are organized by the different **tabs** of the Agent Portal:

- Overview
- Book of Business
- Messages
- Settings

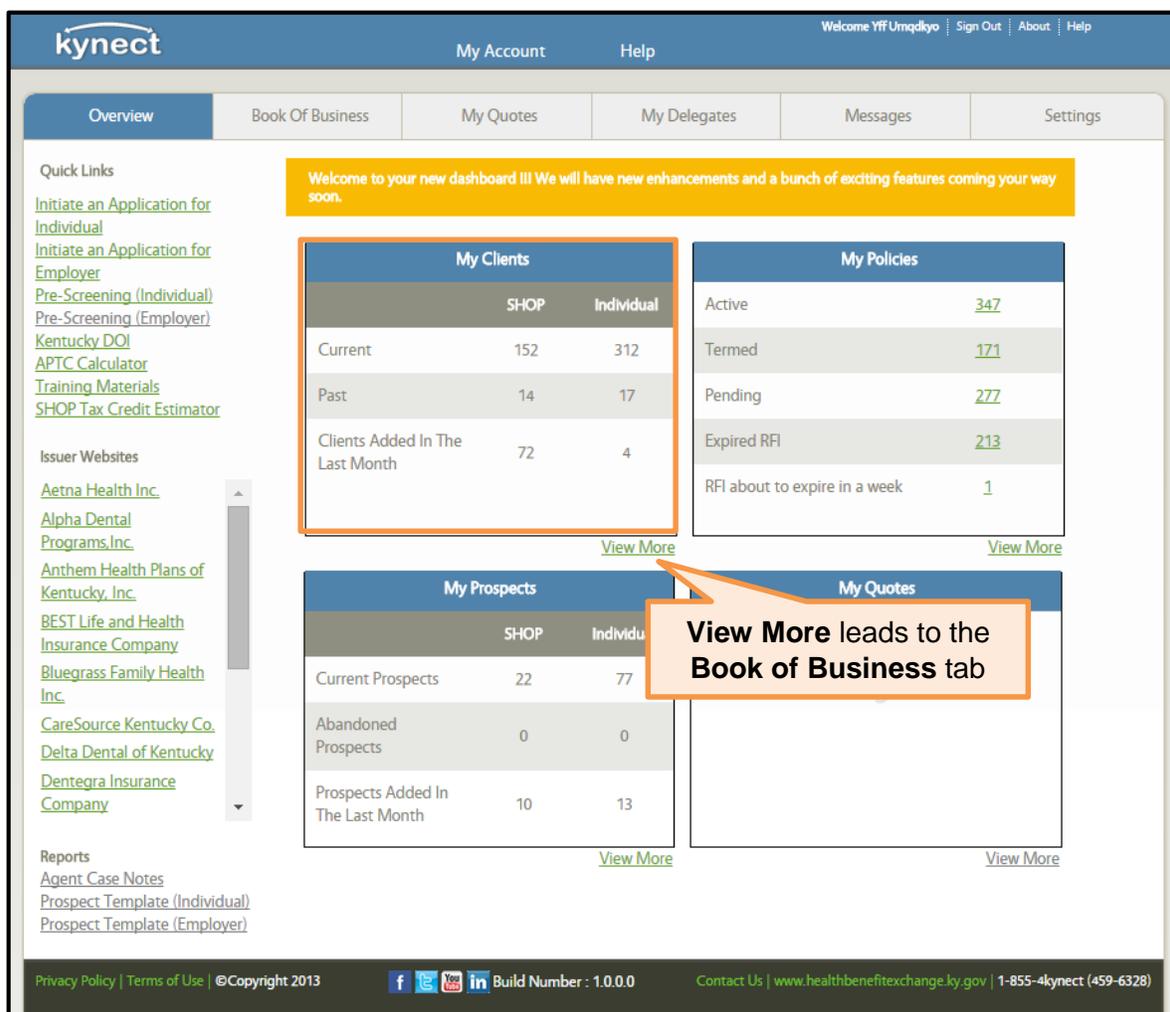
## Agent Portal

### 2. Agent Portal Overview Tab (Dashboard Landing Page)

Just as before, navigate to [kynect.ky.gov](http://kynect.ky.gov) to access your Agent Dashboard and login with your Kentucky Online Gateway (KOG) credentials.

The new **Dashboard** screen displays. You automatically land on the **Overview** tab and page. You will notice it looks very different from the previous Dashboard. Most notably are the four main squares in the middle of the page and the top bar of new tabs.

While Agents always had the ability to see all their clients, the process for viewing and searching for them took time and effort. The new **My Clients** box in the upper left-hand corner makes it clear and easy to see how many clients you are working with currently, as well as how many you have worked with in the past. It also divides the clients into **Small Business Health Options Program (SHOP)** and **Individual** applications and calls out the clients you have most recently added in the last month. You can also click **View More**, which will take you to the new **Book of Business** tab. This tab gives you greater detail to your client list and **Advanced Search** functionality.



Quick Links

- [Initiate an Application for Individual](#)
- [Initiate an Application for Employer](#)
- [Pre-Screening \(Individual\)](#)
- [Pre-Screening \(Employer\)](#)
- [Kentucky DOI](#)
- [APTC Calculator](#)
- [Training Materials](#)
- [SHOP Tax Credit Estimator](#)

Issuer Websites

- [Aetna Health Inc.](#)
- [Alpha Dental Programs, Inc.](#)
- [Anthem Health Plans of Kentucky, Inc.](#)
- [BEST Life and Health Insurance Company](#)
- [Bluegrass Family Health Inc.](#)
- [CareSource Kentucky Co.](#)
- [Delta Dental of Kentucky](#)
- [Dentegra Insurance Company](#)

Reports

- [Agent Case Notes](#)
- [Prospect Template \(Individual\)](#)
- [Prospect Template \(Employer\)](#)

Welcome to your new dashboard!!! We will have new enhancements and a bunch of exciting features coming your way soon.

My Clients		
	SHOP	Individual
Current	152	312
Past	14	17
Clients Added In The Last Month	72	4

[View More](#)

My Policies	
Active	347
Termed	171
Pending	277
Expired RFI	213
RFI about to expire in a week	1

[View More](#)

My Prospects		
	SHOP	Individual
Current Prospects	22	77
Abandoned Prospects	0	0
Prospects Added In The Last Month	10	13

[View More](#)

My Quotes	

[View More](#)

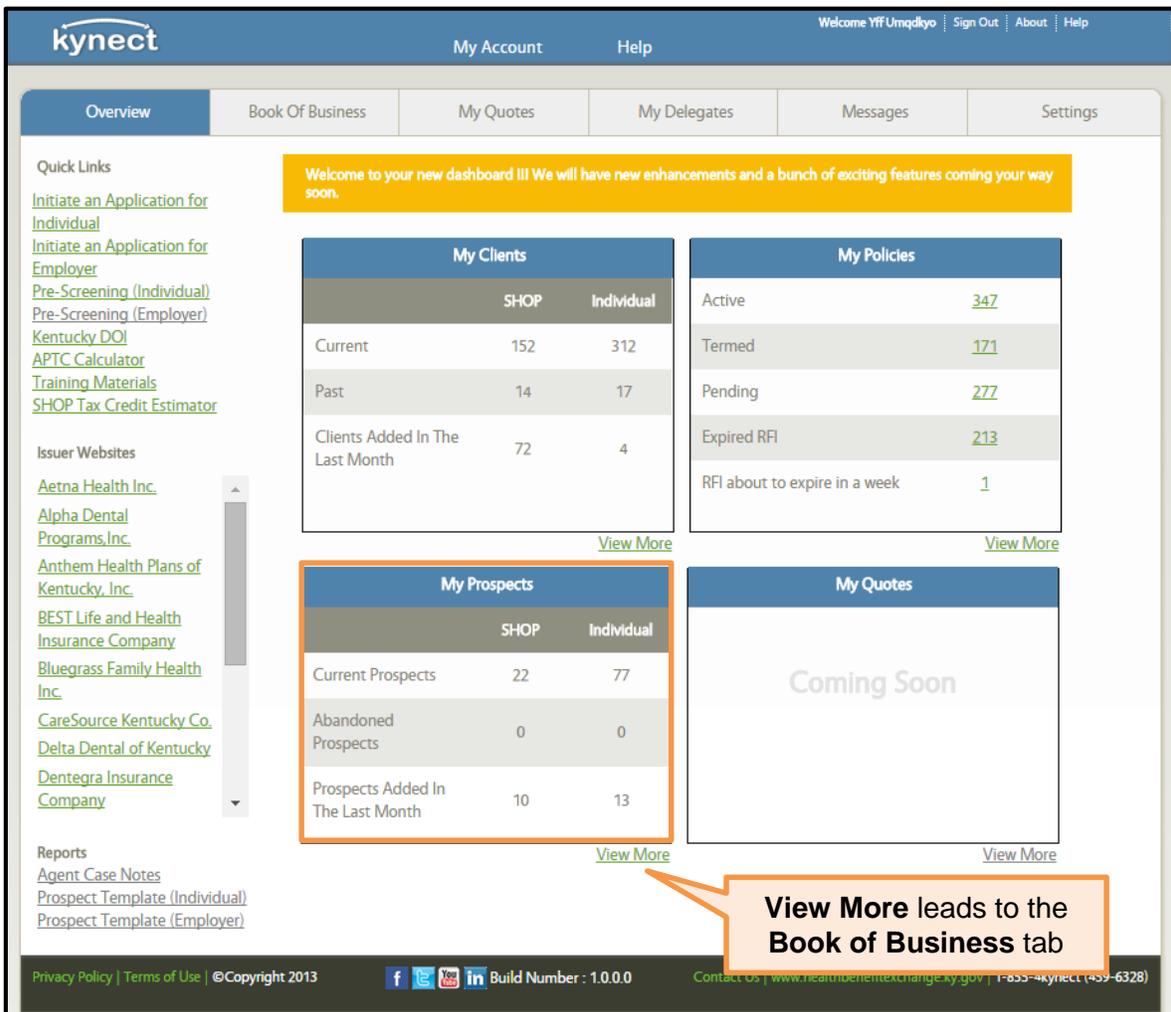
**View More leads to the Book of Business tab**

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## Agent Portal

The next box is the **My Prospects** box, a brand new feature. **My Prospects** allows Agents to track individuals that have started an application with them. In October 2015, this feature will also allow Agents to track individuals that they have had conversations with, but for whom they have not yet started an application. This feature will make it increasingly easier for Agents to keep track of leads and manage follow-up conversations with individuals. Like the **My Clients** box, **My Prospects** is also classified by **SHOP** and **Individual** clients, with the call-out in the bottom row for recently added prospects.

The **View More** link for **My Prospects** also leads to the **Book of Business** tab, which gives you greater detail to your prospect list and **Advanced Search** functionality.



The screenshot shows the Kynect Agent Portal dashboard. The top navigation bar includes the Kynect logo, "My Account", and "Help". The main navigation tabs are "Overview", "Book Of Business", "My Quotes", "My Delegates", "Messages", and "Settings".

On the left side, there are "Quick Links" and "Issuer Websites". The "Quick Links" section includes links for "Initiate an Application for Individual", "Initiate an Application for Employer", "Pre-Screening (Individual)", "Pre-Screening (Employer)", "Kentucky DOI", "APTC Calculator", "Training Materials", and "SHOP Tax Credit Estimator". The "Issuer Websites" section lists various insurance providers like Aetna Health Inc., Alpha Dental Programs, Inc., Anthem Health Plans of Kentucky, Inc., BEST Life and Health Insurance Company, Bluegrass Family Health Inc., CareSource Kentucky Co., Delta Dental of Kentucky, and Dentegra Insurance Company.

The main content area features a yellow welcome message: "Welcome to your new dashboard!!! We will have new enhancements and a bunch of exciting features coming your way soon." Below this are four data tables:

- My Clients**: A table with columns for SHOP and Individual. Rows include Current (152 SHOP, 312 Individual), Past (14 SHOP, 17 Individual), and Clients Added In The Last Month (72 SHOP, 4 Individual). A "View More" link is at the bottom.
- My Policies**: A table with rows for Active (347), Termed (171), Pending (277), Expired RFI (213), and RFI about to expire in a week (1). A "View More" link is at the bottom.
- My Prospects**: A table with columns for SHOP and Individual. Rows include Current Prospects (22 SHOP, 77 Individual), Abandoned Prospects (0 SHOP, 0 Individual), and Prospects Added In The Last Month (10 SHOP, 13 Individual). A "View More" link is at the bottom.
- My Quotes**: A placeholder box with the text "Coming Soon" and a "View More" link at the bottom.

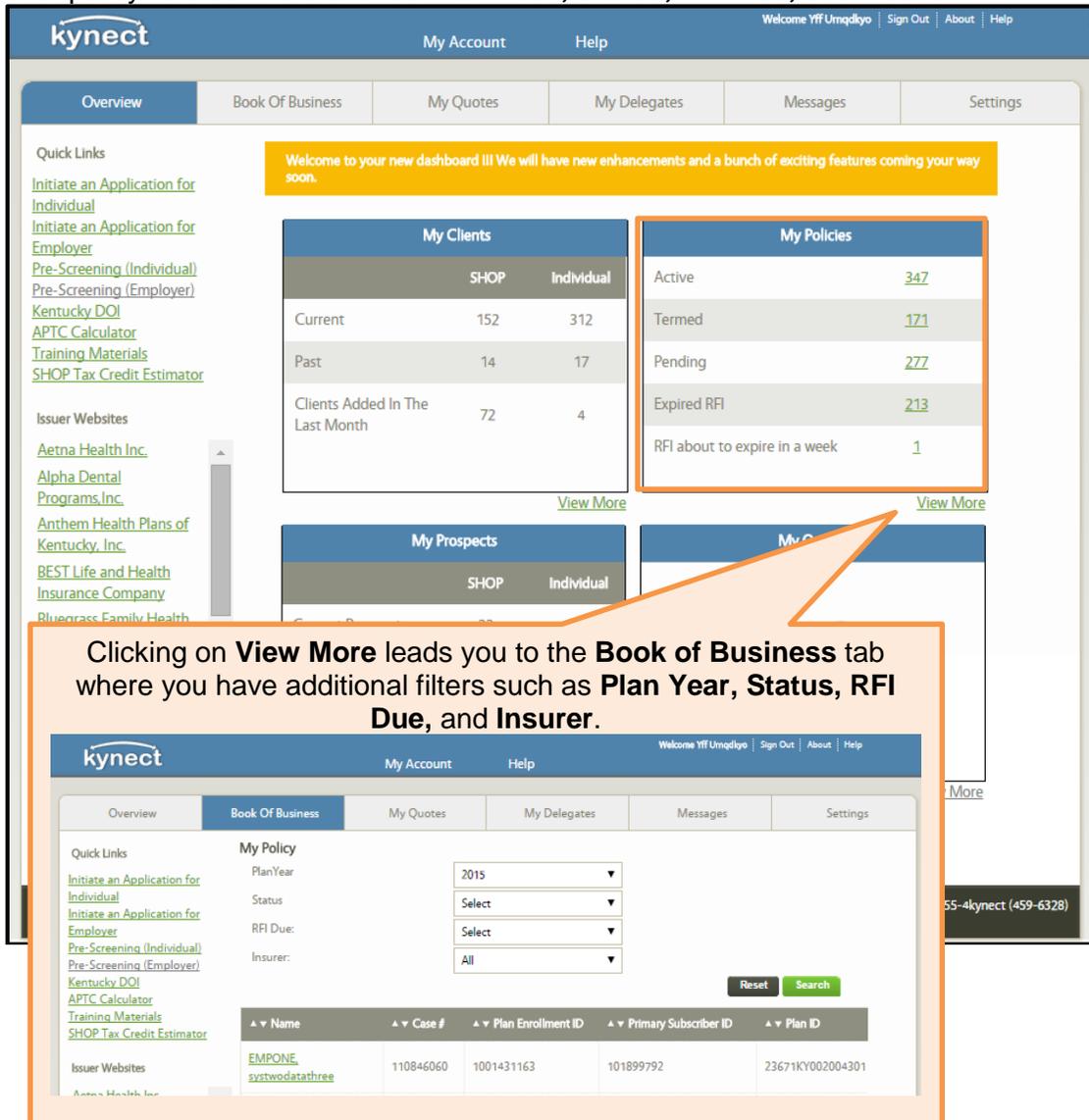
An orange callout box points to the "View More" link under the "My Prospects" table, containing the text: "View More leads to the Book of Business tab".

The footer contains "Privacy Policy | Terms of Use | ©Copyright 2013", social media icons for Facebook, Twitter, YouTube, and LinkedIn, "Build Number : 1.0.0.0", and "Contact Us | www.healthbenefitexchange.ky.gov | 1-855-4KYNECT (439-6328)".

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The **My Policies** box displays the enrollment numbers and statuses of your clients: **Active**, **Terminated**, and **Pending**. It also highlights **Expired RFIs** and notifies you of **RFIs About to Expire in a Week**. This feature is particularly beneficial in helping you follow up with individuals who may have missing information, documentation, or any other outstanding item.

Clicking **View More** under the **My Policies** box also brings you to the **Book of Business Tab**, but with additional policy-related filters such as **Plan Year**, **Status**, **RFI Due**, and **Insurer**.



The screenshot shows the Kynect Agent Portal interface. The top navigation bar includes the Kynect logo, 'My Account', and 'Help'. The main navigation tabs are 'Overview', 'Book Of Business', 'My Quotes', 'My Delegates', 'Messages', and 'Settings'. The 'Overview' tab is active, displaying a 'Quick Links' section on the left and a 'Welcome to your new dashboard' message in a yellow box. The 'My Clients' and 'My Policies' boxes are highlighted with orange borders. The 'My Policies' box shows the following data:

My Policies	
Active	347
Termed	171
Pending	277
Expired RFI	213
RFI about to expire in a week	1

Below the 'My Policies' box, the 'My Prospects' box is partially visible. A callout box with an orange border and a speech bubble tail points to the 'View More' link under the 'My Policies' box. The callout text reads: "Clicking on **View More** leads you to the **Book of Business** tab where you have additional filters such as **Plan Year**, **Status**, **RFI Due**, and **Insurer**."

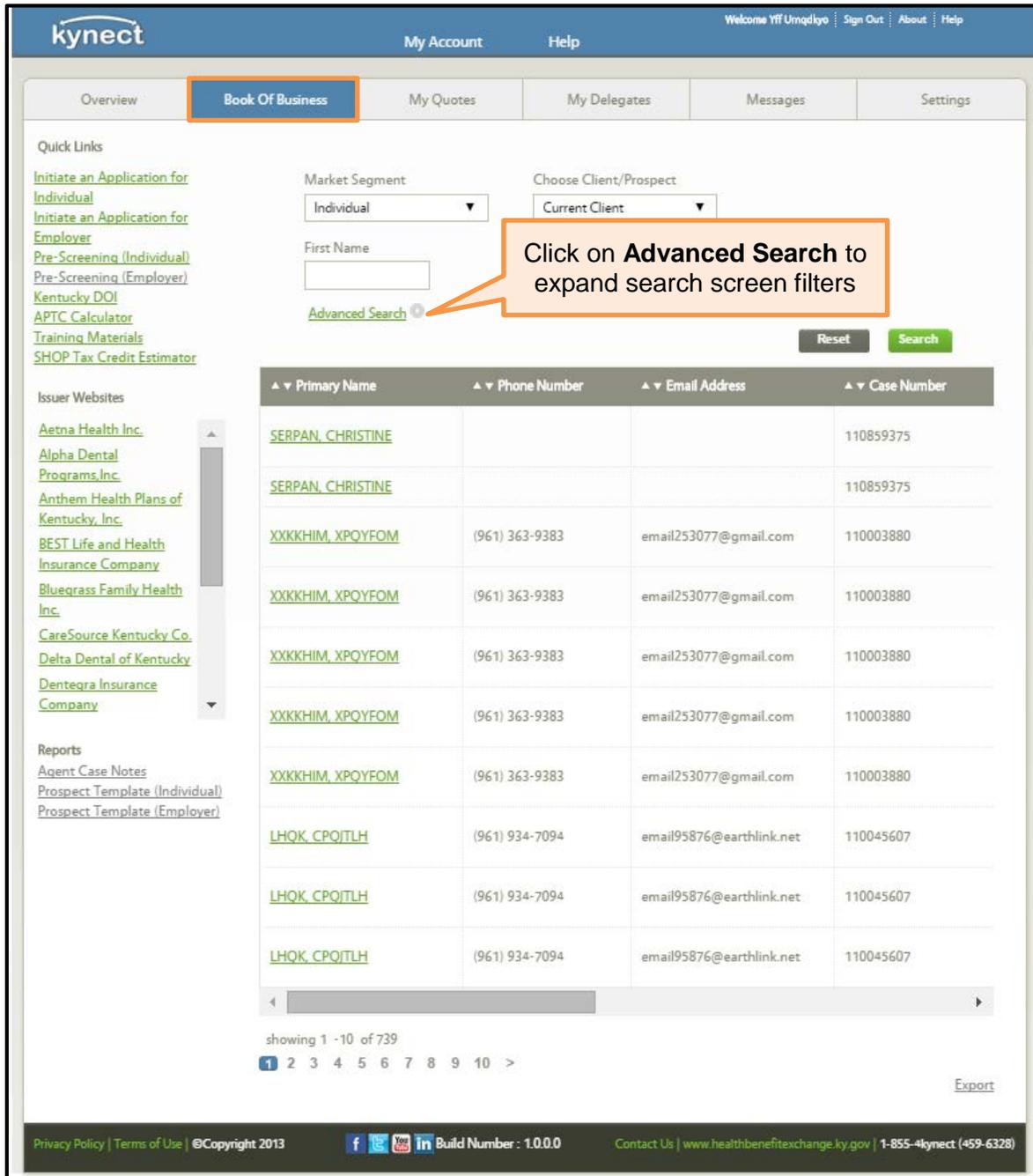
The 'Book of Business' tab is shown below the callout, featuring a 'My Policy' section with filters for Plan Year (2015), Status (Select), RFI Due (Select), and Insurer (All). A table below the filters displays policy details for a specific policy:

Name	Case #	Plan Enrollment ID	Primary Subscriber ID	Plan ID
EMPONE_systwodatathree	110846060	1001431163	101899792	23671KY002004301

## Agent Portal

### 3. Agent Portal Book of Business Tab

When an Agent clicks on the **View More** links under each main box, they are taken to the **Book of Business** screen. Agents can also navigate directly to this page by clicking on the **Book of Business** tab at the top of the page.



Market Segment: Individual

Choose Client/Prospect: Current Client

First Name:

[Advanced Search](#)

Primary Name	Phone Number	Email Address	Case Number
<a href="#">SERPAN, CHRISTINE</a>			110859375
<a href="#">SERPAN, CHRISTINE</a>			110859375
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880
<a href="#">LHQK, CPQJTLH</a>	(961) 934-7094	email95876@earthlink.net	110045607
<a href="#">LHQK, CPQJTLH</a>	(961) 934-7094	email95876@earthlink.net	110045607
<a href="#">LHQK, CPQJTLH</a>	(961) 934-7094	email95876@earthlink.net	110045607

showing 1 - 10 of 739

1 2 3 4 5 6 7 8 9 10 >

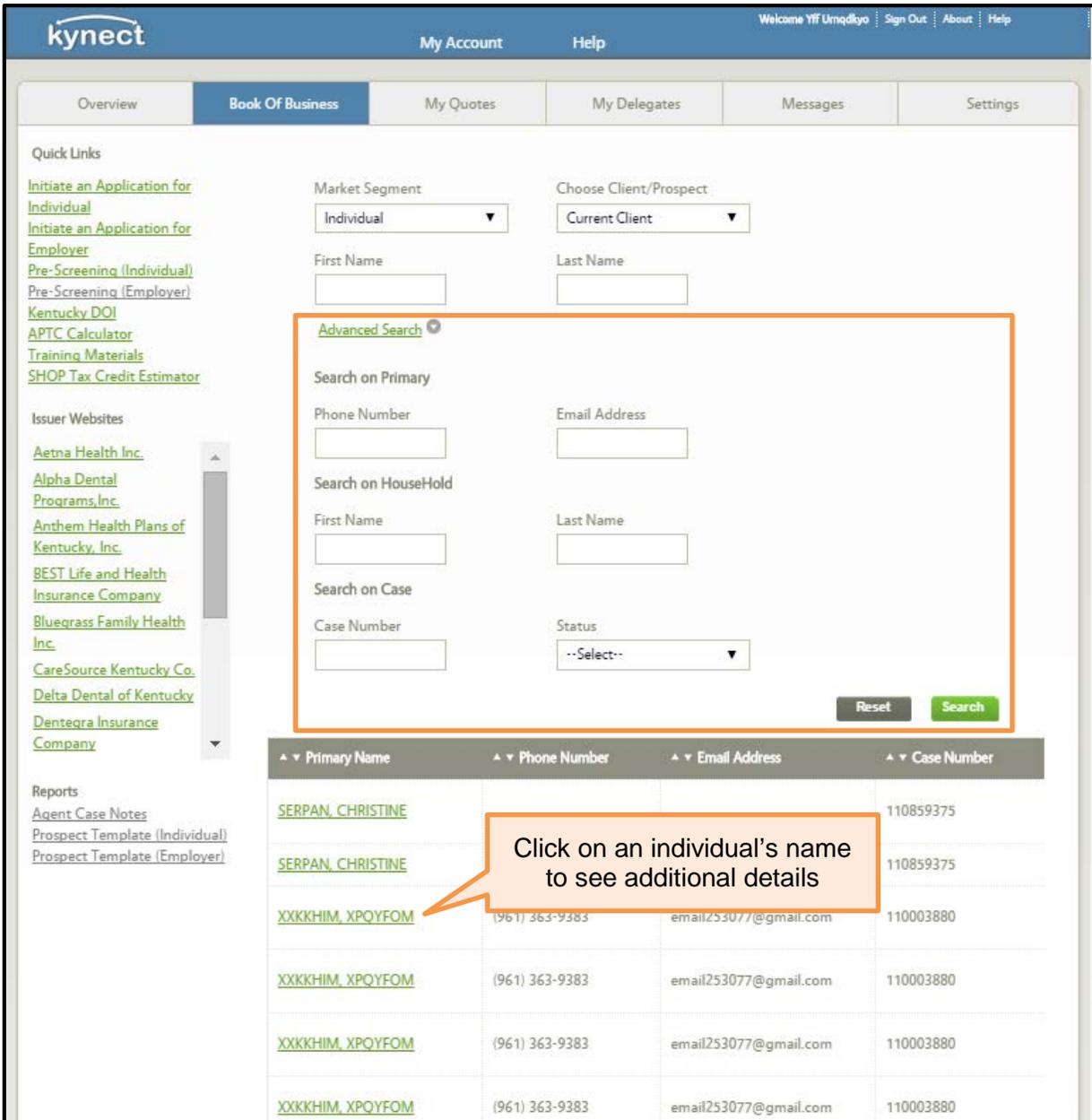
[Export](#)

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### Advanced Search

As previously mentioned, within the **Book of Business** tab, Agents can enjoy the **Advanced Search** option. When an Agent clicks on **Advanced Search**, the page expands to reveal the following search filters with the ability to search by **Primary, Household, or Case**.



Market Segment: Individual

Choose Client/Prospect: Current Client

First Name: [ ] Last Name: [ ]

**Advanced Search**

**Search on Primary**

Phone Number: [ ] Email Address: [ ]

**Search on HouseHold**

First Name: [ ] Last Name: [ ]

**Search on Case**

Case Number: [ ] Status: --Select--

Reset Search

Primary Name	Phone Number	Email Address	Case Number
<a href="#">SERPAN, CHRISTINE</a>			110859375
<a href="#">SERPAN, CHRISTINE</a>			110859375
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880
<a href="#">XXKKHIM, XPOYFOM</a>	(961) 363-9383	email253077@gmail.com	110003880

Click on an individual's name to see additional details

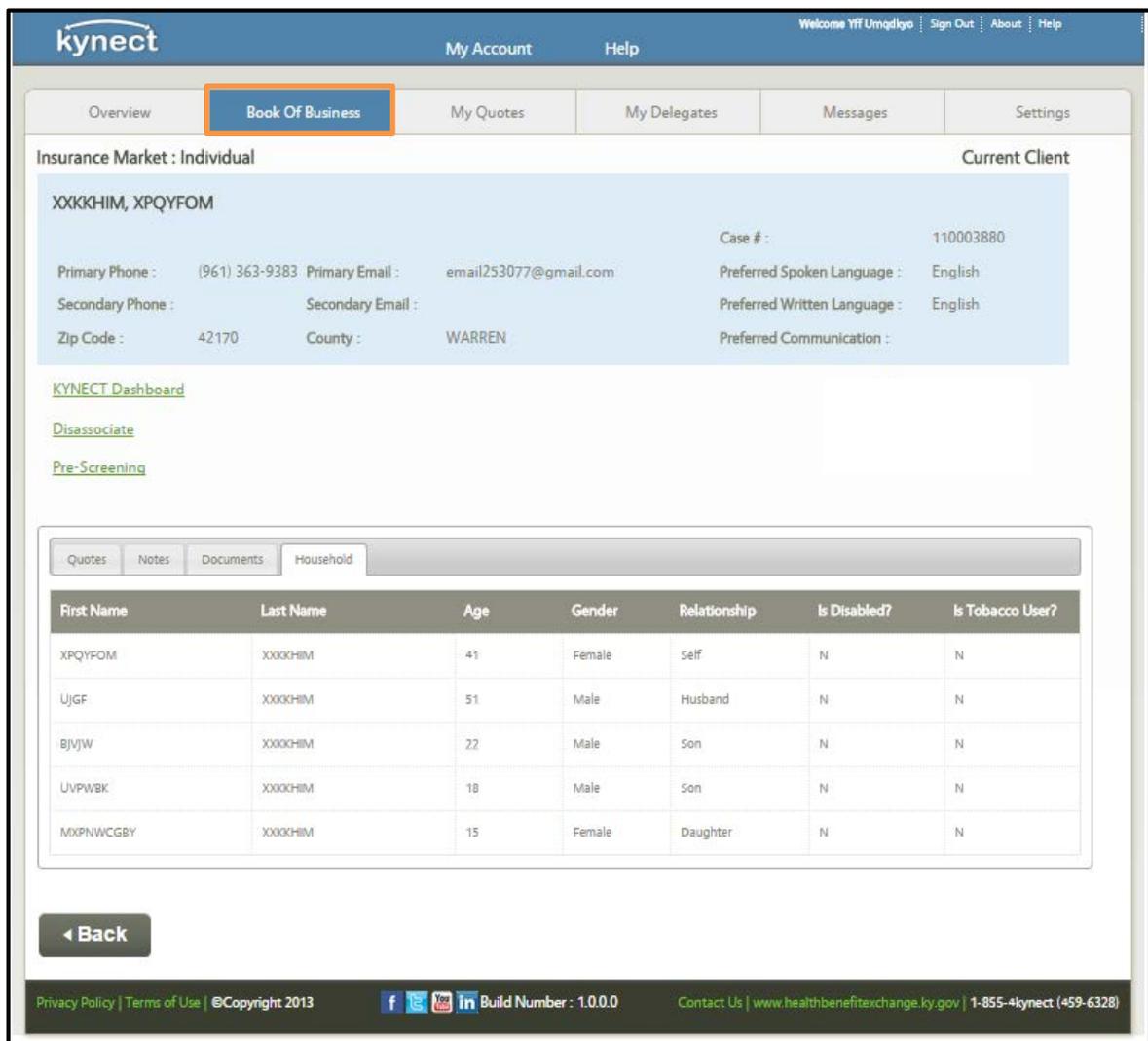
## Agent Portal

### Profile Page

Agents can also choose to click on an individual's name, and a new **Profile** screen displays. On the **Profile** screen, Agents can view details such as the individual's:

- Home phone number
- Email address
- Application Status
- Preferred Spoken Language
- Household members

Agents can also continue the individual's application through this page.



The screenshot shows the Kynect Agent Portal interface. At the top, there is a navigation bar with the Kynect logo, "My Account", and "Help". Below this is a secondary navigation bar with tabs for "Overview", "Book Of Business" (highlighted with an orange box), "My Quotes", "My Delegates", "Messages", and "Settings".

The main content area displays "Insurance Market : Individual" and "Current Client". The client's name is "XXKKHIM, XPQYFOM". Below the name, there are fields for "Primary Phone", "Secondary Phone", "Zip Code", "Primary Email", "Secondary Email", "County", "Case #", "Preferred Spoken Language", "Preferred Written Language", and "Preferred Communication".

Below the client information, there are links for "KYNECT Dashboard", "Disassociate", and "Pre-Screening".

At the bottom of the main content area, there is a "Household" tab selected, showing a table of household members:

First Name	Last Name	Age	Gender	Relationship	Is Disabled?	Is Tobacco User?
XPQYFOM	XXKKHIM	41	Female	Self	N	N
UJGF	XXKKHIM	51	Male	Husband	N	N
BjvJW	XXKKHIM	22	Male	Son	N	N
LVPWBK	XXKKHIM	18	Male	Son	N	N
MXPNWCGBY	XXKKHIM	15	Female	Daughter	N	N

At the bottom of the page, there is a "Back" button and a footer containing "Privacy Policy | Terms of Use | ©Copyright 2013", social media icons, "Build Number : 1.0.0.0", "Contact Us | www.healthbenefitexchange.ky.gov | 1-855-4kynect (459-6328)".

Please note that Agents can also view the same type of **Profile** screen for small businesses in the SHOP market.

## Agent Portal

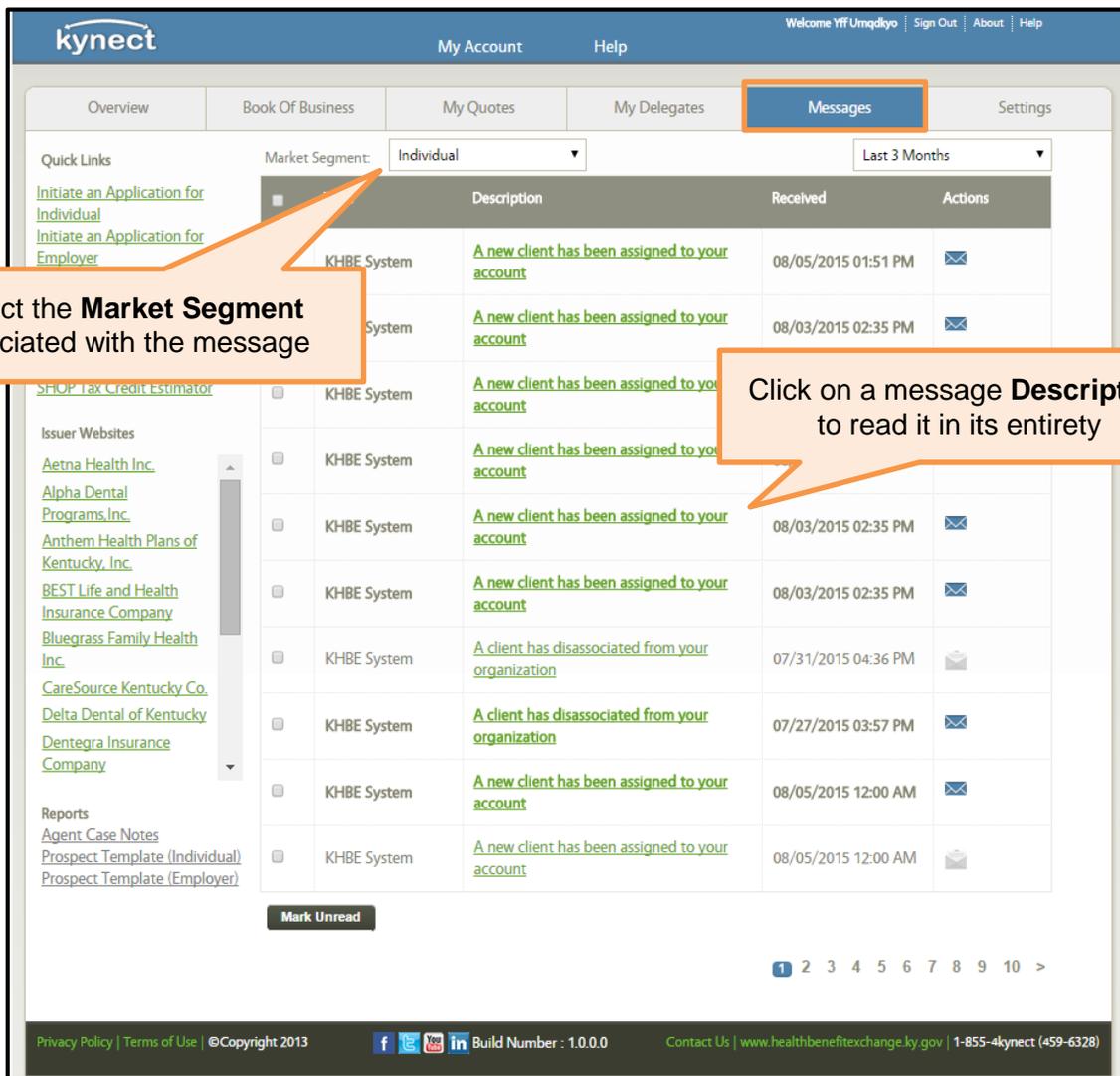
### 4. Agent Portal Messages Tab

By clicking on the **Messages** tab, Agents can search, mark unread, and view message details. Messages will be limited to correspondence from the Kentucky Office of Health Benefit and Information Exchange (KOHBE).

On this page, Agents can also use a drop-down menu in the top right corner to search for messages by:

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

Agents can also filter their messages by the Individual and SHOP market segments.



Quick Links

- [Initiate an Application for Individual](#)
- [Initiate an Application for Employer](#)
- [SHOP Tax Credit Estimator](#)

Issuer Websites

- [Aetna Health Inc.](#)
- [Alpha Dental Programs, Inc.](#)
- [Anthem Health Plans of Kentucky, Inc.](#)
- [BEST Life and Health Insurance Company](#)
- [Bluegrass Family Health Inc.](#)
- [CareSource Kentucky Co.](#)
- [Delta Dental of Kentucky](#)
- [Dentegra Insurance Company](#)

Reports

- [Agent Case Notes](#)
- [Prospect Template \(Individual\)](#)
- [Prospect Template \(Employer\)](#)

Market Segment: Individual Last 3 Months

Description	Received	Actions
<a href="#">A new client has been assigned to your account</a>	08/05/2015 01:51 PM	
<a href="#">A new client has been assigned to your account</a>	08/03/2015 02:35 PM	
<a href="#">A new client has been assigned to your account</a>	08/03/2015 02:35 PM	
<a href="#">A new client has been assigned to your account</a>	08/03/2015 02:35 PM	
<a href="#">A client has disassociated from your organization</a>	07/31/2015 04:36 PM	
<a href="#">A client has disassociated from your organization</a>	07/27/2015 03:57 PM	
<a href="#">A new client has been assigned to your account</a>	08/05/2015 12:00 AM	
<a href="#">A new client has been assigned to your account</a>	08/05/2015 12:00 AM	

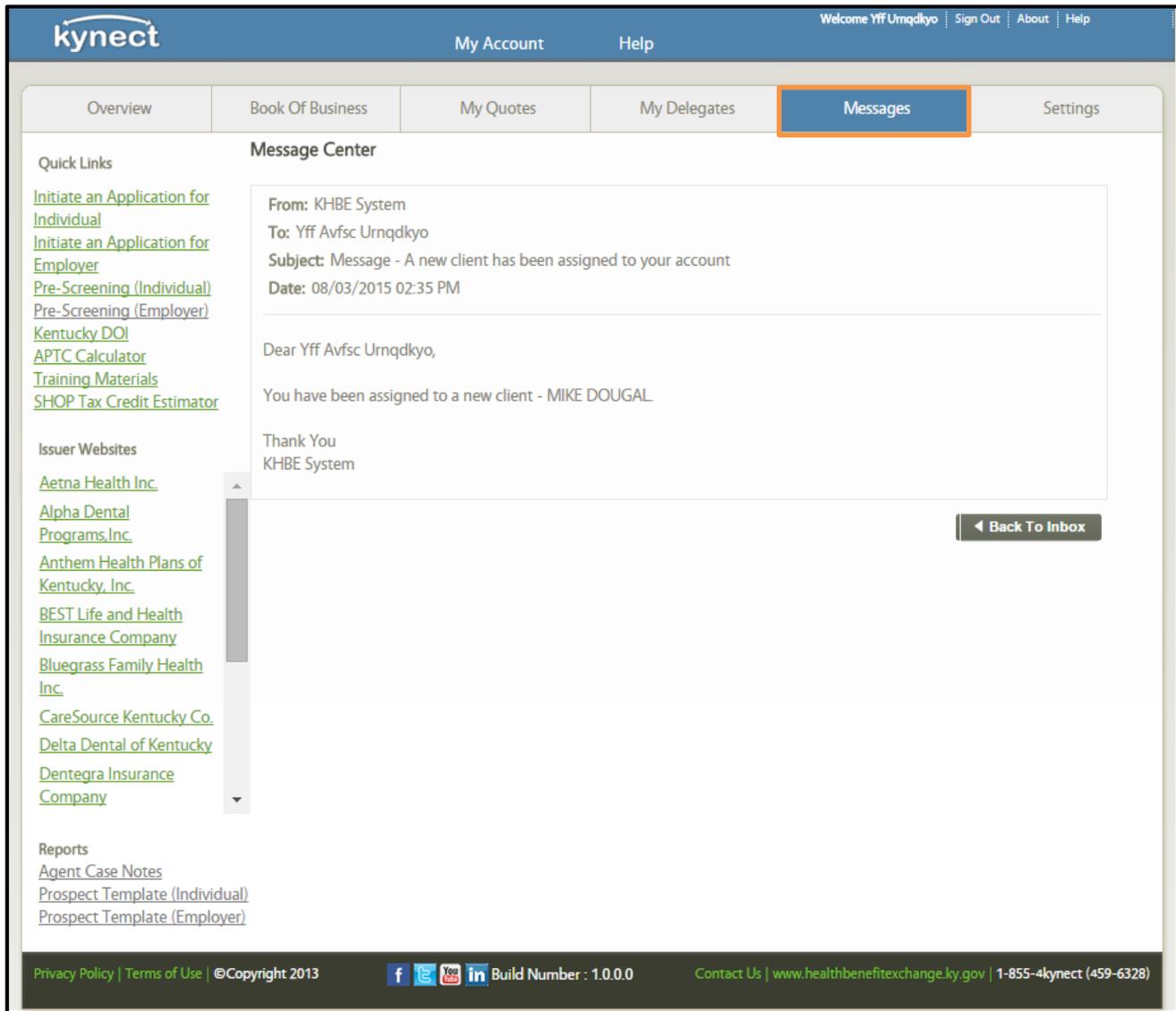
Mark Unread

1 2 3 4 5 6 7 8 9 10 >

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Individual messages and SHOP messages look different. This is the screen that displays when you click to read an Individual Market message.



The screenshot shows the Kynect Agent Portal interface. At the top, there is a navigation bar with the Kynect logo, "My Account", and "Help". A secondary bar contains "Welcome Yff Urnqdkyo", "Sign Out", "About", and "Help". Below this is a menu with "Overview", "Book Of Business", "My Quotes", "My Delegates", "Messages" (highlighted with an orange border), and "Settings".

The main content area is titled "Message Center". On the left, there are sections for "Quick Links" (including "Initiate an Application for Individual", "Initiate an Application for Employer", "Pre-Screening (Individual)", "Pre-Screening (Employer)", "Kentucky DOI", "APTC Calculator", "Training Materials", and "SHOP Tax Credit Estimator"), "Issuer Websites" (listing various insurance providers like Aetna, Alpha Dental, Anthem, etc.), and "Reports" (including "Agent Case Notes", "Prospect Template (Individual)", and "Prospect Template (Employer)").

The message content is as follows:

**From:** KHBE System  
**To:** Yff Avfsc Urnqdkyo  
**Subject:** Message - A new client has been assigned to your account  
**Date:** 08/03/2015 02:35 PM

Dear Yff Avfsc Urnqdkyo,

You have been assigned to a new client - MIKE DOUGAL

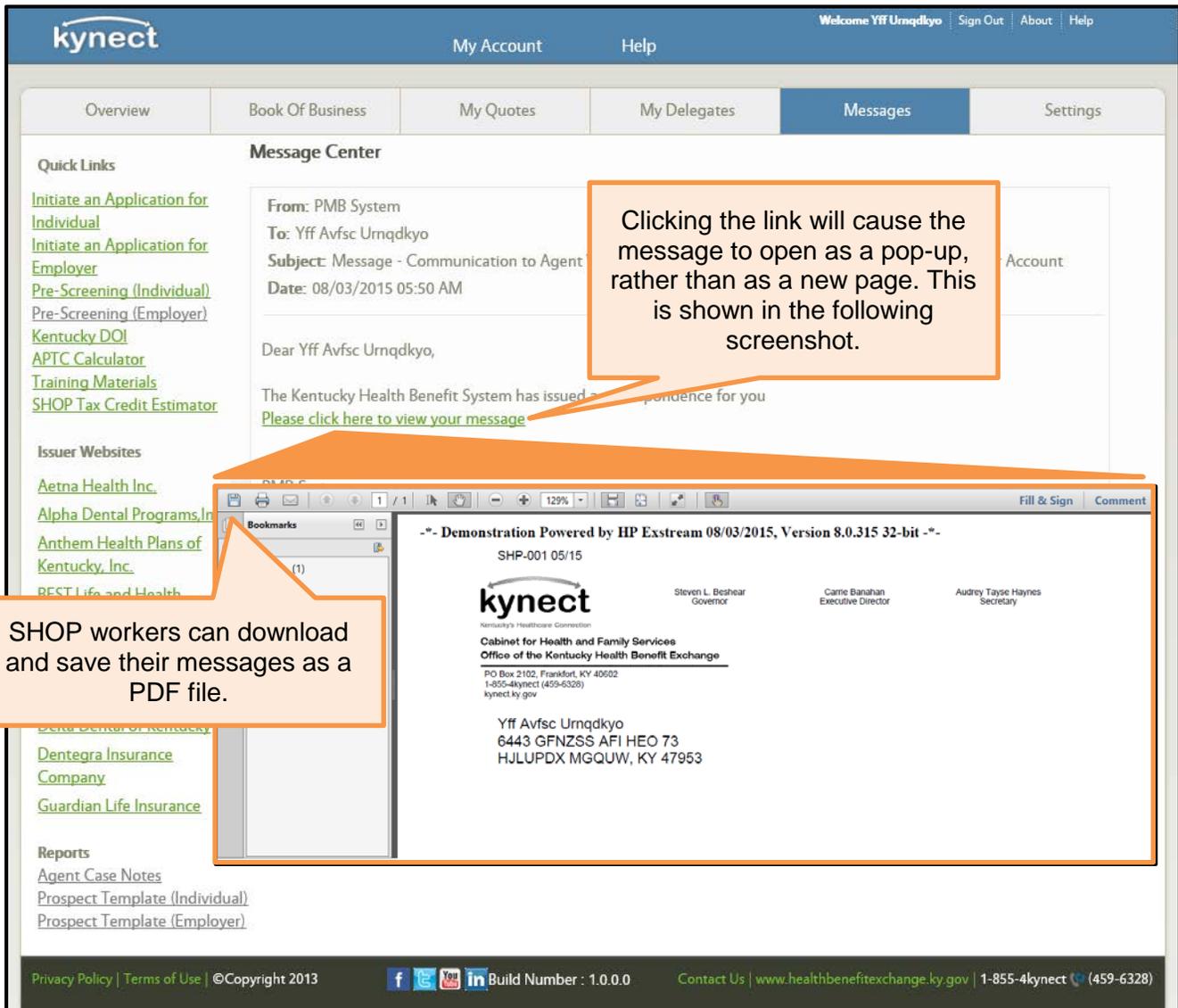
Thank You  
 KHBE System

A "Back To Inbox" button is located at the bottom right of the message content area.

The footer contains "Privacy Policy | Terms of Use | © Copyright 2013", social media icons for Facebook, Twitter, YouTube, and LinkedIn, "Build Number : 1.0.0.0", and "Contact Us | www.healthbenefitexchange.ky.gov | 1-855-4kynect (459-6328)".

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This is the screen that displays when you click to read a SHOP message. To view the message, Agents must click the link. The message opens as a pop-up and they can choose to download it as a PDF.



The screenshot shows the Kynect Agent Portal interface. At the top, there is a navigation bar with the Kynect logo, "My Account", and "Help". Below this is a secondary navigation bar with tabs for "Overview", "Book Of Business", "My Quotes", "My Delegates", "Messages" (which is selected), and "Settings".

The main content area is divided into a left sidebar and a central "Message Center". The sidebar contains "Quick Links" (e.g., "Initiate an Application for Individual", "Initiate an Application for Employer") and "Issuer Websites" (e.g., "Aetna Health Inc.", "Alpha Dental Programs, Inc.", "Anthem Health Plans of Kentucky, Inc.", "BEST Life and Health"). The "Message Center" displays a message from the "PMB System" to "Yff Avfsc Urmqdkyo" on "08/03/2015 05:50 AM". The message body says "Dear Yff Avfsc Urmqdkyo, The Kentucky Health Benefit System has issued a correspondence for you" and includes a link: "Please click here to view your message".

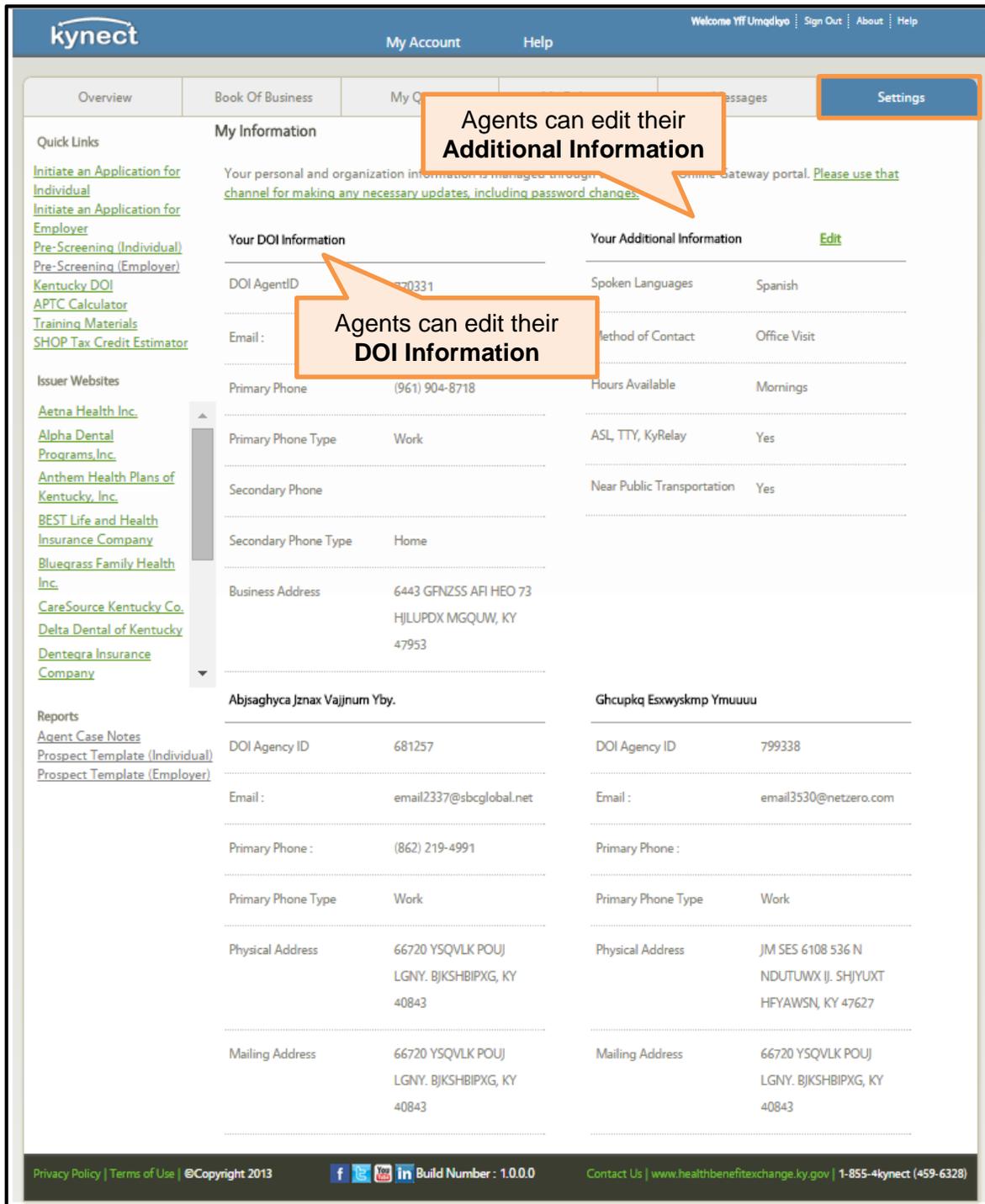
An orange callout box points to the link with the text: "Clicking the link will cause the message to open as a pop-up, rather than as a new page. This is shown in the following screenshot." Below the message center, a browser window is shown displaying a PDF document. The PDF is titled "Demonstration Powered by HP Exstream 08/03/2015, Version 8.0.315 32-bit" and contains the Kynect logo and contact information for the Cabinet for Health and Family Services, Office of the Kentucky Health Benefit Exchange. The PDF also lists the names of Steven L. Beshear (Governor), Carrie Banahan (Executive Director), and Audrey Tayse Haynes (Secretary). The recipient's address is: "Yff Avfsc Urmqdkyo, 6443 GFNZSS AFI HEO 73, HJLUPDX MGQUW, KY 47953".

Another orange callout box points to the PDF viewer with the text: "SHOP workers can download and save their messages as a PDF file." At the bottom of the portal, there is a footer with "Privacy Policy | Terms of Use | ©Copyright 2013", social media icons, "Build Number : 1.0.0.0", "Contact Us | www.healthbenefitexchange.ky.gov | 1-855-4kynect (459-6328)".

## Agent Portal

### 5. Agent Portal Settings Tab

The last tab is the **Settings**. By clicking on the **Settings** tab, Agents can manage their information.



**Agents can edit their Additional Information**

**Agents can edit their DOI Information**

**My Information**

Your personal and organization information is managed through the online gateway portal. [Please use that channel for making any necessary updates, including password changes.](#)

Your DOI Information		Your Additional Information	
DOI AgentID	790331	Spoken Languages	Spanish
Email :		Method of Contact	Office Visit
Primary Phone	(961) 904-8718	Hours Available	Mornings
Primary Phone Type	Work	ASL, TTY, KyRelay	Yes
Secondary Phone		Near Public Transportation	Yes
Secondary Phone Type	Home		
Business Address	6443 GFNZSS AFI HEO 73 HJLUPDX MGQUW, KY 47953		
<b>Abjsaghyca Jznax Vajjnum Yby.</b>		<b>Ghcupkq Esxwyskmp Ymuuuu</b>	
DOI Agency ID	681257	DOI Agency ID	799338
Email :	email2337@sbccglobal.net	Email :	email3530@netzero.com
Primary Phone :	(862) 219-4991	Primary Phone :	
Primary Phone Type	Work	Primary Phone Type	Work
Physical Address	66720 YSQVLK POUJ LGNY. BJKSHBIPXG, KY 40843	Physical Address	JM SES 6108 536 N NDUTUWX IJ. SHJYUXT HFYAWSN, KY 47627
Mailing Address	66720 YSQVLK POUJ LGNY. BJKSHBIPXG, KY 40843	Mailing Address	66720 YSQVLK POUJ LGNY. BJKSHBIPXG, KY 40843

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Agents can edit **DOI Information** such as their:

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

In addition, there is a section on their **Additional Information** including their:

- Spoken Languages
- Method of Contact
- Hours available

By keeping this information up-to-date, Agents can ensure that both KOHBIE and their clients see the most recent and accurate information on kynect.

## 6. SHOP Employee Roster Updates

As of August 2015, enhancements have been made to the process for uploading the employee roster. This change not only streamlines employer setup, but it also makes the process of adding employees easier. The change that Agents should note is summarized below:

1. Upload error detail is now captured when rosters are uploaded. Previously during the employee roster upload process, if errors existed, they were displayed but the detail surrounding those errors was not provided. It was unclear why some employees listed in the Excel spreadsheet did not appear on the roster

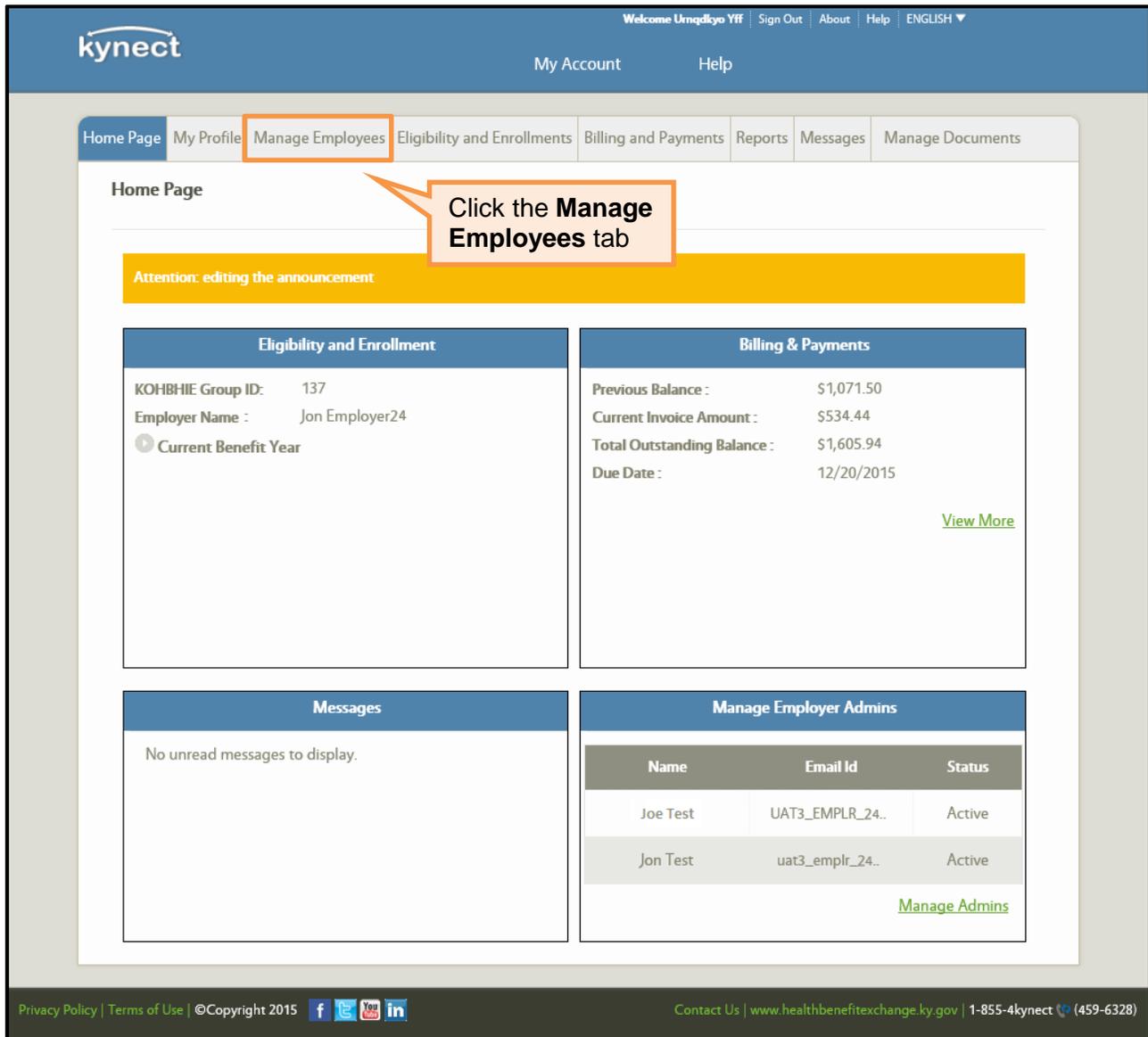
The enhancements to this process are detailed on the following pages.

Agent Portal

## 7. Instructions on Updating the Employee Roster

Start at the **SHOP Employer Home Page**. The process of adding employees to the roster, whether through the **Download/Upload Roster** or **Enter Details on Screen**, remains the same. The new enhancements do not affect the process until after the **Download/Upload Roster** process is completed.

1. On the **Employer Dashboard Home Page**, click the **Manage Employees** tab at the top of the screen



Welcome Umqdliso Yiff | Sign Out | About | Help | ENGLISH ▼

My Account Help

Home Page | My Profile | **Manage Employees** | Eligibility and Enrollments | Billing and Payments | Reports | Messages | Manage Documents

Home Page

Attention: editing the announcement

Eligibility and Enrollment	
KOHBHIE Group ID:	137
Employer Name :	Jon Employer24
Current Benefit Year	

Billing & Payments	
Previous Balance :	\$1,071.50
Current Invoice Amount :	\$534.44
Total Outstanding Balance :	\$1,605.94
Due Date :	12/20/2015

[View More](#)

Messages		
No unread messages to display.		

Manage Employer Admins		
Name	Email Id	Status
Joe Test	UAT3_EMPLR_24..	Active
Jon Test	uat3_emplr_24..	Active

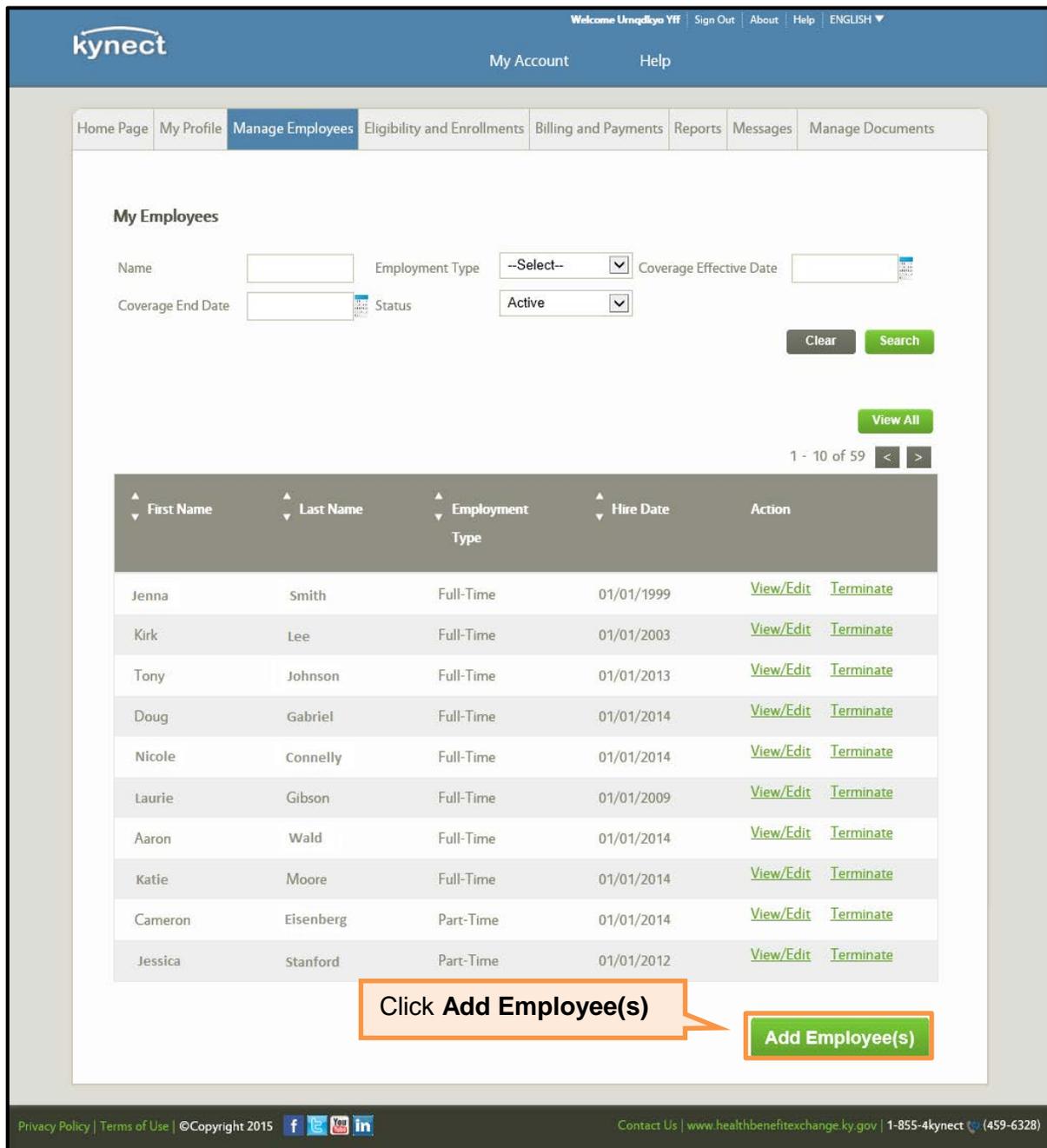
[Manage Admins](#)

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The **My Employees** screen displays. On the **My Employees** screen, you can **View** and **Search** for an employer's existing employees and their information using search criteria such as **Name**, **Employment Type** (part- or full-time), **Coverage Effective Date**, **Coverage End Date**, or **Status**. You can also add new employees to the roster using the **Add Employee(s)** button. Finally, you can terminate employees using the **Terminate** link. This continues to remain the same as before.

### 2. Click **Add Employees**



Welcome **Urnqdjyo Yff** | Sign Out | About | Help | ENGLISH ▼

My Account | Help

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### My Employees

Name:  Employment Type: **--Select--** Coverage Effective Date:

Coverage End Date:  Status: **Active**

1 - 10 of 59 < >

First Name	Last Name	Employment Type	Hire Date	Action
Jenna	Smith	Full-Time	01/01/1999	<a href="#">View/Edit</a> <a href="#">Terminate</a>
Kirk	Lee	Full-Time	01/01/2003	<a href="#">View/Edit</a> <a href="#">Terminate</a>
Tony	Johnson	Full-Time	01/01/2013	<a href="#">View/Edit</a> <a href="#">Terminate</a>
Doug	Gabriel	Full-Time	01/01/2014	<a href="#">View/Edit</a> <a href="#">Terminate</a>
Nicole	Connelly	Full-Time	01/01/2014	<a href="#">View/Edit</a> <a href="#">Terminate</a>
Laurie	Gibson	Full-Time	01/01/2009	<a href="#">View/Edit</a> <a href="#">Terminate</a>
Aaron	Wald	Full-Time	01/01/2014	<a href="#">View/Edit</a> <a href="#">Terminate</a>
Katie	Moore	Full-Time	01/01/2014	<a href="#">View/Edit</a> <a href="#">Terminate</a>
Cameron	Eisenberg	Part-Time	01/01/2014	<a href="#">View/Edit</a> <a href="#">Terminate</a>
Jessica	Stanford	Part-Time	01/01/2012	<a href="#">View/Edit</a> <a href="#">Terminate</a>

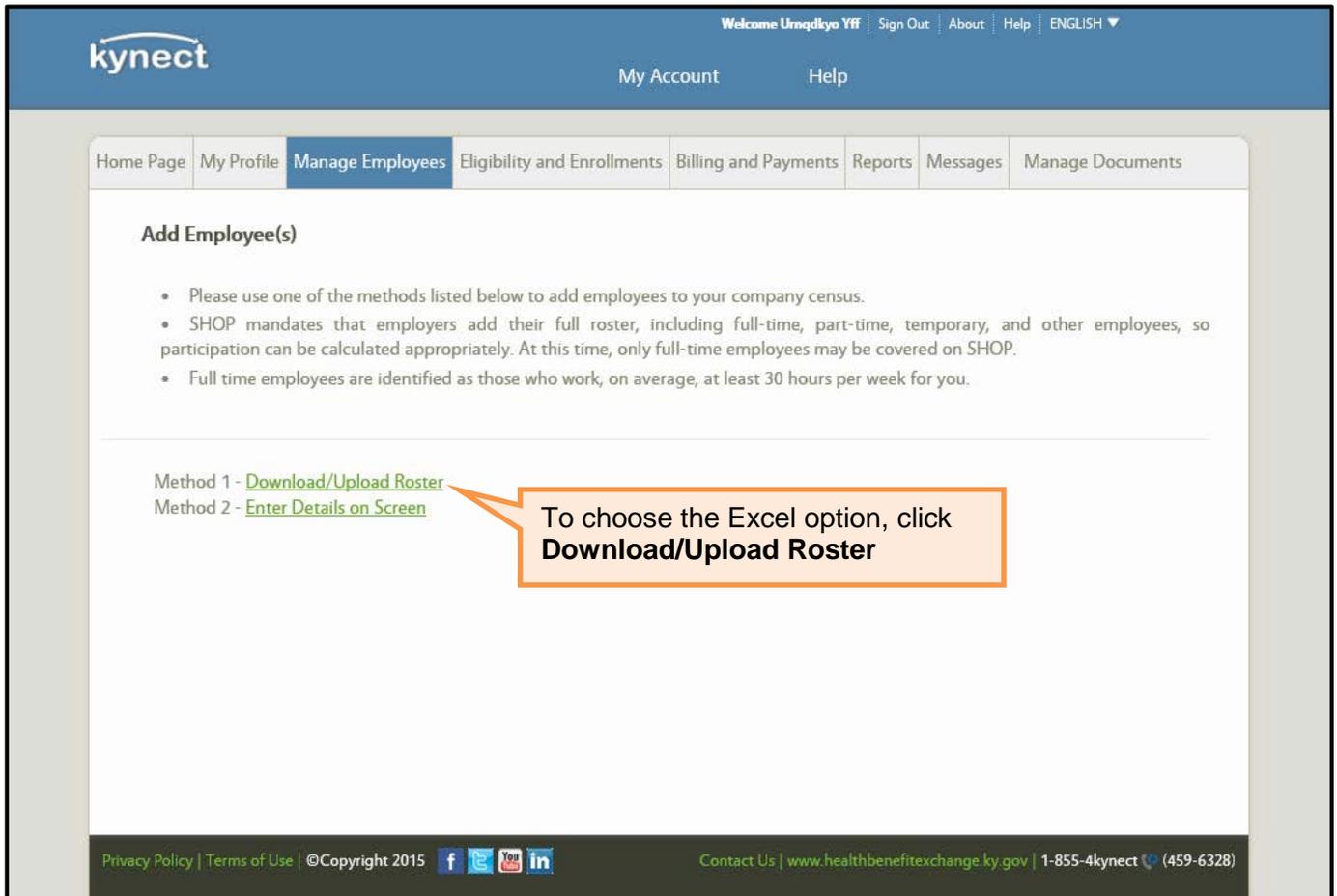
**Click Add Employee(s)**

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## Agent Portal

The **Add Employee(s)** screen displays.

3. To choose the Excel option, click **Download/Upload Roster**



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### Add Employee(s)

- Please use one of the methods listed below to add employees to your company census.
- SHOP mandates that employers add their full roster, including full-time, part-time, temporary, and other employees, so participation can be calculated appropriately. At this time, only full-time employees may be covered on SHOP.
- Full time employees are identified as those who work, on average, at least 30 hours per week for you.

Method 1 - [Download/Upload Roster](#)  
Method 2 - [Enter Details on Screen](#)

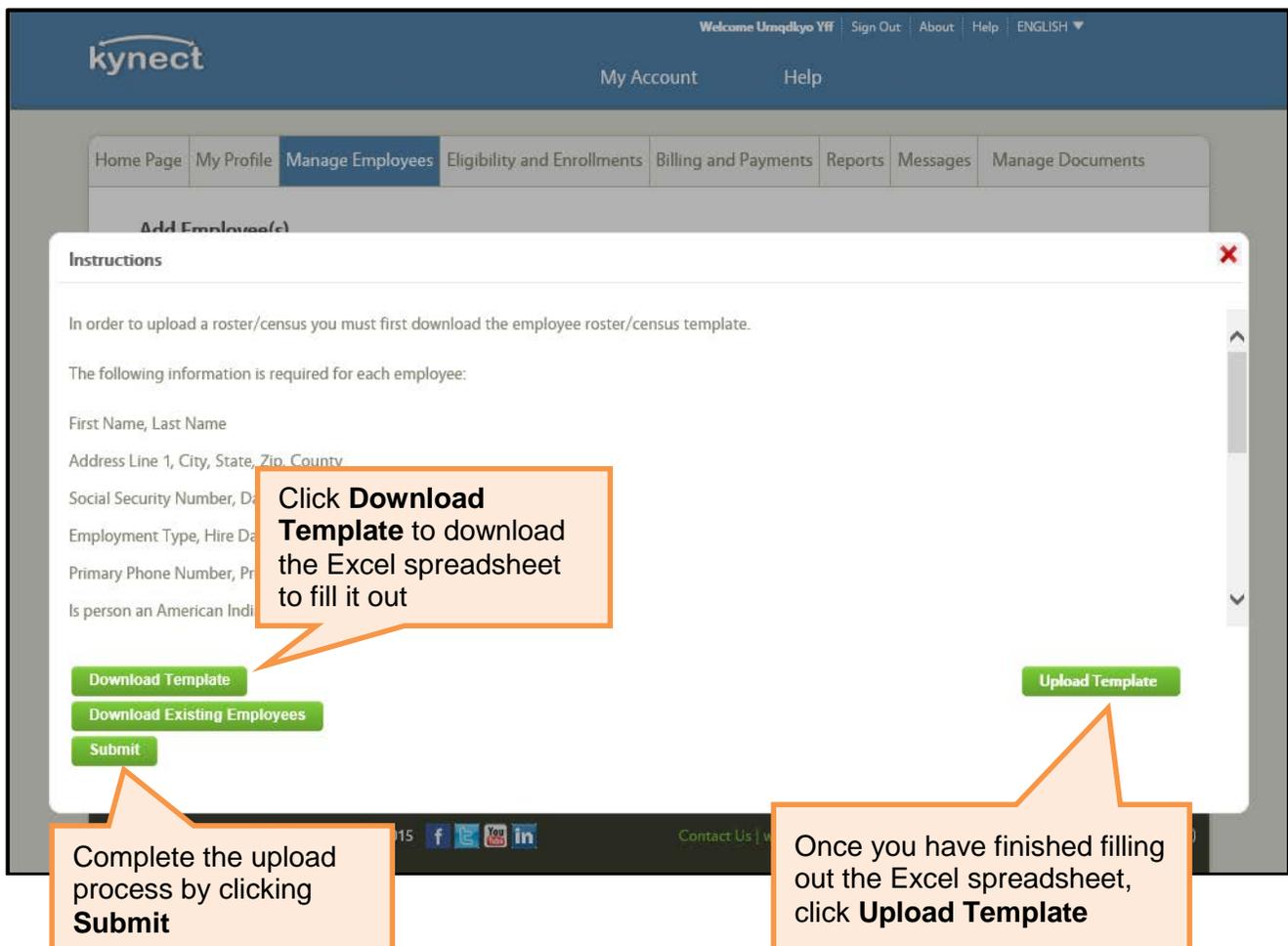
To choose the Excel option, click **Download/Upload Roster**

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## Agent Portal

The **Instructions** pop-up screen displays.

4. Click the **Download Template** button to download the Excel spreadsheet to fill it out
5. Once you have finished filling out the Excel spreadsheet, click the **Upload Template** button to upload the spreadsheet
6. Complete the roster upload process by clicking **Submit**



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**Add Employee(s)**

### Instructions

In order to upload a roster/census you must first download the employee roster/census template.

The following information is required for each employee:

- First Name, Last Name
- Address Line 1, City, State, Zip, County
- Social Security Number, D
- Employment Type, Hire Da
- Primary Phone Number, Pr
- Is person an American Indi

**Download Template** | **Download Existing Employees** | **Submit** | **Upload Template**

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**Click **Download Template** to download the Excel spreadsheet to fill it out**

**Complete the upload process by clicking **Submit****

**Once you have finished filling out the Excel spreadsheet, click **Upload Template****

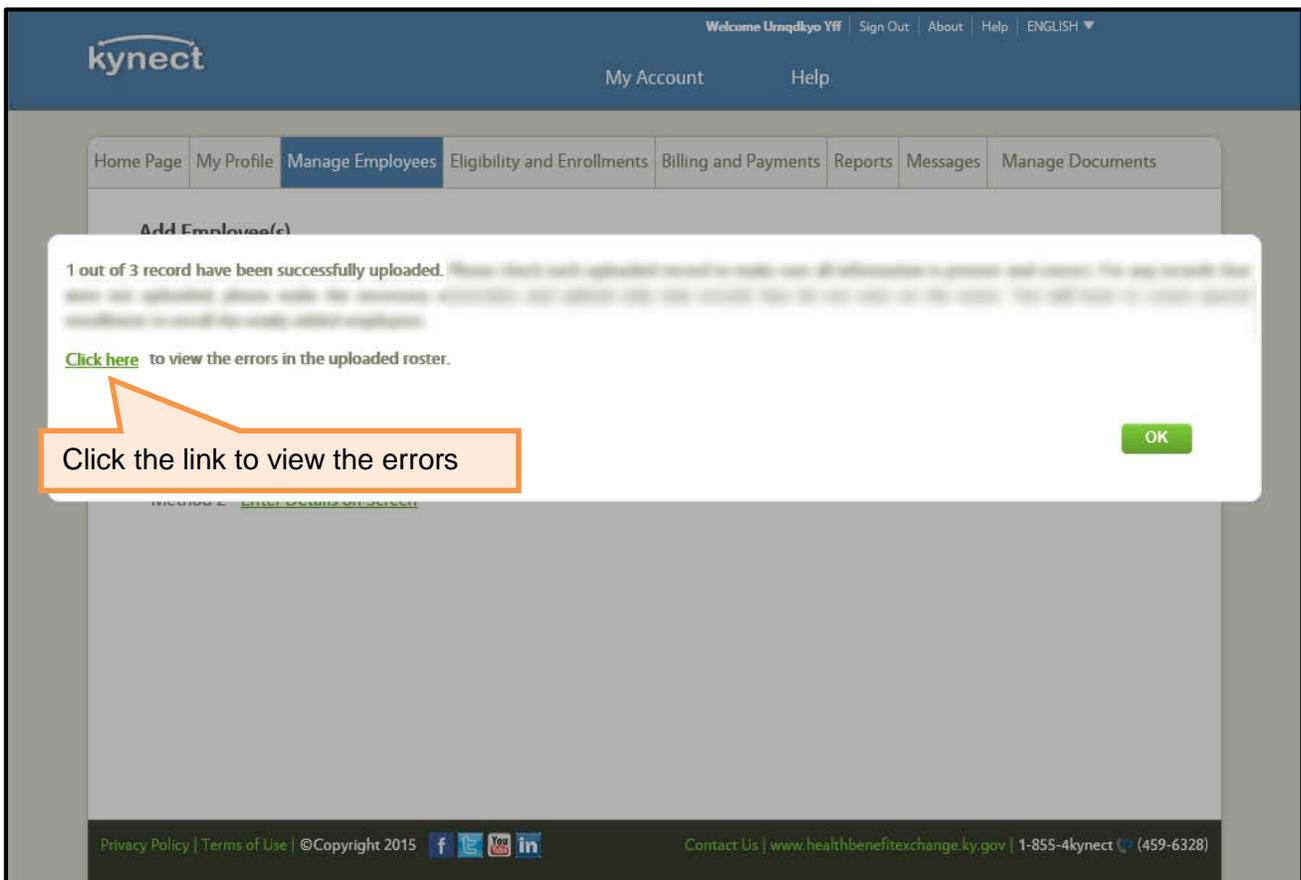
## Agent Portal



Up until now the process for uploading a roster has remained the same. This is the point in the process where you will see the enhancements to SHOP.

Once you click **Upload Template** and upload the Excel document containing the employees, the new **Upload Roster Errors** message displays, but only if there are errors in the Excel spreadsheet. If there are no errors in the Excel spreadsheet and all the information has been correctly entered, the **Upload Roster Errors** message does not display.

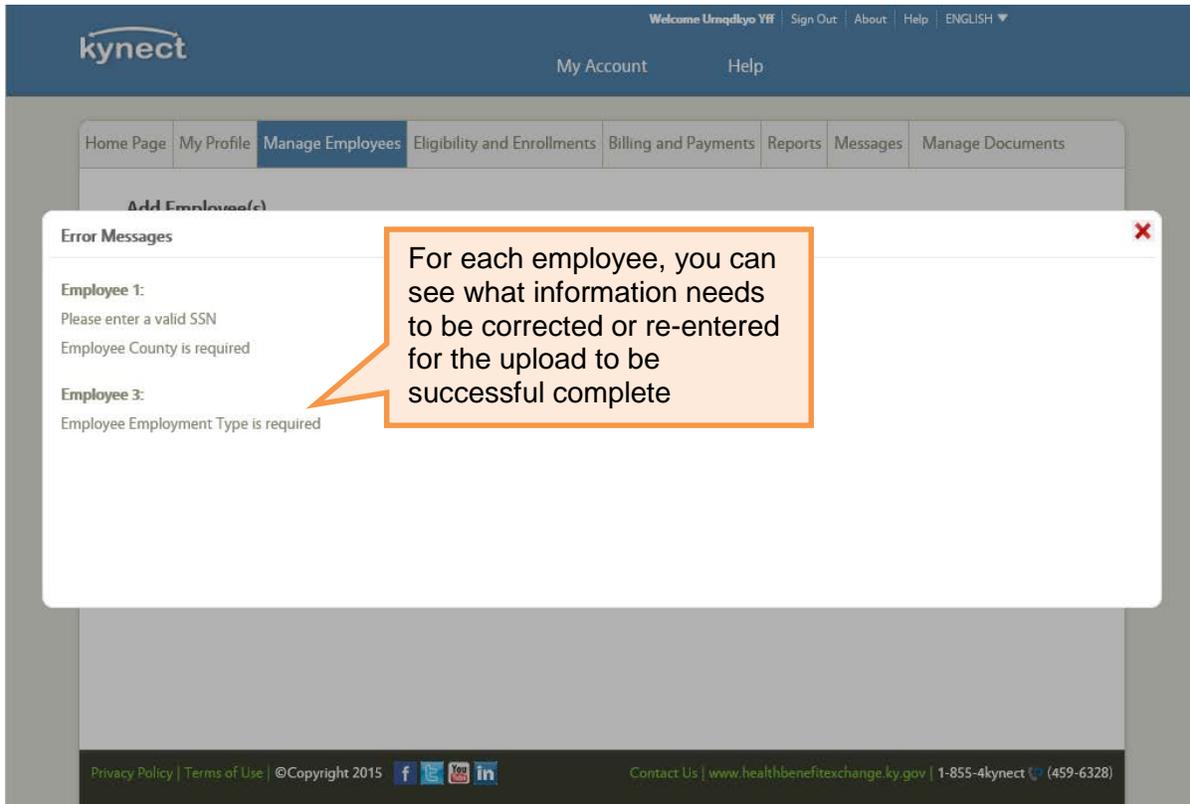
7. Review the message. If there are errors, click **here in the pop-up message** to view additional detail about the errors



The screenshot shows the Kynect Agent Portal interface. At the top, there is a navigation bar with the Kynect logo, a welcome message "Welcome Umqdkyo Yff", and links for "Sign Out", "About", "Help", and "ENGLISH". Below this is a secondary navigation bar with "My Account" and "Help". A main navigation menu includes "Home Page", "My Profile", "Manage Employees", "Eligibility and Enrollments", "Billing and Payments", "Reports", "Messages", and "Manage Documents". The "Manage Employees" tab is active. A pop-up message is displayed in the center, stating "1 out of 3 record have been successfully uploaded." and "Click here to view the errors in the uploaded roster." An orange callout box points to the "Click here" link with the text "Click the link to view the errors". An "OK" button is visible in the bottom right corner of the pop-up. The footer contains "Privacy Policy | Terms of Use | ©Copyright 2015" and social media icons for Facebook, Twitter, YouTube, and LinkedIn. Contact information includes "Contact Us | www.healthbenefitexchange.ky.gov | 1-855-4kynect | (459-6328)".

## Agent Portal

The **Upload Roster Errors** screen displays.



The screenshot shows the Kynect Agent Portal interface. At the top, there is a navigation bar with the Kynect logo, user information (Welcome Umasdlyo YF), and links for Sign Out, About, Help, and ENGLISH. Below this is a secondary navigation bar with 'My Account' and 'Help'. A main navigation bar contains links for Home Page, My Profile, Manage Employees (highlighted), Eligibility and Enrollments, Billing and Payments, Reports, Messages, and Manage Documents. The 'Add Employee(s)' section is visible, but an 'Error Messages' dialog box is overlaid on the screen. The dialog box contains the following text:

**Error Messages**

**Employee 1:**  
Please enter a valid SSN  
Employee County is required

**Employee 3:**  
Employee Employment Type is required

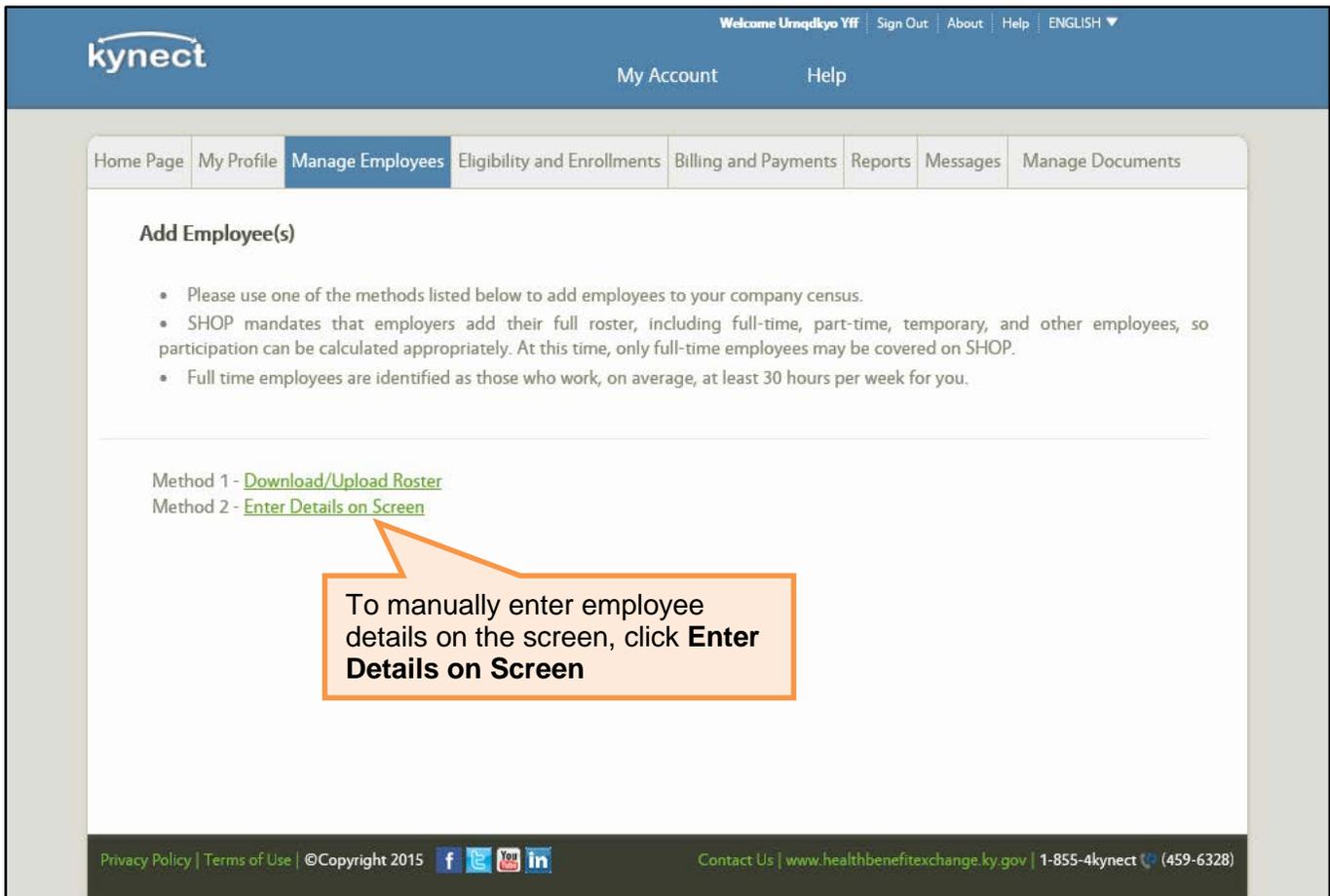
An orange callout box points to the error messages with the text: "For each employee, you can see what information needs to be corrected or re-entered for the upload to be successful complete".

At the bottom of the page, there is a footer with links for Privacy Policy, Terms of Use, Copyright 2015, social media icons, Contact Us, www.healthbenefitexchange.ky.gov, 1-855-4kynect, and (459-6328).

Once you have corrected the errors and re-uploaded the spreadsheet with the necessary employees, you are finished with the process. If you would like to explore the manual screen upload process, continue to the following steps.

## Agent Portal

8. If you want to manually enter employees to the roster on the screen, click the **Enter Details on Screen** link on the **Add Employee(s)** screen



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### Add Employee(s)

- Please use one of the methods listed below to add employees to your company census.
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- Full time employees are identified as those who work, on average, at least 30 hours per week for you.

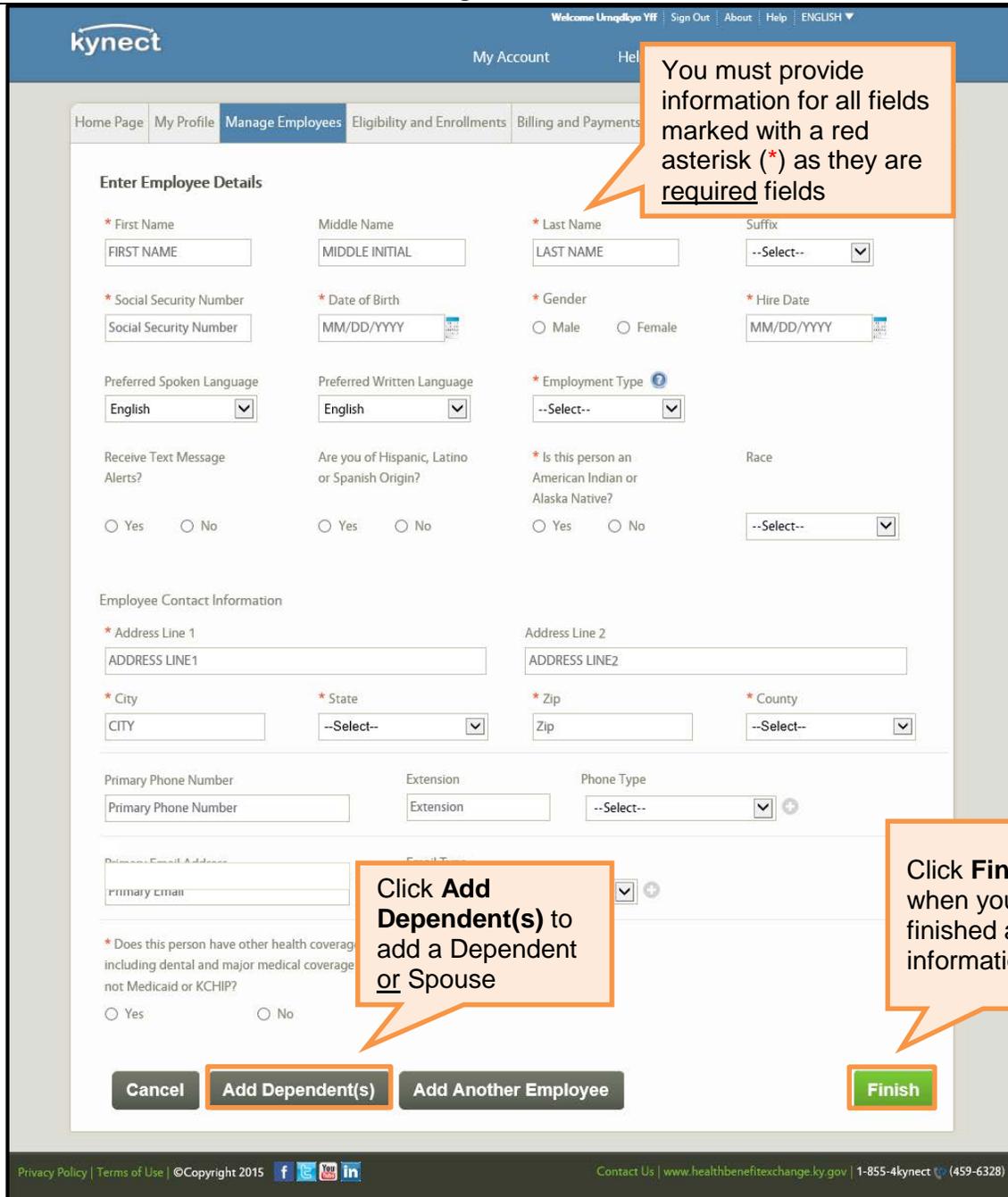
Method 1 - [Download/Upload Roster](#)  
Method 2 - [Enter Details on Screen](#)

To manually enter employee details on the screen, click **Enter Details on Screen**

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The **Enter Employee Details** screen displays, as shown on the following page. As before, the **Employee Details** page is consolidated into one simple screen. Employers can enter all of their employees' information and information about their dependents.

## Agent Portal



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### Enter Employee Details

\* First Name: FIRST NAME | Middle Name: MIDDLE INITIAL | \* Last Name: LAST NAME | Suffix: --Select--

\* Social Security Number: Social Security Number | \* Date of Birth: MM/DD/YYYY | \* Gender: Male / Female | \* Hire Date: MM/DD/YYYY

Preferred Spoken Language: English | Preferred Written Language: English | \* Employment Type: --Select--

Receive Text Message Alerts? Yes / No | Are you of Hispanic, Latino or Spanish Origin? Yes / No | \* Is this person an American Indian or Alaska Native? Yes / No | Race: --Select--

### Employee Contact Information

\* Address Line 1: ADDRESS LINE1 | Address Line 2: ADDRESS LINE2

\* City: CITY | \* State: --Select-- | \* Zip: Zip | \* County: --Select--

Primary Phone Number: Primary Phone Number | Extension: Extension | Phone Type: --Select--

Primary Email Address: primary email

\* Does this person have other health coverage including dental and major medical coverage not Medicaid or KCHIP? Yes / No

**Cancel** | **Add Dependent(s)** | **Add Another Employee** | **Finish**

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9. Enter the employee's personal information such as **First Name**, **Last Name**, and **Social Security Number**
10. Enter employment details such as **Hire Date** and **Employment Type** (Part-Time, Full-Time, or Temporary)
11. Enter the employee's contact information; note that the **Primary Email Address** field is no longer required
12. Click **Add Dependent(s)** to enter any information for an employee's dependent or spouse
13. Click **Finish** when you are finished adding information