

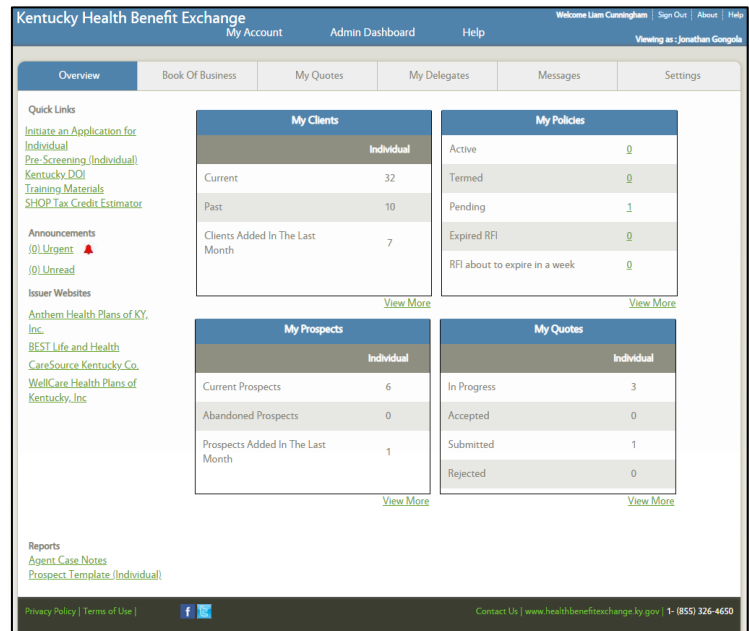


Agent Role in Agent Portal

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 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.



The screenshot shows the 'Kentucky Health Benefit Exchange' Agent Portal dashboard. The user is logged in as 'Jonathan Gongola'. The dashboard is divided into several sections:

- Overview:** Contains 'Quick Links' (Initiate an Application for Individual, Pre-Screening, Training Materials, SHQP Tax Credit Estimator), 'Announcements' (0 Urgent, 0 Unread), and 'Issuer Websites' (Anthem Health Plans of KY, Inc., BEST Life and Health CareSource Kentucky Co., WellCare Health Plans of Kentucky, Inc.).
- My Clients:** A table showing client counts: Current (32), Past (10), Clients Added In The Last Month (7).
- My Policies:** A table showing policy status: Active (0), Termined (0), Pending (1), Expired RFI (0), RFI about to expire in a week (0).
- My Prospects:** A table showing prospect counts: Current Prospects (6), Abandoned Prospects (0), Prospects Added In The Last Month (1).
- My Quotes:** A table showing quote status: In Progress (3), Accepted (0), Submitted (1), Rejected (0).
- Reports:** Links for Agent Case Notes and Prospect Template (Individual).

- **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.
- **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.

