

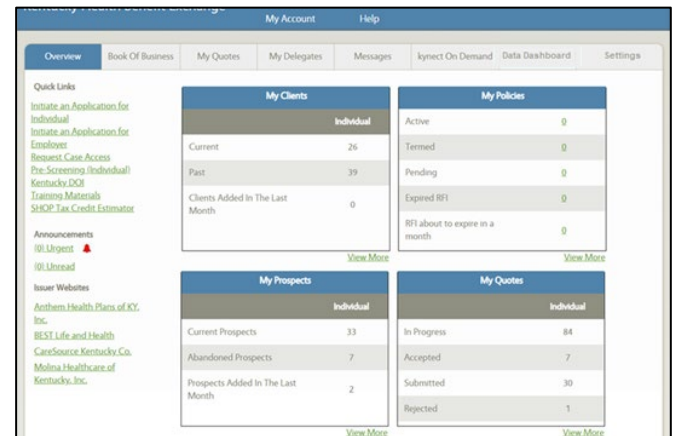


Agent Role in Agent Portal

What Can Agents Do In Agent Portal?

Agents use the State-Based Marketplace (SBM) to enroll Individuals and small businesses in health coverage through kynect health coverage. Agents use Agent Portal to complete referrals, intake new clients, browse plans, generate reports, create proposals, and view all incoming notifications and announcements from Worker Portal. Agents may help clients and prospects in the following ways: initiate a benefits application, conduct prescreening, add notes, generate quotes, upload documents, and view client or prospect information.

- **View Summary of Business:** The **Overview** screen details the Agent's number of clients, policies, prospects, quotes, and their status.
- **Assist Clients and Prospects:** The **Book of Business** screen is where Agents may search for and assist clients and prospects. Agents may also export their client or prospect list to an Excel file or upload prospects directly.
 - ❑ **Client:** Agents may assist clients by viewing benefit information, disassociate from the client, conduct prescreening, add notes to the client's case, start a quote, upload documents, and view client information.
 - ❑ **Prospect:** Agents may assist prospects by initiating or continuing a benefits application, abandon the prospect, conduct prescreening, add notes to the prospect's application, start a quote, upload documents, and view prospect information.
- **Search for and View Quotes:** The **My Quotes** screen is where Agents may search for and view their quotes. They may edit, download, or delete quotes, and change the status of quotes as applicable.
- **View and Associate with Delegates:** The **My Delegates** screen is where Agents may view Agent delegates who may assist them whenever required, including delegates they have assigned as delegates, Agents they are a delegate to, and any delegate requests.
- **View Messages:** The **Messages** screen is where Agents may view any incoming messages.



My Clients		My Policies	
Individual		Individual	
Current	26	Active	0
Past	39	Termed	0
Clients Added In The Last Month	0	Pending	0
		Expired RFI	0
		RFI about to expire in a month	0
My Prospects		My Quotes	
Individual		Individual	
Current Prospects	33	In Progress	84
Abandoned Prospects	7	Accepted	7
Prospects Added In The Last Month	2	Submitted	30
		Rejected	1

- **View Agent Information:** The **Settings** screen is where Agents may view personal and organization information, as well as change their KOG password.
- **Help Residents Enroll in Health Coverage:** **Quick Links** allow Agents to quickly navigate to screens they will commonly use, such as the benefits application, prescreening, training materials, announcements, and Issuer websites. The **kynect On Demand** tab allows Agents to assist citizens with enrolling in a health coverage plan.
- **View Data Dashboard:** Allows Agents to gain an understanding of enrollment and termination trends based on Age, County, and Month.
- **Download Excel Reports:** **Reports** allow Agents to download case notes to an Excel file and download a prospect template which can be used to upload multiple prospects to Agent Portal.

