

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.

Table of Contents

| | | |
|-------------|---|----------|
| 1 | Document Upload Overview | 3 |
| 1.1. | Tips for Document Upload..... | 3 |
| 2 | Uploading a Document in Agent Portal..... | 4 |
| 3 | Uploading a Document in kynect benefits..... | 6 |

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.

1.1. Tips for Document Upload

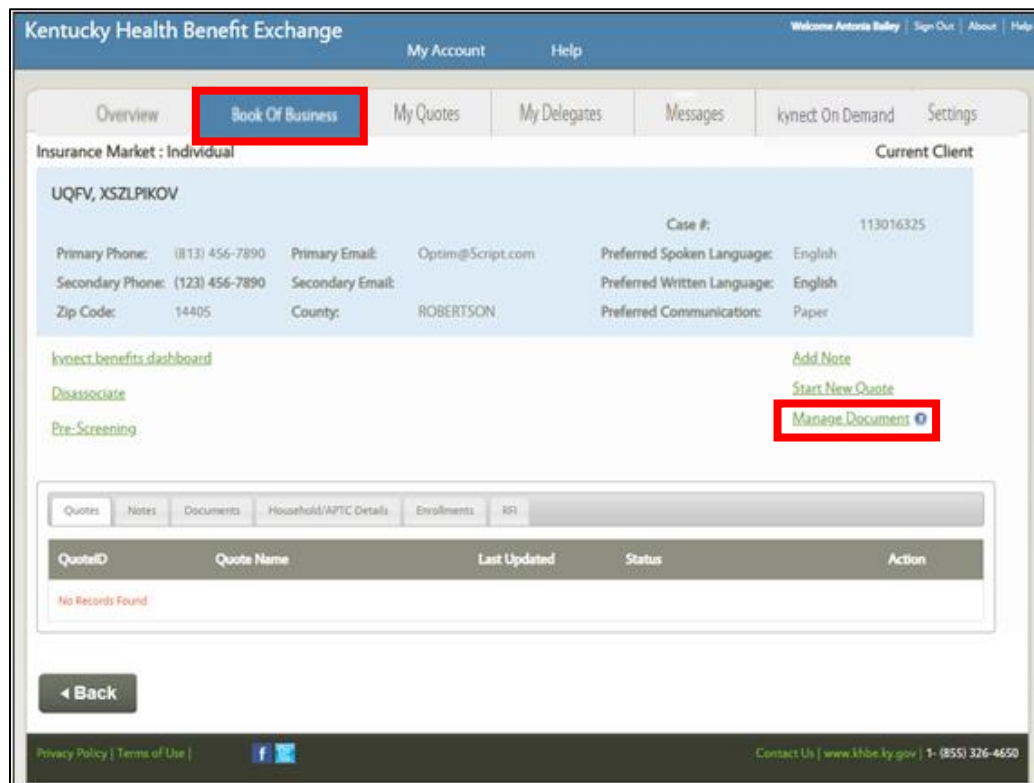
1. Make sure the image is clear and it captures all information on the document when taking a picture for a mobile upload.
2. Files must not be password protected.
3. Image Files must not exceed 6MB and document files must not exceed 4MB. The accepted document file types include: *.PDF, *.TIF, *.TIFF and the accepted image file types include *.JPEG, *.JPG, and *.PNG. Other file types are not accepted. In case the file exceeds the limit, the following options can be considered:
 - a. Use the "crop" tool to remove any remaining background or empty space around the image. This will reduce the size of the image.
 - b. Use a smaller image format. Different image formats have varying file sizes; PNG files are typically the largest and JPG files are the smallest.
 - c. To keep the size of PDF files as small as possible for faster uploading and to keep within the required size limit: After saving the completed PDF, select on File > Save As Other > Reduced Size PDF.
 - d. While scanning a paper document, choose the scanner setting of black and white (not gray scale or color) and set the resolution to 300 dpi.
4. View required documents under "Documents Needed" in the Document Center before beginning the Document Wizard.

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. Select **Search**.
4. Select a **Client** or **Prospect Name**.
5. Select **Manage Document**.



Quick Reference Guide: Document Upload

6. Select **Browse** to open the File Folder.
7. Enter **Comments** detailing the information that is included in the selected document(s).
8. Select **Upload**.

Kentucky Health Benefit Exchange

Welcome Jonathan Gongola | Sign Out | About | Help

My Account Help

Overview Book Of Business My Quotes My Delegates Messages Settings

Insurance

beam,

Primary

Second

Zip Co

Initiate

Abando

Pre-Sce

Manage Documents

Add Documents

Document Name [Browse](#)

Comments

Cancel Upload

Quotes Notes Documents Household

| QuoteID | Quote Name | Last Updated | Status | Action |
|---------|-----------------------------|--------------|----------|--------|
| 995 | jim's quote | 12/20/2021 | Accepted | |

showing 1 - 1 of 1

[Back](#)

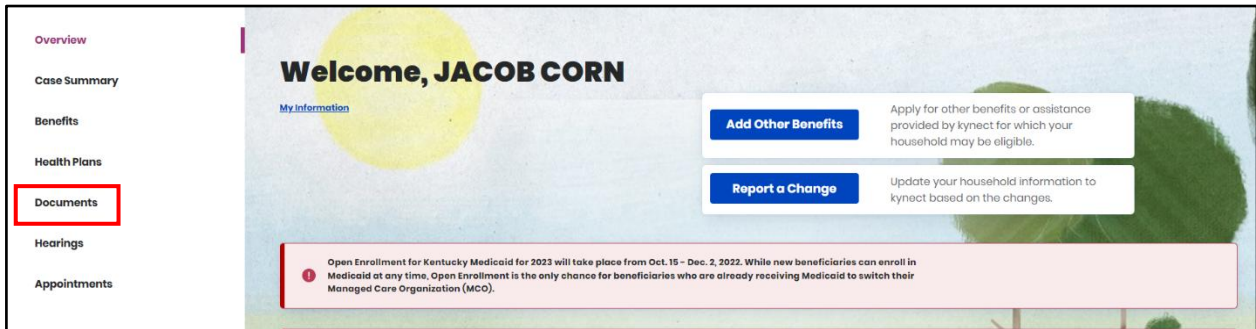
Privacy Policy | Terms of Use | Contact Us | www.healthbenefitexchange.ky.gov | 1- (855) 326-4650

3 Uploading a Document in kynect benefits

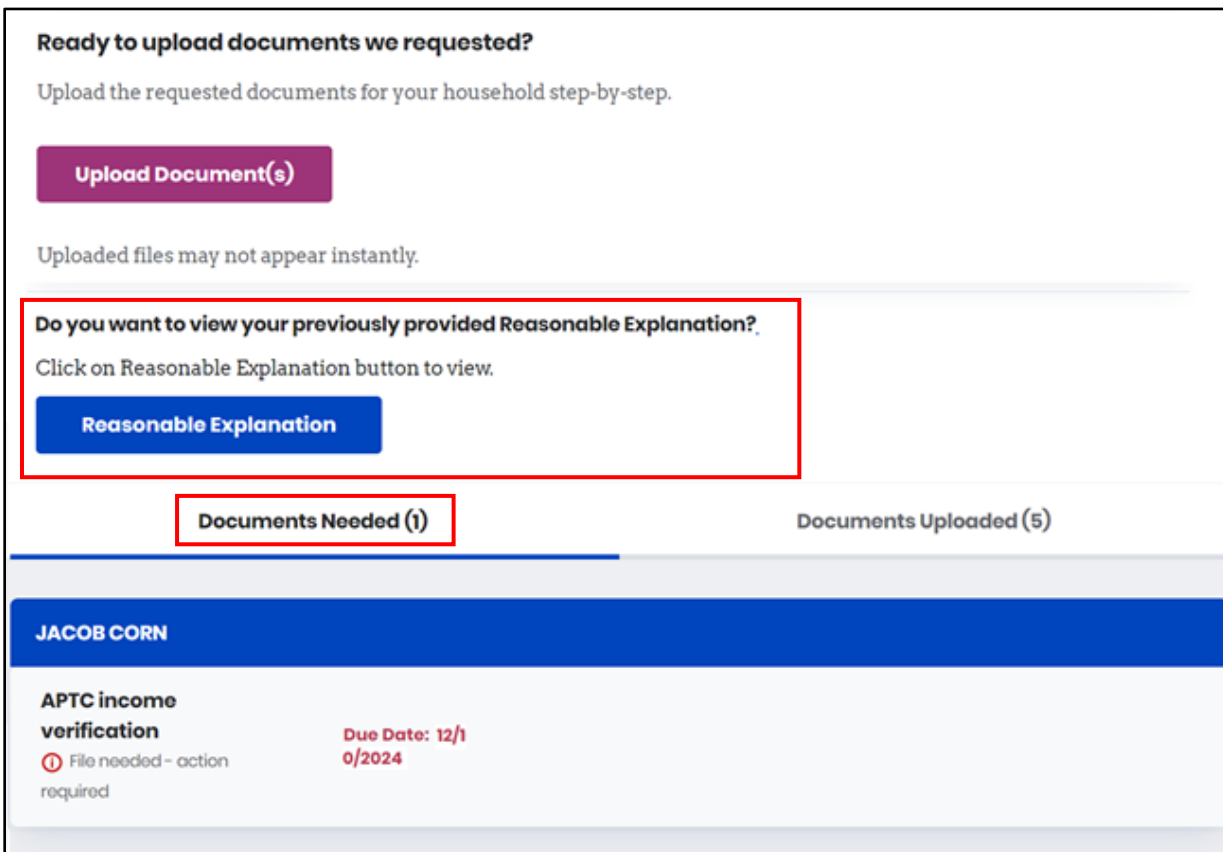
Agents can begin the Document Upload process from the Resident Dashboard in kynect benefits. A benefits application must be signed and submitted before kynect benefits allows users to submit documents as forms of proof.

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. Select **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.

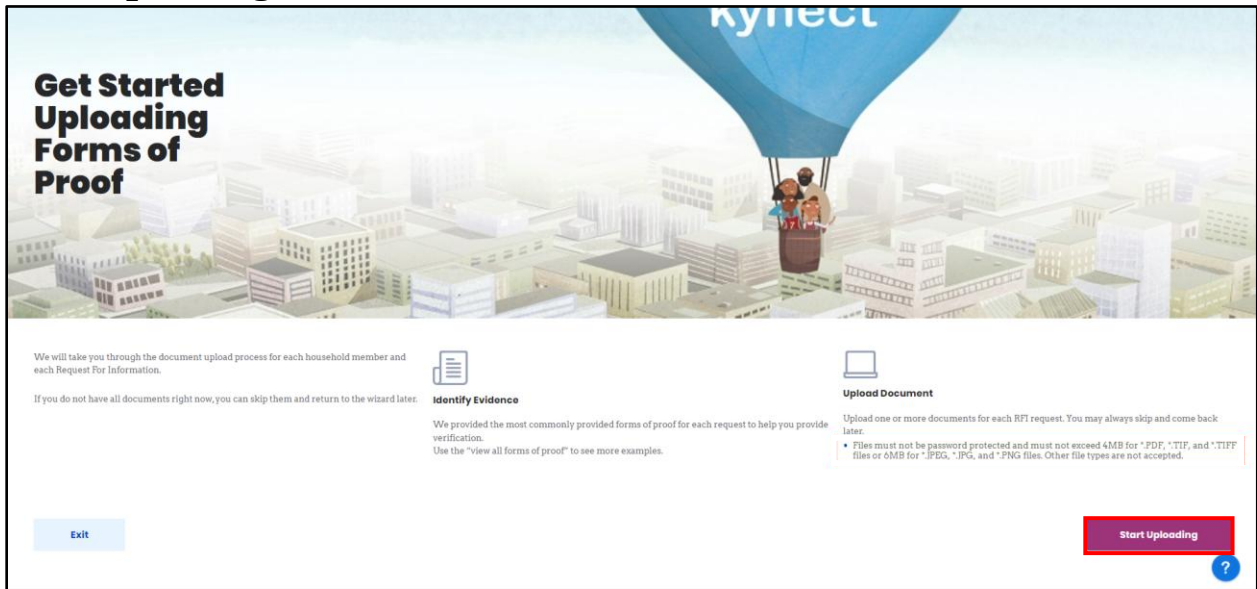


Please note: Documents remain under the Documents Needed tab as pending until they are accepted.

3. Select **Upload Document(s)** to begin uploading documents for open requests.



4. Select **Start Uploading** after reviewing the information on the **Get Started Uploading Forms of Proof** screen.



Quick Reference Guide: Document Upload

5. Select **Yes** or **No** for *Do you have proof* question on the **Proof** screen.
6. Select **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 2 Requests

JACOB CORN's APTC income verification

[View accepted forms of proof](#)

Do you have proof of JACOB CORN's APTC income verification?

Please note: Select **View accepted forms of proof** to view a list of all accepted documents.

Quick Reference Guide: Document Upload

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. Select the **Document** icon to search the device's files and select the document to upload from the computer or mobile device.


The screenshot shows the 'Upload' screen for 'JACOB CORN's APTC income verification: JACOB CORN'. It features two informational messages: one about file formats and sizes, and another about not re-uploading documents. Below these is a 'Form of proof' dropdown menu with 'Pay Stubs' selected. A document icon with a plus sign is highlighted with a red box. At the bottom, there are buttons for 'Add new form of proof', 'Skip', and 'Upload & Continue'.


9. Select **Add new form of proof** to add an additional document if there is more than one document for this proof.
10. Select **Upload & Continue** to return to the **Proof** screen for the next request.


Quick Reference Guide: Document Upload


Upload


JACOB CORN's APTC income verification: JACOB CORN

 Files must not be password protected and must not exceed 4MB for *.PDF, *.TIF, and *.TIFF files or 6MB for *.JPEG, *.JPG, and *.PNG files. Other file types are not accepted.

 You do not need to upload the same document more than once. If you have already uploaded this document as proof of something else please use the 'Skip' button below instead of uploading the same document again.

 **Pay Stubs**

[Pay Stubs.pdf](#) 



Please upload a file within the allowable size. File size should be no more than 6 MB.

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

[Skip](#) [Upload & Continue](#)

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. Select **Back to the Document Center** once the required document(s) are uploaded.

Submitted Documents

We have received the documents below and are in the process of reviewing. If a request for verification was not submitted or if we are unable to use as a form of proof, please be sure to return to the Document Center and upload the appropriate documents.

You can review each request status individually on the Document Center. If you believe you uploaded the incorrect document, you may manually upload the correct document or contact DCBS.

JACOB CORN's APTC income verification

Pay Stubs
Pay Stubs.pdf

Back to Document Center

The **Submitted Documents** tab will change from “Not Received” to “Received, under review-no action required” under the **Documents Needed** tab once they are uploaded correctly.

Ready to upload documents we requested?

Upload the requested documents for your household step-by-step.

Upload Document(s)

Uploaded files may not appear instantly.

Documents Needed (2) **Documents Uploaded (13)**

JACOB CORN

APTC income verification

Received, under review - no action required.

Due Date: 03/18/2024

[Test doc.pdf](#)

Submitted Date: 02/26/2024 2:09 PM

Please allow up to 10 business days for processing.

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.