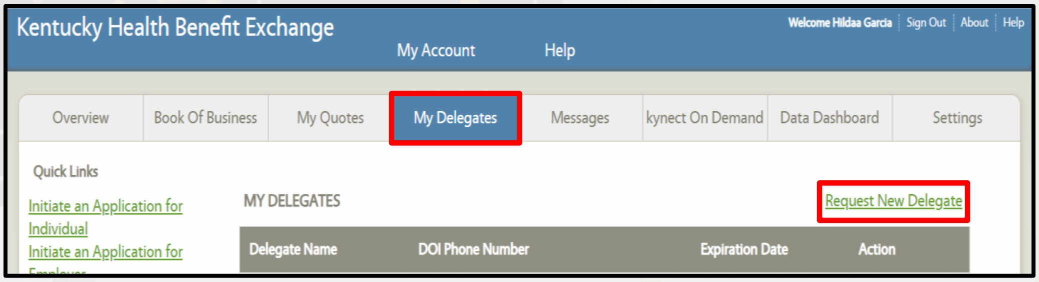
AGENT DELEGATION

Agent delegation is a valuable tool for improving efficiency and collaboration. By adding other Agents as delegates, primary Agents can share their caseload when unavailable or when extra support is needed. This allows secondary Agents to access and assist with cases.

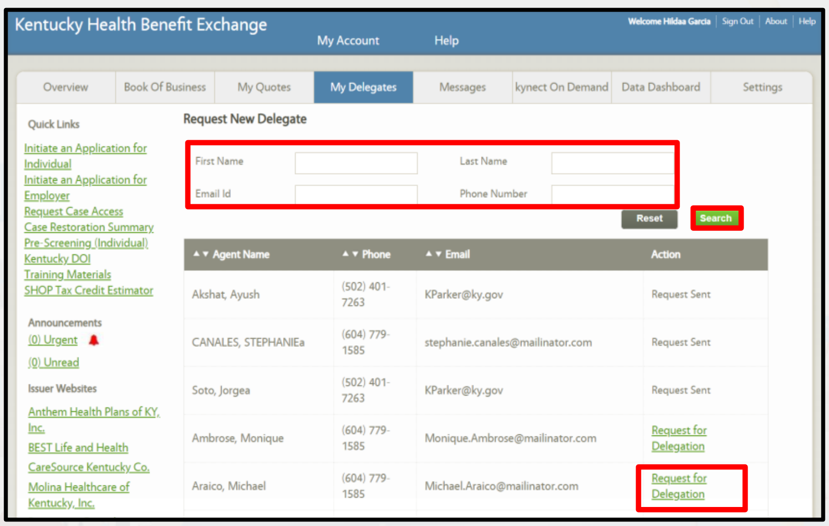
HOW DO I SEND A DELEGATE REQUEST?

Agents can add a delegate to their account by clicking the *My Delegates* tab on Agent Portal. Follow the steps below to add a delegate:

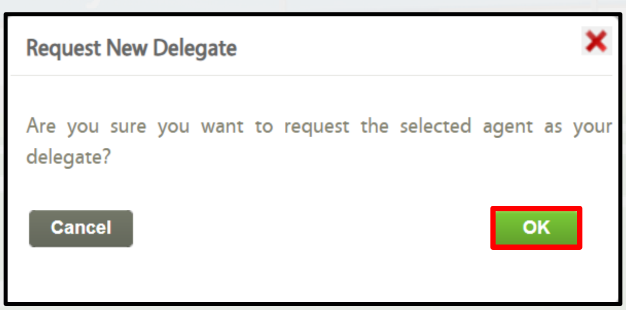
1. Navigate to Agent Portal and click on the **My Delegates** tab.
2. Click **Request New Delegate**.



3. On the **Request New Delegate** screen, enter the Agent's **First Name**, **Last Name**, **Email Id**, or **Phone Number**. Then click **Search**.
4. Click **Request for Delegation** next to the desired delegate.



5. Click **OK** on the **Request New Delegate** pop-up screen to send the request.

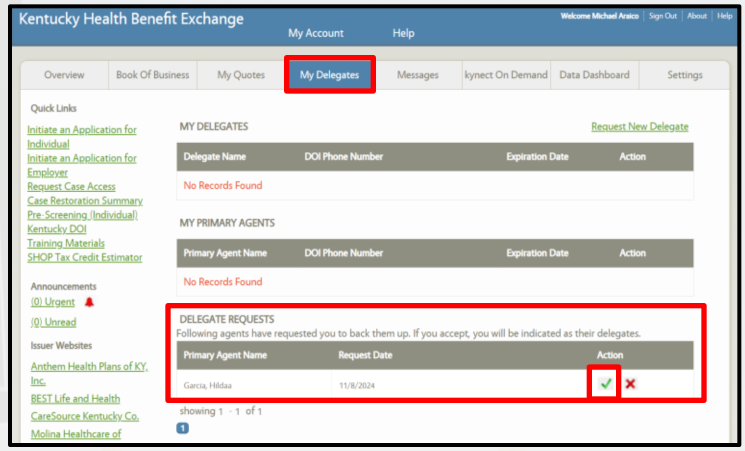


To add more delegates, repeat steps 2 through 5.
Each Agent can assign up to six (6) delegates.

AGENT DELEGATION

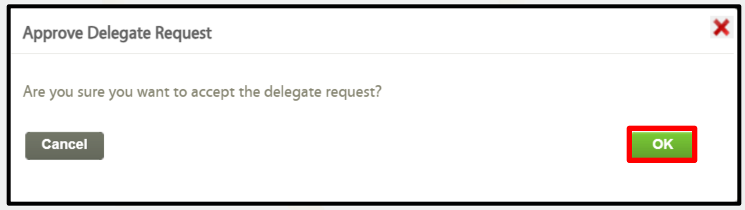
HOW DO I ACCEPT A DELEGATE REQUEST?

Agents can accept a delegate request from the *My Delegates* tab on Agent Portal. Follow the steps below to accept a delegate request:

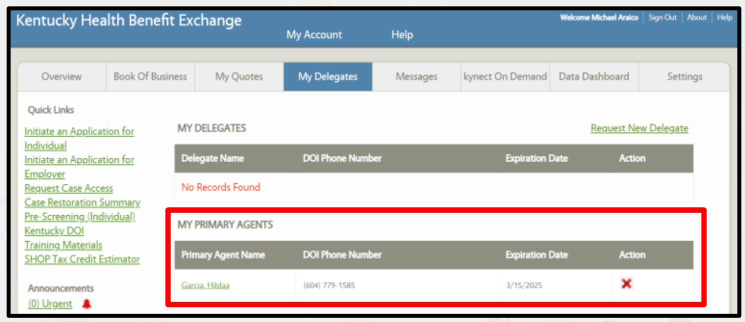


1. Navigate to Agent Portal and click on the **My Delegates** tab.
2. Under the *DELEGATE REQUESTS* section, click **Accept (✓)** to accept the delegate request.

Please note: If you do not wish to be a delegate and want to decline, you may click **Decline (✗)** under the *Action* column.



3. Click **OK** on the **Approve Delegate Request** pop-up screen.



4. Review the *MY PRIMARY AGENTS section* to view a list of Agents you are a delegate to.
5. Click the **Primary Agent Name (green hyperlink)** to navigate to their Agent Dashboard and access client details.

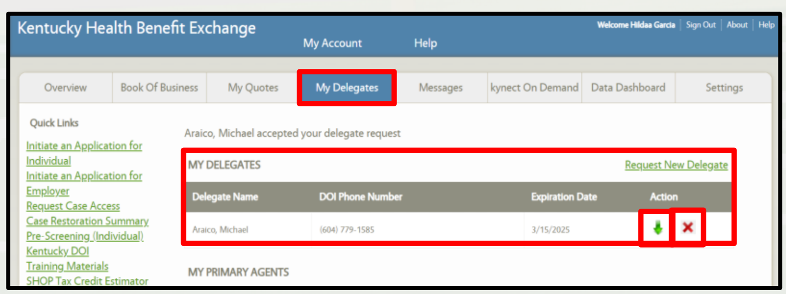
Please note: To end delegation with another Agent, click **Remove (✗)** under the *Action* column.

HOW DO I VIEW MY DELEGATES?

Agents can view their delegates and actions taken on a case by accessing the *My Delegates* tab on Agent Portal. Follow the steps below to view delegates and their actions:

1. Navigate to Agent Portal and click on the **My Delegates** tab.
2. Under the *MY DELEGATES* section, choose one of the following options:
   - Click **Download Activity (⬇)** to view actions a delegate has taken on your case(s).
   - Click **Remove (✗)** to remove a delegate.

Please note: Clicking **Download Activity** will save an Excel report to your local device.



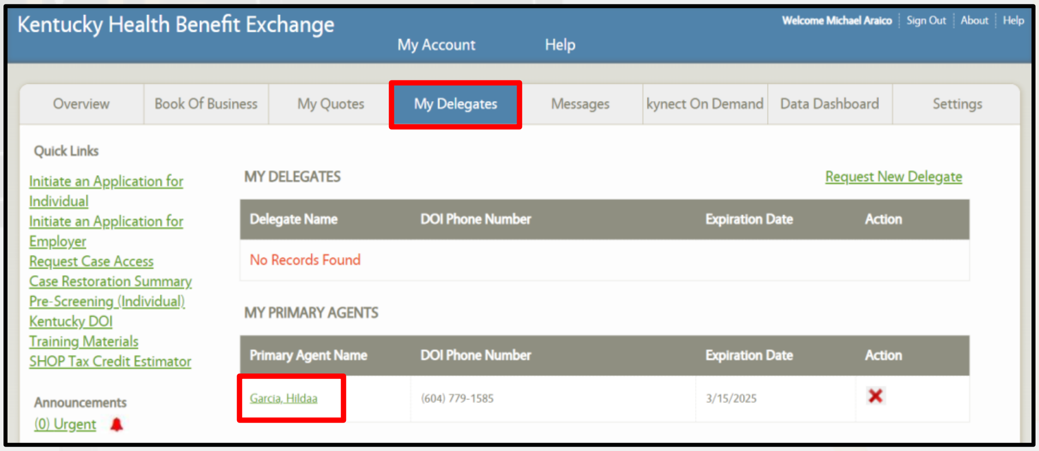
AGENT DELEGATION

HOW DO I VIEW THE PRIMARY AGENT'S BOOK OF BUSINESS?

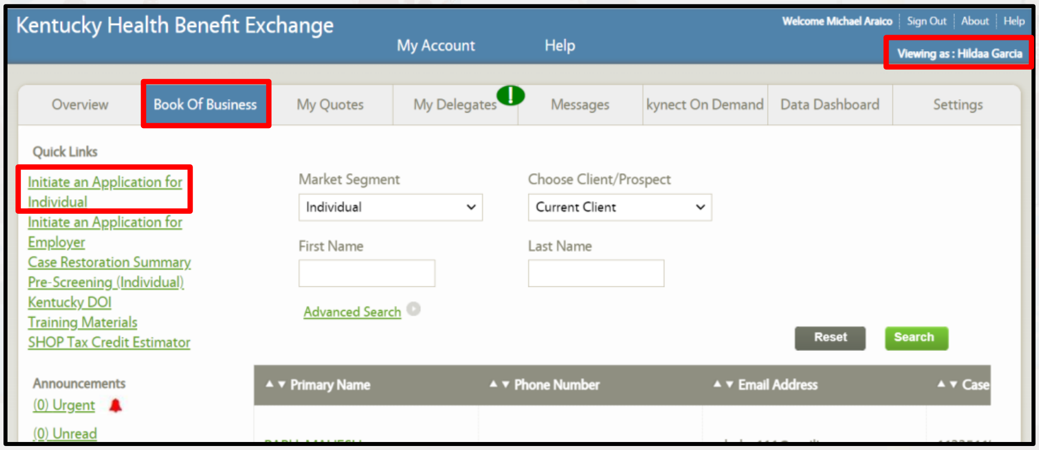
Delegate Agents can view a Primary Agent's Book Of Business from their **My Delegate** screen. Delegate Agents must login to Agent Portal using their own credentials, not those of the Primary Agent.

Follow the steps below to access a Primary Agent's Book Of Business:

1. Navigate to Agent Portal and click on the **My Delegates** tab.
2. Click the **Primary Agent Name (green hyperlink)** to navigate to their Agent Portal.



3. To confirm you are accessing the Primary Agent's Agent Portal, verify that the **Viewing as: [Primary Agent Name]** field is in the top right corner of your screen.
4. Click the **Book Of Business** tab to view the Primary Agent's Book Of Business and take required action including initiating an application for an Individual. The action of completing an application will associate the new case/enrollment with the Primary Agent as the Agent Of Record.



KHBE is not responsible for the payment of commissions. KHBE verifies and sends files containing the Agent Of Record to Issuers, who are then responsible for the payment of commissions.