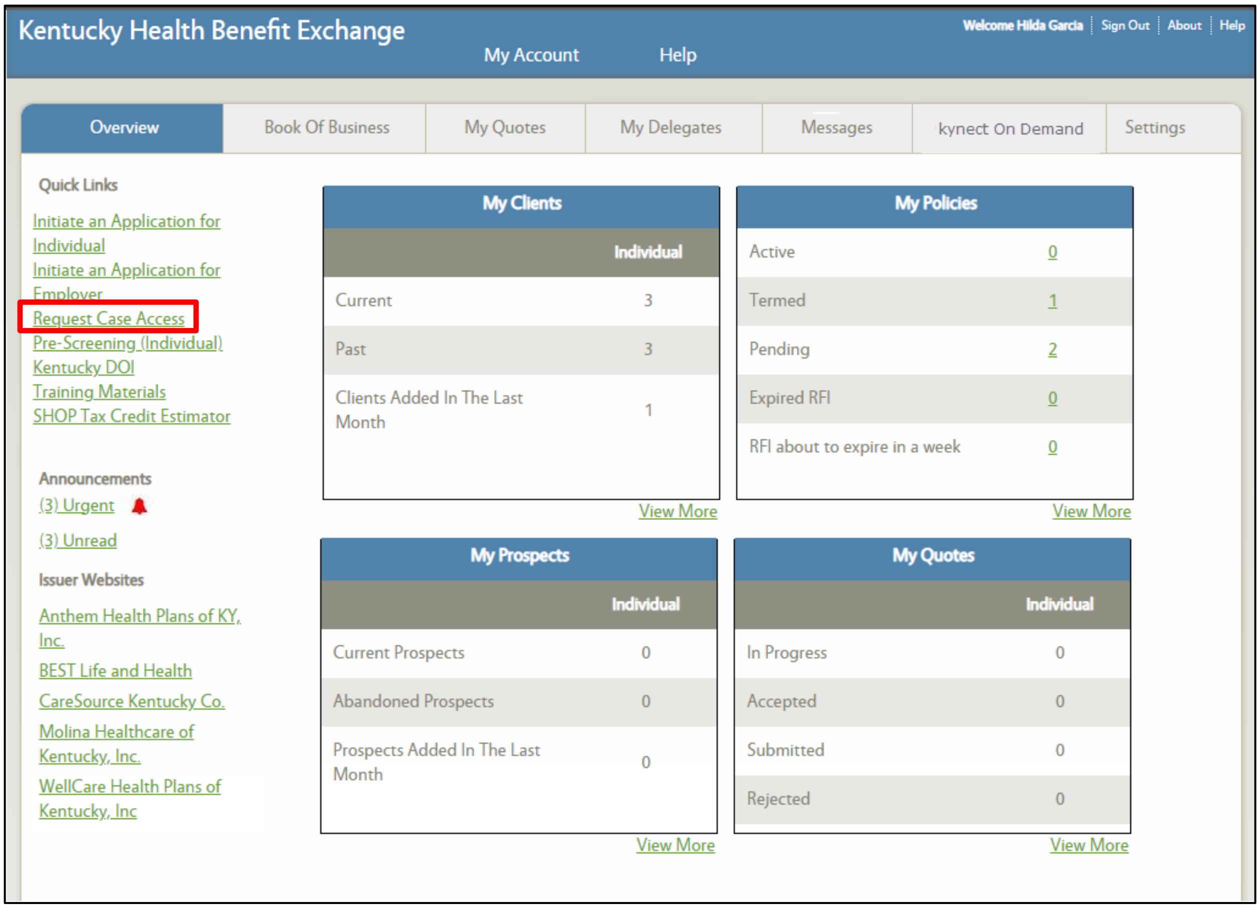
kynect
health coverage

Agent Portal: Agent Association to Client Cases

If an Agent is not associated to an existing case, they may request access through Agent Portal. Access to an existing case may be requested electronically or verbally. Electronic consent sends a message to the Resident through their preferred communication method, and they have 90 seconds to accept. If the Client fails to accept electronic consent within 90 seconds, the banner notification will expire and should not appear in the dashboard. Agents may continue with verbal consent by reading through the acknowledgments with the client.

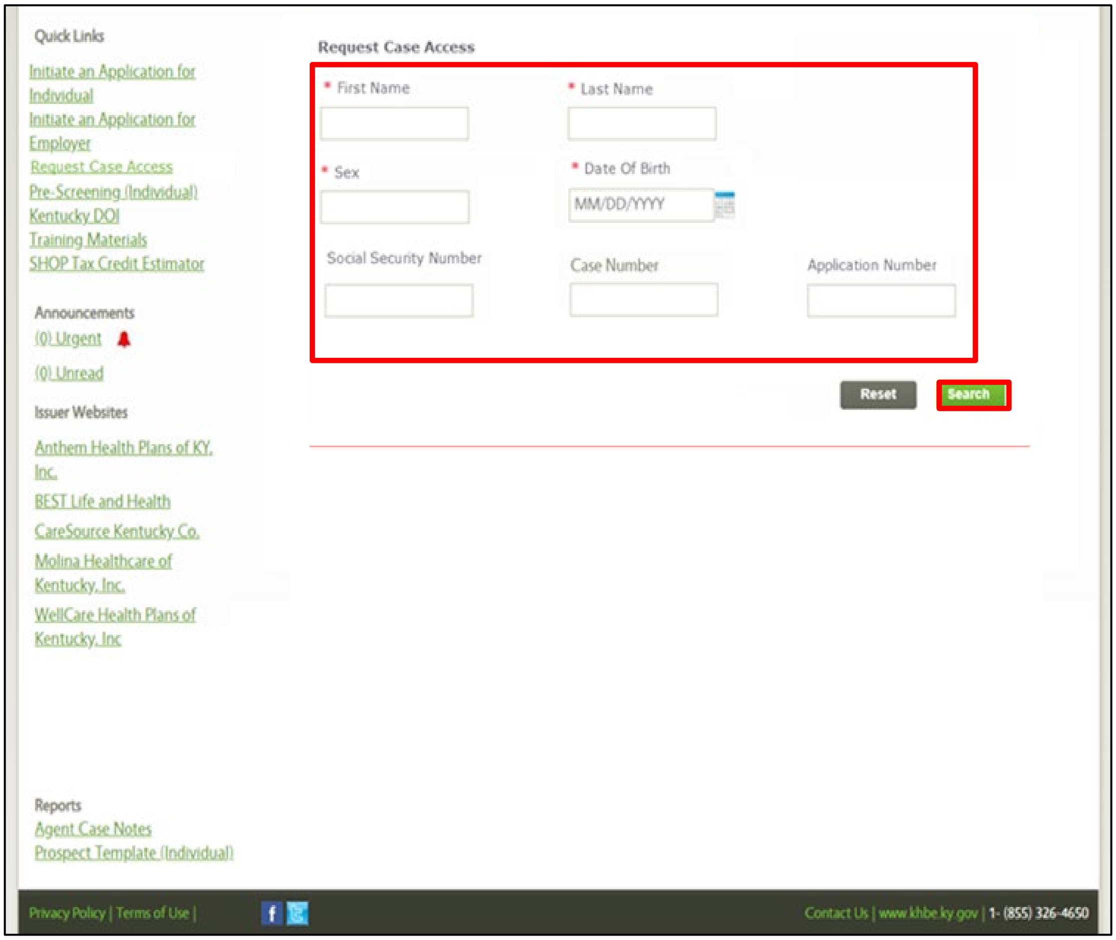
Request Case Access:

1. On the **Agent Portal Dashboard**, click **Request Case Access** under **Quick Links**.



Please note: Agents should not associate with Clients by creating a Prospect or by completing a new benefits application if there is an existing enrollment or benefits application.

2. Agents will be redirected to the Request Case Access screen. Fill out the client's **First Name, Last Name**, **Sex**, **Date of Birth**, and optionally their **Social Security Number**, **Case Number**, and **Application Number**.
3. Click **Search**.

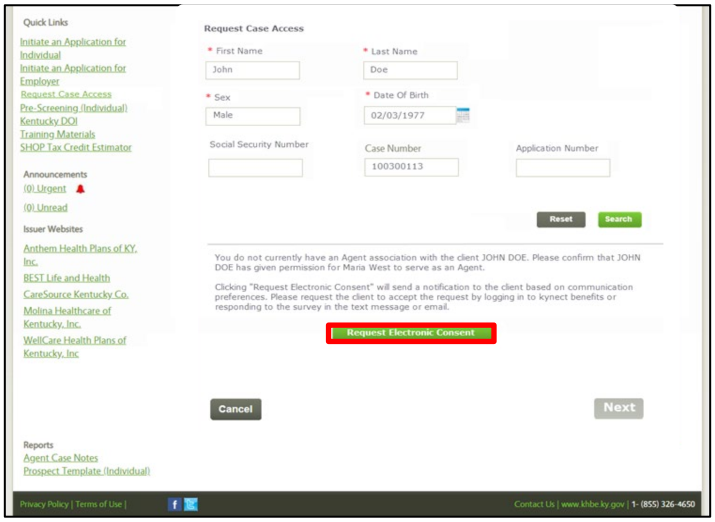


The system will validate whether the case is or is not associated with another Agent. If the Agent does not have an Agent association with the client, the Agent will have to receive consent from the Client. There are two ways to submit a consent:

1. Electronic Consent
2. Verbal Consent

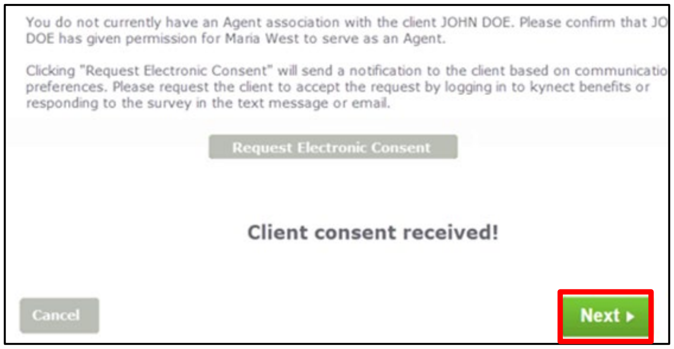
Electronic Consent:

1. A screen will display explaining that the Agent does not have association with the Client. Click **Request Electronic Consent**. This will send a notification to the Client based on their preferred communication method. The Client must accept the request by logging in to kynect benefits or responding to the survey in the text message or email within 90 seconds. Agents can request a maximum of 3 electronic consents to the same Client if the access to case is not processed.



Please note: If an Agent navigates to different screen within Agent Portal, the requested electronic consent will expire.

2. If the Client accepts the consent, a *Client Consent Received* message will display notifying the Agent they consented to association. Click **Next**.



3. A confirmation message will display. Click **Ok** to complete association and view the Client's case.

Verbal Consent:

Verbal Consent will be triggered if:

- There is a technical failure in processing the electronic consent
- The Client's communication preference is electronic
- Electronic consent is not responded by the Client

1. If the Client does not respond, a *Client did not respond* message will display. If this is the case, Agents will have to receive verbal consent from the Client. Click **Confirm Verbal Consent**.

2. A Verbal Consent pop-up will display. Read through the acknowledgements and click **Accept**.
3. A confirmation pop-up will display. Click **Ok**.

Please note: If the Client does not have an electronic communication method or they are not known to the system, a message will display to the Agent information them of next steps.