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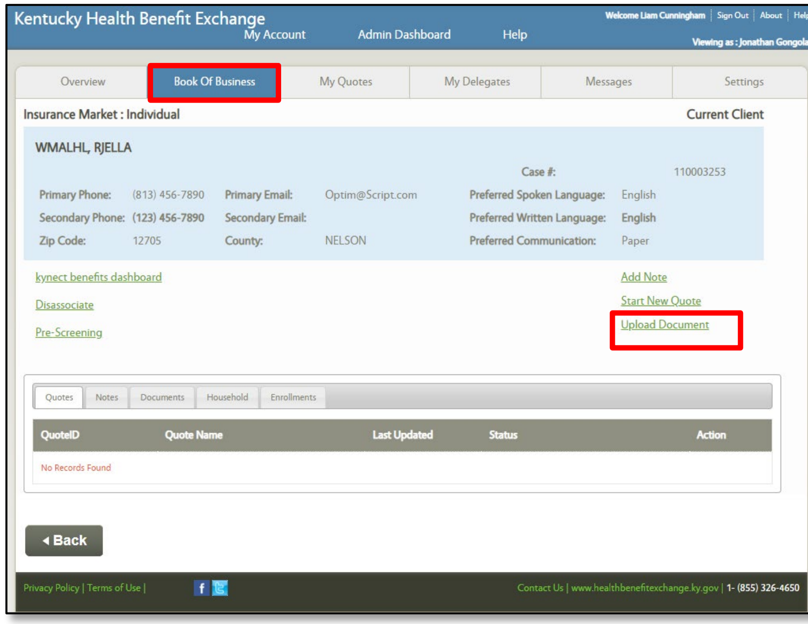
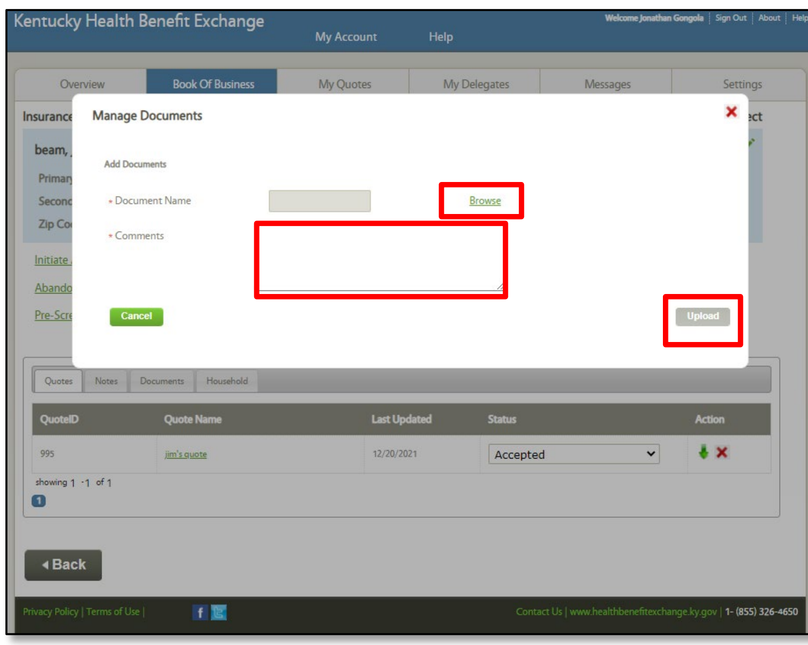
Agent Portal: Upload Documents for Clients and Prospects

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. To upload documents, please follow the steps as listed below.

Steps to Upload Documents for Clients and Prospects:

1. Navigate to the **Book of Business** screen.
2. Select **Current Client** or **Current Prospect** from the *Choose Client/Prospect* drop-down.
3. Click **Search**.
4. Select a **Client** or **Prospect Name**.
5. Click **Upload Document**.
6. Click **Browse** to open the File Folder.
7. Select the appropriate **Document(s)** to upload.
8. Enter **Comments** detailing the information that is included in the selected document(s).
9. Click **Upload**.





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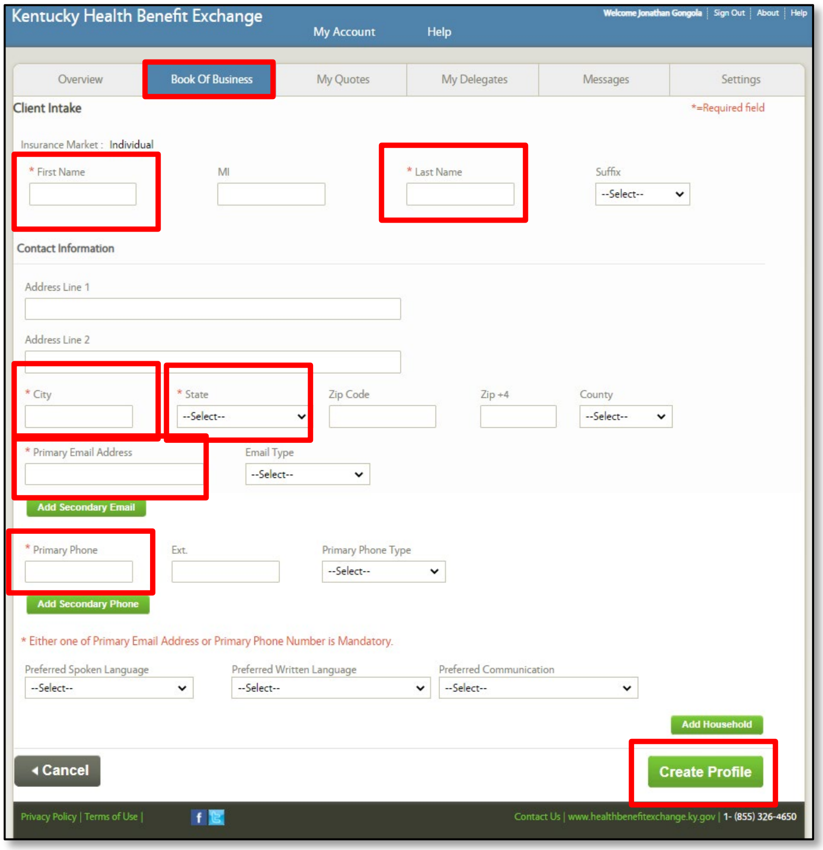
Agent Portal: Upload Prospects

Agents may upload prospects to Agent Portal one at a time by clicking **Create New Prospect** or may upload a group of prospects by uploading a **Prospect Template (Individual)**. To upload prospects, please follow the steps listed below. If Agents are reassociating with a client, they should not create a new prospect.

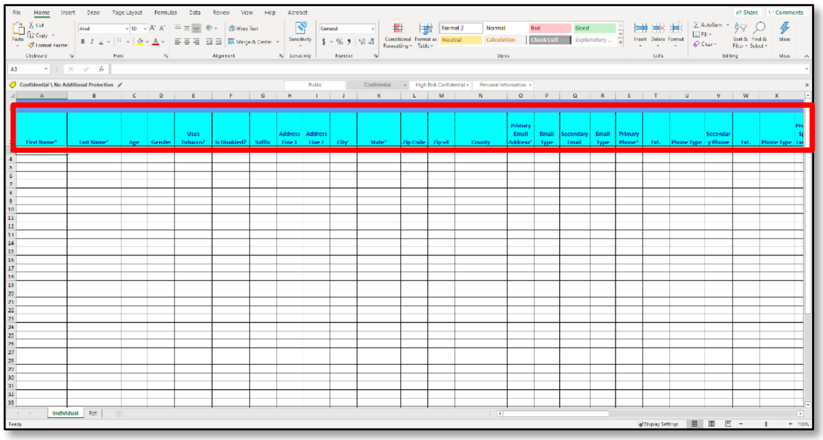
Steps to Create a New Prospect:

1. Navigate to the **Book of Business** screen.
2. Select **Current Prospect** from the *Choose Client/Prospect* drop-down.
3. Click **Search**.
4. Click **Create New Prospect** at the bottom of the screen.
5. Enter **information** as applicable. Mandatory fields include: *First Name, Last Name, City, State, Primary Email Address,* and *Primary Phone*.
6. Click **Create Profile**.



Steps to Upload a Prospect Template:

1. Click **Prospect Template (Individual)** to download an Excel file.
2. Enter **information** as applicable. Mandatory fields include: *First Name, Last Name, City, State, Primary Email Address,* and *Primary Phone*. Save the document.
3. Click **Upload Prospects** on the **Book of Business (Prospect)** screen.
4. Click **Upload Template**.
5. Select the **Prospect Template (Individual)** from the file folder that was just created.
6. Click **Submit**.



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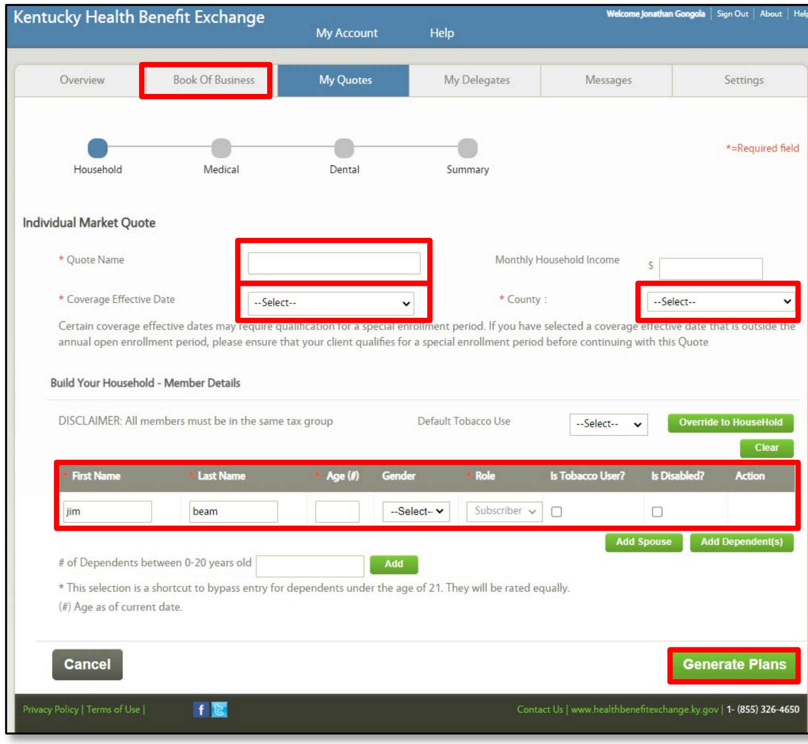
Agent Portal: Create a Quote

Agents may generate quotes for clients and prospects at any time through Agent Portal. Navigate to the **Book of Business**, select a **Client** or **Prospect**, click **Start New Quote**, enter **information**, and select a **medical and/or dental plan** to send to the client or prospect.

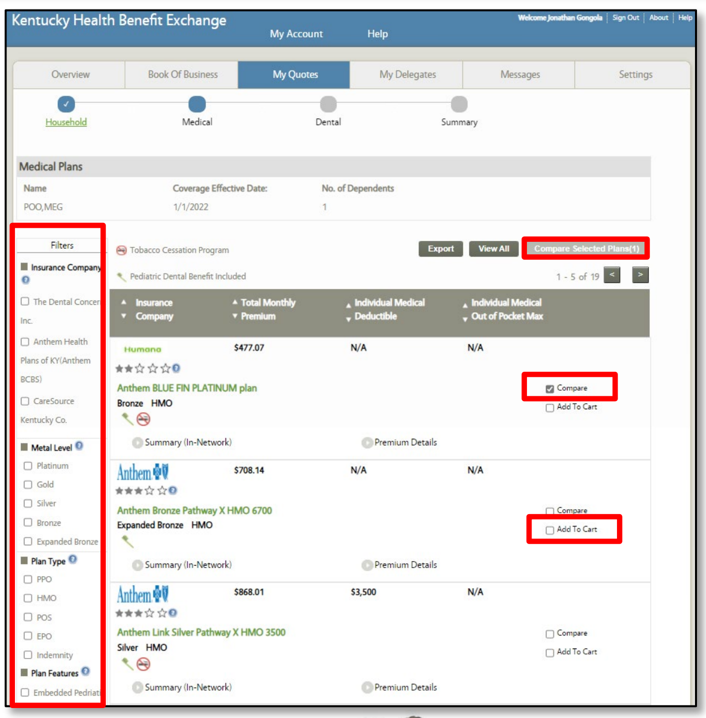
Start a Quote:

1. Navigate to the **Book of Business** screen.
2. Select the **Client** or **Prospect** who will receive the quote.
3. Click **Start New Quote**.
4. Enter the **Quote Name, Coverage Effective Date, County,** and **Member Details**.
5. Click **Generate Plans**.



Compare Plans and Send Quote to Prospect/Client:

1. Select any **filter criteria** and click **Apply** to narrow search results.
2. Check **Compare** on any medical plans to select for comparison.
3. Click **Compare Selected Plans**.
4. Once a plan is selected, check **Add To Cart**.
5. Click **Next** to compare dental plans and follow steps 1-4 above.
6. Click **Send to Client**.
7. Click **Send Quote**.



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Agent Portal: Reassociate With Clients

If Agents wish to reassociate with Clients after the Passive Renewal date (10/31/21), they will need to contact the Client and have them reassociate the Agent to their case or they may reach out to the Contact Center. Clients may call the Contact Center on their own to add the Agent to their case, but the Agent cannot call to reassociate with the case without the Client. Agents should not reassociate with Clients by creating a Prospect.

Client Reassociation:

1. In order to reassociate with a Client, Agents must first complete Agent training on MyPurpose if they have not already.
2. Clients may add the Agent to their case in kynect benefits by searching for the Agent in the *Reps, kynectors, and Agents* section. Agents may also ask the Client to complete the Appendix B Form located on the kynect benefits website and send it to their local DCBS office.
3. Agents may call the Contact Center to reassociate the Agent with the Client's case, but the Client must be on the line. Clients may call the Contact Center on their own to add the Agent to their case, but the Agent cannot call to reassociate with the case without the Client.
4. Once reassociation is complete, Agents may assist the Client as applicable.

Please note: The Contact Center may be reached at 855-459-6328 (855-4kynect).