The Commonwealth of Kentucky

kynect State-Based Marketplace

Agent Portal Quoting Tool Scenarios Quick Reference Guide

Last Updated: March 1st, 2024

Introduction

This document provides information on various scenarios related to the Quoting Tool in Agent Portal.

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1 Agent Portal Quoting Tool Overview

Agents may create quotes for Clients and Prospects in Agent Portal. A quote may only be created in Agent Portal if the Individual is entered as a Prospect or Client. The process to create a quote may vary depending on the scenario.

2 Scenario 1: Create a Prospect, Submit a Benefits Application, and Create a Quote

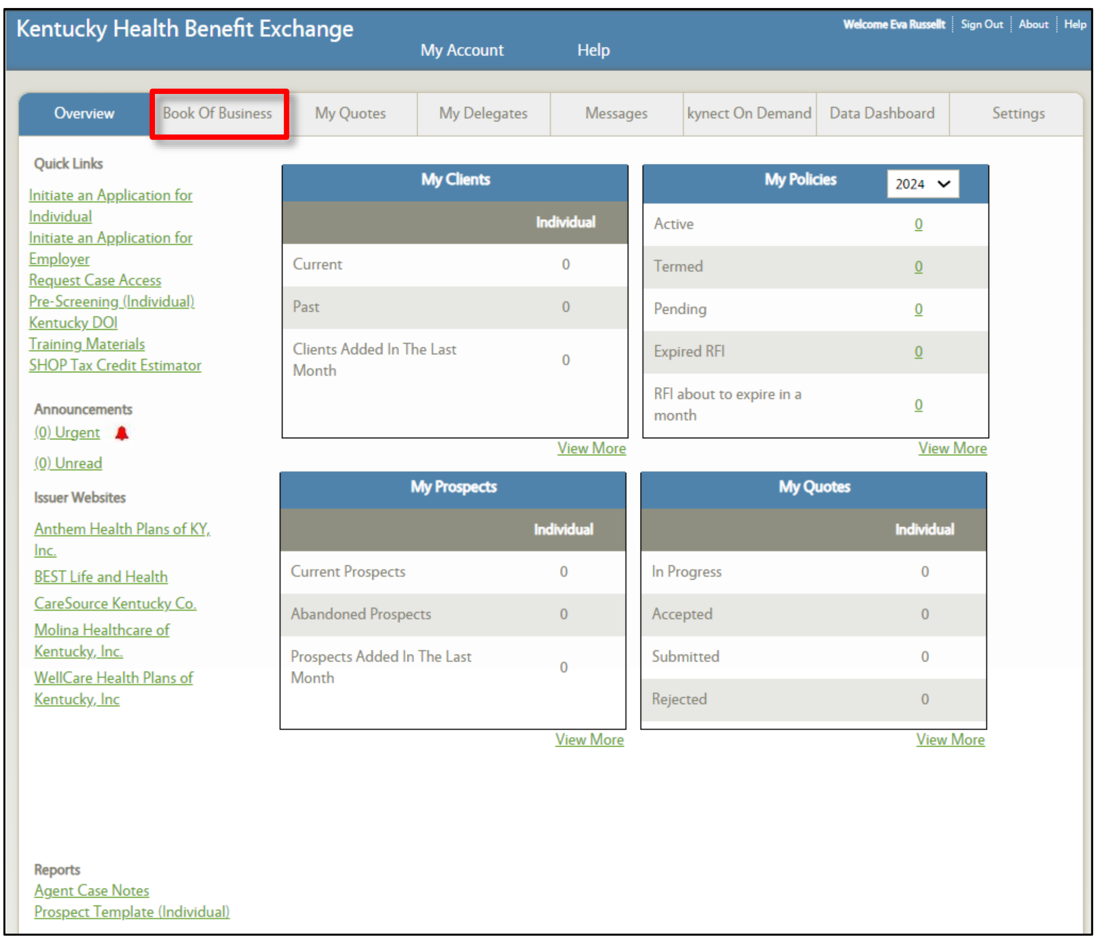
This scenario walks through the process of creating a Prospect in Agent Portal, accessing the benefits application within kynect benefits from Agent Portal, and creating a quote for that Prospect.

Please note: A Prospect does not need to be created if the Individual is ready to apply for benefits. Instead, click **Initiate an Application for Individual** under *Quick Links*. Once the benefits application is complete, the Individual should automatically be included in the Book of Business as a Client.

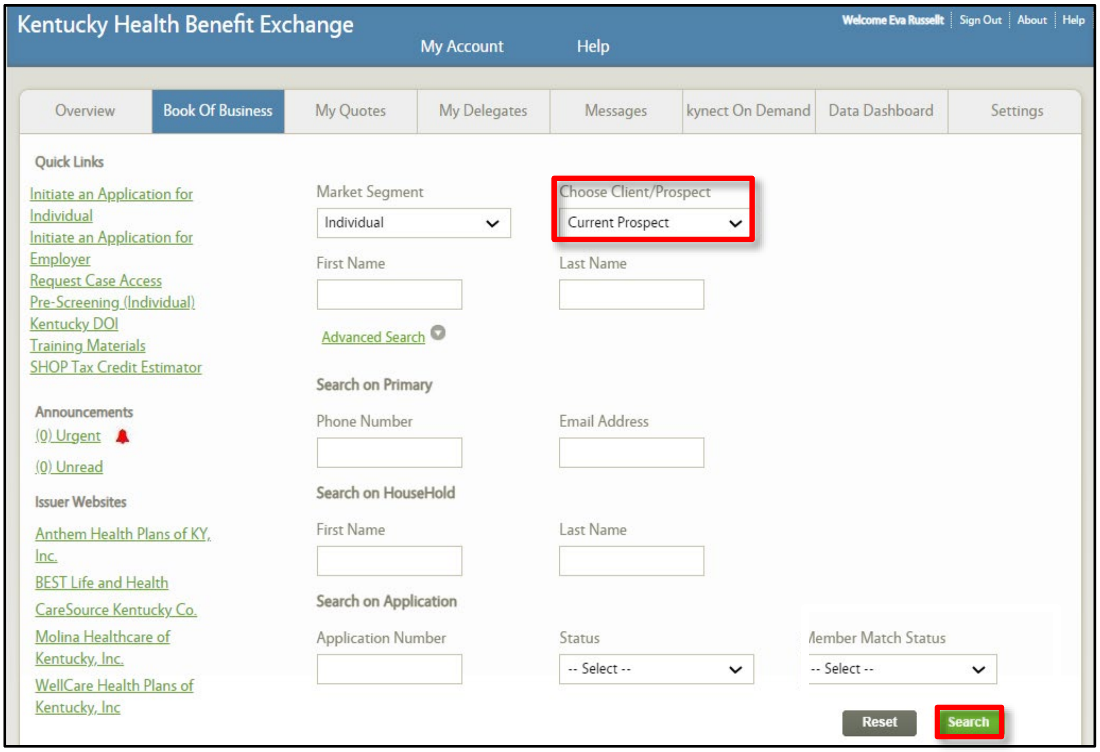
2.1 Create a Prospect in Agent Portal

Complete the following steps to create a Prospect in Agent Portal:

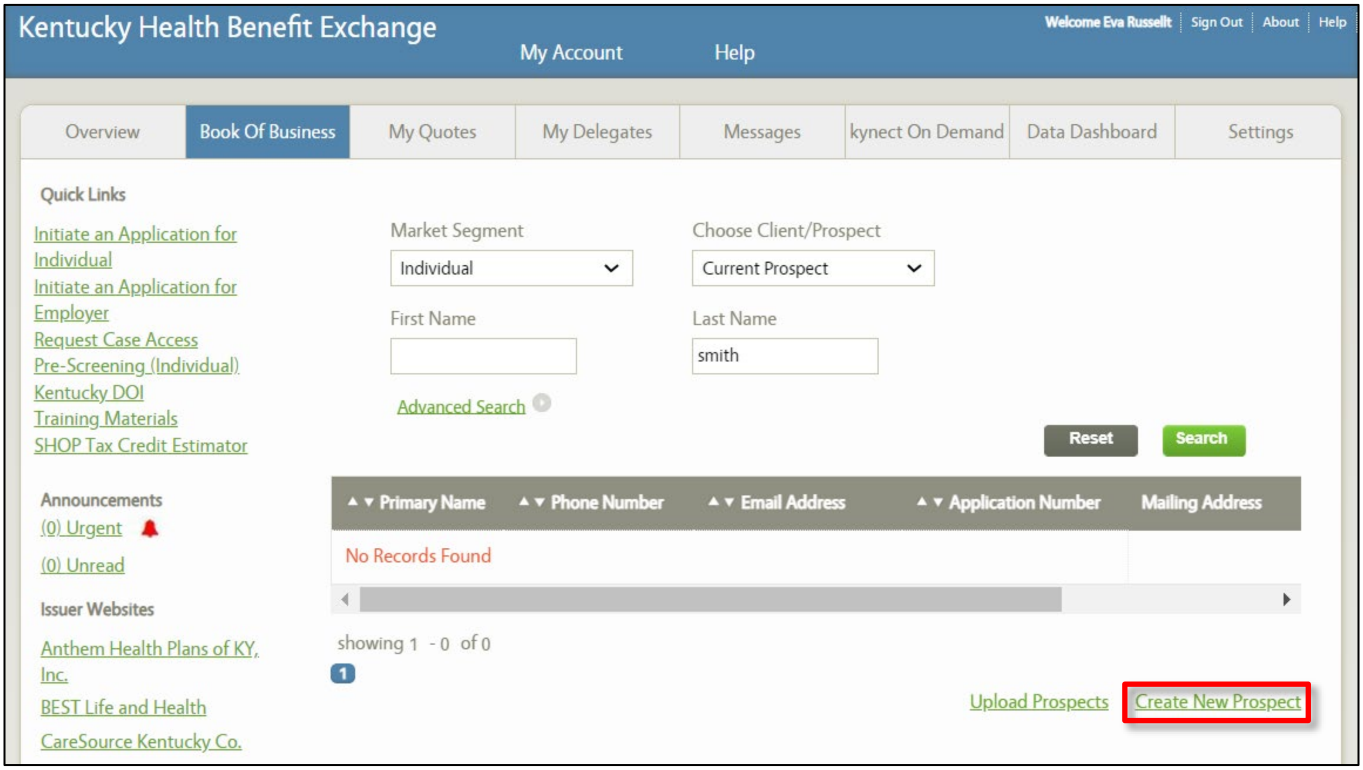
1. On the **Agent Portal Dashboard**, click **Book of Business** to navigate to the **Book of Business** screen.



2. Select **Current Prospect** from the *Choose Client/Prospect* drop-down.
3. Click **Search**.



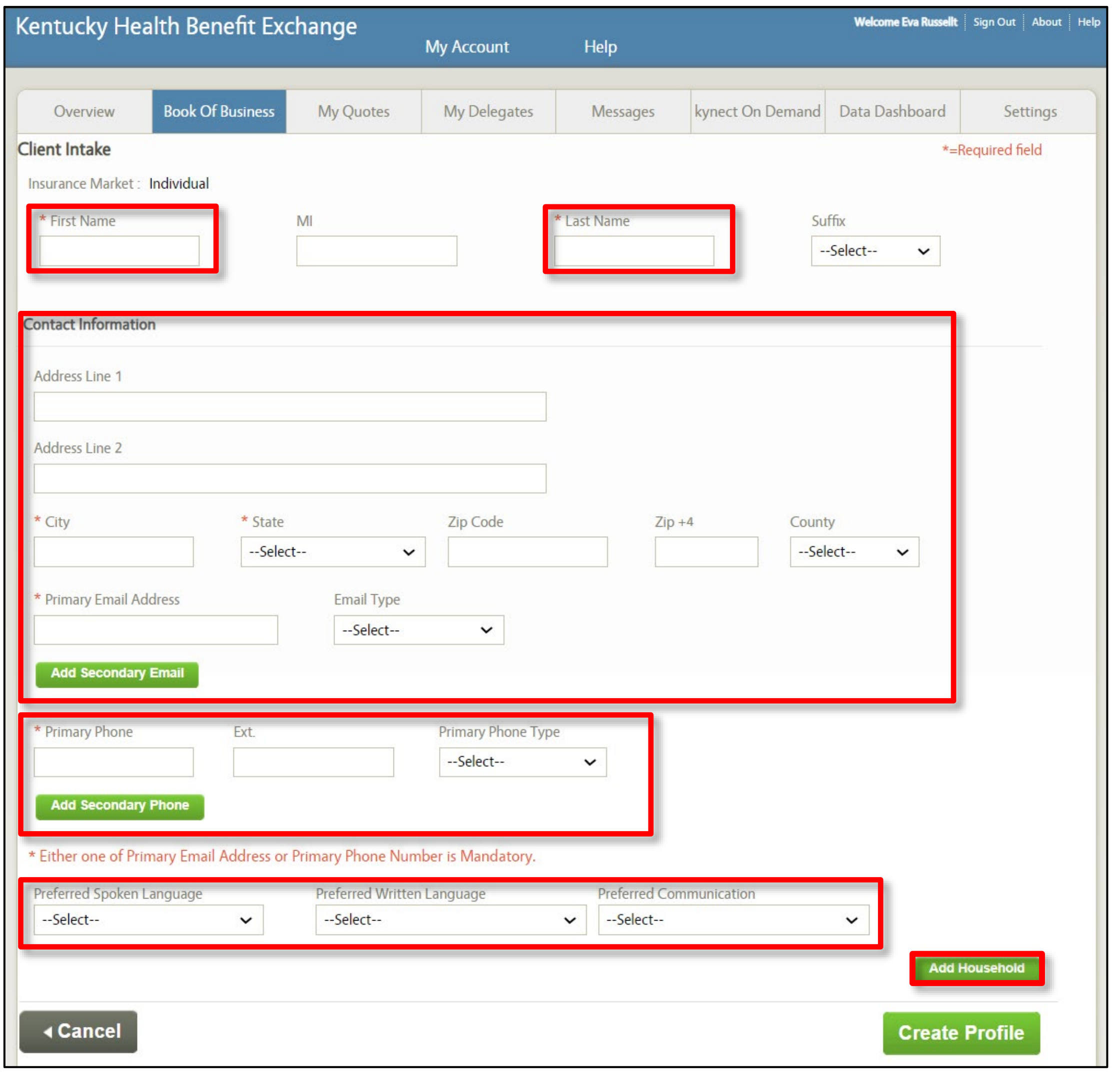
4. Click **Create New Prospect**.



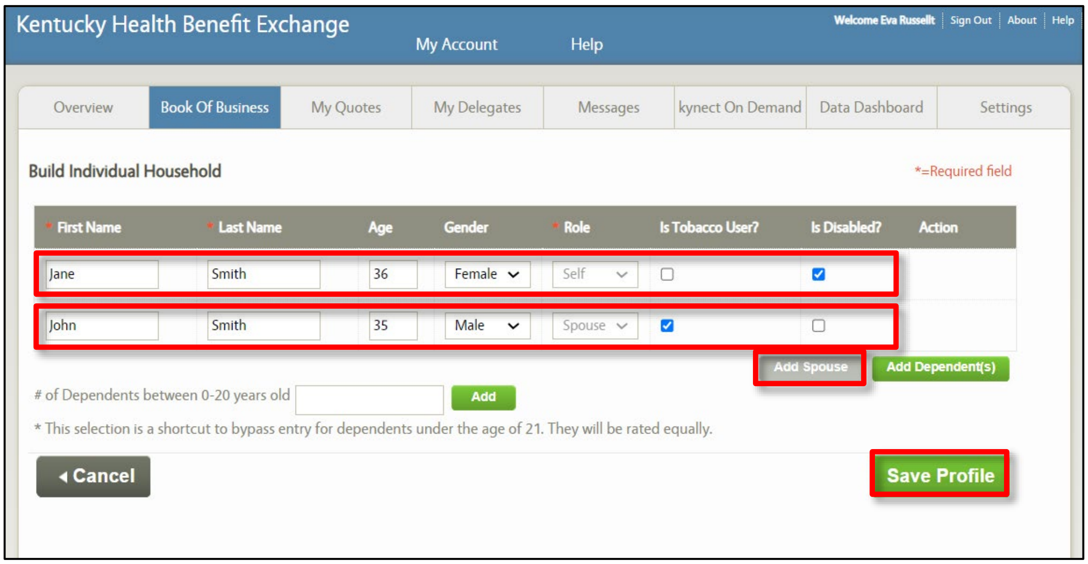
5. Enter the Prospect’s **First Name**.
6. Enter the Prospect’s **Last Name**.
7. Enter or select the Prospect’s *Contact Information* including **Address**, **City**, **State**, **Zip Code**, **County**, **Primary Email Address**, and **Email Type**.
8. Enter or select the Prospect’s **Primary Phone Number** and **Primary Phone Type**.

Please note: The *Primary Email Address* and *Primary Phone* fields are optional, but at least one of these fields must be completed to create the Prospect.

9. Select the Prospect’s **Preferred Spoken Language**, **Preferred Written Language**, and **Preferred Communication**.
10. Click **Add Household** to add other household members.



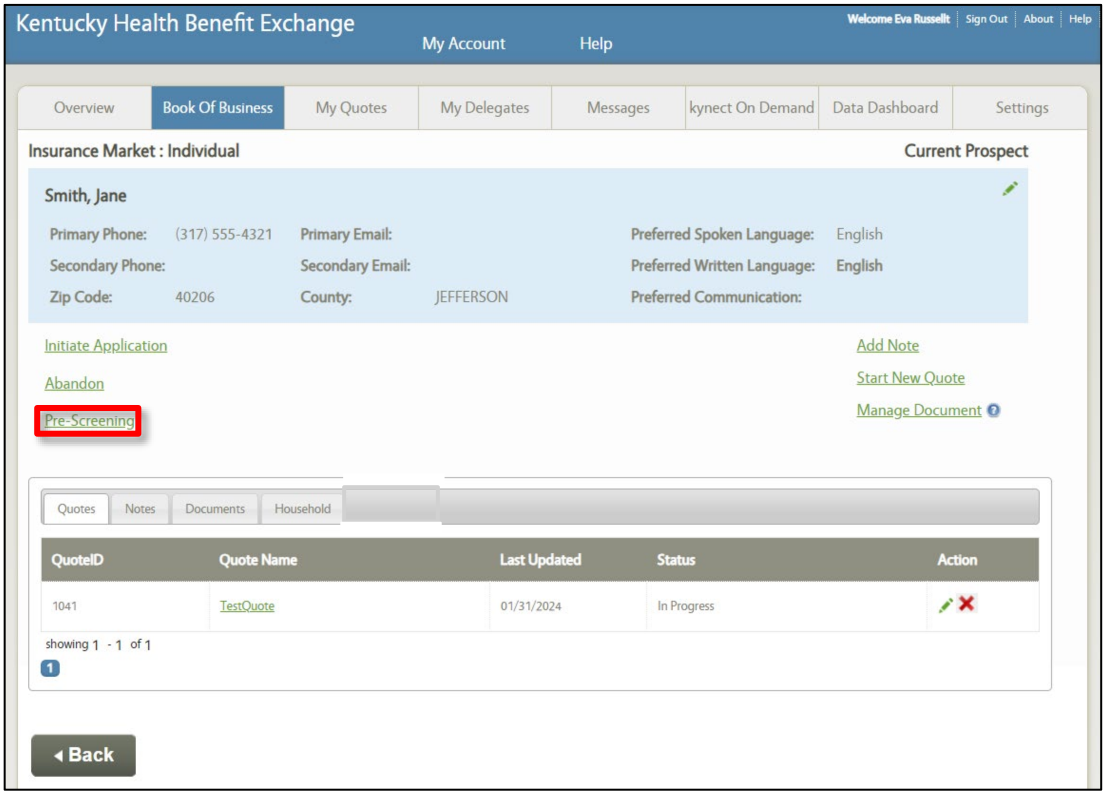
11. The Prospect's First Name and Last Name automatically populate**.** Enter the **Age, Gender,** and select whether the Individual is **disabled** and/or a **tobacco user**, if applicable.
12. Click **Add Spouse** to enter spousal information.
13. Enter the Spouse's **First Name, Last Name, Age, Gender,** and select whether the Individual is **disabled** and/or a **tobacco user**, if applicable.
14. Click **Save Profile** to save the household and add the Prospect.



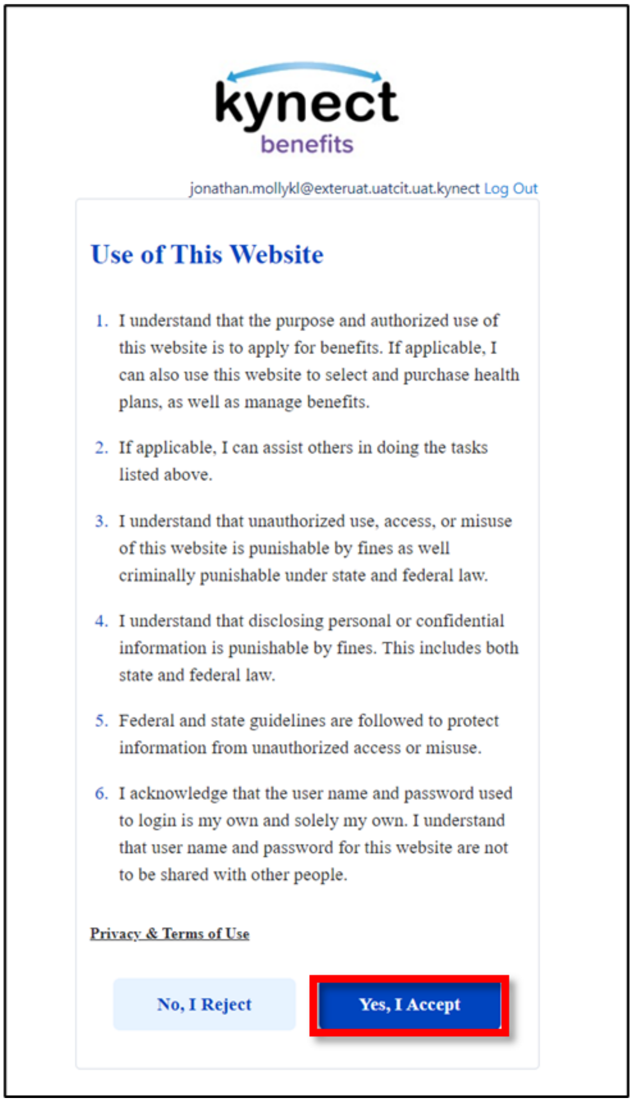
2.2 Submit the Benefits Application

Complete the following steps to submit a benefits application from Agent Portal:

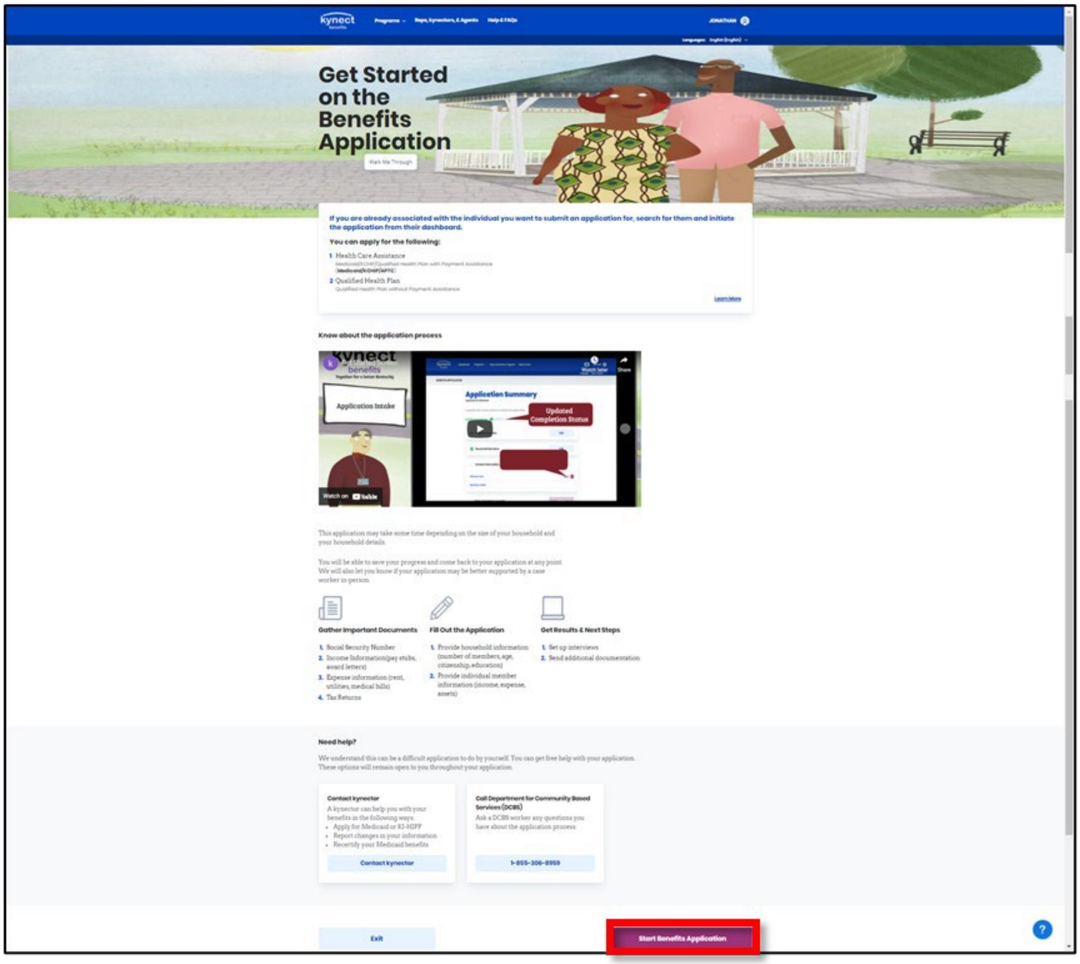
15. On the **Current Prospect** screen, click **Pre-Screening**.



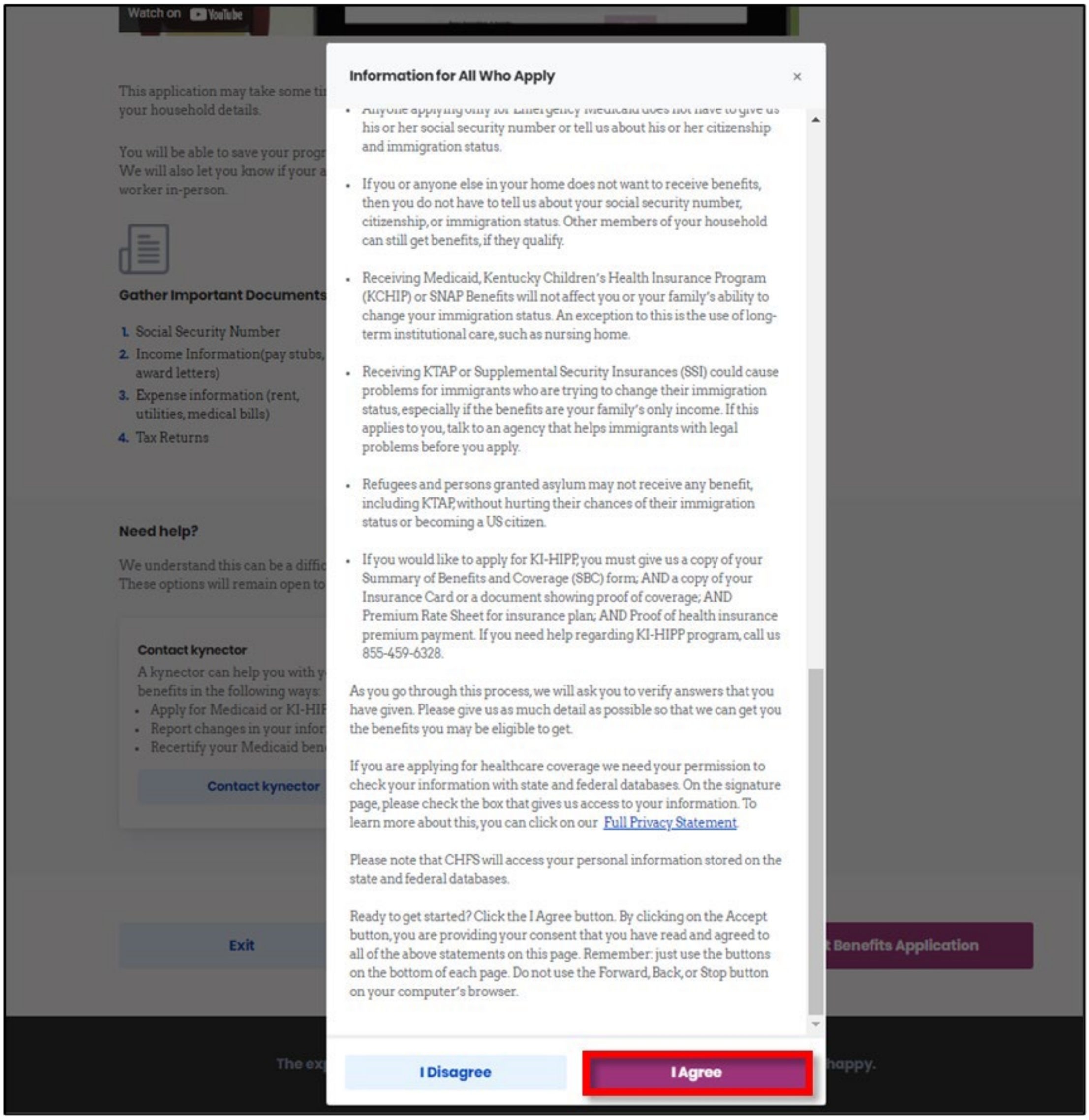
16. Click **Yes, I accept** to proceed to the benefits application.



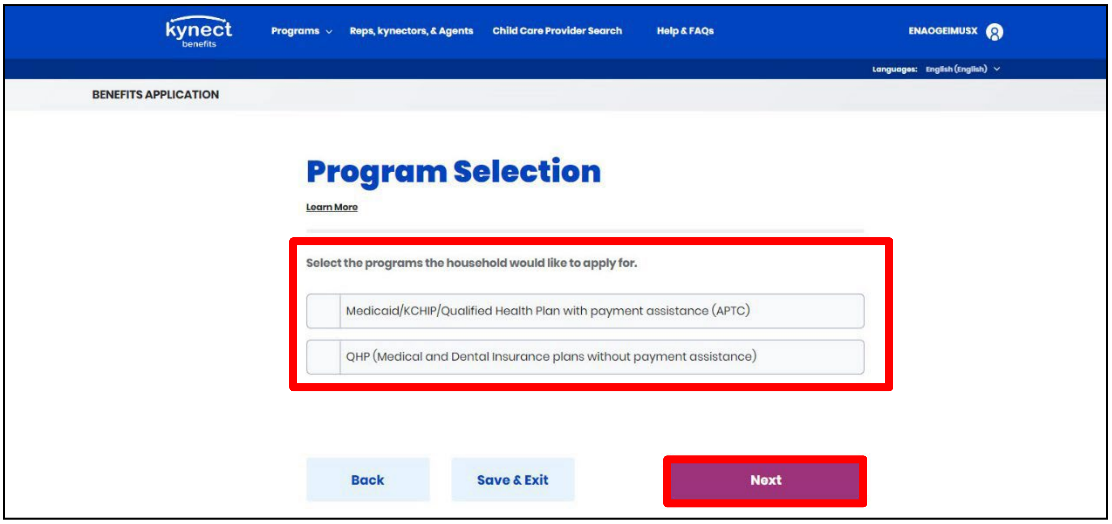
17. Click **Start Benefits Application**.



18. Read the *Information for All Who Apply* and click **I Agree**.

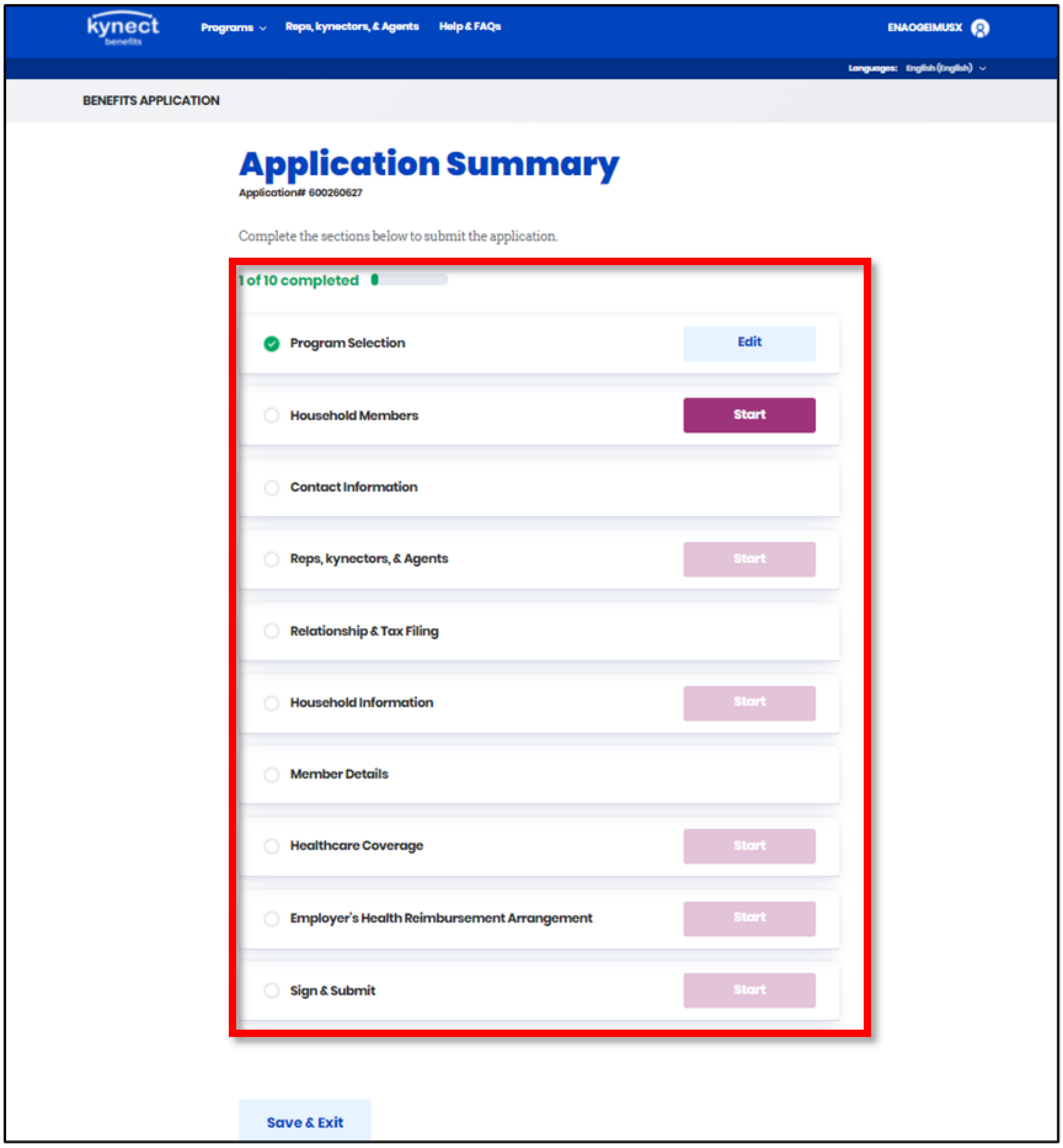


19. Select the **Program(s)** the Prospect would like to apply for.
20. Click **Next**.



Please note: Benefits may be grayed out if the program(s) are not applicable to the Individual. Hovering over the program will display informational text explaining the reason.

21. Complete the benefits application with the Prospect and submit the application to determine eligibility.

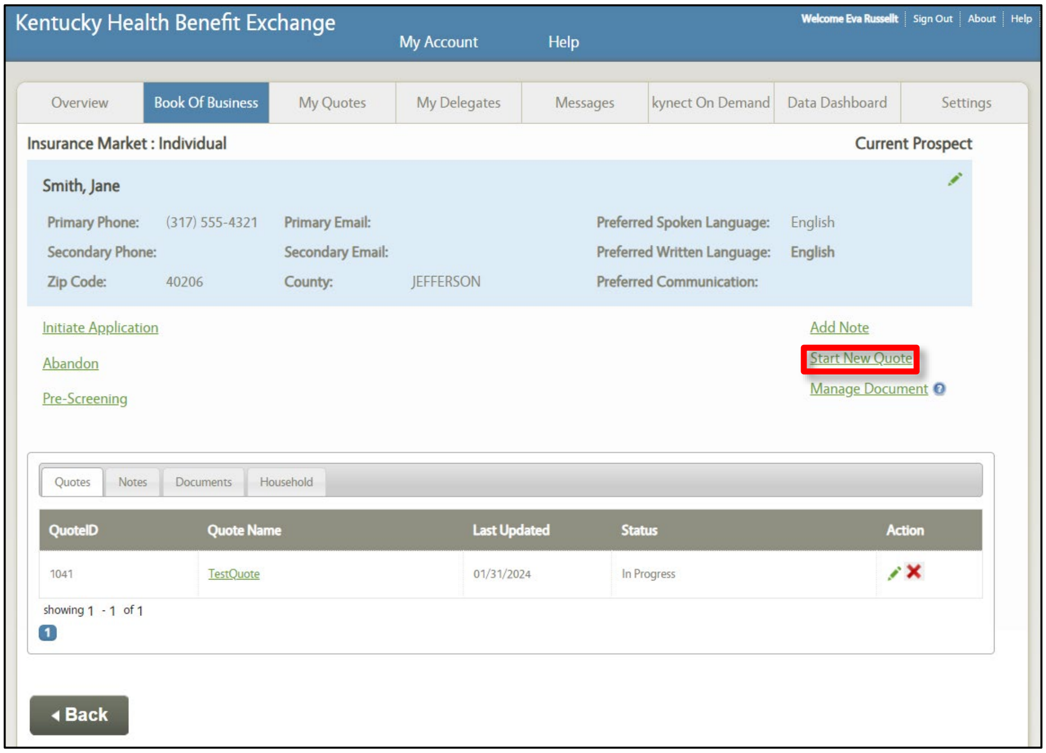


Please note: Refer to the **Benefits Application Within kynect benefits QRG** for steps to complete the benefits application.

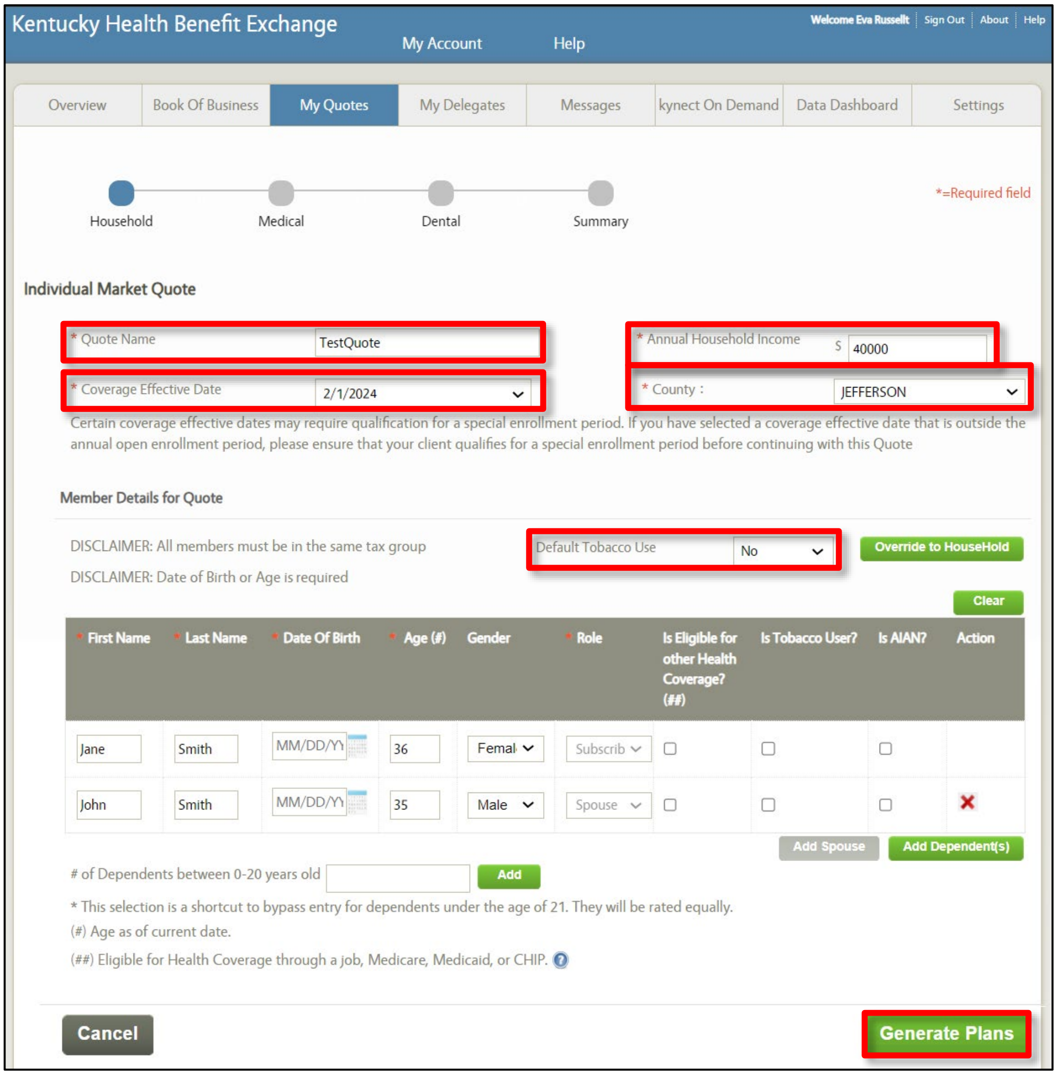
2.3 Create a Quote in Agent Portal

Complete the following steps to create a quote in Agent Portal:

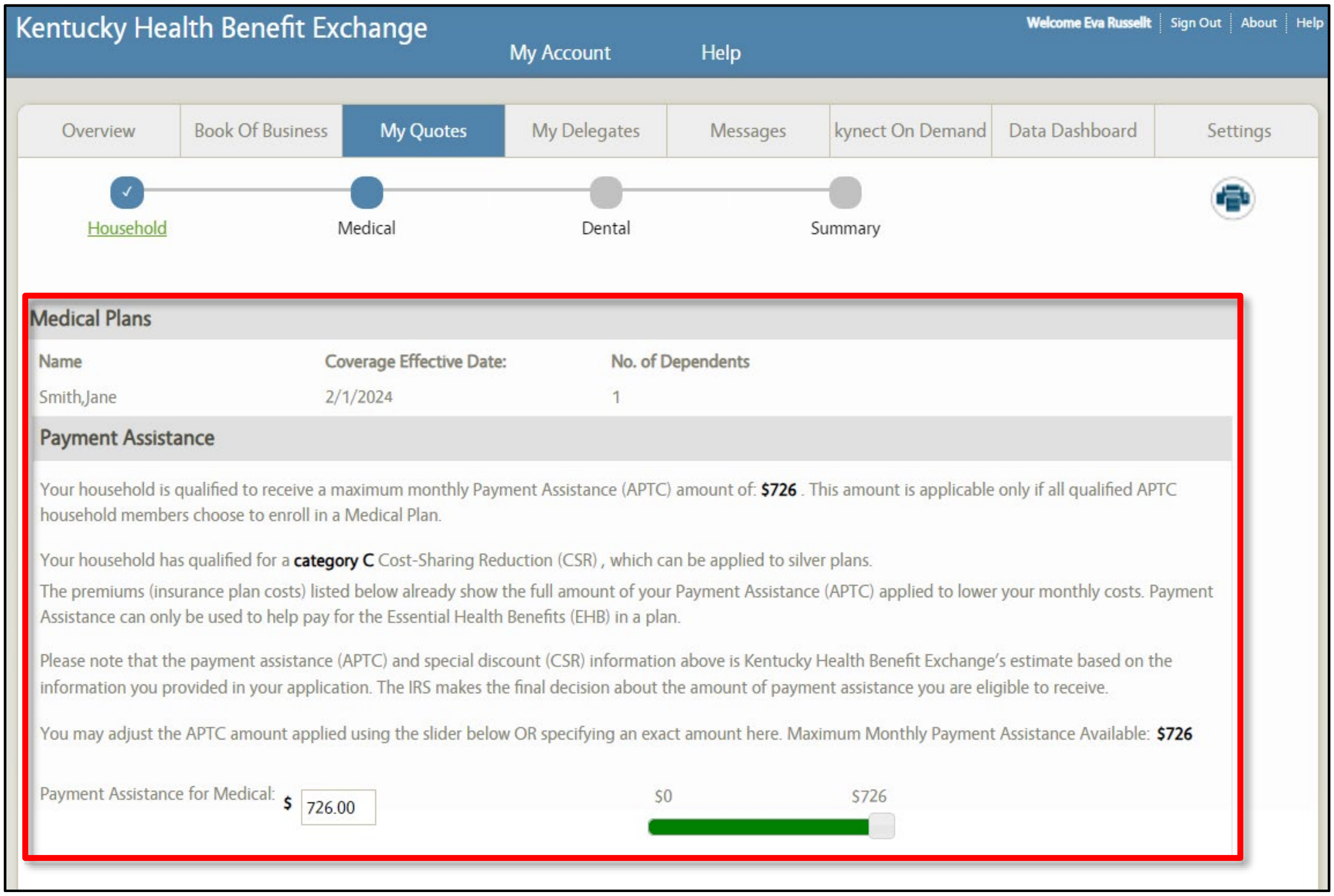
22. On the **Current Client** screen, click **Start New Quote**.



23. Enter the **Quote Name**.
24. Select the **Coverage Effective Date** from the drop-down.
25. Enter the **Annual Household Income**.
26. Select the **County** from the drop-down.
27. Select **Yes** or **No** for *Default Tobacco Use* from the drop-down.
28. Click **Generate Plans**.

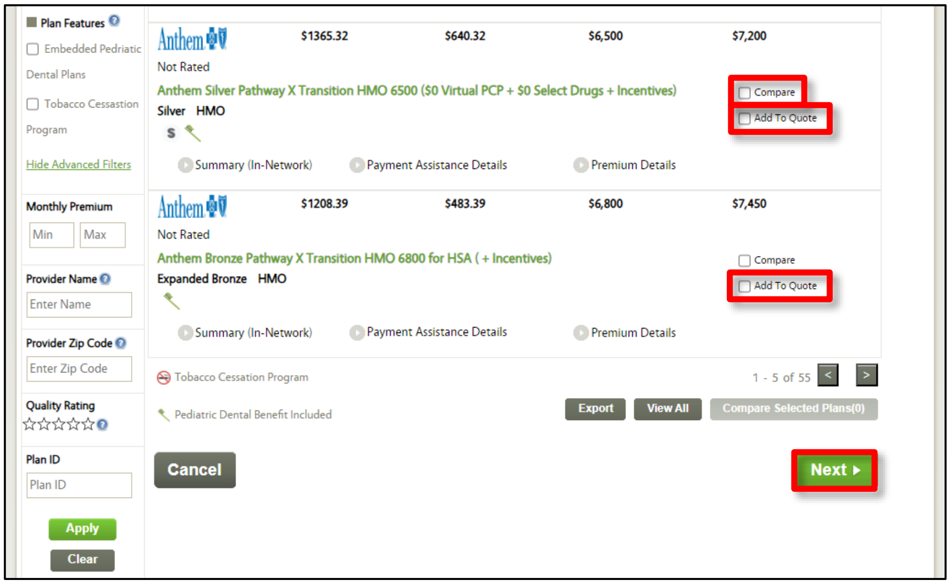


29. The APTC amount displayed is the maximum amount the household may apply to the Medical plan.



Please note: Agents may use the slider to update the APTC applied or enter the amount in the field.

30. Check **Compare** and click **Compare Selected Plans** to compare plans side-by-side.
31. Check **Add To Quote** for the desired plan.
32. Click **Next**.

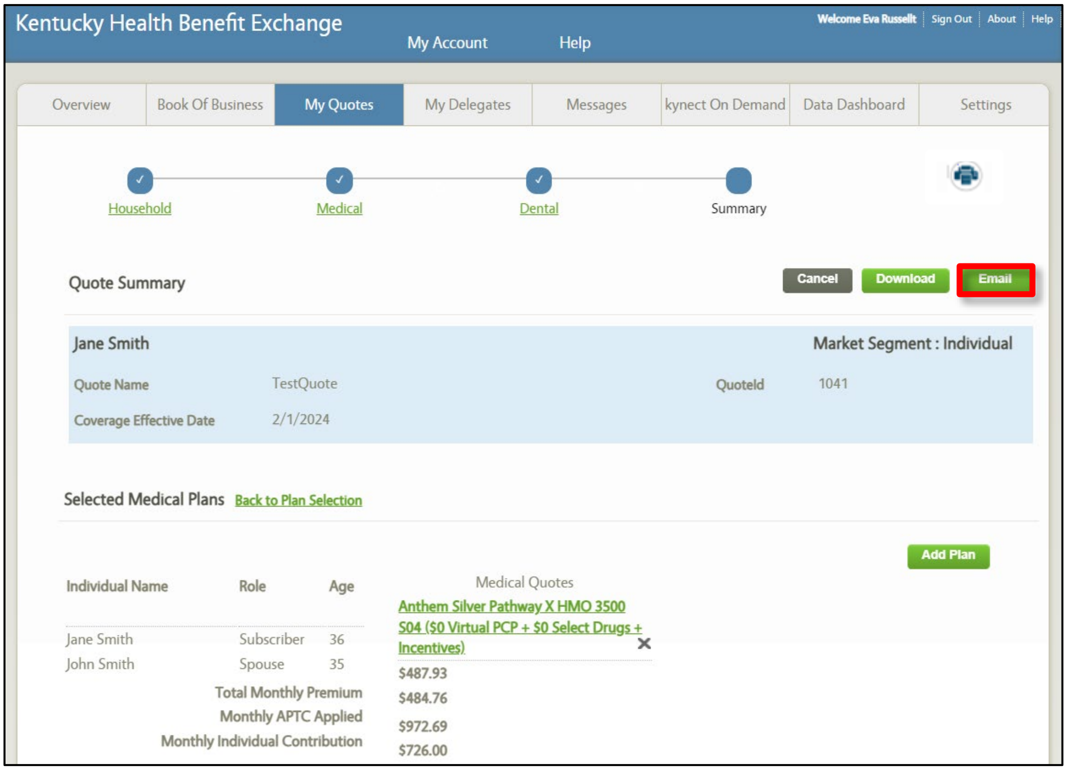


Please note: Agents may add a Dental plan to the quote by completing the same steps.

Please note: Agents may also print previously created Medical Plan quotes for Clients and Prospects by clicking the **Print** Icon located on the right-hand side of the **Medical Plan Search**, **Medical Plan Detail**, or **Compare Medical Plan** screens. Agents may print Dental Plan quotes for Clients and Prospects by completing the same steps for Medical Plan quotes.

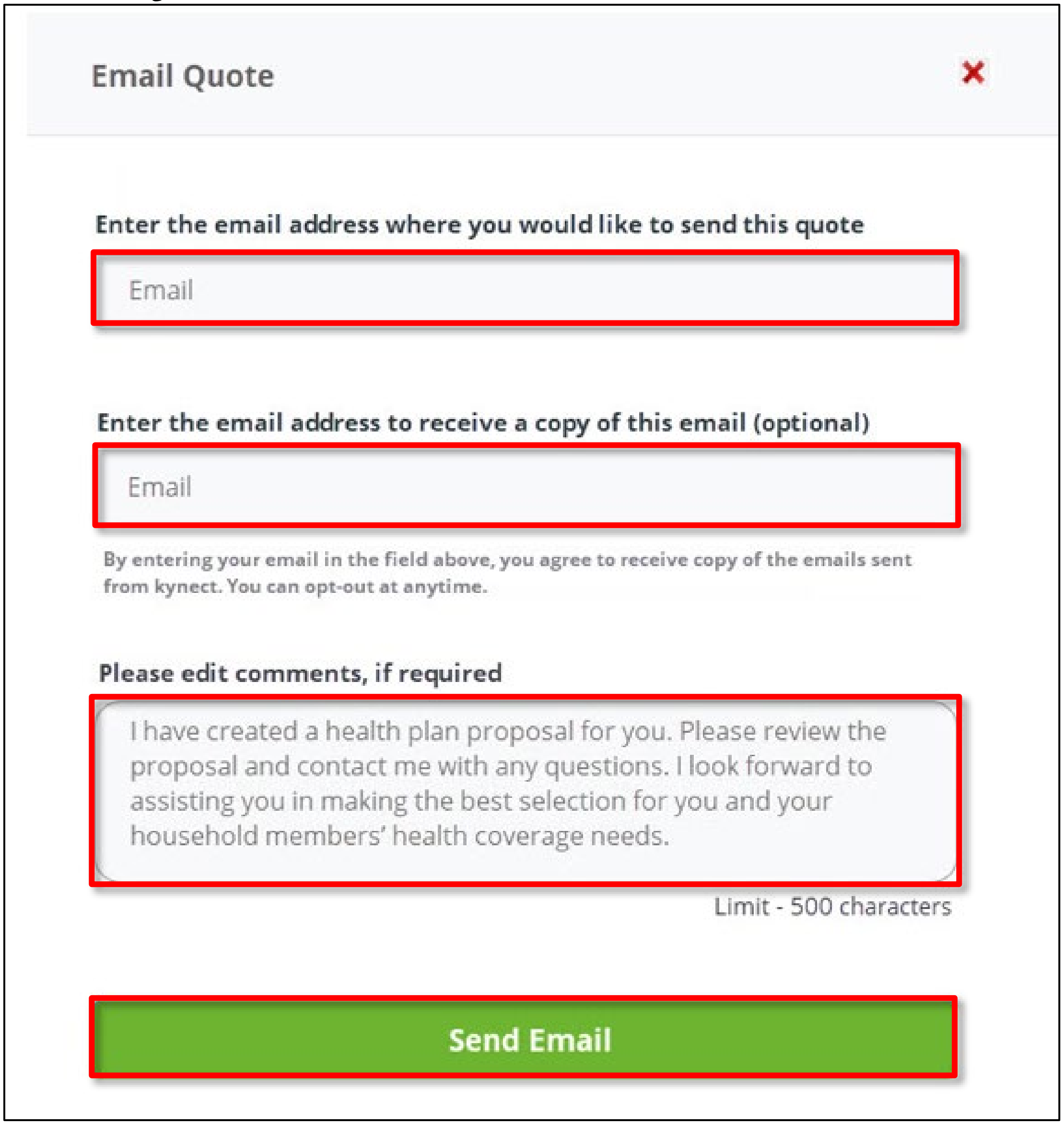
Please note: Clicking the **Email** icon or **Email** hyperlink on the **Medical Plan Search** or **Medical Plan Detail** screens enables Agents to send a copy of the **Quotes** they have created. Agents may email Dental Plan quotes for Clients and Prospects by completing the same steps for Medical Plan quotes.

33. The *Quote Summary* information displays. Click **Email** to email the quote to the Client.

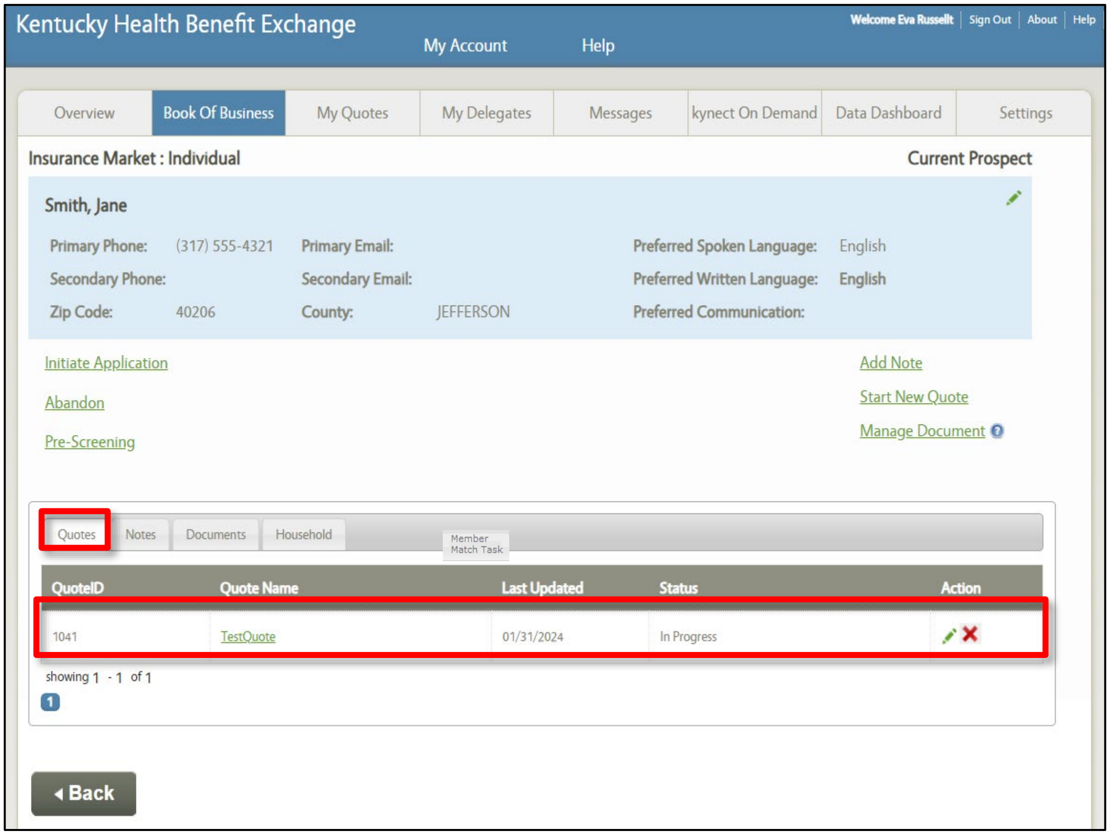


34. Enter your **Email Address**.

35. Enter the Resident's **Email Address**.
36. Enter **Comments** or use the automated text.
37. Click **Send Quote**.



38. The quote displays under the *Quotes* tab.

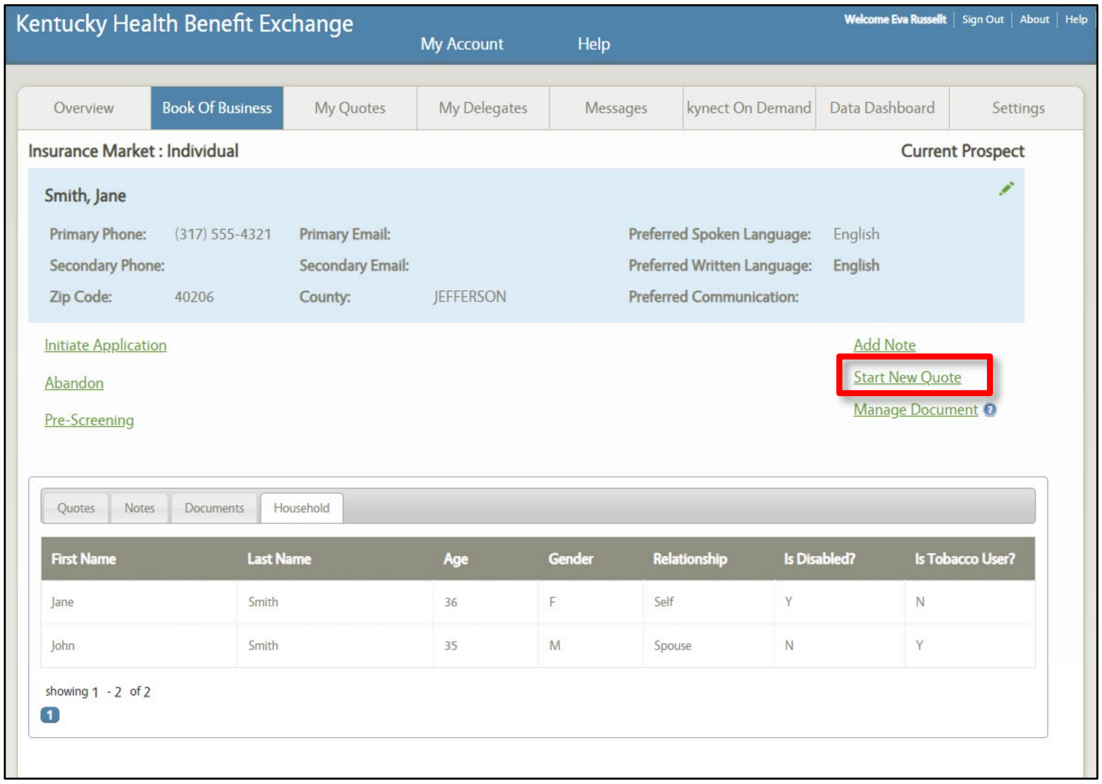


3 Scenario 2: Create a Quote for a Non-Prospect

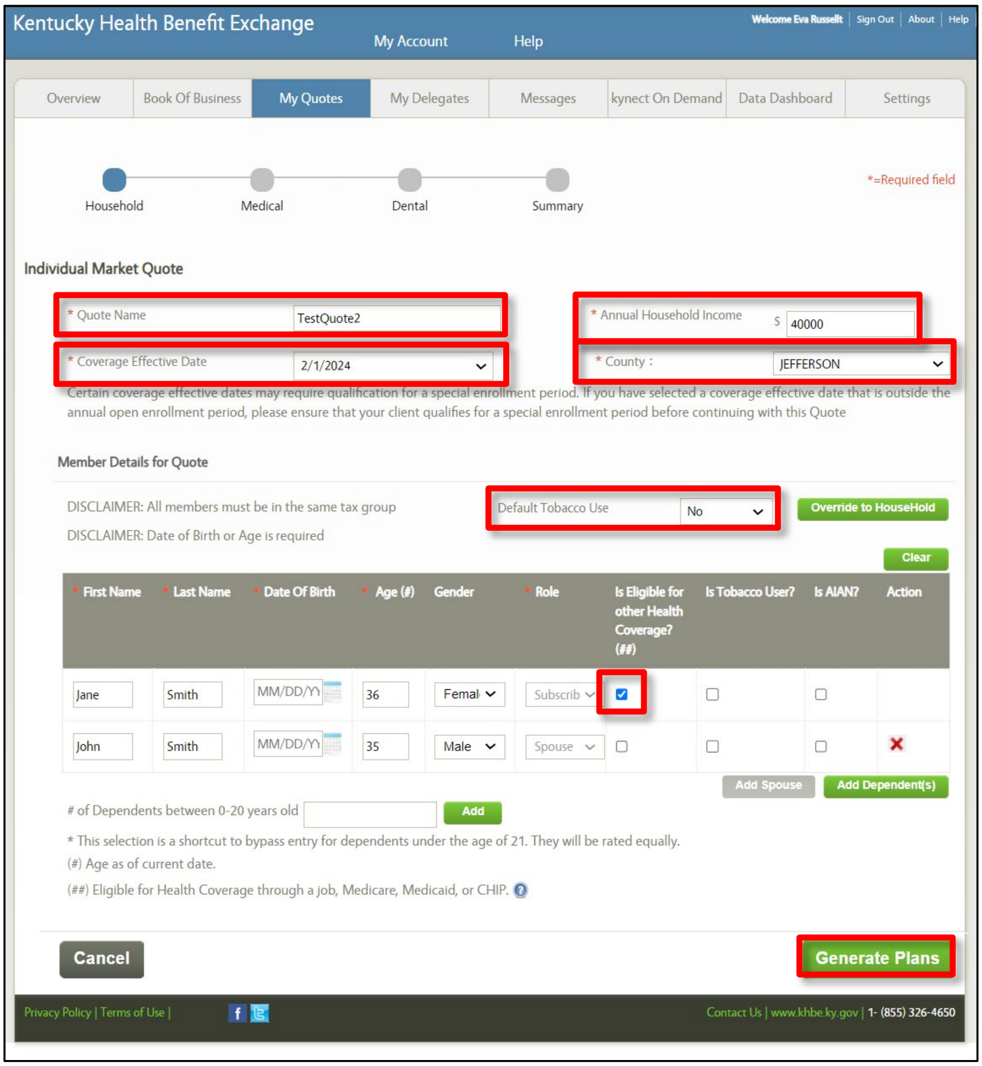
This scenario walks through the process of creating a quote in Agent Portal for an Individual not listed as the Prospect but included in the Household.

Complete the following steps to create a quote for a Non-Prospect in Agent Portal:

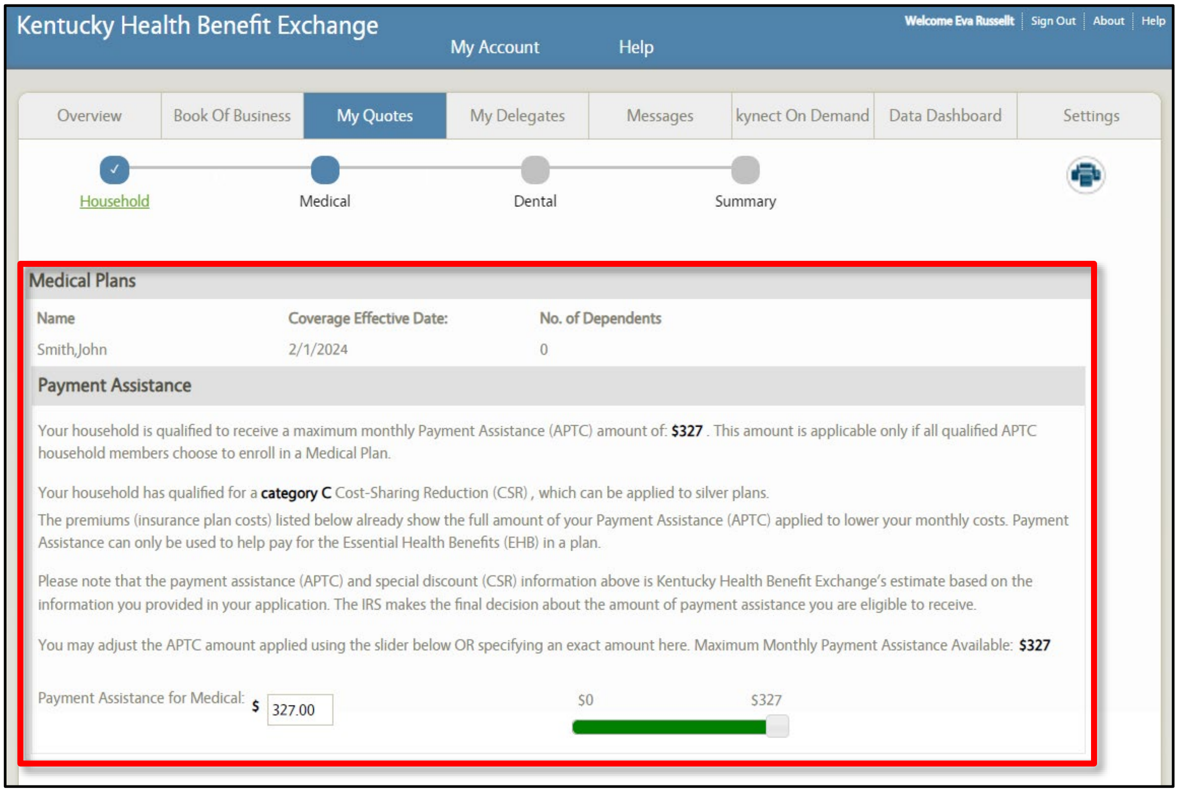
1. On the **Current Prospect** screen, click **Start New Quote**.



2. Enter the **Quote Name**.
3. Select the **Coverage Effective Date** from the drop-down.
4. Enter the **Annual Household Income.**
5. Select the **County** from the drop-down.
6. Select **Yes** or **No** for *Default Tobacco Use* from the drop-down.
7. Since the Individual is enrolled in Medicare and should not be included in the quote, check the **box** for *Is Eligible for other Health Coverage? (##)*.
8. Click **Generate Plans**.

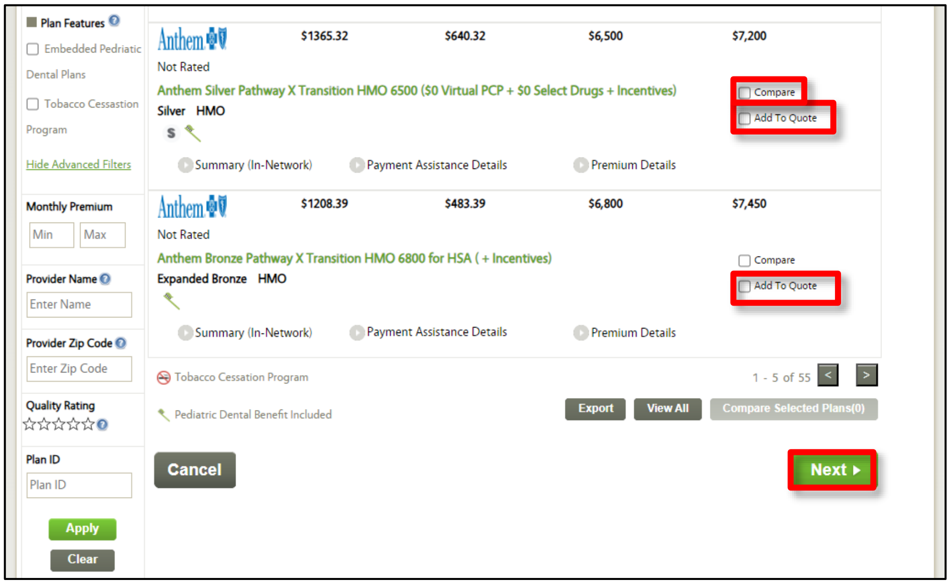


9. The APTC amount displayed is the maximum amount the household may apply to the Medical plan.



Please note: Agents may use the slider to update the APTC applied or enter the amount in the field.

10. Check **Compare** and click **Compare Selected Plans** to compare plans side-by-side.
11. Check **Add To Quote** for the desired plan.
12. Click **Next.**

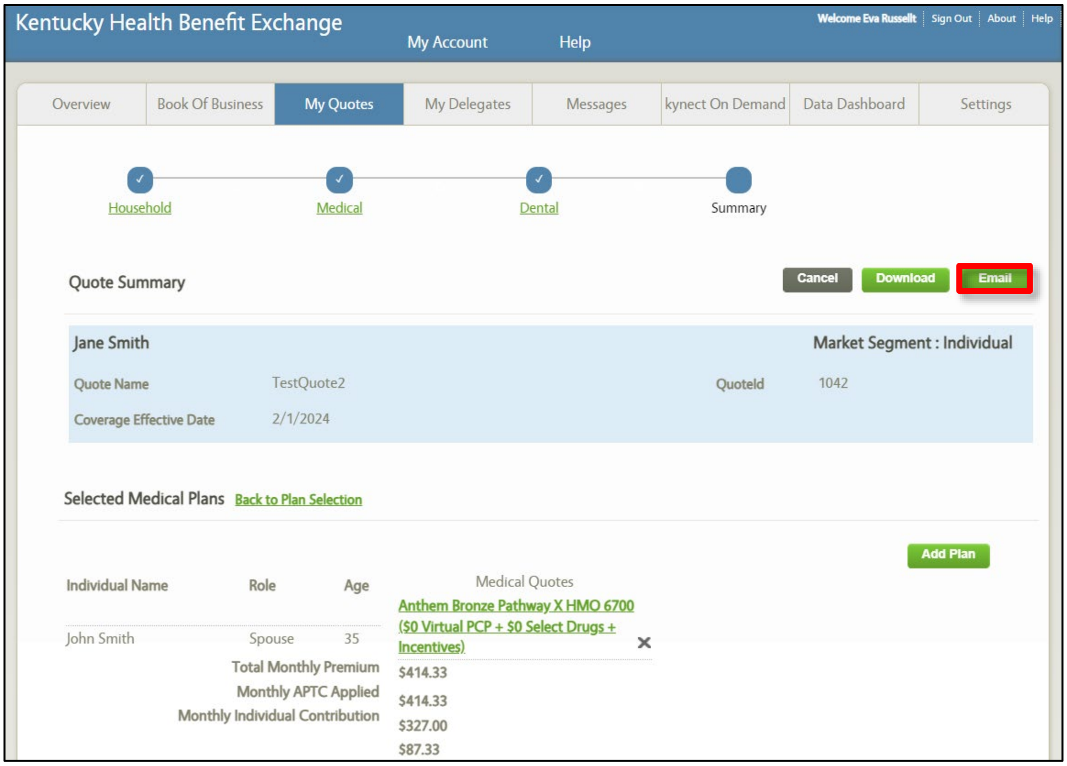


Please note: Agents may add a Dental plan to the quote by completing the same steps.

Please note: Agents may also print previously created Medical Plan quotes for Clients and Prospects by clicking the **Print** Icon located on the right-hand side of the **Medical Plan Search**, **Medical Plan Detail**, or **Compare Medical Plan** screens. Agents may print Dental Plan quotes for Clients and Prospects by completing the same steps for Medical Plan quotes.

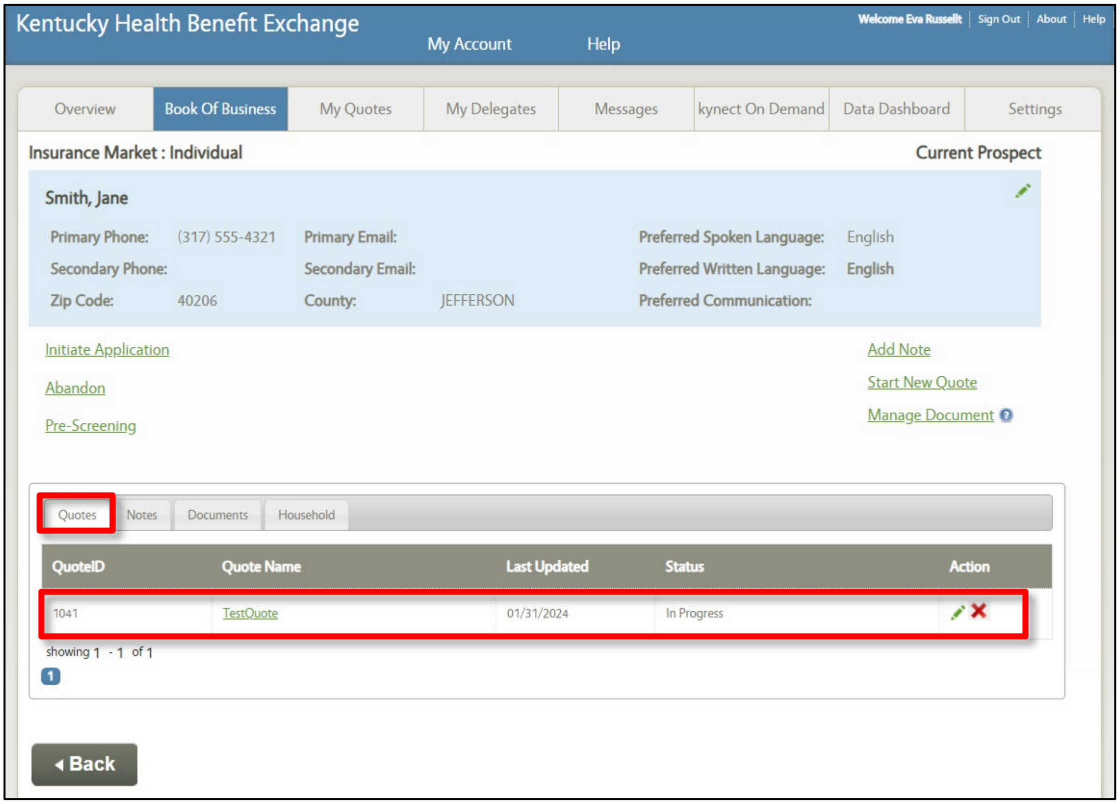
Please note: Clicking the **Email** icon or **Email** hyperlink on the **Medical Plan Search** or **Medical Plan Detail** screens enables Agents to send a copy of the **Quotes** they have created. Agents may email Dental Plan quotes for Clients and Prospects by completing the same steps for Medical Plan quotes.

13. The *Quote Summary* information displays. Click **Email** to email the quote to the Client.



Please note: The quote created is only for the Subscriber, but the Spouse remains in the tax household. The Client's name will still appear in the *Quote Summary* section.

14. The quote displays under the *Quotes* tab.

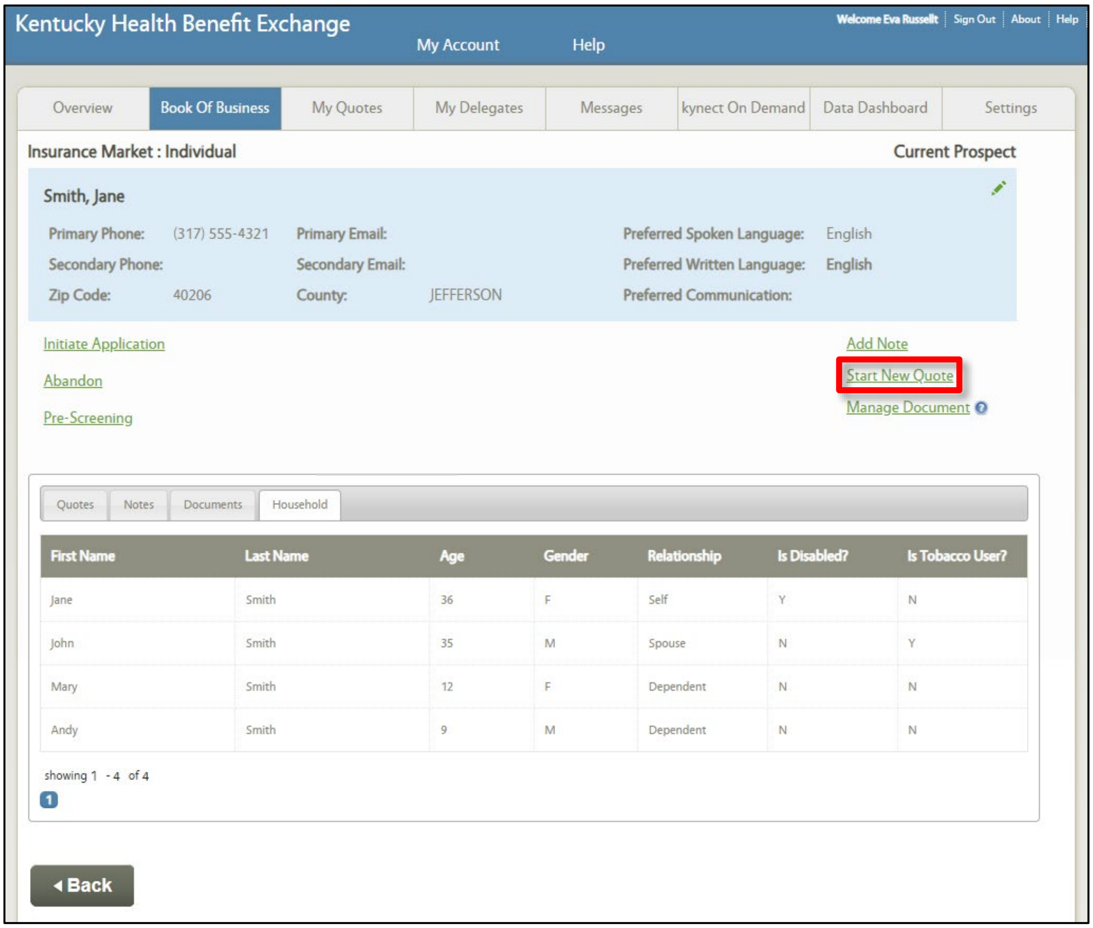


4 Scenario 3: Create a Quote for Two Individuals (QHP) and Two Children (KCHIP)

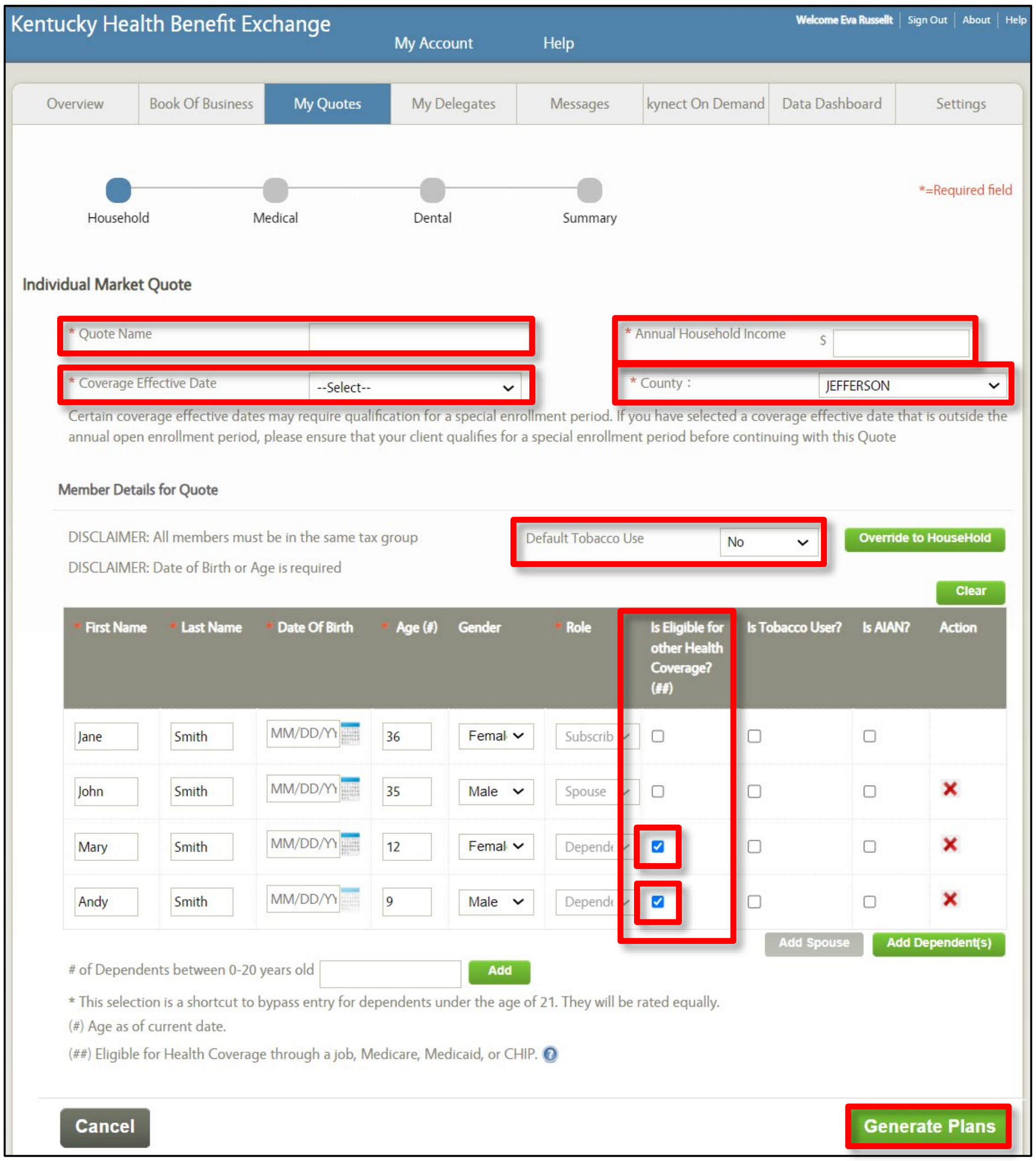
This scenario walks through the process of creating a quote in Agent Portal for two Individuals eligible for QHP and removing the two Dependents receiving KCHIP.

Complete the following steps to create a quote for two Individuals (QHP) and two Children (KCHIP) in Agent Portal:

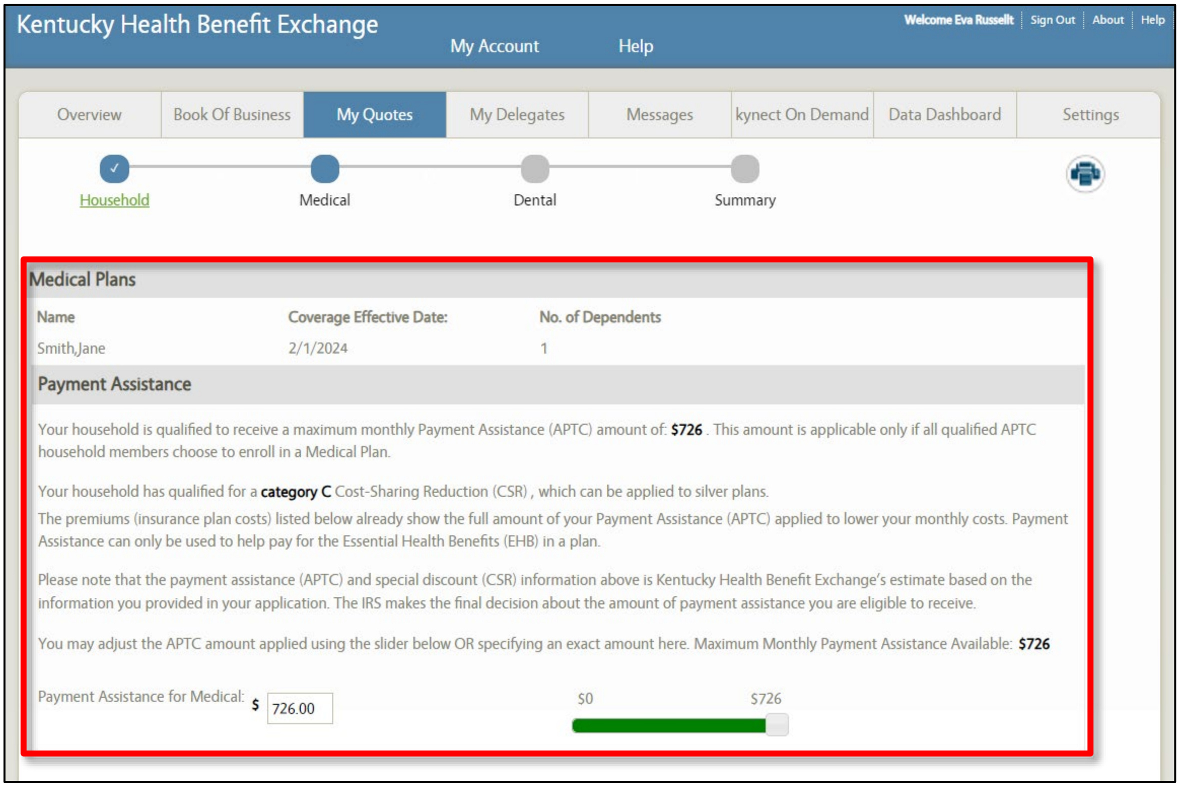
1. On the **Current Prospect** screen, click **Start New Quote**.



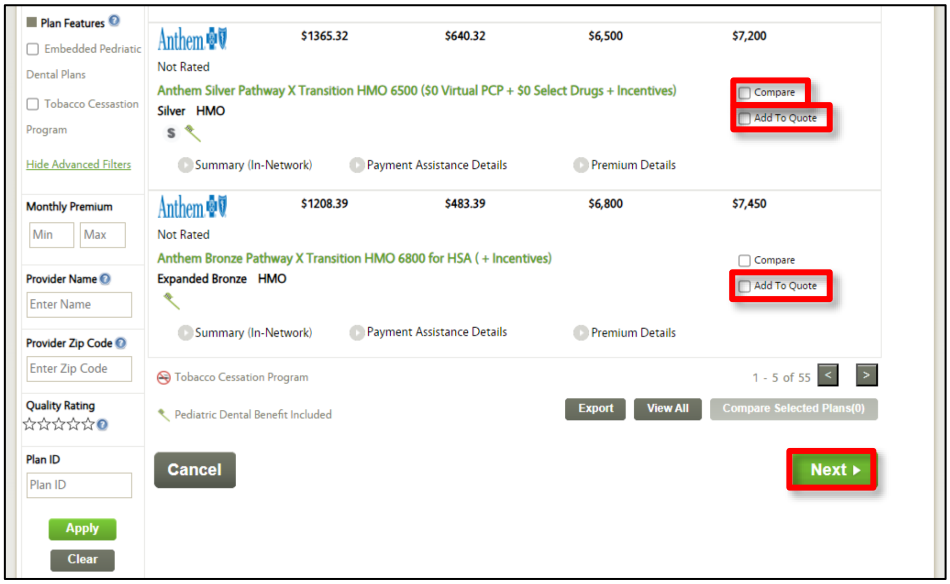
2. Enter the **Quote Name**.
3. Select the **Coverage Effective Date** from the drop-down.
4. Enter the **Annual Household Income.**
5. Select the **County** from the drop-down.
6. Select **Yes** or **No** for *Default Tobacco Use* from the drop-down.
7. Since the dependents are enrolled in KCHIP and should not be included in the quote, check the **box** for *Is Eligible for other Health Coverage? (##)*.
8. Click **Generate Plans**.



9. The APTC amount displayed is the maximum amount the household may apply to the Medical plan.



10. Check **Compare** and click **Compare Selected Plans** to compare plans side-by-side.
11. Check **Add To Quote** for the desired plan.
12. Click **Next.**

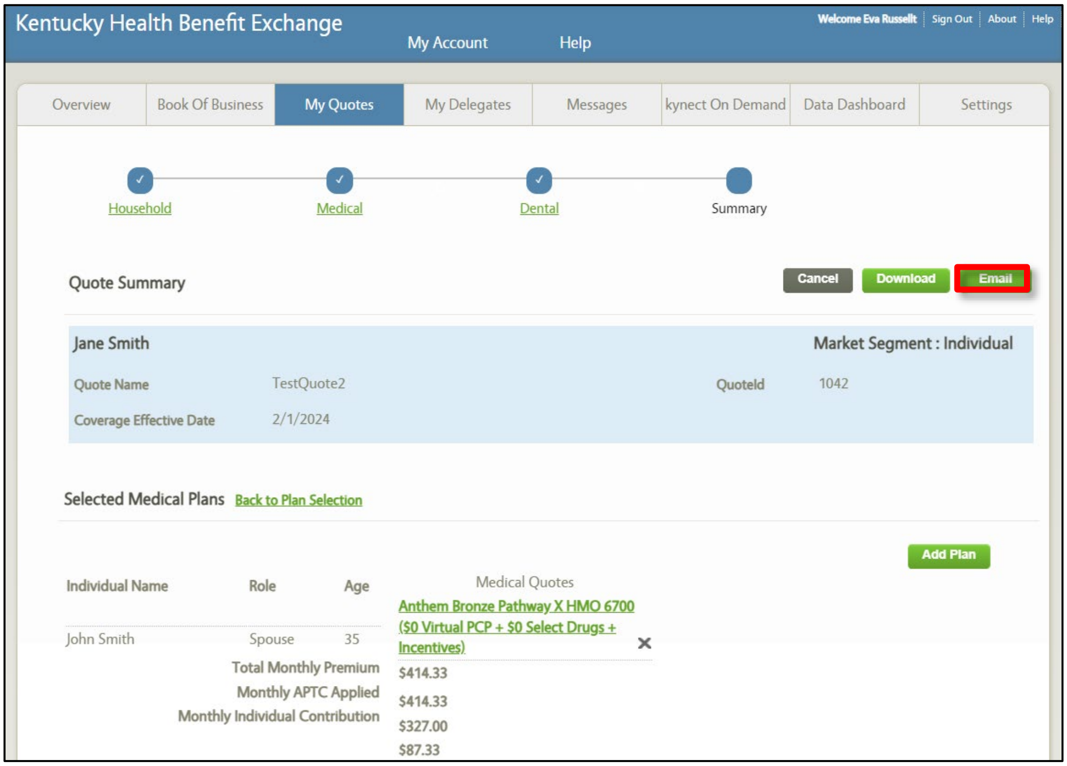


Please note: Agents may add a Dental plan to the quote by completing the same steps.

Please note: Agents may also print previously created Medical Plan quotes for Clients and Prospects by clicking the **Print** Icon located on the right-hand side of the **Medical Plan Search**, **Medical Plan Detail**, or **Compare Medical Plan** screens. Agents may print Dental Plan quotes for Clients and Prospects by completing the same steps for Medical Plan quotes.

Please note: Clicking the **Email** icon or **Email** hyperlink on the **Medical Plan Search** or **Medical Plan Detail** screens enables Agents to send a copy of the **Quotes** they have created. Agents may email Dental Plan quotes for Clients and Prospects by completing the same steps for Medical Plan quotes.

13. The *Quote Summary* information displays. Click **Email** to email the quote to the Client.



Please note: The quote created is only for the Subscriber and Spouse, but the Dependents remain in the tax household.

14. The quote displays under the *Quotes* tab.