Introduction

This document provides information on various scenarios related to the Quoting Tool in Agent Portal.

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1 Agent Portal Quoting Tool Overview

Agents may create quotes for Clients and Prospects in Agent Portal. A quote may only be created in Agent Portal if the Individual is entered as a Prospect or Client. The process to create a quote may vary depending on the scenario.

2 Scenario 1: Create a Prospect, Submit a Benefits Application, and Create a Quote

This scenario walks through the process of creating a Prospect in Agent Portal, accessing the benefits application within kynect benefits from Agent Portal, and creating a quote for that Prospect.

Please note: A Prospect does not need to be created if the Individual is ready to apply for benefits. Instead, click Initiate an Application for Individual under Quick Links. Once the benefits application is complete, the Individual should automatically be included in the Book of Business as a Client.

2.1 Create a Prospect in Agent Portal

Complete the following steps to create a Prospect in Agent Portal:

1. On the Agent Portal Dashboard, click Book of Business to 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**.
5. Enter the Prospect’s **First Name**.
6. Enter the Prospect’s **Last Name**.
7. Enter or select the Prospect’s **Contact Information** including **Address**, **City**, **State**, **Zip Code**, **County**, **Primary Email Address**, and **Email Type**.
8. Enter or select the Prospect’s **Primary Phone Number** and **Primary Phone Type**.

**Please note:** The **Primary Email Address** and **Primary Phone** fields are optional, but at least one of these fields must be completed to create the Prospect.

9. Select the Prospect’s **Preferred Spoken Language**, **Preferred Written Language**, and **Preferred Communication**.
10. Click **Add Household** to add other household members.
11. The Prospect’s First Name and Last Name automatically populate. Enter the Age, Gender, and select whether the Individual is disabled and/or a tobacco user, if applicable.

12. Click Add Spouse to enter spousal information.

13. Enter the Spouse’s First Name, Last Name, Age, Gender, and select whether the Individual is disabled and/or a tobacco user, if applicable.

14. Click Save Profile to save the household and add the Prospect.
2.2 Submit the Benefits Application

Complete the following steps to submit a benefits application from Agent Portal:

16. Click **Yes, I accept** to proceed to the benefits application.
17. Click **Start Benefits Application**.
18. Read the *Information for All Who Apply* and click *I Agree.*
19. Select the **Program(s)** the Prospect would like to apply for.
20. Click **Next**.
21. Complete the benefits application with the Prospect and submit the application to determine eligibility.

Please note: Refer to the Benefits Application Within kynect benefits QRG for steps to complete the benefits application.
2.3 Create a Quote in Agent Portal

Complete the following steps to create a quote in Agent Portal:

22. On the **Current Client** screen, click **Start New Quote**.
23. Enter the **Quote Name**.
24. Select the **Coverage Effective Date** from the drop-down.
25. Enter the **Monthly Household Income**.
26. Select the **County** from the drop-down.
27. Select **Yes** or **No** for **Default Tobacco Use** from the drop-down.
28. Click **Generate Plans**.
29. The APTC amount displayed is the maximum amount the household may apply to the Medical plan.

Please note: Agents may use the slider to update the APTC applied or enter the amount in the field.
30. Check **Compare** and click **Compare Selected Plans** to compare plans side-by-side.

31. Check **Add To Cart** for the desired plan.

32. Click **Next**.

**Please note:** Agents may add a Dental plan to the quote by completing the same steps.
33. The *Quote Summary* information displays. Click **Download** to display a PDF of the quote and save the quote.
34. The quote displays under the *Quotes* tab.
3  Scenario 2: Create a Quote for a Non-Prospect

This scenario walks through the process of creating a quote in Agent Portal for an Individual not listed as the Prospect but included in the Household.

Complete the following steps to create a quote for a Non-Prospect in Agent Portal:

2. Enter the **Quote Name**.
3. Select the **Coverage Effective Date** from the drop-down.
4. Enter the **Monthly Household Income**.
5. Select the **County** from the drop-down.
6. Select **Yes** or **No** for **Default Tobacco Use** from the drop-down.
7. Since the Individual is enrolled in Medicare and should not be included in the quote, check the **box** for **Is Eligible for other Health Coverage?** (##).
8. Click **Generate Plans**.
9. The APTC amount displayed is the maximum amount the household may apply to the Medical plan.

**Please note:** Agents may use the slider to update the APTC applied or enter the amount in the field.
10. Check **Compare** and click **Compare Selected Plans** to compare plans side-by-side.
11. Check **Add To Cart** for the desired plan.
12. Click **Next**.

**Please note:** Agents may add a Dental plan to the quote by completing the same steps.
13. The *Quote Summary* information displays. Click **Download** to display a PDF of the quote and save the quote.

**Please note:** The quote created is only for the Subscriber, but the Spouse remains in the tax household. The Prospect's name will still appear in the *Quote Summary* section.
14. The quote displays under the *Quotes* tab.
4. Scenario 3: Create a Quote for Two Individuals (QHP) and Two Children (KCHIP)

This scenario walks through the process of creating a quote in Agent Portal for two Individuals eligible for QHP and removing the two Dependents receiving KCHIP.

Complete the following steps to create a quote for two Individuals (QHP) and two Children (KCHIP) in Agent Portal:

2. Enter the **Quote Name**.

3. Select the **Coverage Effective Date** from the drop-down.

4. Enter the **Monthly Household Income**.

5. Select the **County** from the drop-down.

6. Select **Yes** or **No** for **Default Tobacco Use** from the drop-down.

7. Since the dependents are enrolled in KCHIP and should not be included in the quote, check the box for **Is Eligible for other Health Coverage? (#)**.

8. Click **Generate Plans**.

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![Screenshot of the Agent Portal Quoting Tool](image_url)
9. The APTC amount displayed is the maximum amount the household may apply to the Medical plan.
10. Check **Compare** and click **Compare Selected Plans** to compare plans side-by-side.
11. Check **Add To Cart** for the desired plan.
12. Click **Next**.

Please note: Agents may add a Dental plan to the quote by completing the same steps.
13. The *Quote Summary* information displays. Click **Download** to display a PDF of the quote.

*Please note:* The quote created is only for the Subscriber and Spouse, but the Dependents remain in the tax household.
14. The quote displays under the *Quotes* tab.