

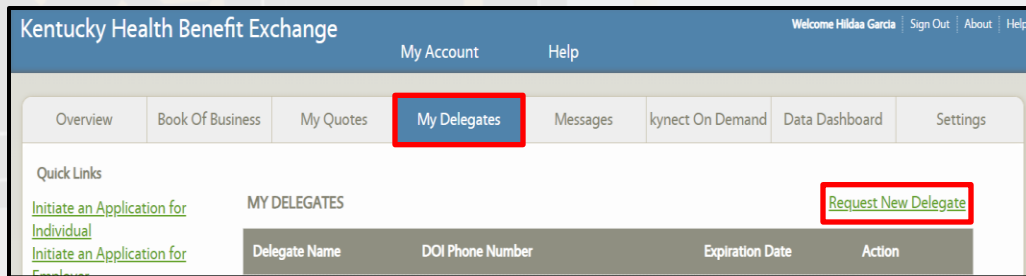
AGENT DELEGATION

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.

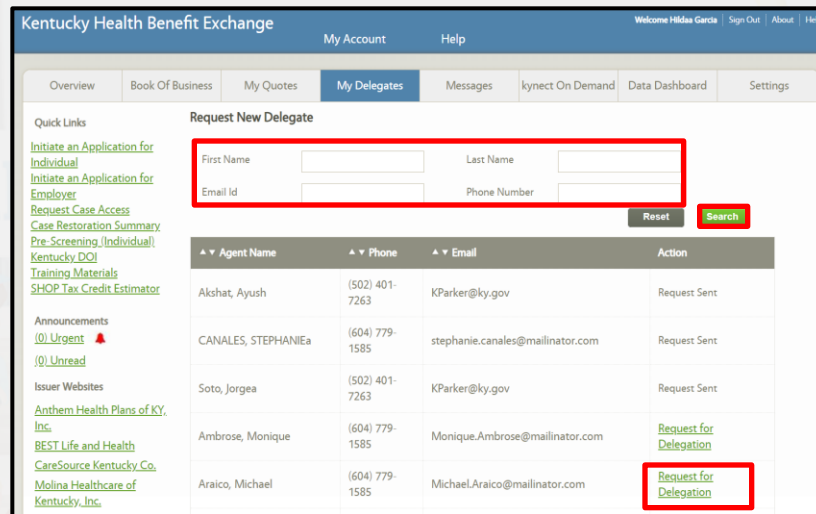
HOW DO I SEND A DELEGATE REQUEST?

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:

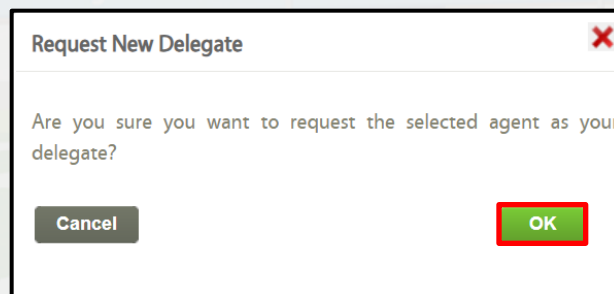
1. Navigate to Agent Portal and click on the **My Delegates** tab.
2. Click **Request New Delegate**.



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.

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Quick Links

- Initiate an Application for Individual
- Initiate an Application for Employer
- Request Case Access
- Case Restoration Summary
- Pre-Screening (Individual)
- Kentucky DOI
- Training Materials
- SHOP Tax Credit Estimator

Announcements

- 0 Urgent
- 0 Unread

Issuer Websites

- Anthem Health Plans of KY, Inc.
- BEST Life and Health
- CareSource Kentucky Co.
- Molina Healthcare of

MY DELEGATES [Request New Delegate](#)

Delegate Name	DOI Phone Number	Expiration Date	Action
No Records Found			

MY PRIMARY AGENTS

Primary Agent Name	DOI Phone Number	Expiration Date	Action
No Records Found			

DELEGATE REQUESTS

Following agents have requested you to back them up. If you accept, you will be indicated as their delegates.

Primary Agent Name	Request Date	Action
Garcia, Hilda	11/9/2024	<input checked="" type="checkbox"/> <input type="checkbox"/>

showing 1 - 1 of 1

Approve Delegate Request

Are you sure you want to accept the delegate request?

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MY DELEGATES [Request New Delegate](#)

Delegate Name	DOI Phone Number	Expiration Date	Action
No Records Found			

MY PRIMARY AGENTS

Primary Agent Name	DOI Phone Number	Expiration Date	Action
Garcia, Hilda	(604) 779-1585	3/15/2025	<input type="checkbox"/> <input checked="" type="checkbox"/>

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.

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Araico, Michael accepted your delegate request

MY DELEGATES [Request New Delegate](#)

Delegate Name	DOI Phone Number	Expiration Date	Action
Araico, Michael	(604) 779-1585	3/15/2025	<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

MY PRIMARY AGENTS

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.

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Announcements

(0) Urgent

MY DELEGATES

[Request New Delegate](#)

Delegate Name	DOI Phone Number	Expiration Date	Action
No Records Found			

MY PRIMARY AGENTS

Primary Agent Name	DOI Phone Number	Expiration Date	Action
Garcia, Hilda	(604) 779-1585	3/15/2025	X

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.

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Viewing as: Hilda Garcia

Overview **Book Of Business** My Quotes My Delegates Messages kynect On Demand Data Dashboard Settings

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Announcements

(0) Urgent

(0) Unread

Market Segment: Individual

Choose Client/Prospect: Current Client

First Name: [Input Field]

Last Name: [Input Field]

[Advanced Search](#)

Reset Search

Primary Name	Phone Number	Email Address	Case
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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.