Agent Portal Dashboard and SHOP Employee Roster Updates

August 2015

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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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:

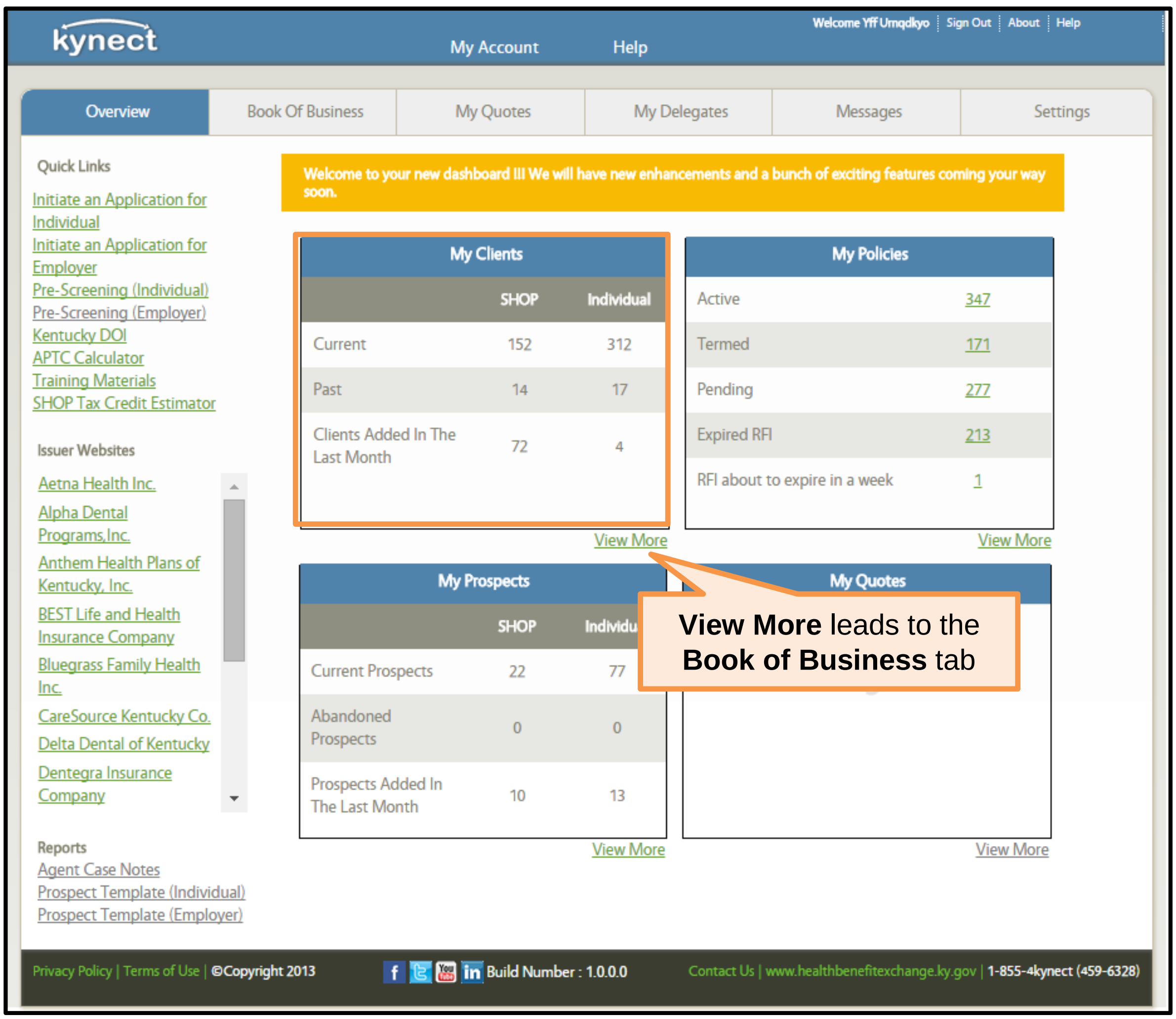
- Overview
- Book of Business
- Messages
- Settings

2. Agent Portal Overview Tab (Dashboard Landing Page)

Just as before, navigate to 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.

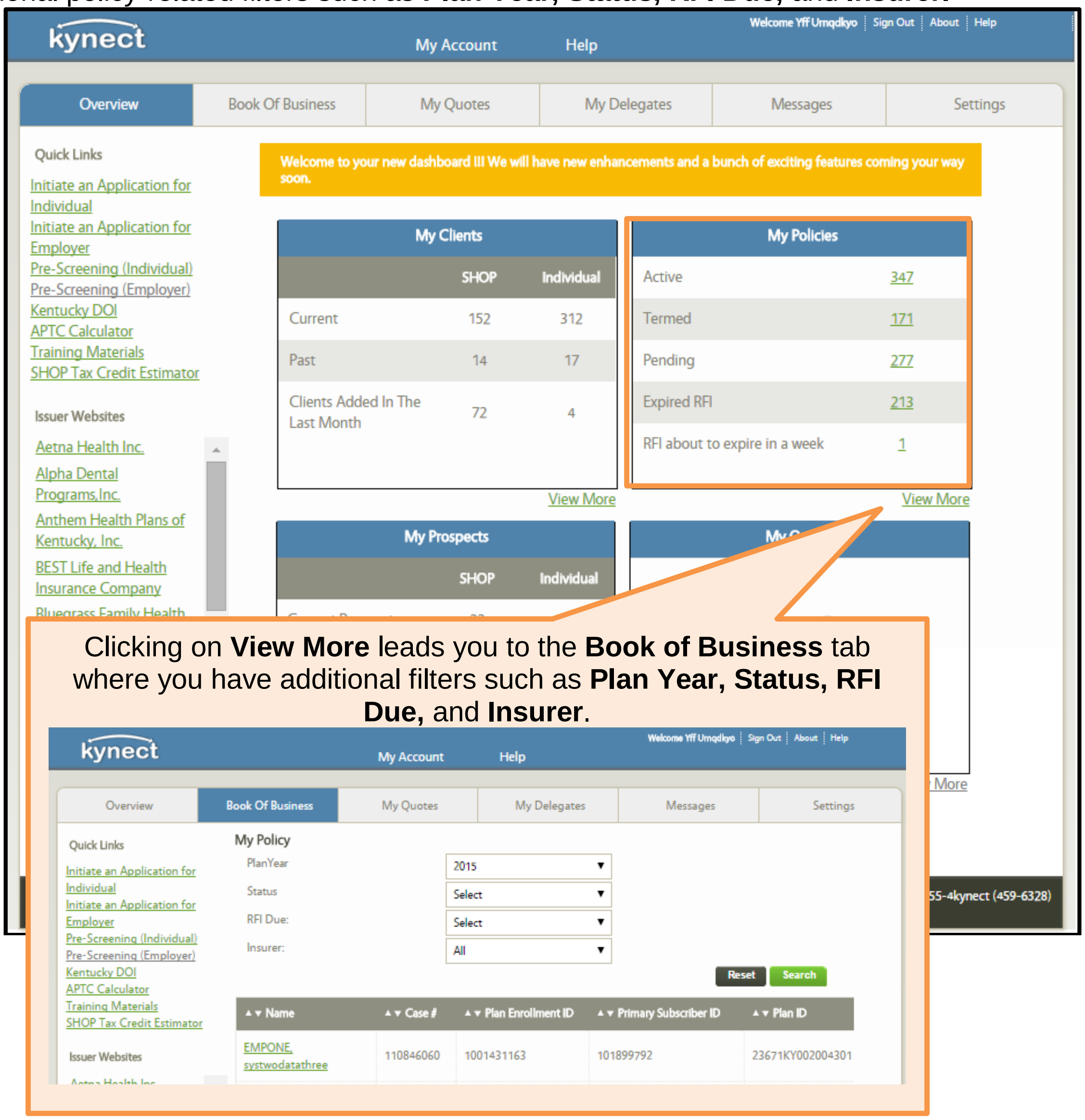


The next box is the **My Prospects** box, a brand new feature. **My Prospects** allows Agents to track individuals that have started an application with them. In October 2015, this feature will also allow Agents to track individuals that they have had conversations with, but for whom they have not yet 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.

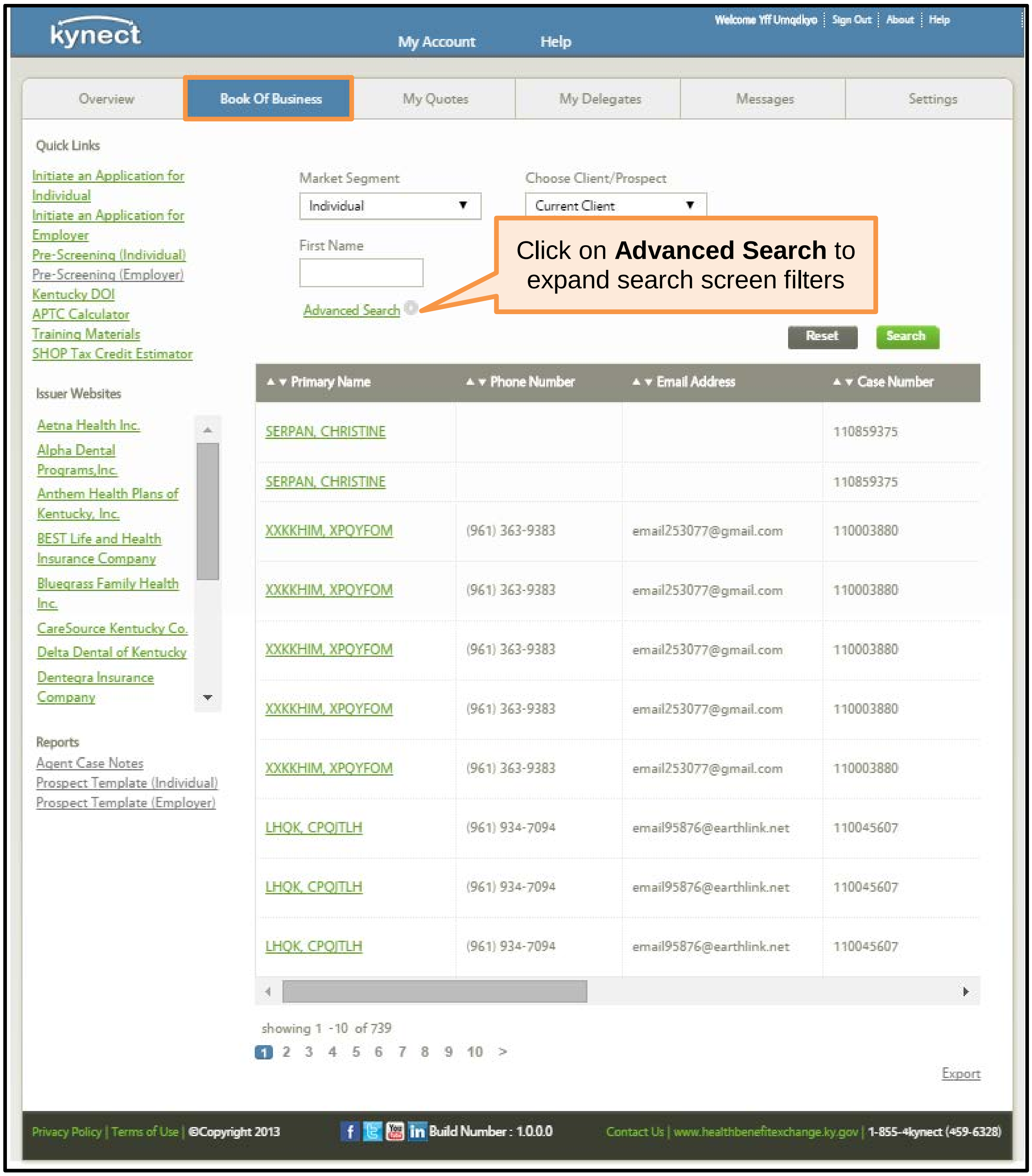
The **My Policies** box displays the enrollment numbers and statuses of your clients: **Active, Terminated,** and **Pending.** It also highlights **Expired RFIs** and notifies you of **RFIs About to Expire in a Week.** This feature is particularly beneficial in helping you follow up with individuals 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.**



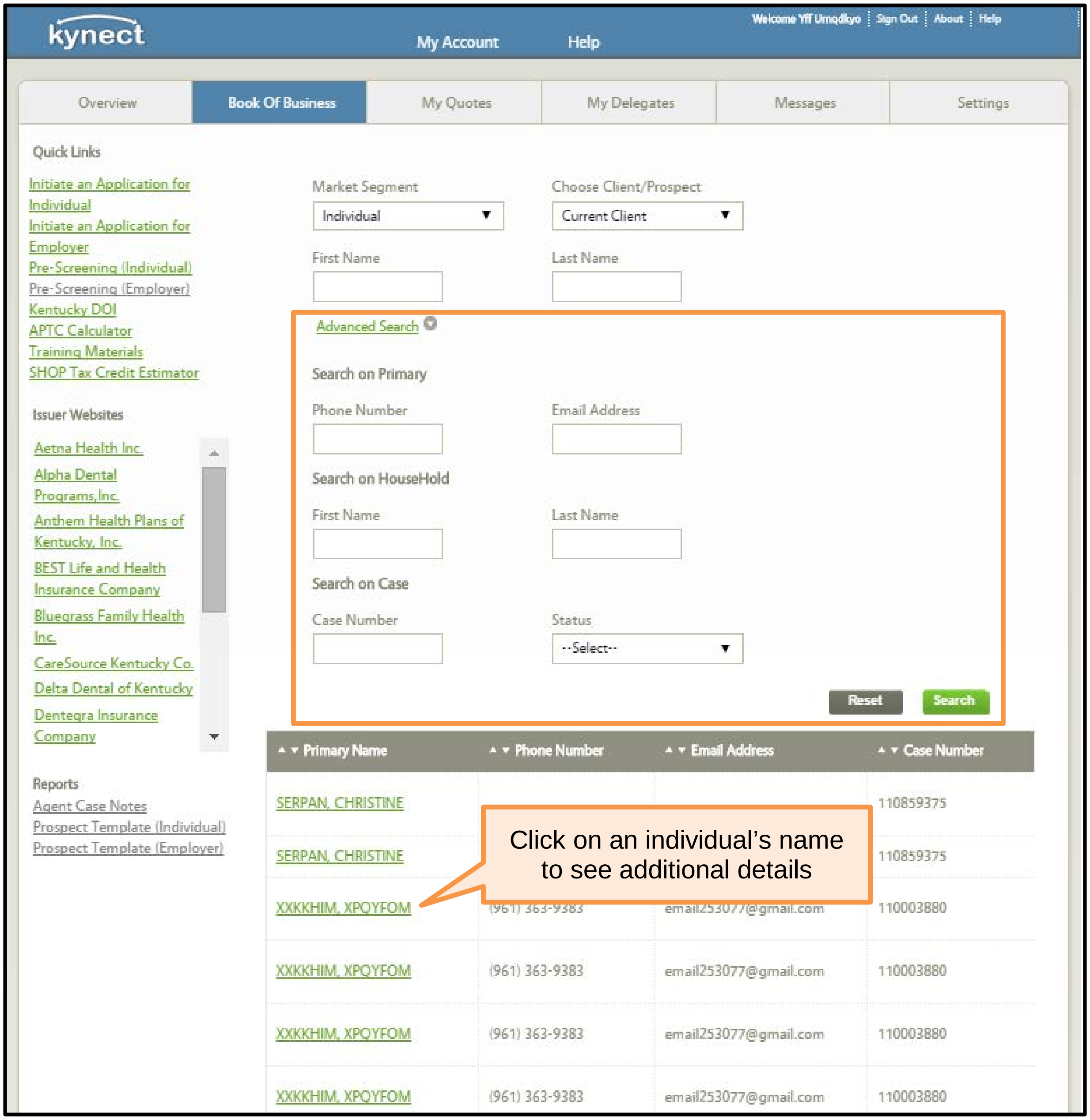
3. Agent Portal Book of Business Tab

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.



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.**

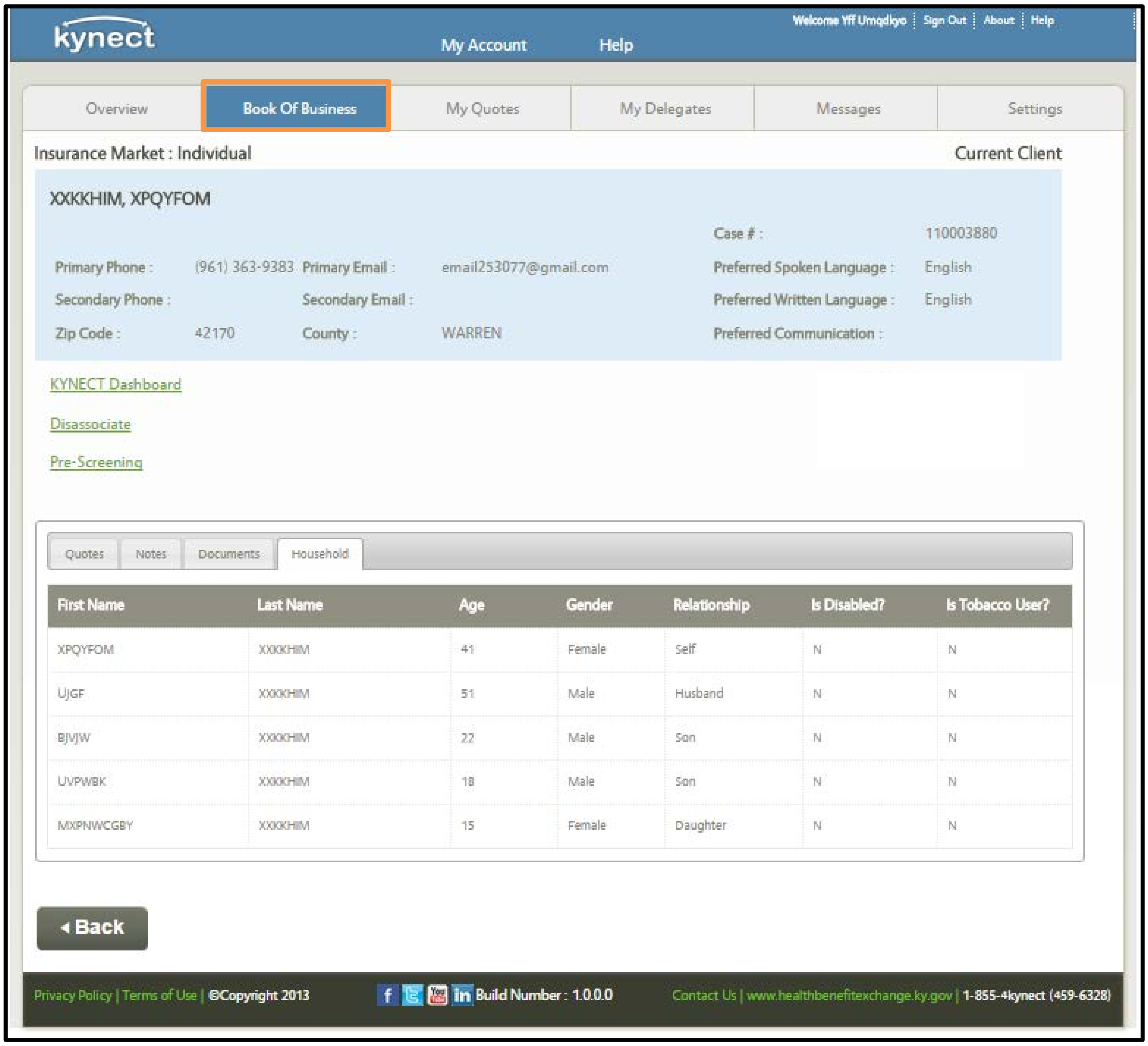


Profile Page

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.



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

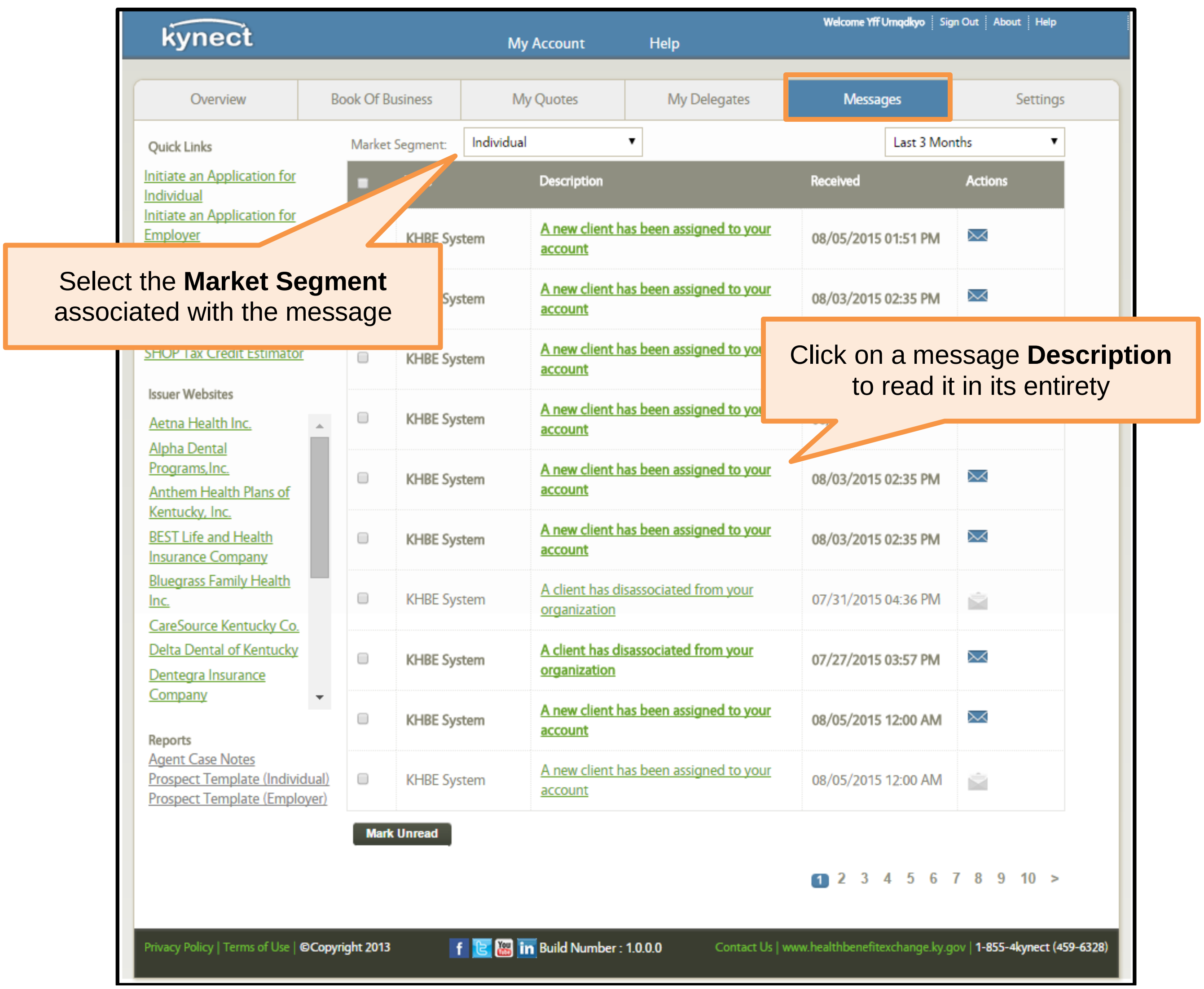
4. Agent Portal Messages Tab

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 (KOHBIE).

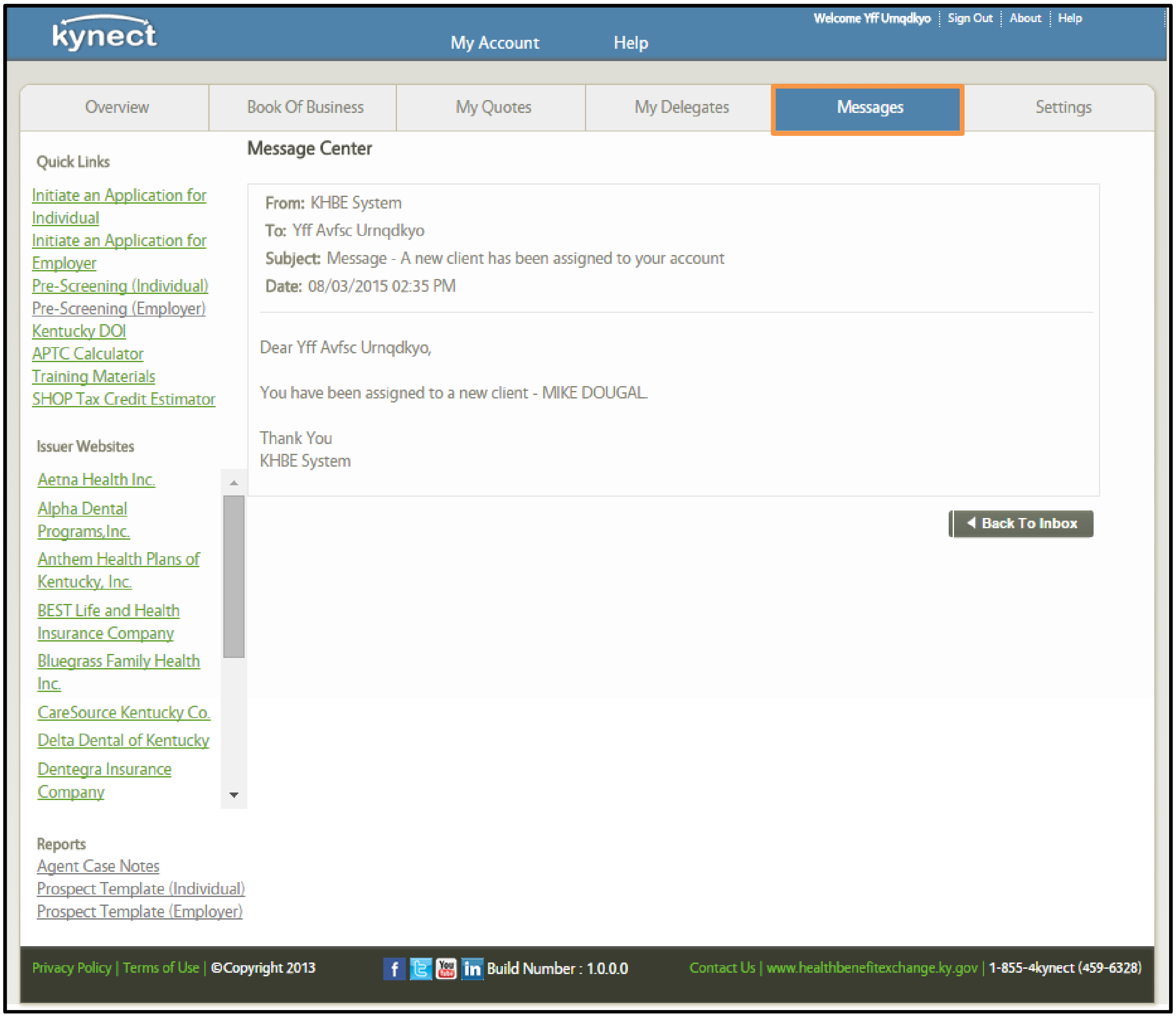
On this page, Agents can also use a drop-down menu in the top right corner to search for messages by:

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

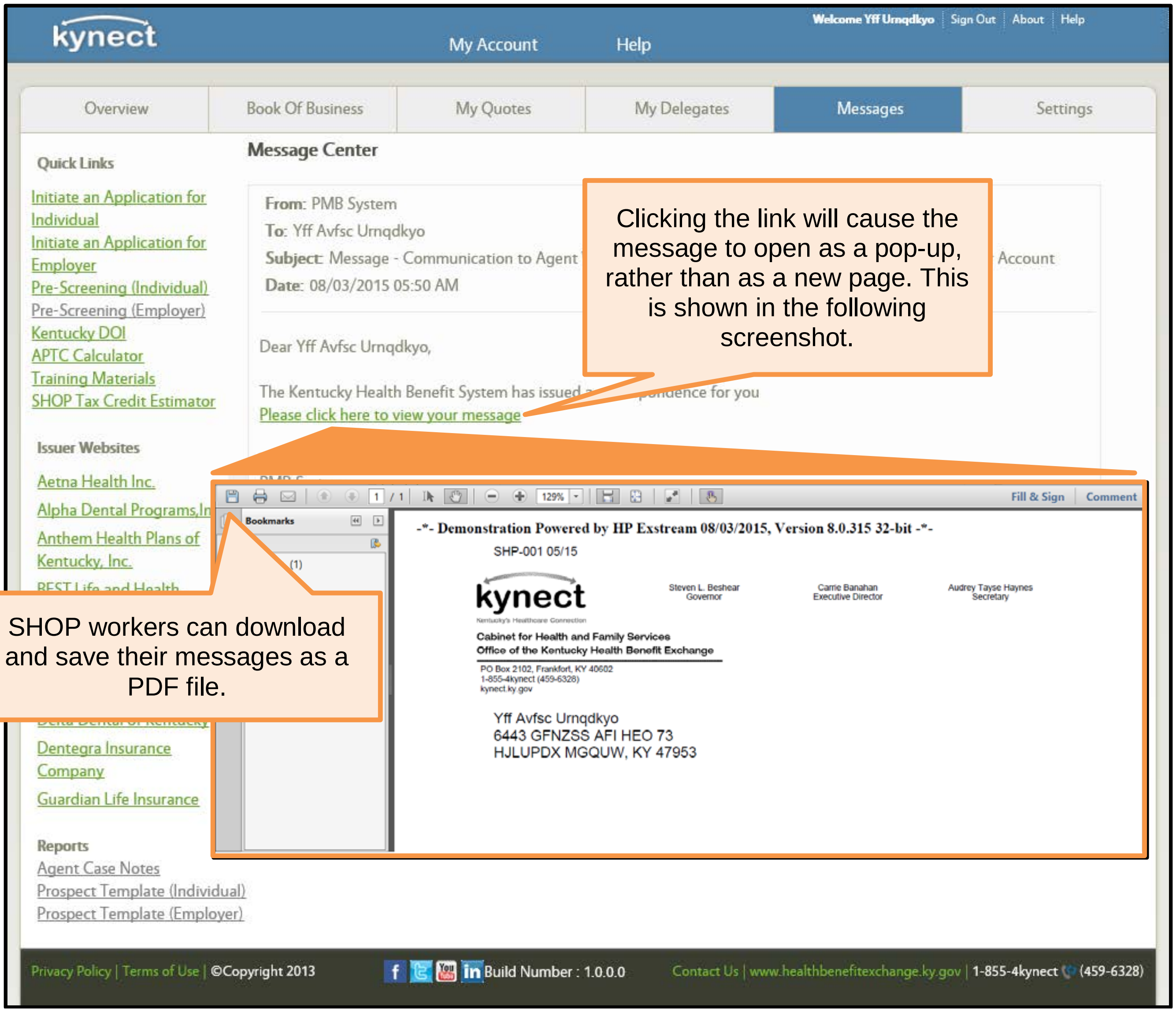
Agents can also filter their messages by the Individual and SHOP market segments.



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

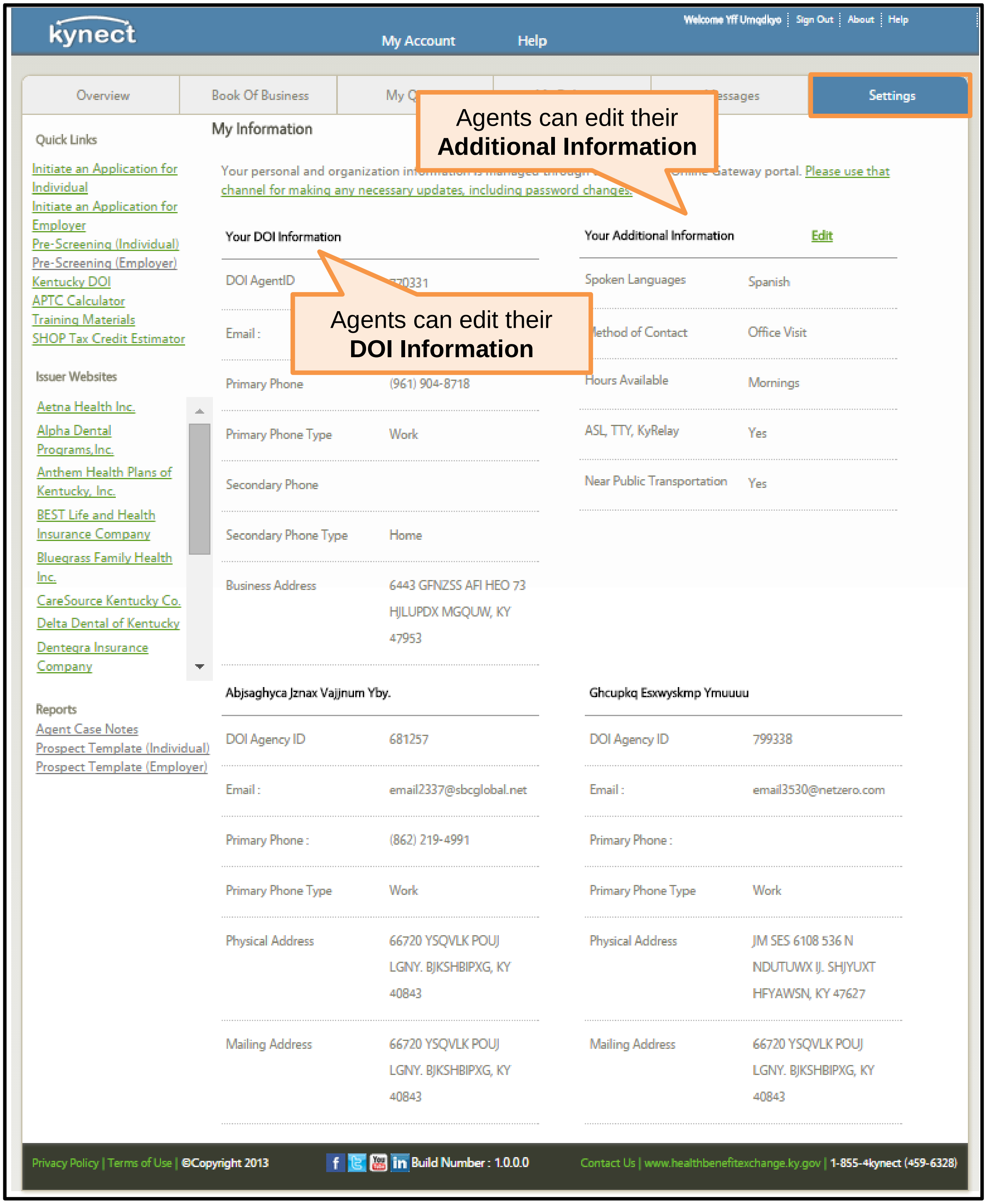


This is the screen that displays when you click to read a SHOP message. To view the message, Agents must click the link. The message opens as a pop-up and they can choose to download it as a PDF.



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 **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:

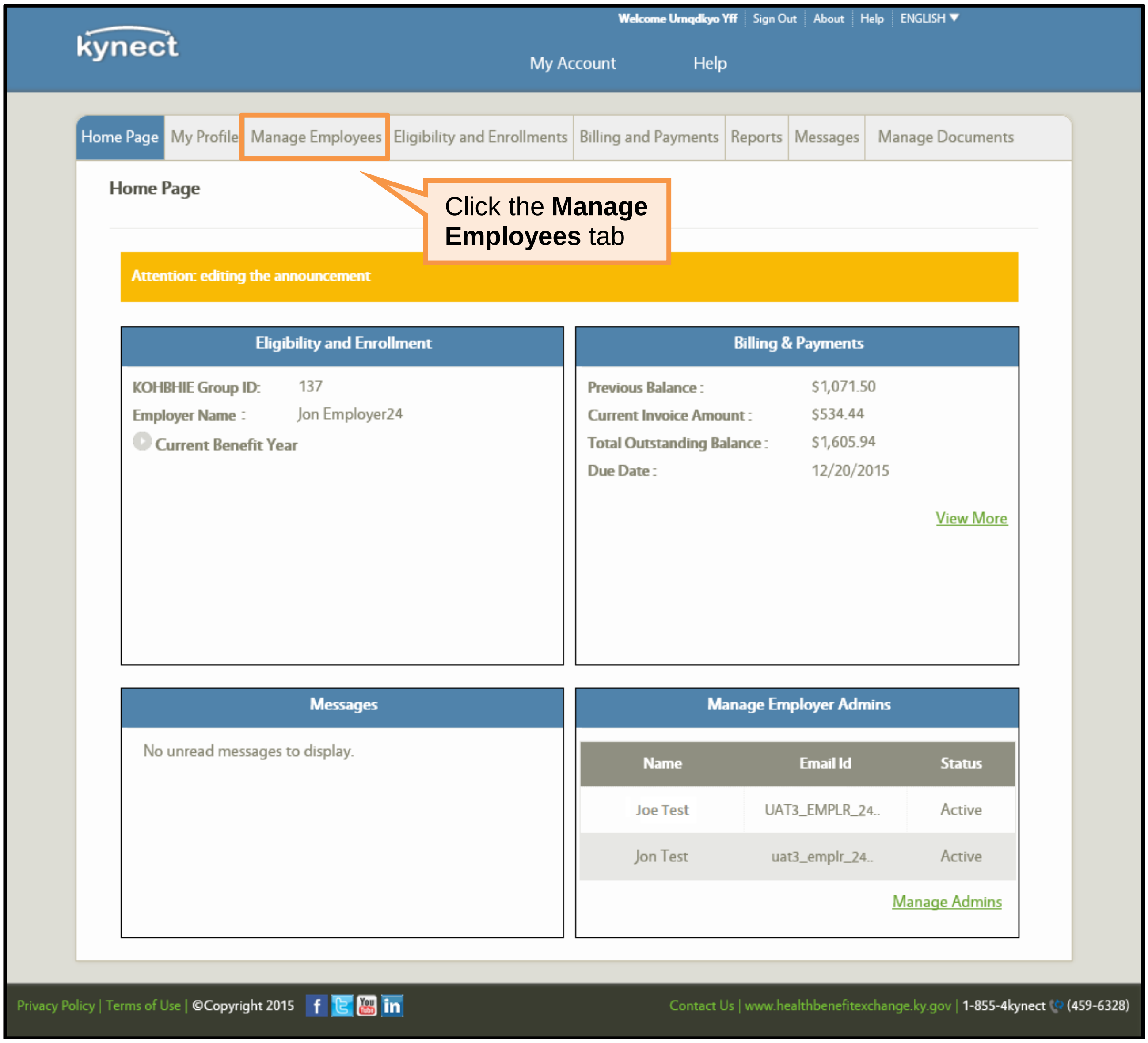
1. Upload error detail is now captured when rosters are uploaded. Previously during the employee roster upload process, if errors existed, they were displayed but the detail surrounding those errors was not provided. It was unclear why some employees listed in the Excel spreadsheet did not appear on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

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

7. Instructions on Updating the Employee Roster

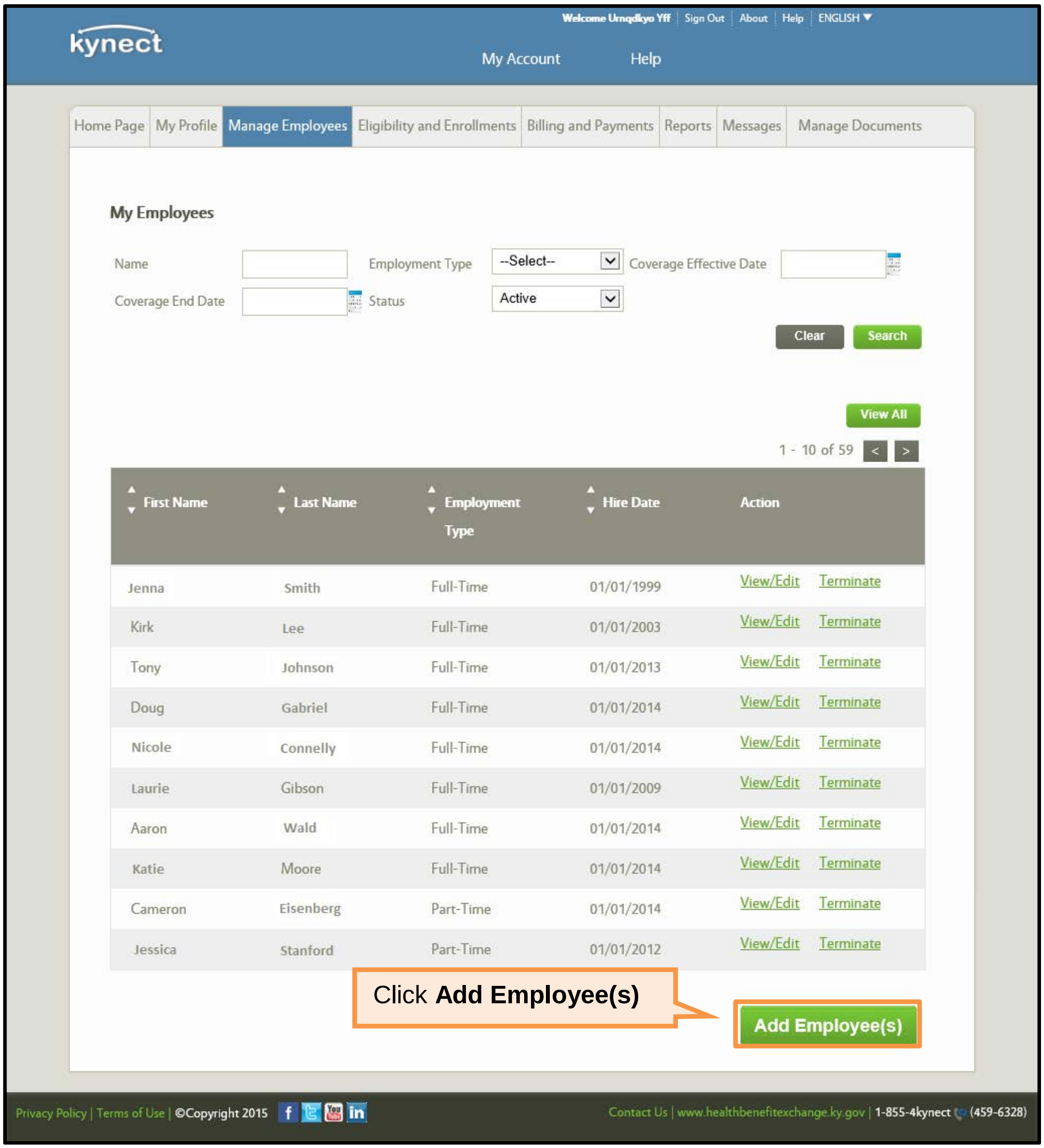
Start at the **SHOP Employer Home Page.** The process of adding employees to the roster, whether through the **Download/Upload Roster** or **Enter Details on Screen**, remains the same. The new enhancements do not affect the process until after the **Download/Upload Roster** process is completed.

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



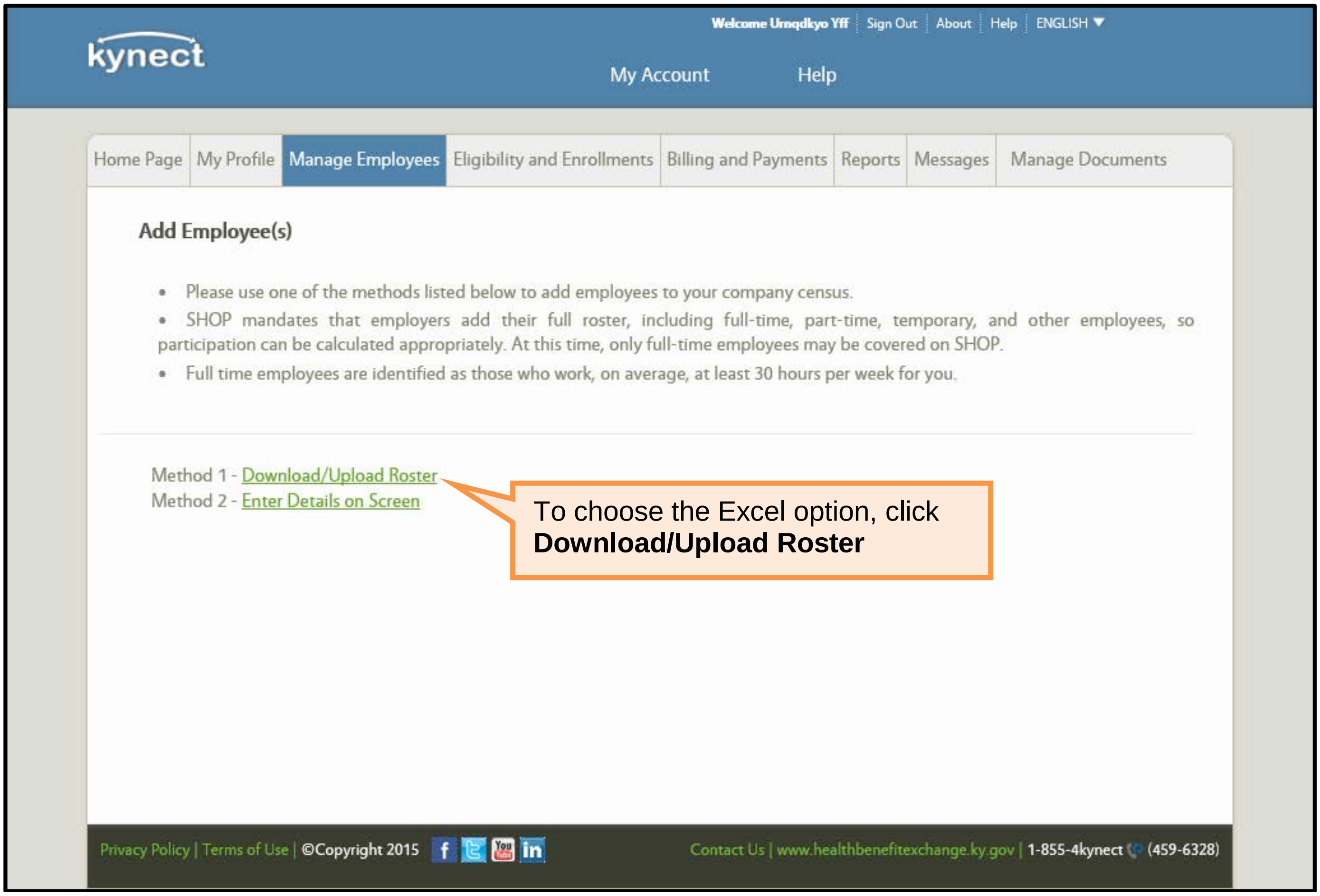
The **My Employees** screen displays. On the **My Employees** screen, you can **View** and **Search** for an employer's existing employees and their information using search criteria such as **Name**, **Employment Type** (part- or full-time), **Coverage Effective Date**, **Coverage End Date**, or **Status**. 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**



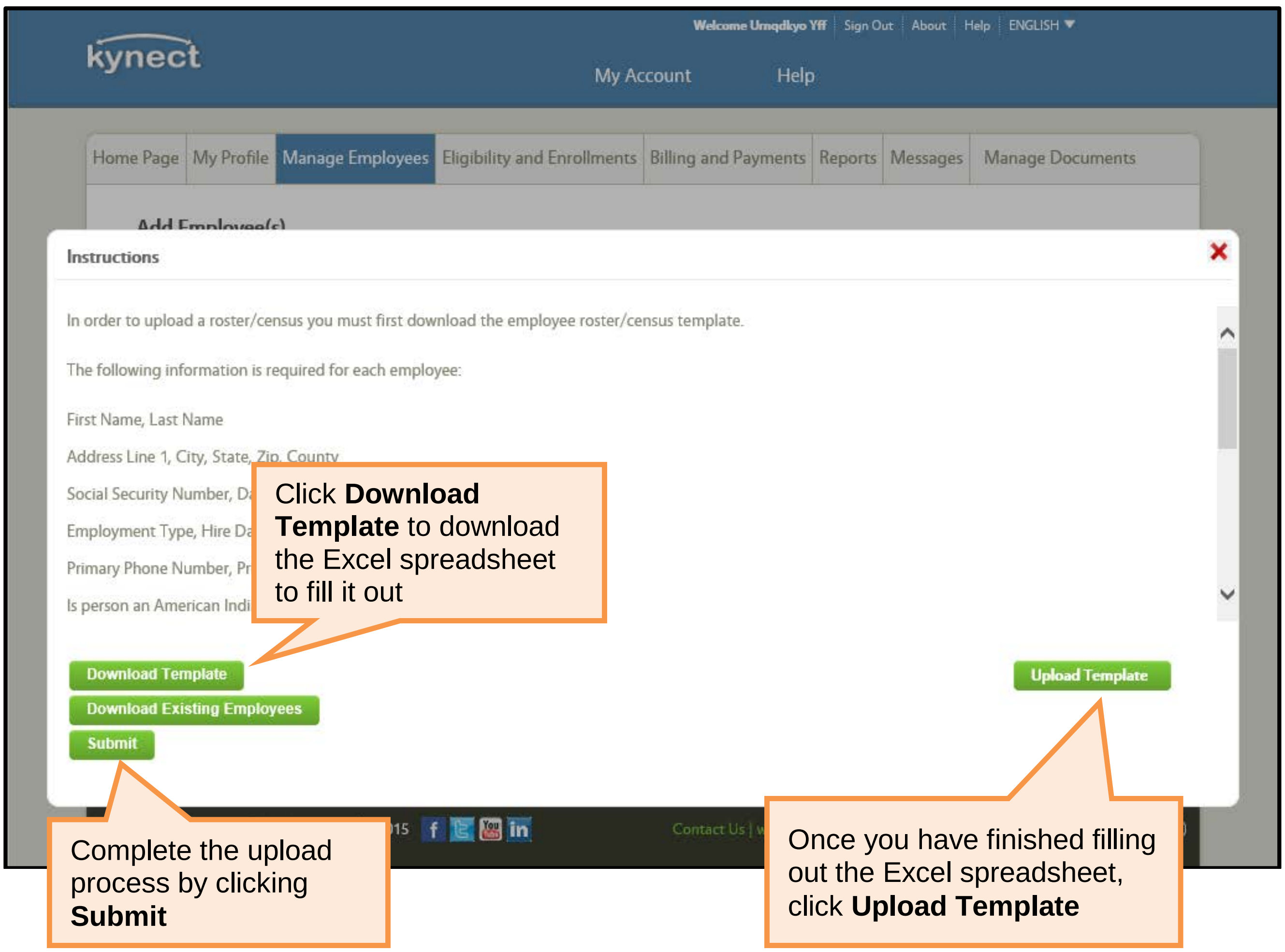
The **Add Employee(s)** screen displays.

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



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

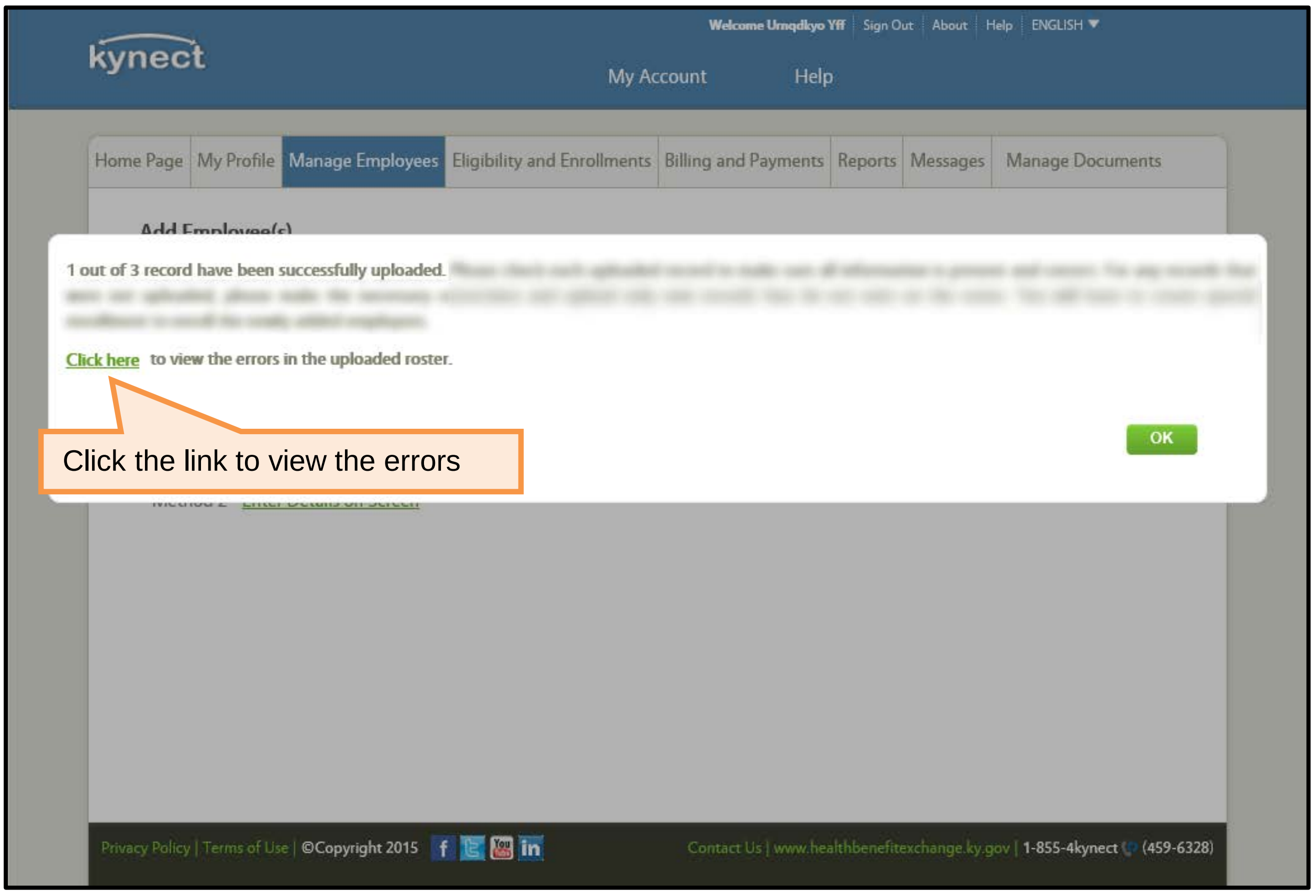
4. Click the **Download Template** button to download the Excel spreadsheet to fill it out
5. Once you have finished filling out the Excel spreadsheet, click the **Upload Template** button to upload the spreadsheet
6. Complete the roster upload process by clicking **Submit**



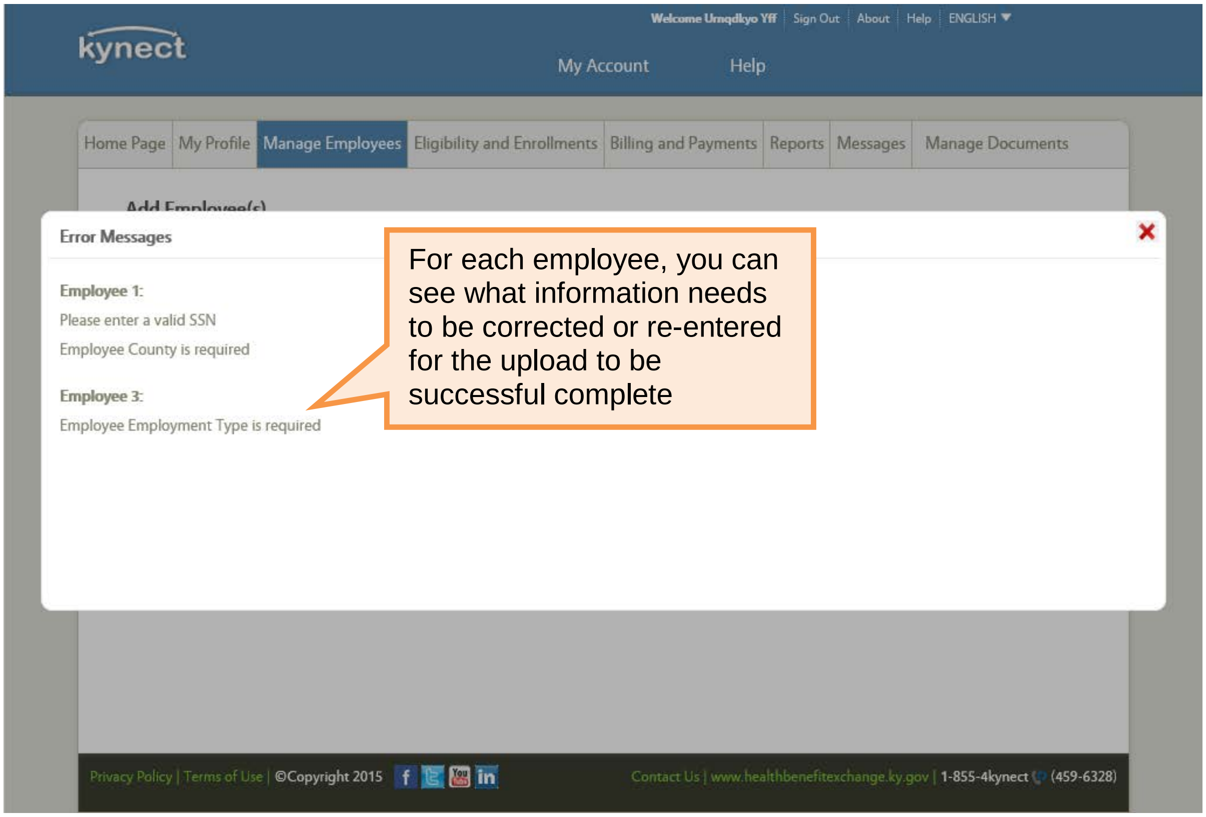
Up until now the process for uploading a roster has remained the same. This is the point in the process where you will see the enhancements to SHOP.

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

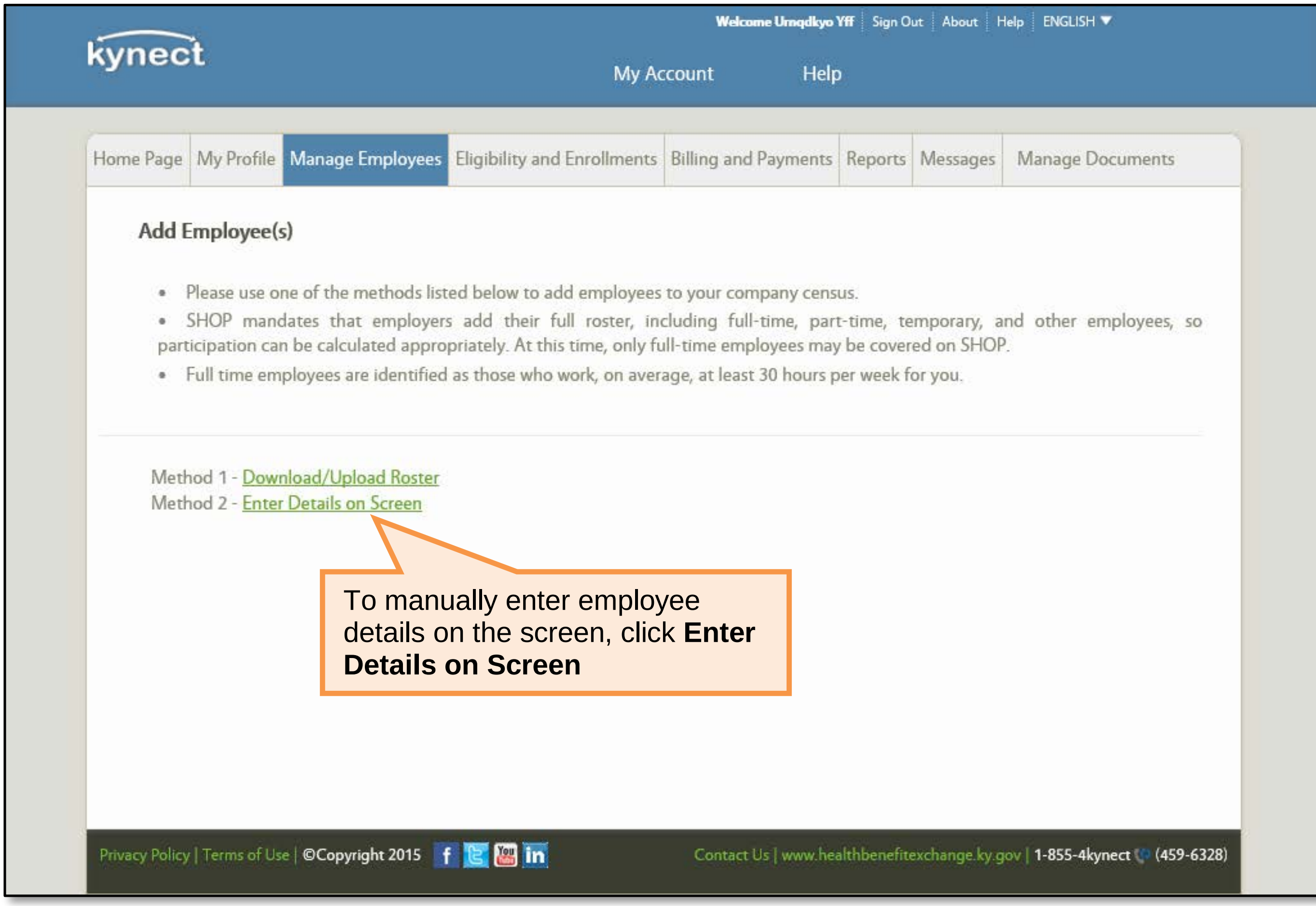


The **Upload Roster Errors** screen displays.

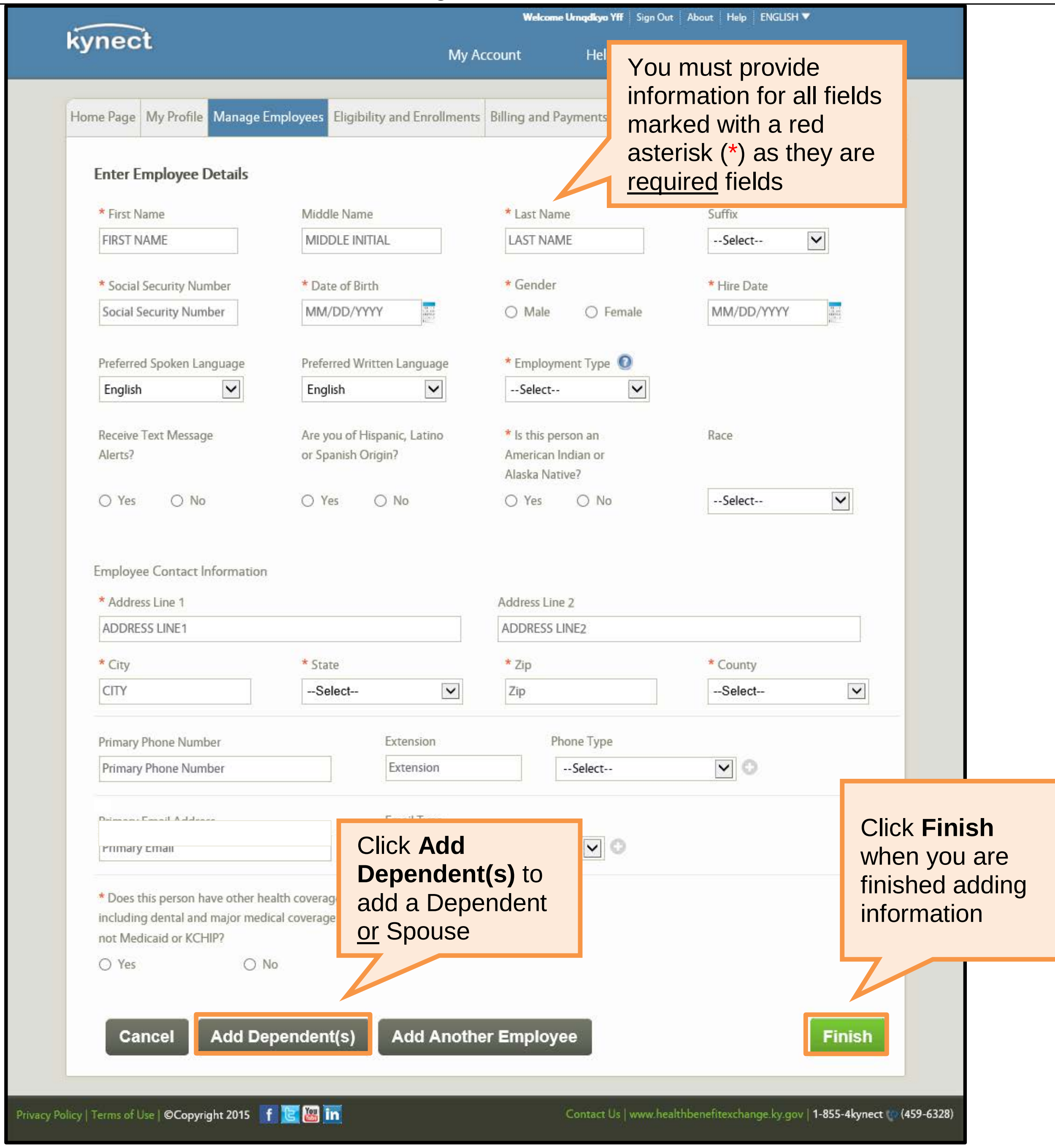


Once you have corrected the errors and re-uploaded the spreadsheet with the necessary employees, you are finished with the process. If you would like to explore the manual screen upload process, continue to the following steps.

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



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.



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