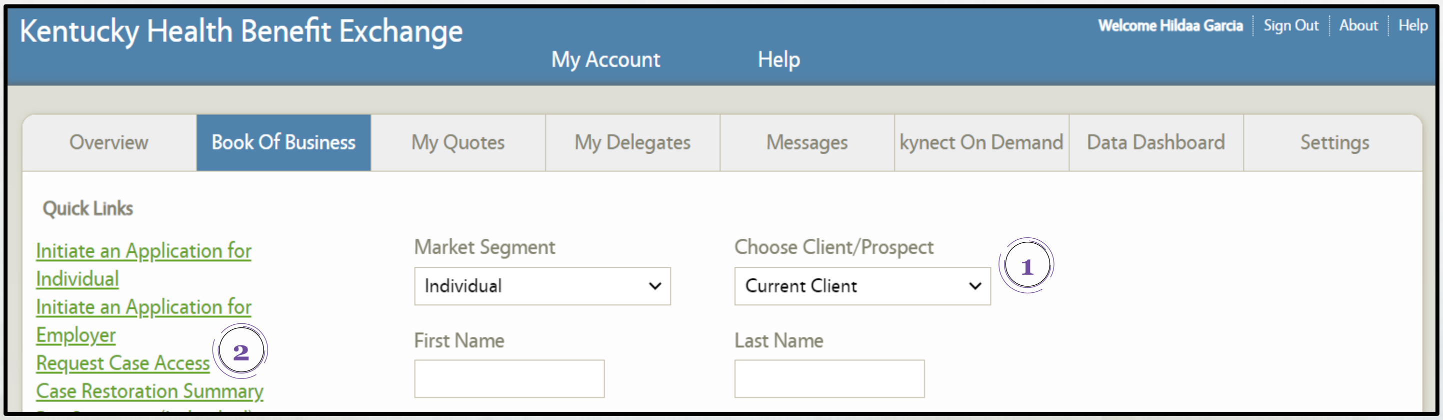
AGENT CASE ASSOCIATION

Agents have several methods to access an Individual's case. Follow these best practices:

1 **Check Your Book of Business:**
Look under *Current Prospects* or *Current Clients* to see if you are already associated with the Individual.

2 **Request Case Access:**
If no existing association is found, under *Quick Links*, select **Request Case Access**.



Under *Quick Links*, Agents may select **Initiate an Application for Individual** to start a new application and merge cases if there is not an existing kynect case.

3 **Call Professional Services Line (PSL):**
If unable to request access through *Quick Links*, call the PSL at 1-855-326-4650. Have the Individual present on the call to provide verbal consent when requesting association.

WHY AM I UNABLE TO REQUEST CASE ACCESS?

Agents may face restrictions when attempting to request electronic case access due to the following reasons:

Inactive kynect Case

- **Requirement:** Individuals must have an active case in kynect.
- **Restriction:** If an Individual does not have an existing case, or if the Individual is present on an inactive case, Agents cannot gain access.

Ineligible Benefit Program

- **Requirement:** Individuals must be approved for a benefit program that Agents can assist with.
- **Restriction:** Agents cannot access cases for programs they cannot help with (e.g., Supplemental Nutrition Assistance Program (SNAP)-only cases).

Failed Consent Request

- **Requirement:** Agents may request electronic case access to gain association to an Individual's case.
- **Restriction:** If an Individual rejects the request or fails to respond to the notification within three (3) days, the Agent will fail to be associated with the case.

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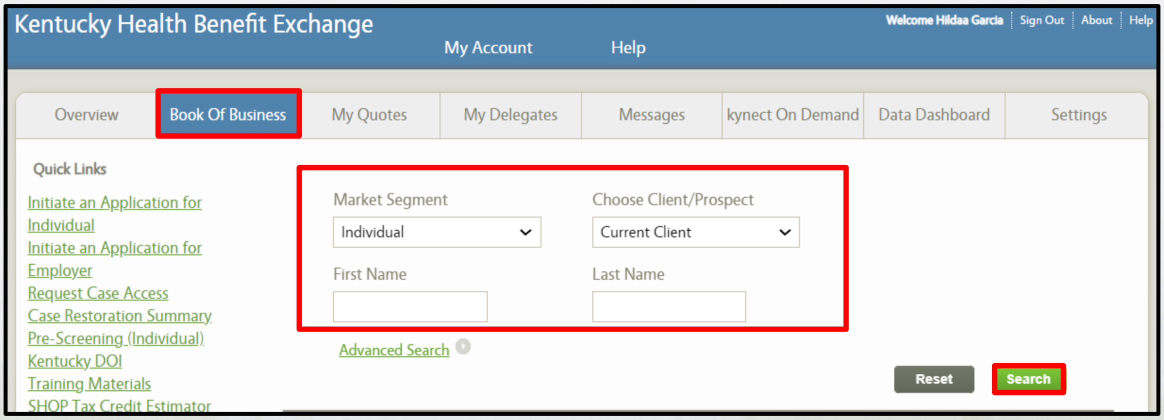
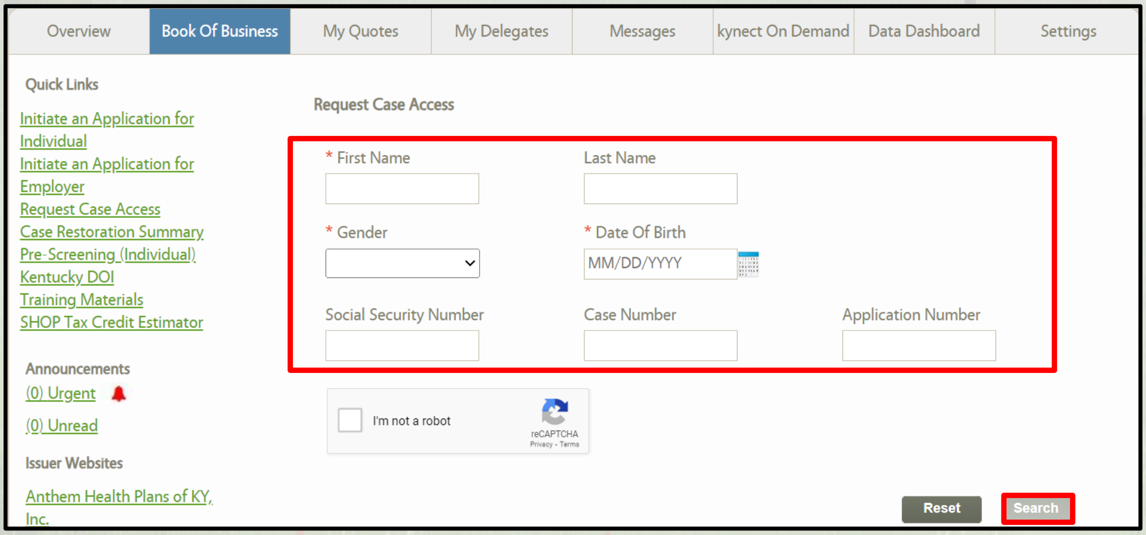
HOW CAN I CHECK CASE ASSOCIATION?

To verify if there is an existing association or to request case access, follow these steps:

1. Navigate to Agent Portal and select **Book of Business**. Enter the Individual's **First Name** and **Last Name**. Select either **Current Client** or **Current Prospect** from the *Choose Client/Prospect* drop-down. Then select **Search** to verify if there is an existing association between you and the Individual.



2. If there is not an existing association, select **Request Case Access** under *Quick Links*. On the **Request Case Access** screen, search for the Individual by entering their **First Name**, **Last Name**, **Sex**, **Date of Birth**, and other applicable details and then select **Search**.



If an Individual prefers mail for communication but has a phone number or email in kynect, Agents can use the Pre-Verbal Consent attestation on the Individual's behalf. Once complete, Agents can proceed with Electronic Consent and select the applicable contact method to request association from the Individual.

If an Individual prefers mail for communication and there is no phone number or email in kynect, Agents can send a Case Access Consent to the Individual's Message Center and Resident Dashboard. This consent will be active for three (3) days. If the Individual accepts the request, the Agent will be associated with the case. If the Individual rejects the request or does not respond within three (3) days, the Agent will not be associated.

3. Select **Case Access Consent** to send an approval request to the Individual based on their preferred communication method. For more information on requesting electronic case access, reference the **Agent Association to Client Cases Fact Sheet**.

> You do not currently have an agent association with the client TAX CREDIT
>
> Clicking 'Case Access Consent' will send a notification to the client dashboard in kynect benefits. Please request the client to accept the consent from client dashboard or their message center by logging in to kynect benefits.
>
> Please reach out to the Professional Services Line (PSL): 1-855-326-4650 for additional help (the individual must also be present on the call).
>
> Case Access Consent

Contacting the PSL for Case Association

If the Individual is not found in the Agent's Book of Business or able to be associated electronically, Agents may contact the PSL at 1-855-326-4650 and request association. Agents will need to have the Individual available on the call to provide verbal consent to complete the association.