

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.

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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

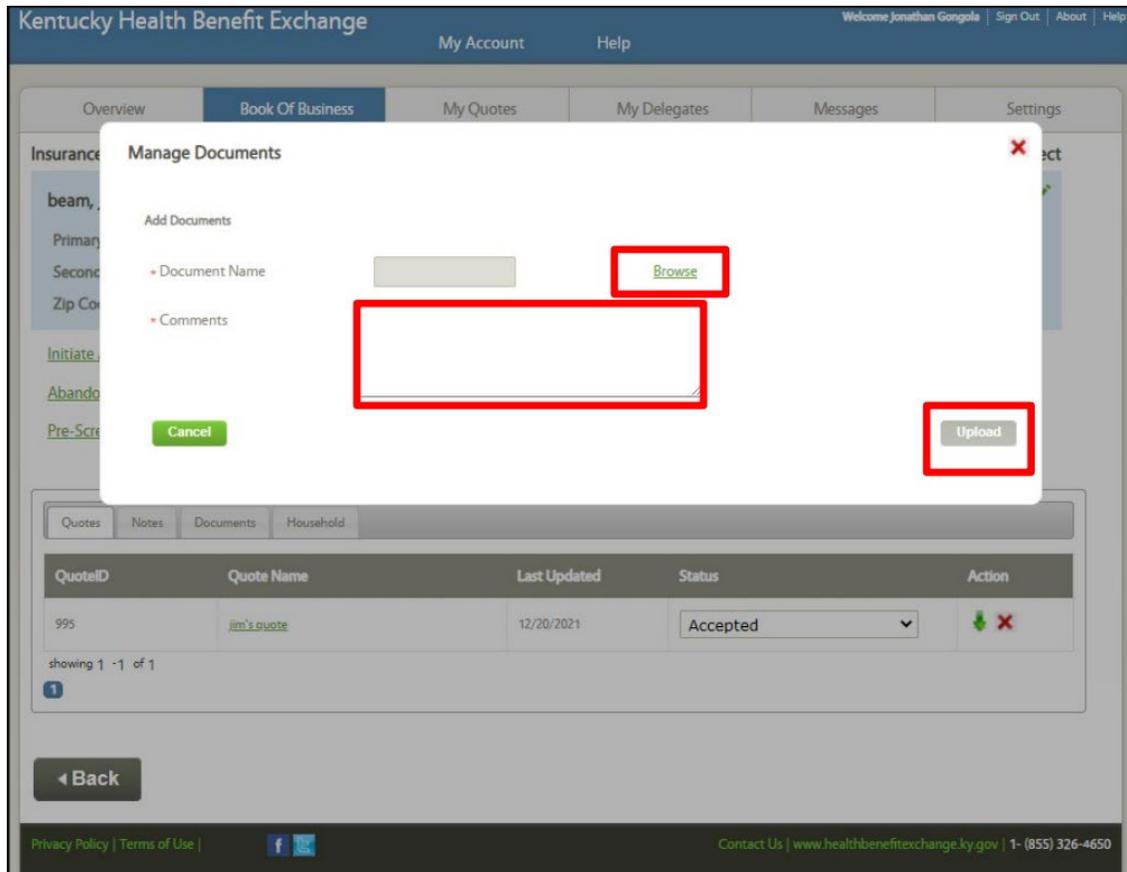
Agents may upload documents for clients and prospects on Agent Portal. Agents upload documents providing proof of information needed to apply for benefits such as income information, tax records, Social Security Number, citizenship information, etc.

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**.

The screenshot displays the 'Book Of Business' interface for a client named WMALHL, RJELLA. The page includes a navigation bar with 'Overview', 'Book Of Business', 'My Quotes', 'My Delegates', 'Messages', and 'Settings'. The 'Book Of Business' tab is selected and highlighted with a red box. Below the navigation bar, the client's information is displayed, including contact details and preferences. The 'Upload Document' button is highlighted with a red box. The page also features a 'Back' button and a footer with contact information.

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**.

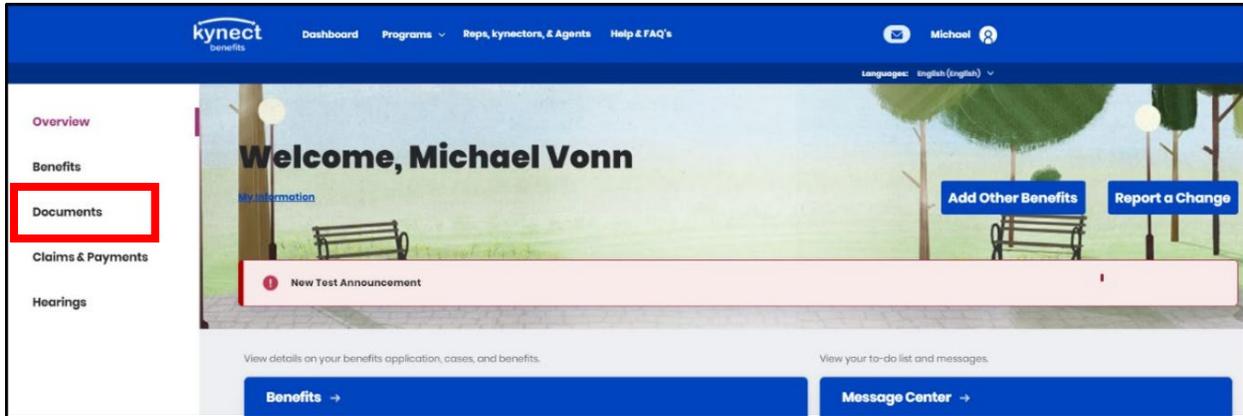


3 Uploading a Document in kynect benefits

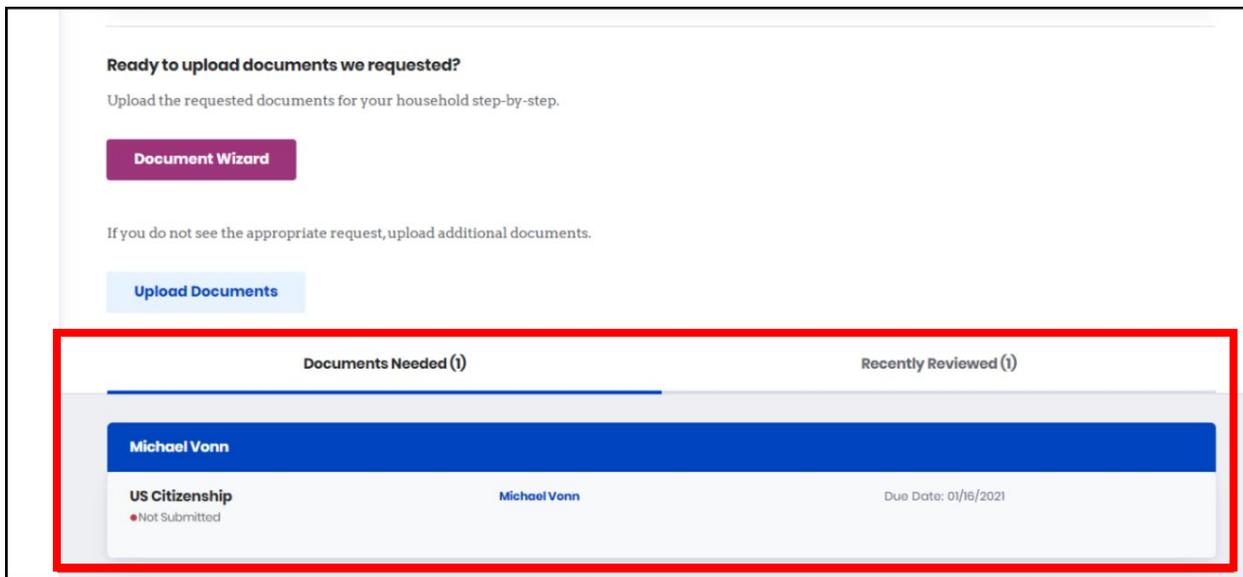
Agents can begin the Document Upload process from the Resident Dashboard in kynect benefits. A benefits application must be signed and submitted before kynect benefits allows users to submit documents as forms of proof.

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**.



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

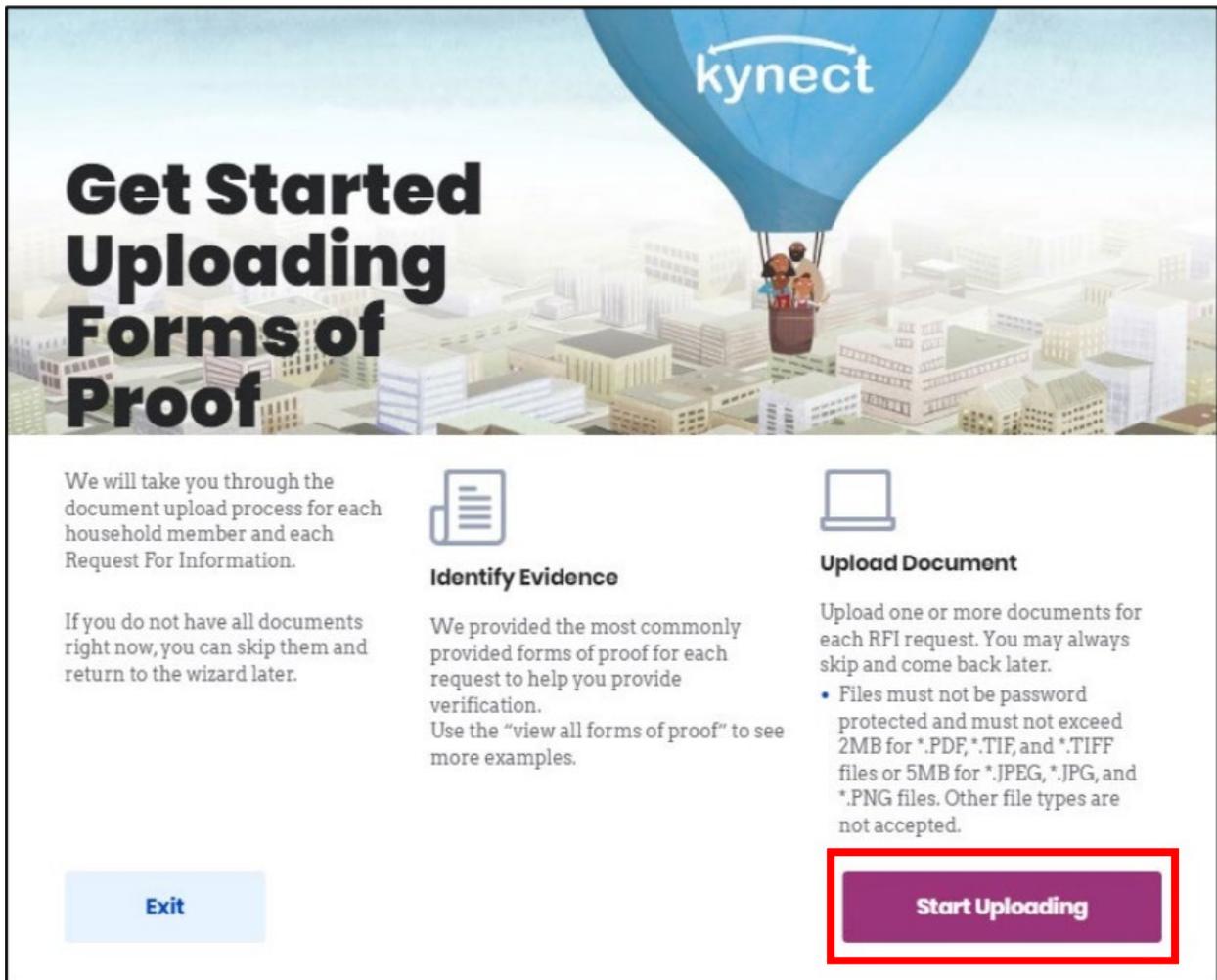


Please note: Documents remain under the **Documents Needed** tab as pending until they are accepted. Once they are reviewed and accepted, they appear in the **Recently Reviewed** tab.

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



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.

Proof

1 of 1 Requests

Michael Vonn's US Citizenship

Recommended forms of proof:

- Hospital Birth Record
- Passport
- School Record

[View accepted forms of proof](#)

Do you have proof of Michael Vonn's US Citizenship?

Yes **No**

Exit **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

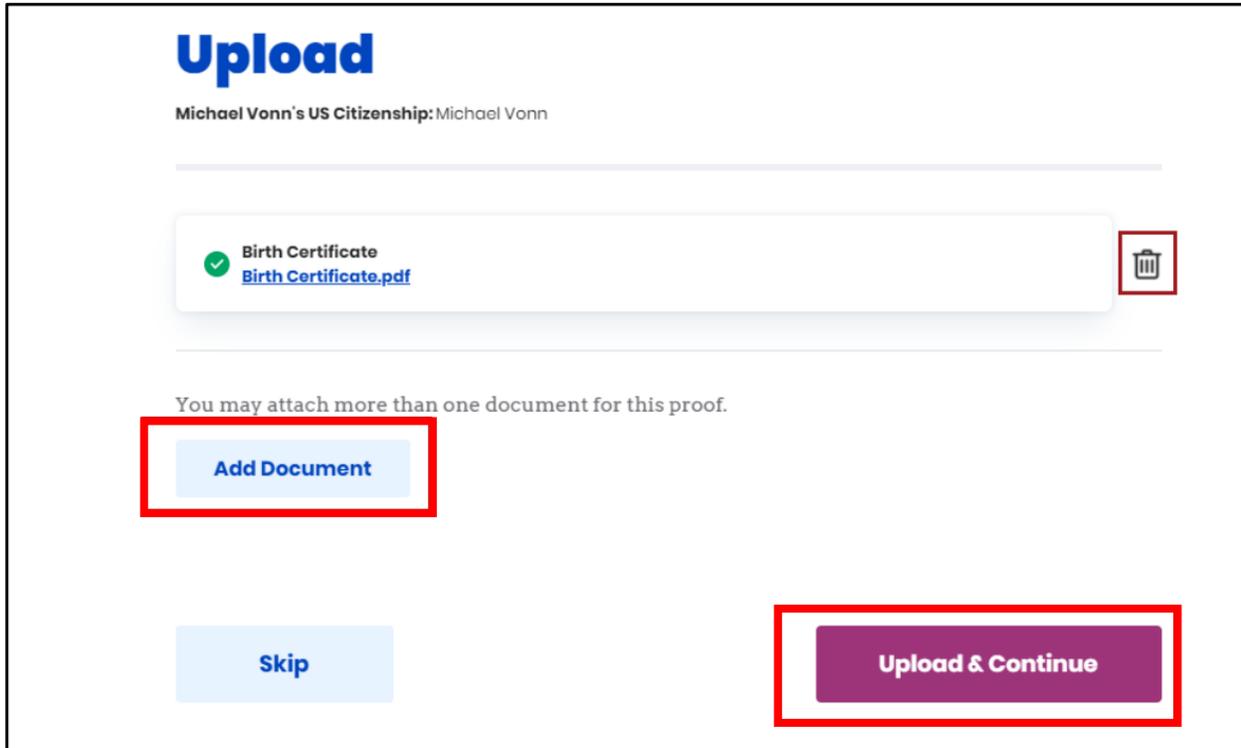
Form of proof
Birth Certificate

You may attach more than one document for this proof.

[Add Document](#)

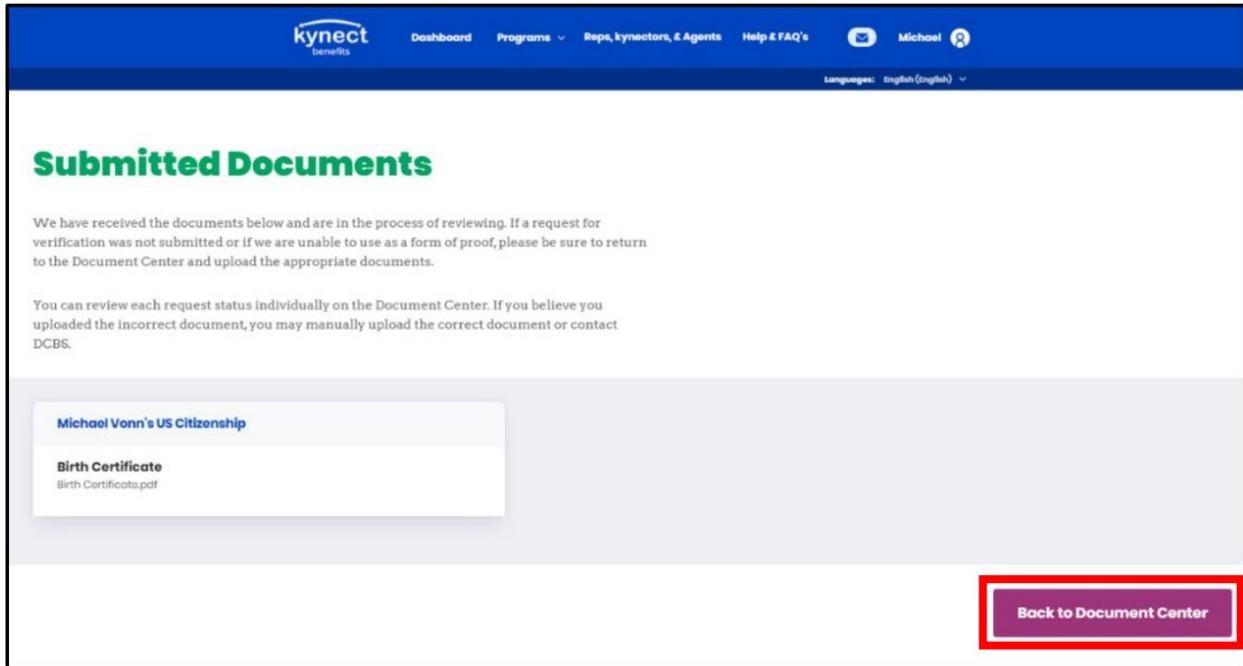
[Upload & Continue](#)

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.

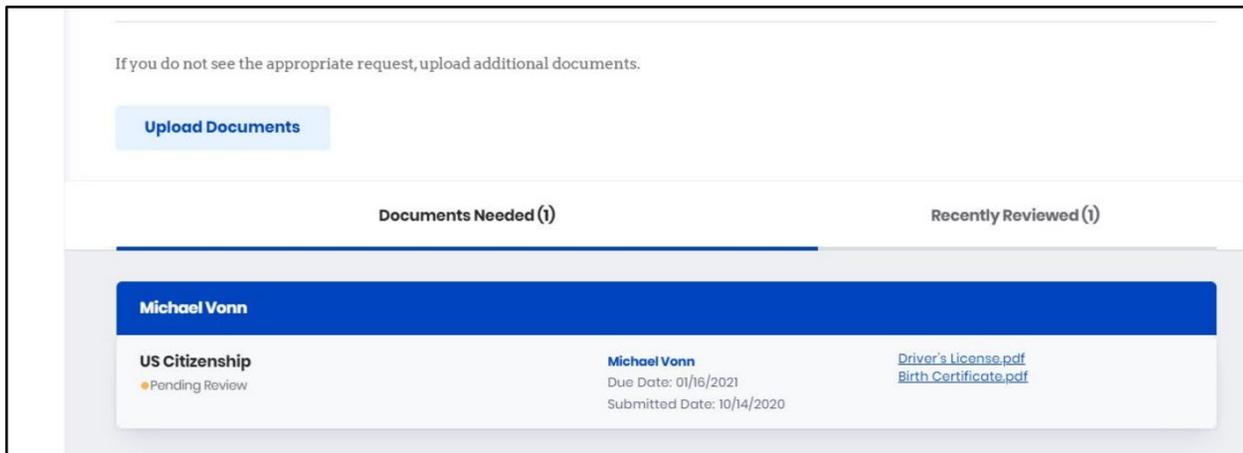


11. The **Document Wizard** will walk the user through the steps to upload a document for each request. After all documents have been submitted, the **Submitted Documents** screen displays.

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.



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**.

The screenshot shows a web interface for document upload. At the top, it asks 'Ready to upload documents we requested?' and provides a 'Document Wizard' button. Below this, it says 'If you do not see the appropriate request, upload additional documents.' The 'Upload Documents' button is highlighted with a red rectangular box. The interface also features two tabs: 'Documents Needed (1)' and 'Recently Reviewed (1)'. Under the 'Documents Needed' tab, there is a section for 'Michael Vonn' with a status of 'US Citizenship' and 'Pending Review'. It also shows 'Michael Vonn' with a 'Due Date: 01/18/2021' and 'Submitted Date: 10/14/2020'. There are links for 'Driver's License.pdf' and 'Birth Certificate.pdf'.

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
Benefits

Programs ▾ Reps, Kynectors, & Agents Help & FAQs

Language

Upload

Please enter all information for document verification.

Case number
110034599

Household Member
Select

Type of proof
Start Typing

Description

Form of proof
Select

If you'd like to add another form of proof, please attach 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.
3. 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 [here](#) is a Quick Reference Guide on how to resize a document for upload.