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.

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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, click 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.

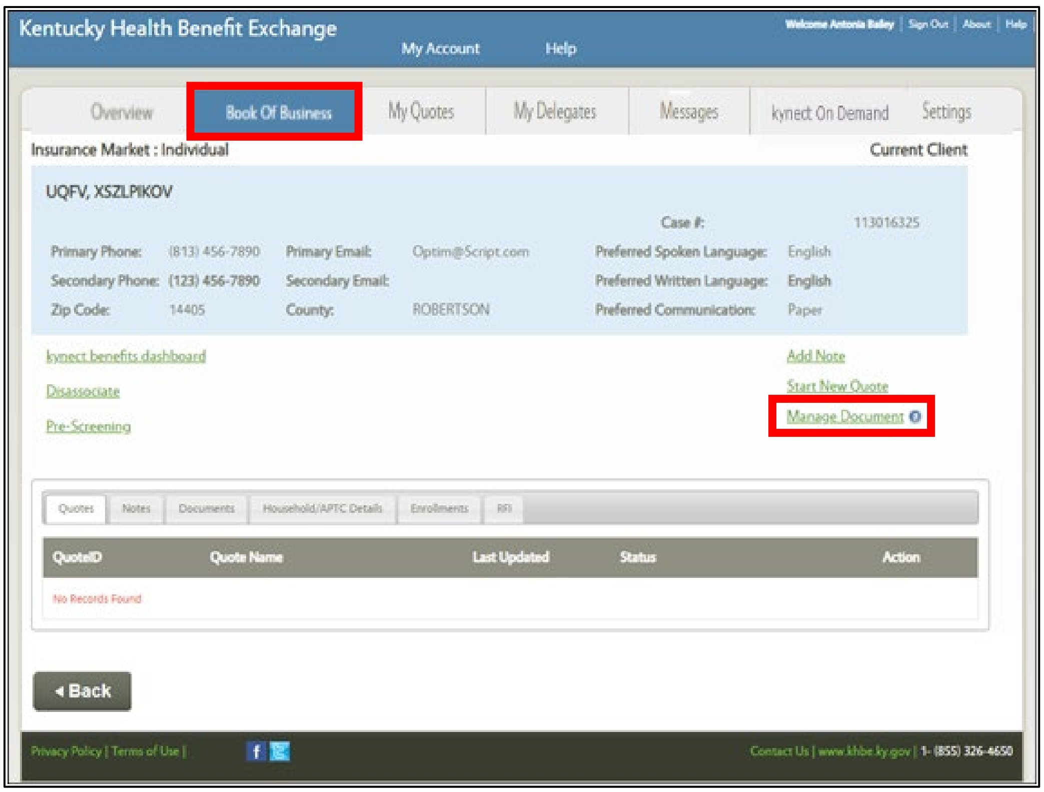
4. View required documents under "Documents Needed" in the Document Center before beginning the Document Wizard.

2 Uploading a Document in Agent Portal

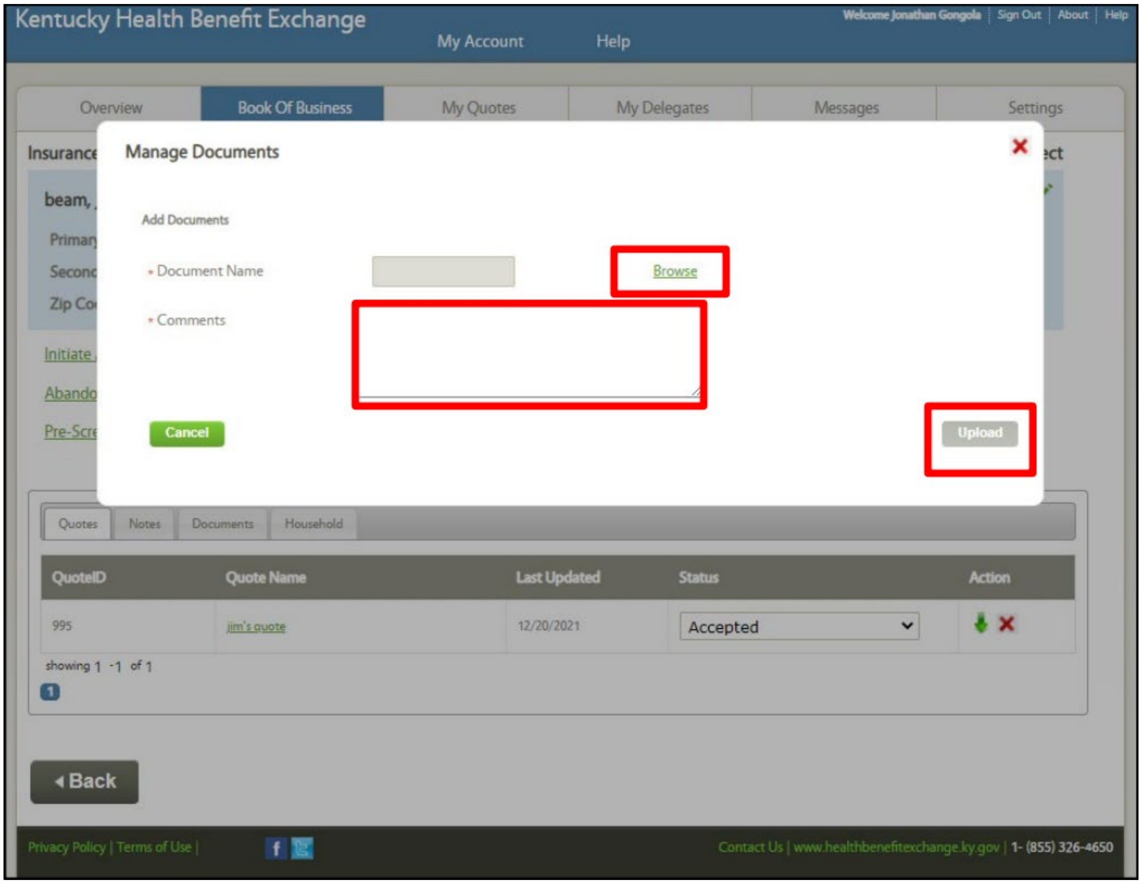
Agents may upload documents for clients and prospects on Agent Portal. Agents upload documents providing proof of information needed to apply for benefits such as income information, tax records, Social Security Number, citizenship information, etc.

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



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



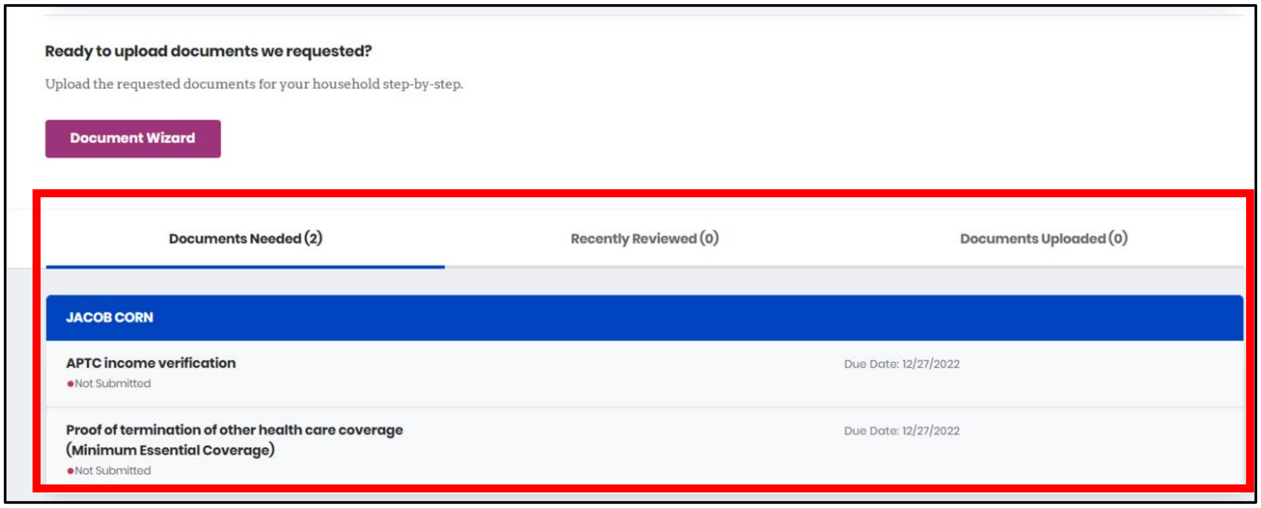
3 Uploading a Document in kynect benefits

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. Click **Documents** on the side menu of the Resident Dashboard to be taken to the **Document Center**.

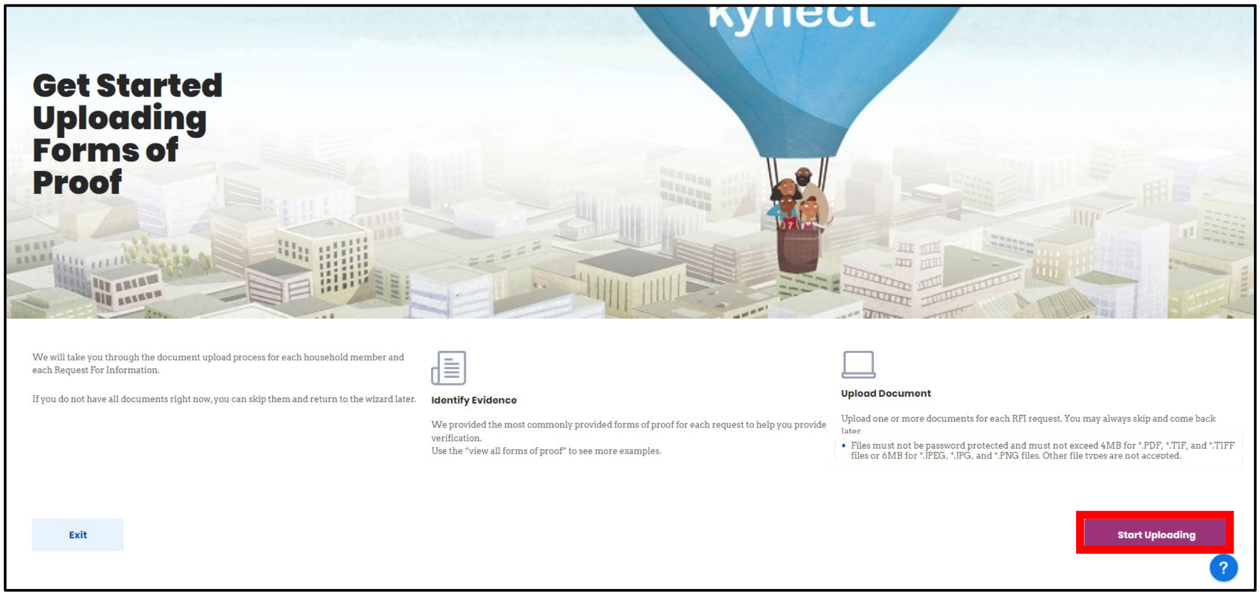
2. View the required documents under the **Documents Needed** tab.



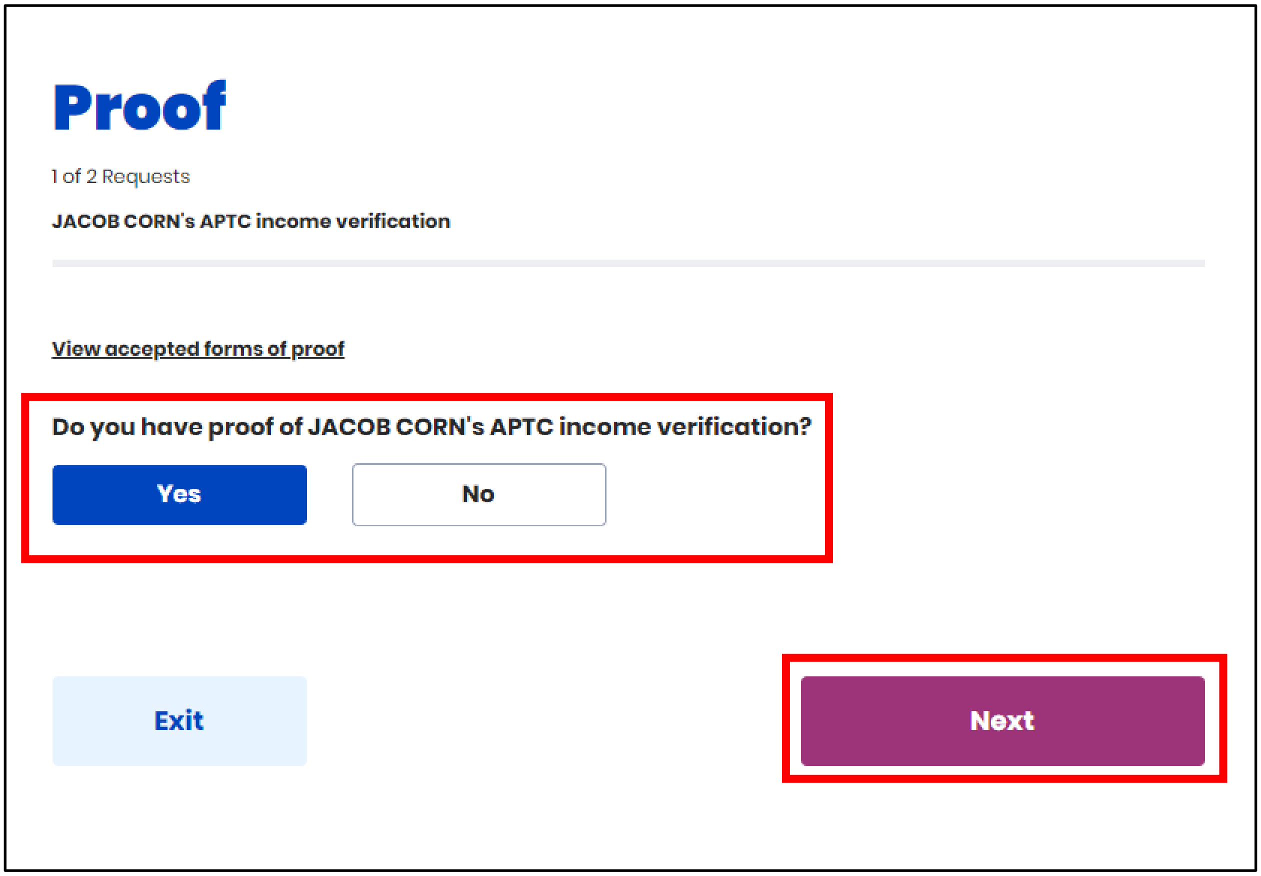
Please note: Documents remain under the **Documents Needed** tab as pending until they are accepted. Once they are reviewed and accepted, they appear in the **Recently Reviewed** tab.

3. Click **Document Wizard** to being uploading documents for open requests.

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



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

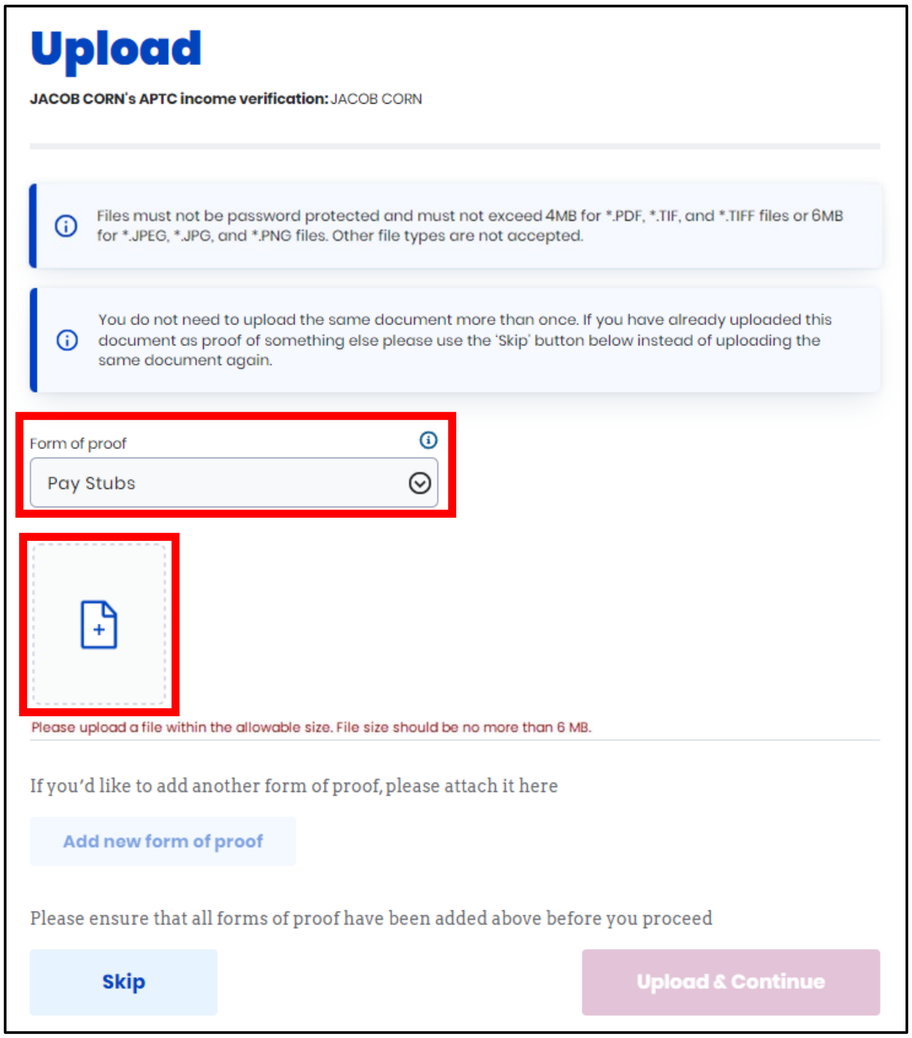


Please note: Click **View accepted forms of proof** to view a list of all accepted documents.

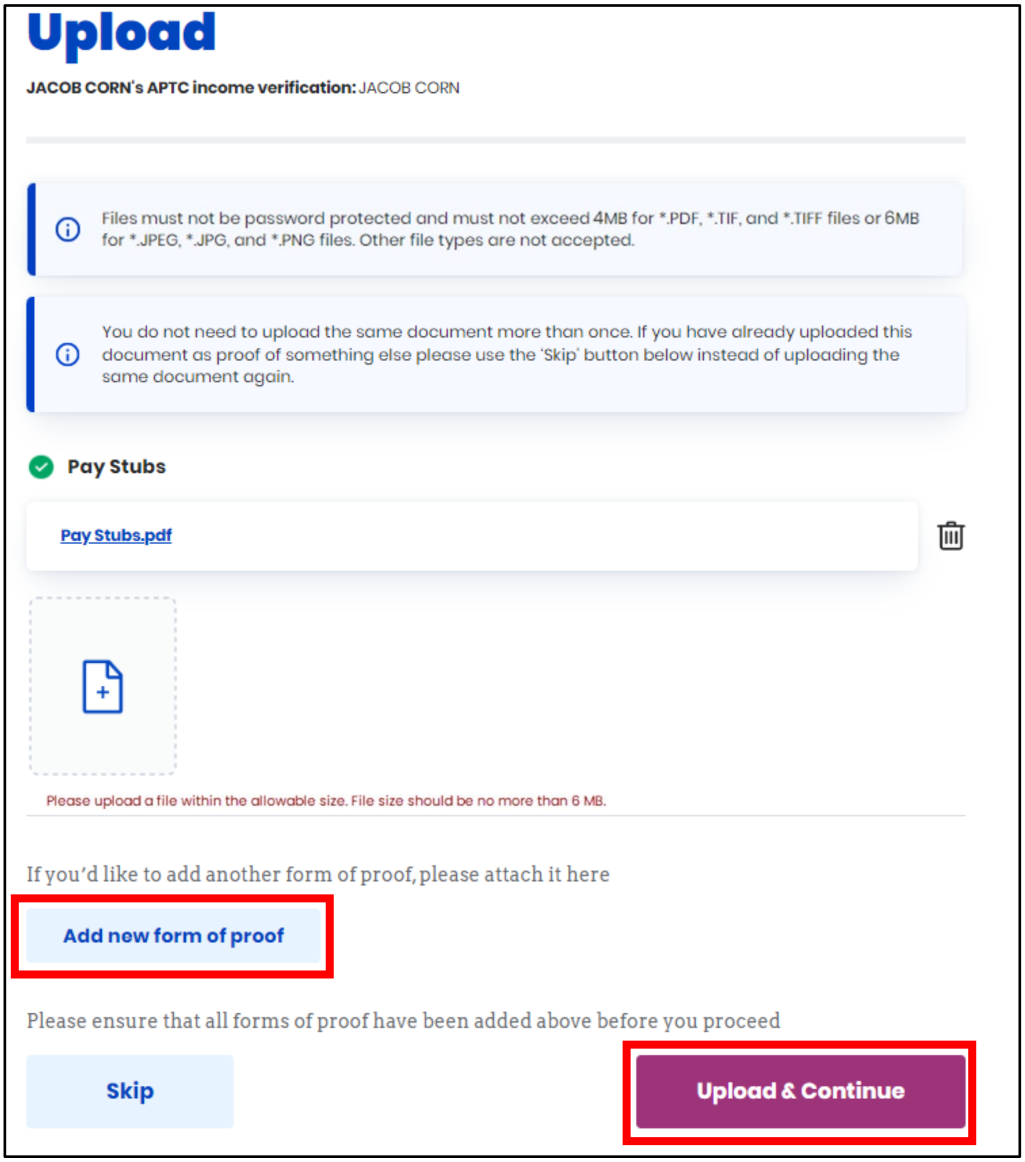
7. Select the type of document being uploaded in the *Form of proof* drop-down menu.

Please note: A hyperlink to download a template appears if there is a template document to help satisfy the need of the request.

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

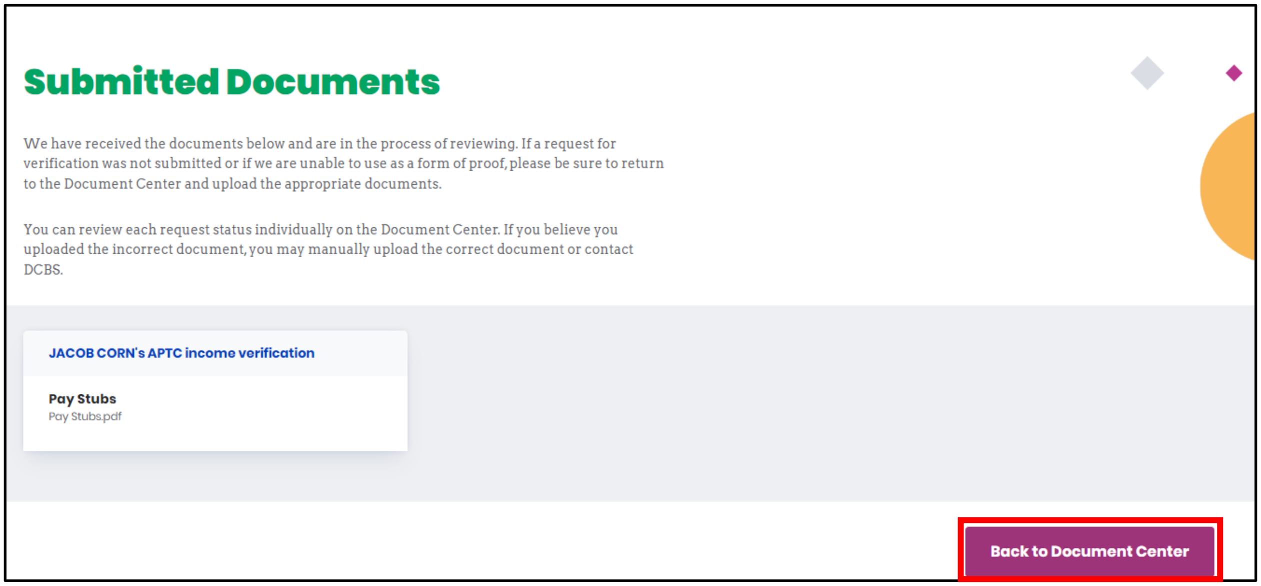


9. Click **Add new form of proof** to add an additional document if there is more than one document for this proof.
10. Click **Upload & Continue** to return to the **Proof** screen for the next request.

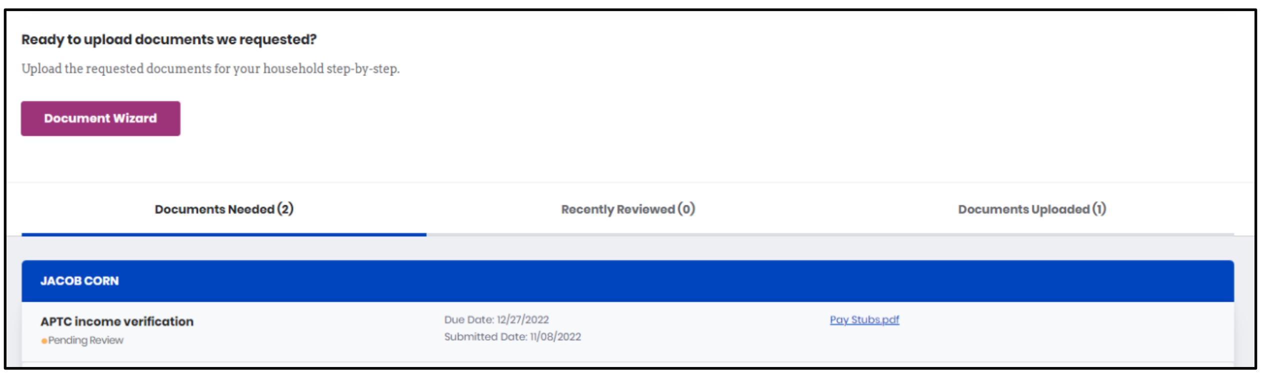


11. The **Document Wizard** will walk the user through the steps to upload a document for each request. After all documents have been submitted, the **Submitted Documents** screen displays.

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



The **Submitted Documents** tab will change from "Not Received" to "Pending Review" under the **Documents Needed** tab once they are uploaded correctly. Once they are reviewed, they will move to the **Recently Reviewed** tab.



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.