# The Commonwealth of Kentucky kynect State-Based Marketplace



## Document Upload Quick Reference Guide for Agents

### Introduction

This document is intended to provide step by step instructions for Agents to upload Client documents to Agent Portal and kynect benefits.

#### **Table of Contents**

1	D	ocument Upload Overview	3
2	U	ploading a Document in Agent Portal	3
3	U	ploading a Document in kynect benefits	5
;	3.1	Submitting Additional Documents	.11
	3.2	Tips for Document Upload	.12

#### **1** Document Upload Overview

The Document Upload process provides Agents with simple and guided instructions for uploading documents that may be requested to verify information during the enrollment process. During the enrollment process, many cases may have a Request for Information (RFI) to complete the application. RFIs verify a Client's information so correct eligibility may be returned and to ensure proper benefits are being applied. There are two different ways that an Agent may upload documents for their Clients and Prospects. Those methods are through Agent Portal and in kynect benefits.

#### 2 Uploading a Document in Agent Portal

Agents may upload documents for clients and prospects on Agent Portal. Agents upload documents providing proof of information needed to apply for benefits such as income information, tax records, Social Security Number, citizenship information, etc.

Below are the steps to complete the Document Upload process in Agent Portal:

- 1. Navigate to the Book of Business screen in Agent Portal.
- 2. Select Current Client or Current Prospect drop-down.
- 3. Click Search.
- 4. Select a **Client** or **Prospect Name**.
- 5. Click Upload Document.

Overview     Book C       nsurance Market : Individual       WMALHL, RJELLA       Primary Phone:     (813) 456-7890       Secondary Phone:     (123) 456-7890       Zip Code:     12705       kynect benefits dashboard       Disassociate       Pre-Screening       Quotes     Notes       QuoteID     Quote National Science	Of Business Primary Email: Secondary Email: County:	My Quotes Optim@Script.com NELSON	My Delegates Case #: Preferred Spoken Preferred Written Preferred Commu	Messages Language: Englisi Language: Englisi Inication: Paper	Settings Current Client 110003253
Insurance Market : Individual       WMALHL, RJELLA       Primary Phone:     (813) 456-7890       Secondary Phone:     (123) 456-7890       Zip Code:     12705       kynect benefits dashboard     Disassociate       Pre-Screening     Documents       Quotes     Notes     Documents	Primary Email: Secondary Email: County:	Optim@Script.com NELSON	Case ≢: Preferred Spoken Preferred Written Preferred Commu	: Language: Englisi Language: Englisi Inication: Paper	Current Client
WMALHL, RJELLA       Primary Phone:     (813) 456-7890       Secondary Phone:     (123) 456-7890       Zip Code:     12705       kynect benefits dashboard       Disassociate       Pre-Screening       Quotes     Notes       QuoteID     Quote National Actional Actionactional Actional Actional Actional Actional Actionactional Actiona	Primary Email: Secondary Email: County:	Optim@Script.com NELSON	Case #: Preferred Spoken Preferred Written Preferred Commu	: Language: Englisi Language: Englisi Inication: Paper	110003253 h
Primary Phone:     (813) 456-7890       Secondary Phone:     (123) 456-7890       Zip Code:     12705       kynect benefits dashboard     Disassociate       Pre-Screening     Value       Quotes     Notes     Documents       QuoteID     Quote National Actional	Primary Email: Secondary Email: County:	Optim@Script.com	Preferred Spoken Preferred Written Preferred Commu	Language: Englisi Language: Englisi inication: Paper	h 1
kynect benefits dashboard Disassociate Pre-Screening Quotes Notes Documents QuoteID Quote Na					
Quotes Notes Documents QuoteID Quote Na				Add N Start N Upload	ote lew Quote d Document
QuoteID Quote Na	Household Enrollment	в			
	ame	Last Updated	Status		Action
No Records Found					

- 6. Click **Browse** to open the File Folder.
- 7. Enter **Comments** detailing the information that is included in the selected document(s).
- 8. Click Upload.

,	Health Benefit Exchange	My Account	Help	Toroning Principal 4	
Over	view Book Of Business	My Quotes	My Delegates	Messages	Settings
urance	Manage Documents				× ect
eam, <sub>.</sub> Primary	Add Documents				ſ.
ieconc	Document Name		Browse		
Zip Co	* Comments				
nitiate .					
bando					
Ouotes	Cancel				Upload
QuotelD	Quote Name	Last Up	dated Status		Action
	iim's quote	12/20/20	Accepted	~	ł x
995					

#### **3 Uploading a Document in kynect benefits**

Agents can begin the Document Upload process from the Resident Dashboard in kynect benefits. A benefits application must be signed and submitted before kynect benefits allows users to submit documents as forms of proof.

It is very important that all required documents and RFI's are submitted through the Document Wizard. The steps below are the quickest way to have documents reviewed and approved:

1. Click **Documents** on the side menu of the Resident Dashboard to be taken to the **Document Center**.

	Kynect Dashboard Programs v Reps, kynectors, & Agents Help & FAQ's	🕑 Michoel 👰
Overview Benefits	Welcome, Michael Vonn	Add Other Benefits Percet a Change
Documents Claims & Payments Hearings	New Test Announcement	
	View details on your benefits application, cases, and benefits.  Benofits →	View your to-do list and messages.  Message Conter →

2. View the required documents under the **Documents Needed** tab.

Jpload the requested documents fo	or your household step-by-step.	
Document Wizard		
fuou do not see the appropriate rece	quest unload additional documents	
r you do not see the appropriate ree	quest, upioad additional documents.	
Unload Decuments		
opioda Documents		
opioda Documents		
Documents	ments Needed (1)	Recently Reviewed (1)
Docur	ments Needed (1)	Recently Reviewed (1)
Docur Michael Vonn	nents Needed (1)	Recently Reviewed (1)
Michael Vonn US Citizenship	ments Needed (1)	Recently Reviewed (1)

**Please note:** Documents remain under the **Documents Needed** tab as pending until they are accepted. Once they are reviewed and accepted, they appear in the **Recently Reviewed** tab.

3. Click **Document Wizard** to being uploading documents for open requests.

Ready to	pupload documents we requested?	
Upload the	e requested documents for your household step-by-step.	
Docur	ment Wizard	

4. Click **Start Uploading** after reviewing the information on the **Get Started Uploading Forms of Proof** screen.



- 5. Select **Yes** or **No** for *Do you have proof* question on the **Proof** screen.
- 6. Click Next.
  - If Yes for the proof question, then the **Document Upload** screen displays.
  - If **No** was selected for the *Do you have proof* question, then the **Proof** screen for the next document requested displays.

Michael Vonn's US	Citizenship			
Recommended	forms of proof:			
• Hospital Birth	Record			
<ul> <li>Passport</li> </ul>				
<ul> <li>School Record</li> </ul>				
View acconted for				
wiew accepted for	<u>ns of proof</u>		_	
Do you have pro	ns of proof oof of Michael Vor	nn's US Citizen No	ship?	Next

Please note: Click View accepted forms of proof to view a list of all accepted
documents.

7. Select the type of document being uploaded in the Form of proof drop-down menu.

**Please note:** A hyperlink to download a template appears if there is a template document to help satisfy the need of the request.

8. Click the **Document** icon to search the device's files and select the document to upload from the computer or mobile device.

Upload Michael Vonn's US Citizenship: Michael Vonn
Form of proof Birth Certificate
+
You may attach more than one document for this proof.
Add Document
Upload & Continue

- 9. Click **Add Document** to add an additional document if there is more than one document for this proof.
- 10. Click **Upload & Continue** to return to the **Proof** screen for the next request.

м	Jpload ichael Vonn's US Citizenship: Mi	ichael Vonn		
	Birth Certificate <u>Birth Certificate.pdf</u>			圃
Y	ou may attach more than o Add Document	one document for this proof.		
	Skip		Upload & Continue	

11. The **Document Wizard** will walk the user through the steps to upload a document for each request. After all documents have been submitted, the **Submitted Documents** screen displays.

kynect Dashboard I	Programs v Reps, kynectors, E Agents Help & FAQ's 📨 Michael 🔗
	Langueges: English (English) v
Submitted Documents	
We have received the documents below and are in the process of reviewing verification was not submitted or if we are unable to use as a form of proof, j to the Document Center and upload the appropriate documents.	g. If a request for ,please be sure to return
You can review each request status individually on the Document Center. If uploaded the incorrect document, you may manually upload the correct do DCBS.	If you believe you ocument or contact
Michael Vonn's US Citizenship	
Birth Certificate Birth Certificate.pdf	
	Back to Document Center

12. Click **Back to the Document Center** once the required document(s) are uploaded.

The **Submitted Documents** tab will change from "Not Received" to "Pending Review" under the **Documents Needed** tab once they are uploaded correctly. Once they are reviewed, they will move to the **Recently Reviewed** tab.

you do not see the appropriate request,	pioad additional documents.
Upload Documents	
Docu	nents Needed (1) Recently Reviewed (1)
Michael Vonn	
Michael Vonn US Citizenship	Michael Vonn Driver's License.pdf Bith Contificate off

**Please note:** Once submitted, the document(s) reflect the date it was submitted, due date, and provides a hyperlink so the document may be reviewed.

#### 3.1 Submitting Additional Documents

Additional documents may be added if the appropriate request for information is not present under the "Documents Needed" tab.

Follow the steps below to add additional documents from the **Document Center**.

1. Click Upload Documents.

Ready to upload documents we requested?						
Upload the requested documents for your household step-by-step.						
Document Wizard						
If you do not see the appropriate request,	upload additional documents.					
Upload Documents						
Upload Documents	ments Needed (1)	Recently Reviewed (1)				
Upload Documonts Docu Michael Vonn	ments Needed (1)	Recently Reviewed (1)				
Upload Documents Docu Michael Vonn US Citizenship	ments Needed (1)	Recently Reviewed (1) <u>Driver's License off</u>				

- 2. Select the **Case Number.**
- 3. Select the Household Member.
- 4. Select Type of Proof.
- 5. Enter a **Description**.
- 6. Select a Form of proof for the document upload.
- 7. Click the **Document** icon to search and select the document to upload.
- 8. Click Add Document to upload if an additional document is required.
- 9. Click **Upload** to upload the document and return to the **Document Center**.

kynect Progra	ams 🗸 🛛 Reps, kynectors, & Agents	Help & FAQs				
					Languag	
	Upload					
	Please enter all information fo	or document verific	ation.			
	Case number 110034599	$\odot$				
	Household Member	$\odot$	Type of proof Start Typin	ng		
	Description				, J	
	Form of proof	0				
	Select	$\odot$				
	+					
	If you'd like to add another for	rm of proof, please a	ttach it here			
	Add new form of proof					
	Please ensure that all forms of proof have been added above before you proceed					
	Cancel			Upload		

#### 3.2 Tips for Document Upload

- 1. Make sure the image is clear and it captures all information on the document when taking a picture for a mobile upload.
- 2. Files must not be password protected.
- Files must not exceed 2MB. The accepted file types include: \*.PDF, \*.TIF, \*.TIFF, \*.JPEG, \*.JPG, and \*.PNG files. Other file types are not accepted. Attached <u>here</u> is a Quick Reference Guide on how to resize a document for upload.