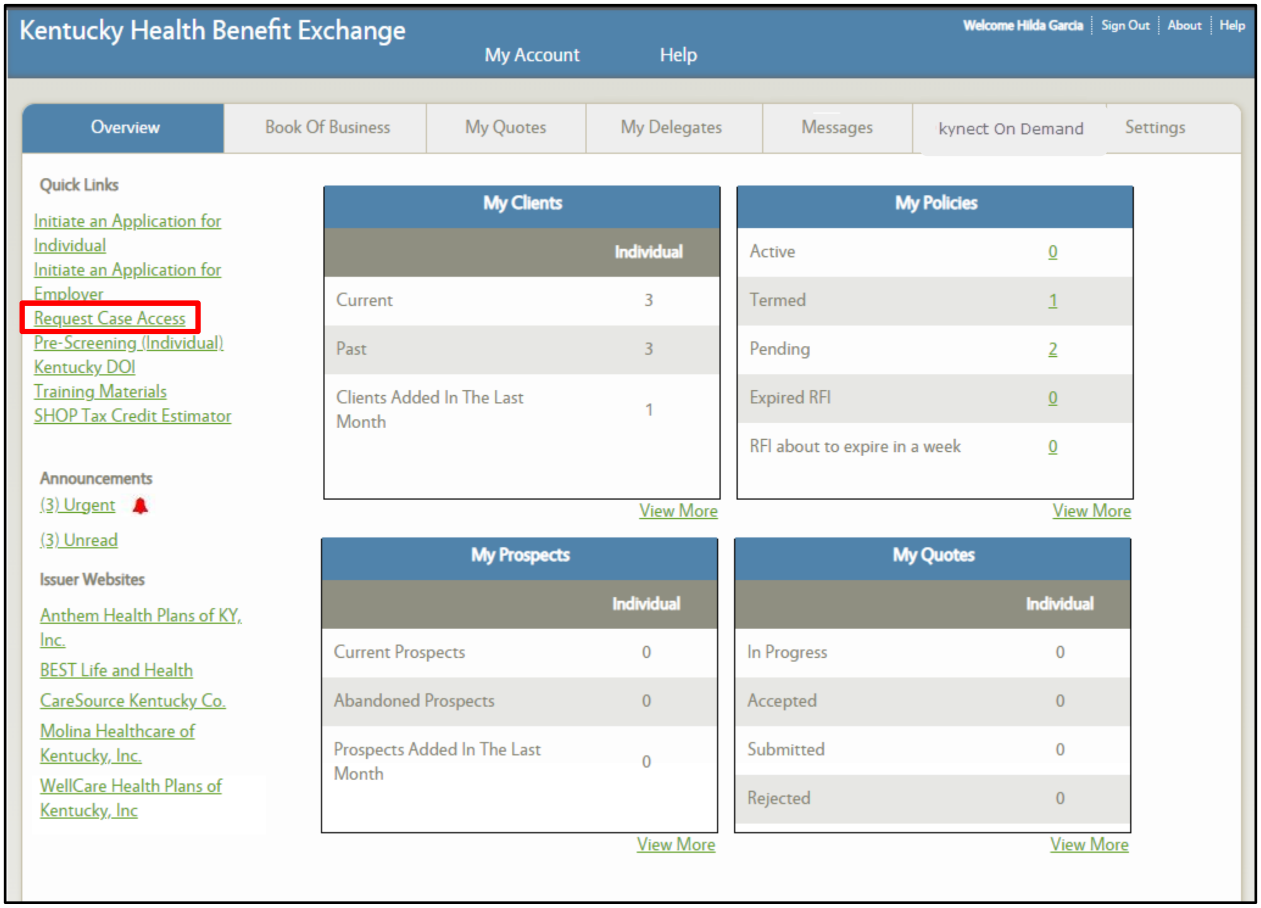
Agent Portal: Agent Association to Client Cases

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 Client 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.

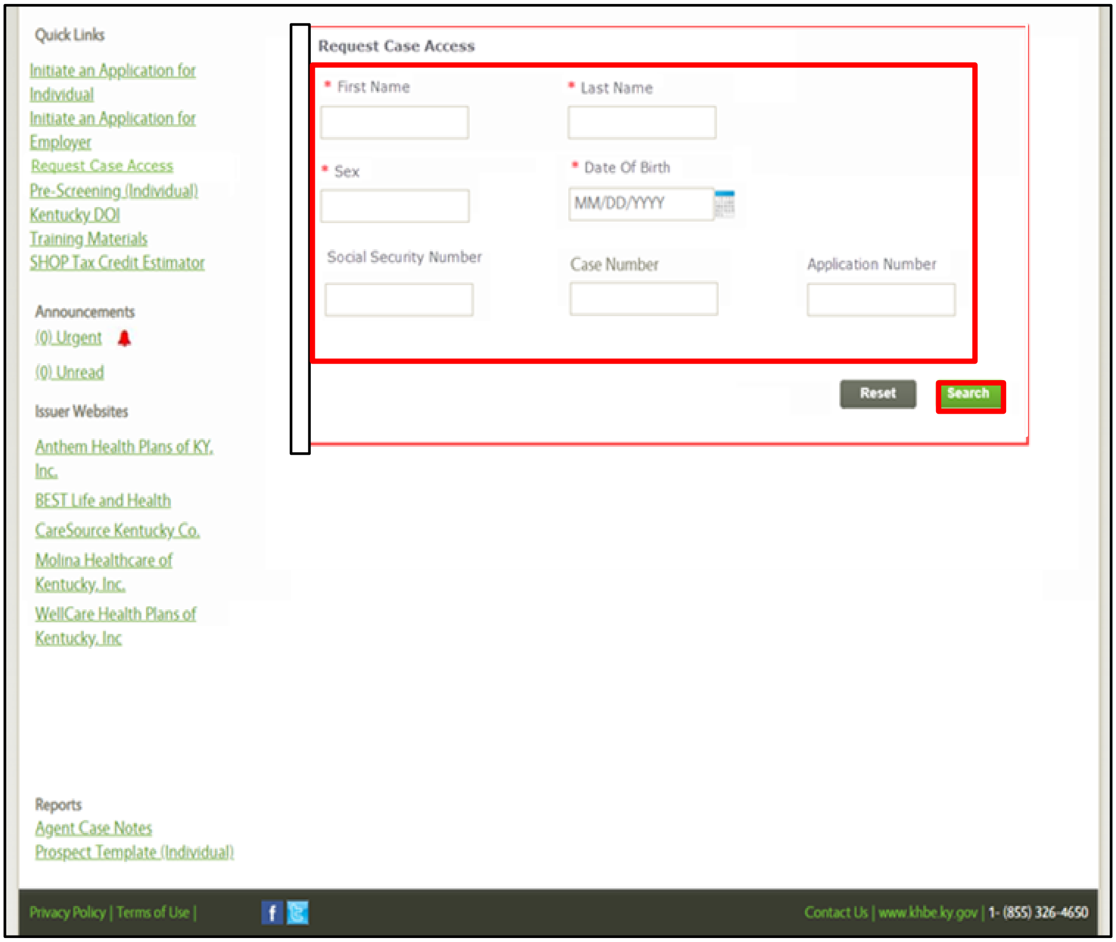
Request Case Access:

1. On the **Agent Portal Dashboard**, select **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 are 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. Select **Search**.

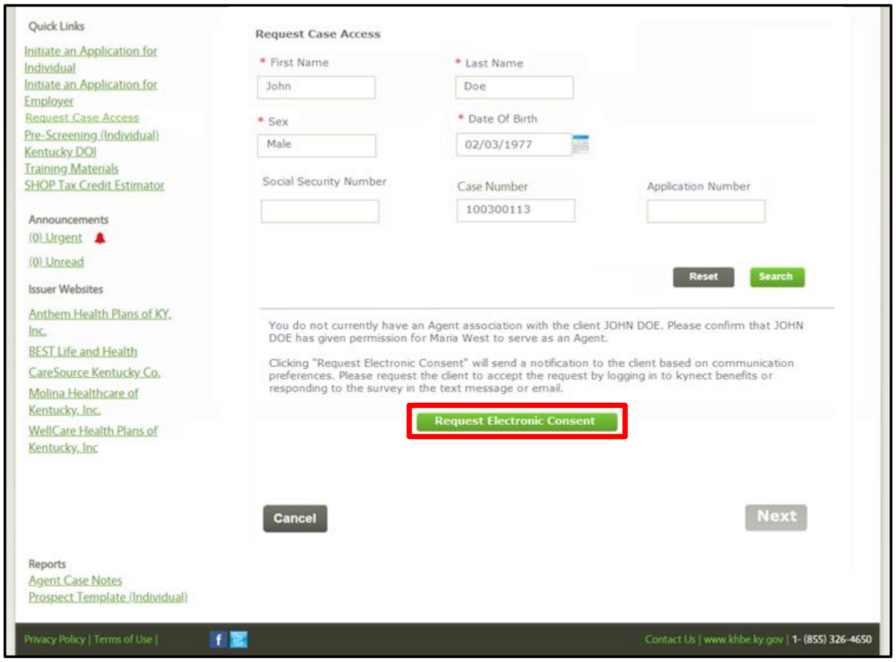


The system will validate whether the case is or is not associated with another Agent. If the Agent does not have an Agent association with the Client, the Agent needs to receive consent from the Client. There are two ways to submit a consent:

1. Electronic Consent
2. Verbal Consent

Electronic Consent:

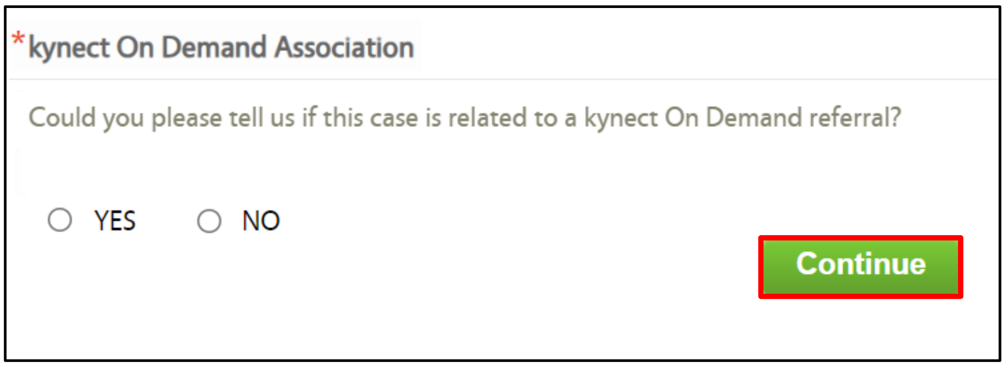
1. A screen displays explaining that the Agent does not have association with the Client. Select **Request Electronic Consent**. This sends a notification to the Client based on their preferred communication method. The Client must accept the request by logging in to kynect benefits or responding to 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.



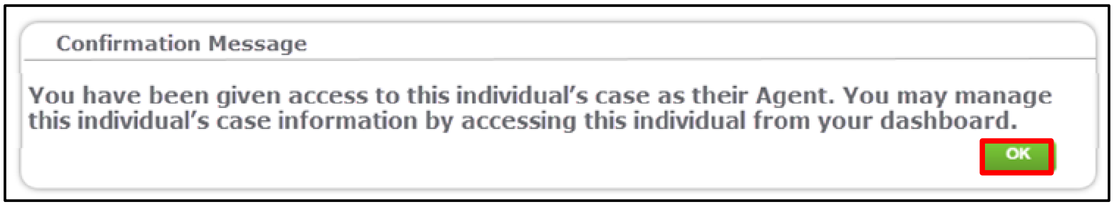
Please note: If an Agent navigates to a different screen within Agent Portal, the requested electronic consent will expire.

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

3. Upon selecting **Next**, the following pop-up displays to capture the kynect On Demand reference response. Once the response is provided, select **Continue** to proceed.



4. A confirmation message will display. Select **OK** to complete association and view the Client's case.

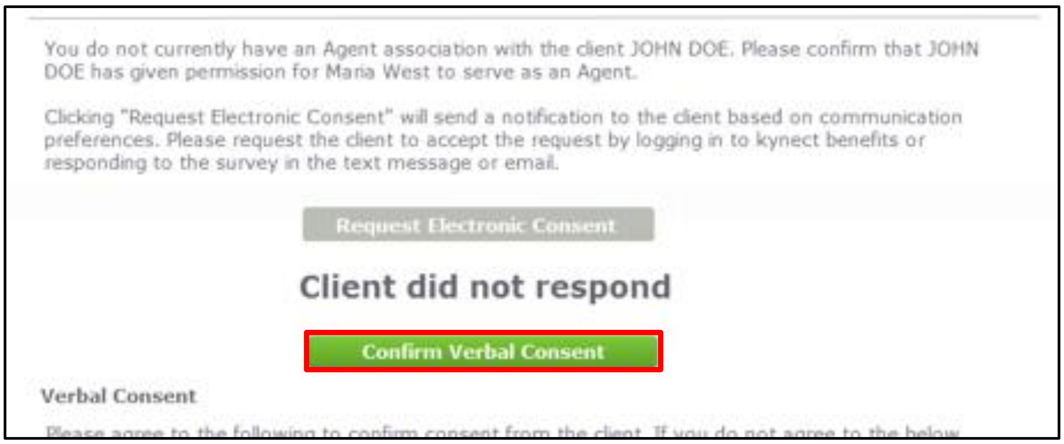


Verbal Consent:

Verbal Consent will be triggered if:

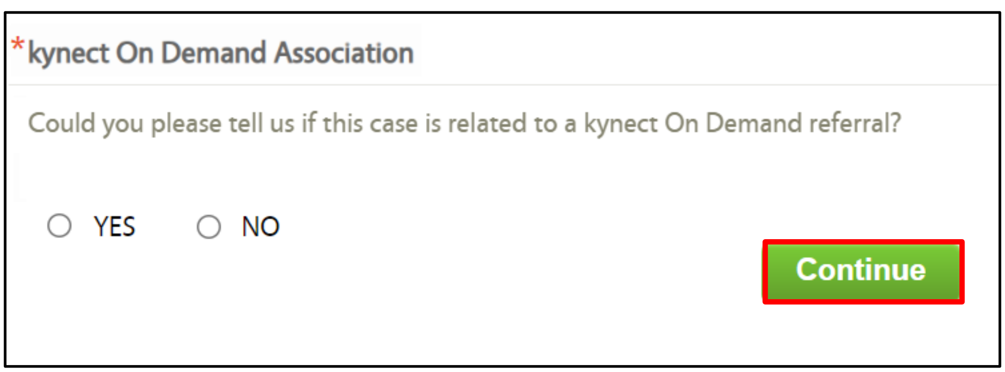
- There is a technical failure in processing the electronic consent
- The Client's communication preference is not electronic
- Electronic consent is not responded by the Client

1. If the Client does not respond, a *Client did not respond* message displays. If this is the case, Agents need to receive verbal consent from the Client. Select **Confirm Verbal Consent**.



2. A **Verbal Consent** pop-up displays. Read through the acknowledgements and select **Accept**.

3. Upon selecting **Accept**, the following pop-up displays to capture the kynect On Demand reference response. Once the response is provided, select **Continue** to proceed.



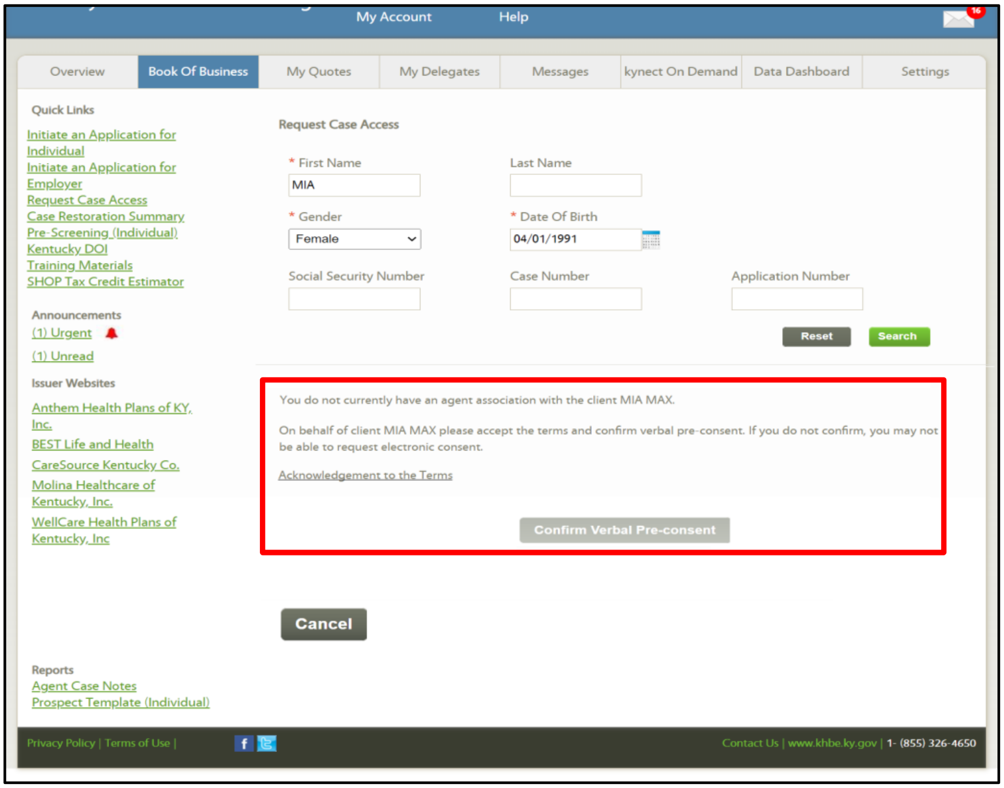
4. A confirmation pop-up displays. Select **OK**.

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

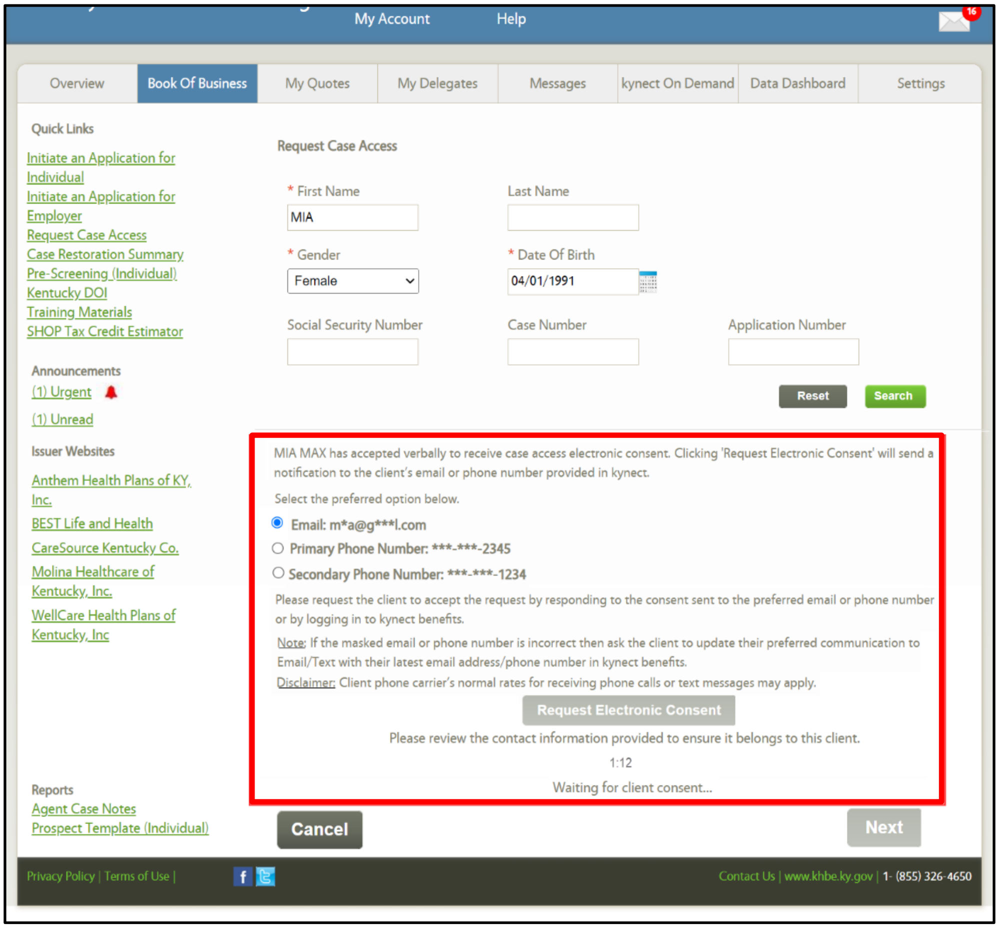
The Agent 'Request Case Access' process flow allows Agents to request additional consent when Clients select paper as the preferred method of communication.

Request Case Access Process Flow for Additional Consent if Client Email Address or Phone Number is Available:

1. The Agent selects **Confirm Verbal Pre-Consent** to begin the 'Electronic Consent' process. Agent may view **Acknowledgement to the Terms** details by selecting the link to display the **Verbal Pre-consent** acknowledgement.



2. The Agent selects the preferred communication option from **Email, Primary,** or **Secondary Phone Number,** then selects the **Request Electronic Consent** button which enables the 90-second Client response window. This button is green until selected then turns grey to indicate the timer is running.

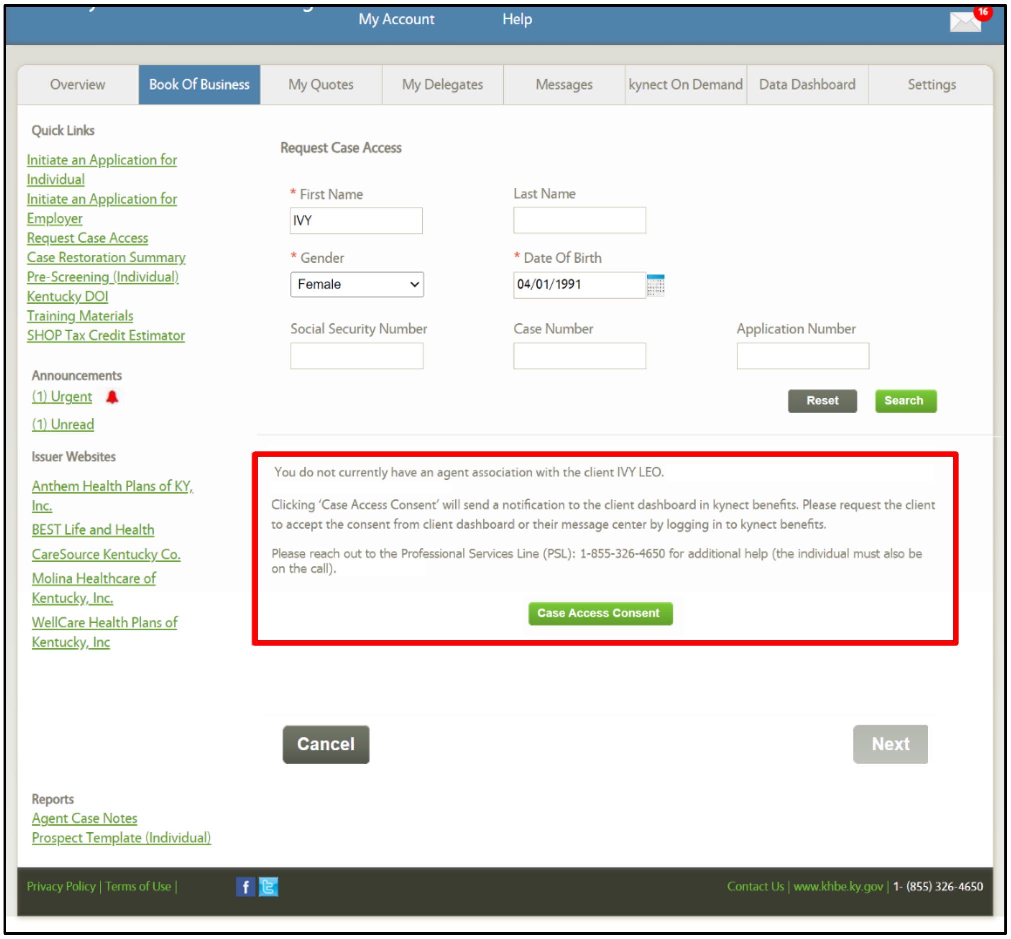


Please note: If the Client does not have a phone number listed in their account, the Phone Number options display **Primary/Secondary Phone Number: Not Available** and the Agent can only send electronic consent via email. If the Client does not have an email address listed in their account, the Email option displays **Email: Not Available** and the Agent can only send electronic consent via Primary or Secondary Phone Number text message.

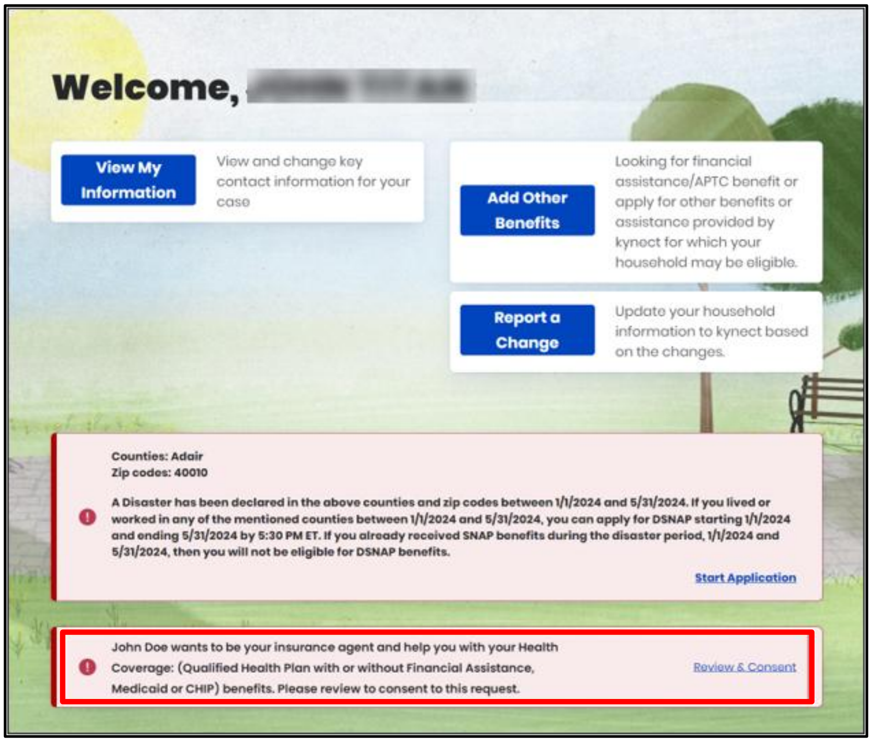
3. The Client receives the Email or Text survey notification based on Agent's selection.
   a. If the Client selects **Accept** to the Electronic Consent before the 90-second expiration window, the Agent receives the message "Client consent received!" in the Agent Portal.
   b. If the Client selects **Reject**, the Agent receives the message "Client did not consent!" in the Agent Portal. The Agent can request Electronic Consent up to two more times.
   c. If the Client did not respond within the 90-second expiration window, the Agent receives the message "Client did not respond" in the Agent Portal and the Agent may request consent again without restriction until Client responds.

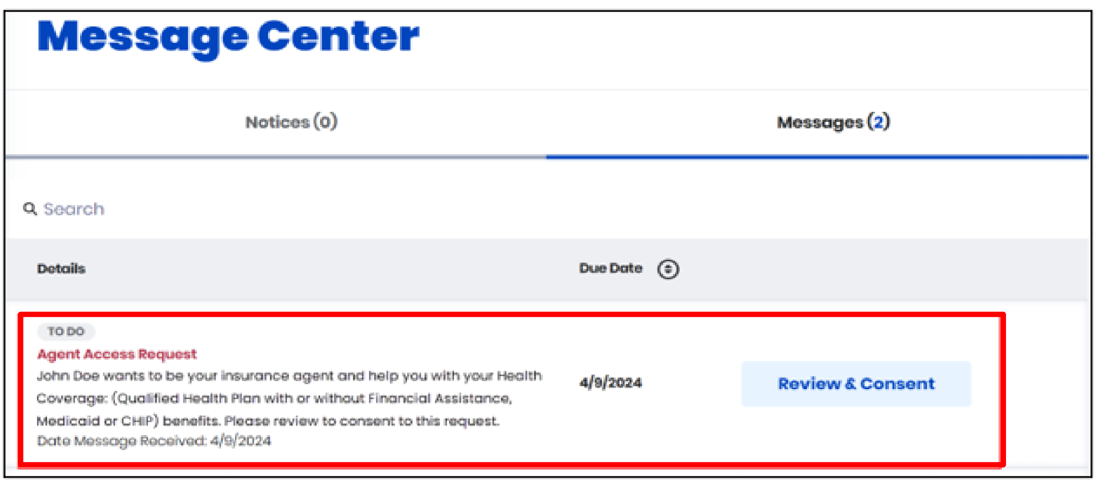
Request Case Access Process Flow for Additional Consent if Client Email Address and Phone Number is not Available:

1. The Agent selects the **Case Access Consent** button which sends a notification message to the Client's kynect benefits dashboard and Message Center.

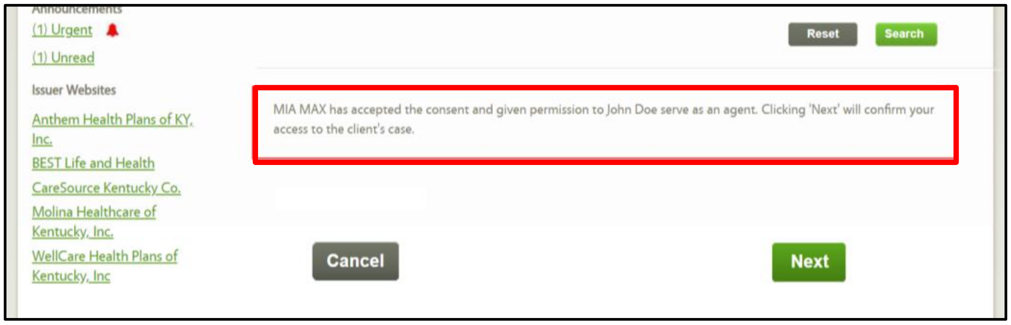


2. The Client receives a notification message in their kynect benefits dashboard and Message Center. When the Client selects the **Review & Consent** link on the dashboard or **Review & Consent** button in the Message Center, a pop-up opens with the options to select **Accept** or **Reject.**



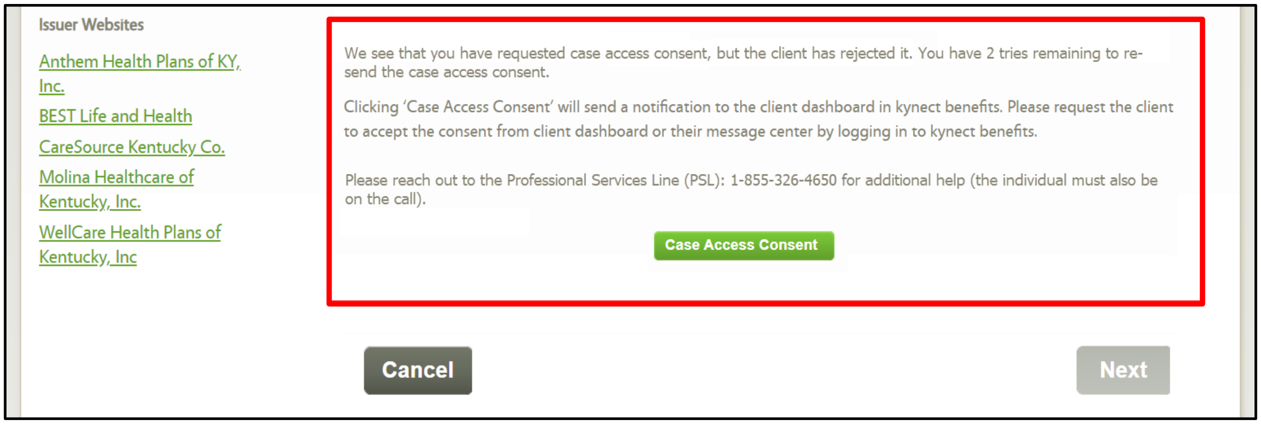


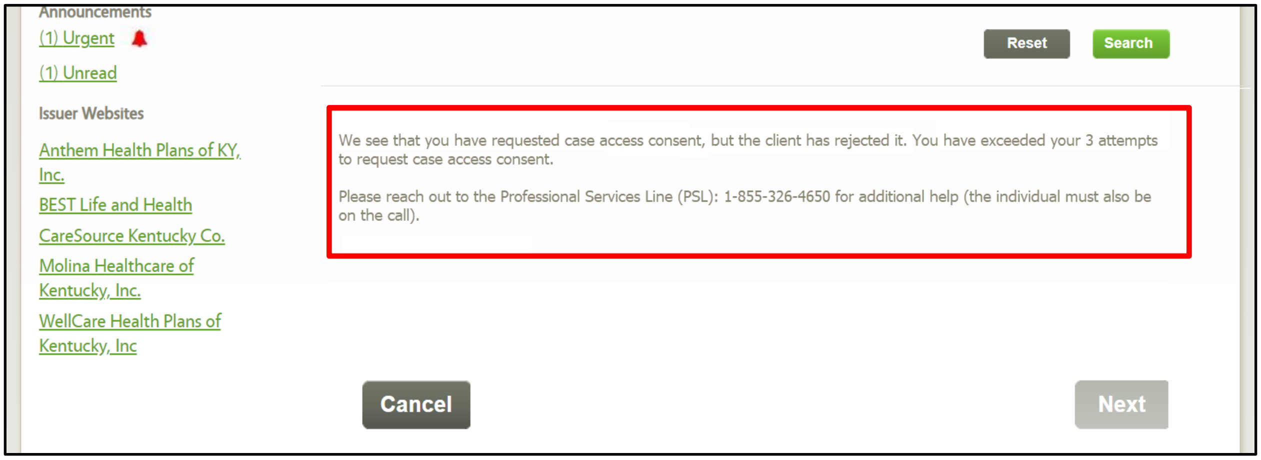
3. If the Client selects **Accept**, a notification displays on the Agent Portal **Book of Business** tab on the **Request Case Access** screen and **Message Center** tab.

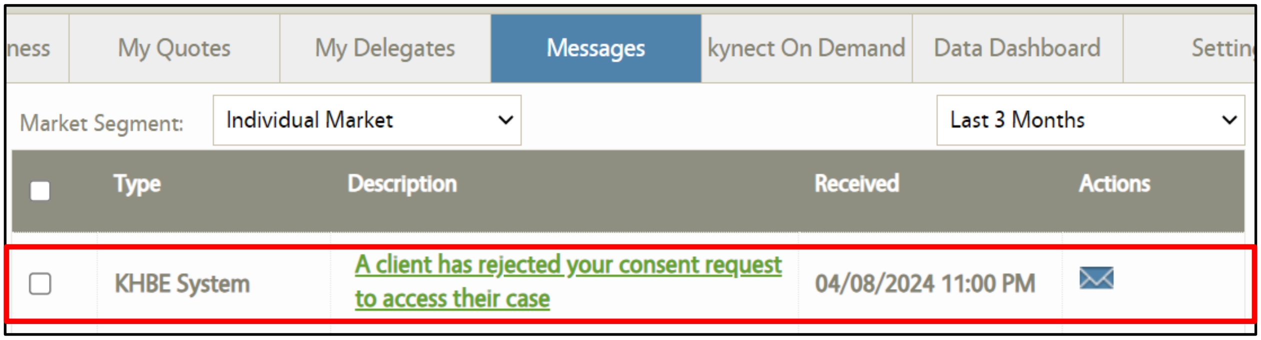


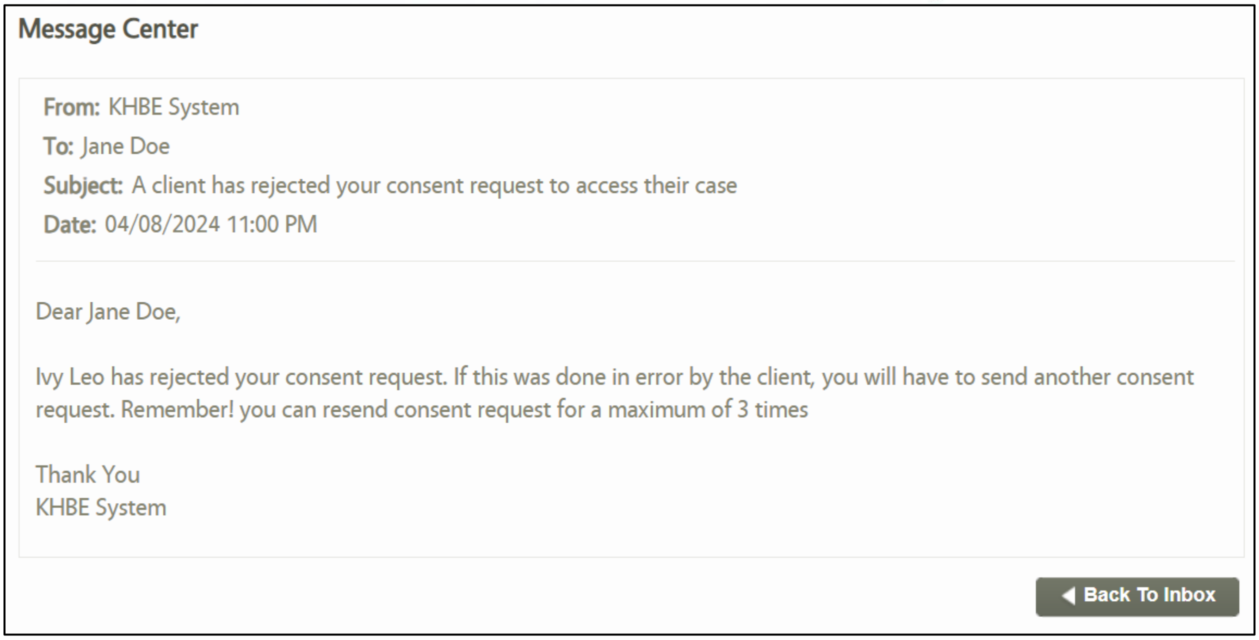
4. The Agent also receives a case association pop-up message when the Client accepts the Agent's case access consent request. Agent association is enabled upon select of the **OK** button.

5. If the Client selects **Reject**, a notification message displays on the **Request Case Access** screen and Agent Portal **Message Center** tab. The message includes information about the number of attempts left for the Agent to request consent.

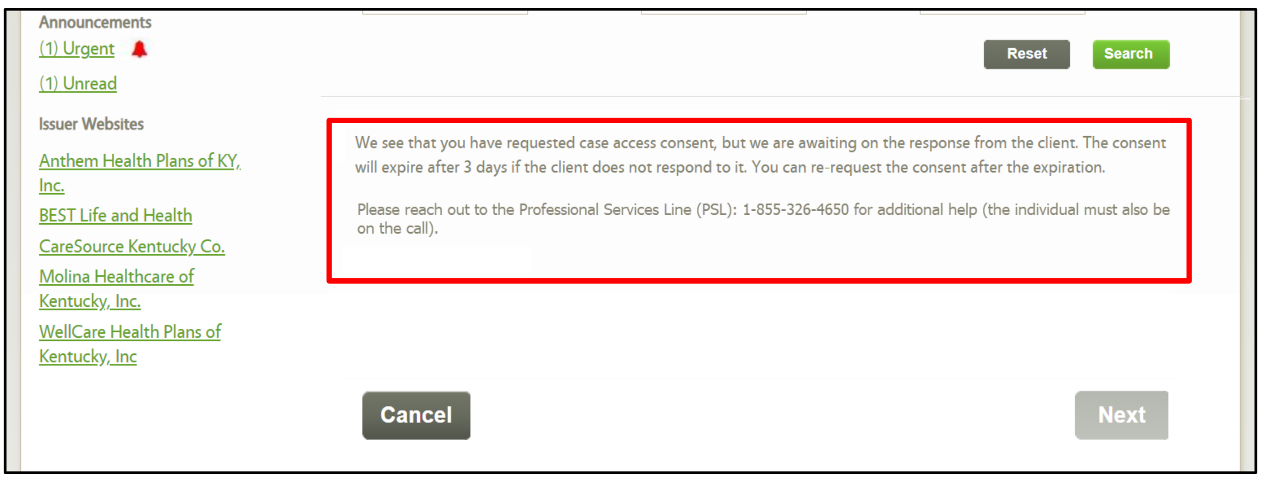








6. If the Client does not respond, a notification message displays in the **Request Case Access** screen which includes information regarding the consent expiration. The Client has up to three calendar days to respond to the notification in their kynect benefits' dashboard.



Request Case Access Notification in Other Scenarios:

1. When the Client was found in a search, but does not have a Medicaid/QHP case, the following verbiage displays in the Agent Portal Message Center:

   > “The details you entered match an individual in the system, but they are associated with a program other than Medicaid or QHP. Because of this, we cannot associate you to this individual’s case at this time. Please reach out to the Professional Services Line (PSL): 1-855-326-4650 for additional help (the individual must also be on the call).”

2. When more than one Client matches the Agent's search, the following verbiage displays in the Agent Portal Message Center:

   > 'The details you entered match more than one individual in the system. Please provide additional details in your search criteria and try again. If you are still facing issues after entering additional details or you do not have this information, please reach out to the Professional Services Line (PSL): 1-855-326-4650 for additional help (the individual must also be on the call).

Please note: If the Client prefers paper communication, does not have an email address or phone number listed in the application, and has not set up a kynect benefits account, they will not be able to receive any message notifications. In this case, the Agent must contact the Client using the same method the Client initially used to reach out to the Agent to inform them about creating a kynect benefits account.