

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.

Kentucky Health Benefit Exchange

Welcome HBAE Agents
Sign Out
About
Help

My Account

Help

Overview

Book Of Business

My Quotes

My Delegates

Messages

kyntnet On Demand

Settings

Quick Links

[Initiate an Application for Individual](#)
[Initiate an Application for Employer](#)
[Request Case Access](#)
[Pre-Screening \(Individual\)](#)
[Kentucky DOJ](#)
[Training Materials](#)
[SHOP Tax Credit Estimator](#)

Announcements

(3) Urgent

(3) Unread

Issuer Websites

[Anthem Health Plans of KY, Inc.](#)
[BEST Life and Health](#)
[CareSource Kentucky Co.](#)
[Molina Healthcare of Kentucky, Inc.](#)
[WellCare Health Plans of Kentucky, Inc.](#)

My Clients

	Individual
Current	3
Past	3
Clients Added In The Last Month	1

View More

My Policies

Active	0
Termed	1
Pending	2
Expired RFI	0
RFI about to expire in a week	0

View More

My Prospects

	Individual
Current Prospects	0
Abandoned Prospects	0
Prospects Added In The Last Month	0

View More

My Quotes

	Individual
In Progress	0
Accepted	0
Submitted	0
Rejected	0

View More

- **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.
- **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.

