

The Commonwealth of Kentucky  
**kynect State-Based Marketplace**



**Filtering and Sorting  
Reports in Agent Portal**

## How to Update Additional Information in Agent Portal

If an Agent wishes to view the enrollment status of clients for current plan year and upcoming plan year, use the below steps:

1. Log into Agent Portal and select “View More” under “My Clients”

**Kentucky Health Benefit Exchange** | Welcome Jonathan Gongola | Sign Out | About | Help

My Account | Help

Overview | Book Of Business | My Quotes | My Delegates | Messages | Settings

**Quick Links**

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

**Announcements**

- (0) Urgent
- (0) 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.](#)

**Reports**

- [Agent Case Notes](#)
- [Prospect Template \(Individual\)](#)

**My Clients**

	Individual
Current	31
Past	4
Clients Added In The Last Month	0

[View More](#)

**My Policies**

Active	2
Termed	5
Pending	21
Expired RFI	1
RFI about to expire in a week	0

[View More](#)

**My Prospects**

	Individual
Current Prospects	13
Abandoned Prospects	1
Prospects Added In The Last Month	0

[View More](#)

**My Quotes**

	Individual
In Progress	14
Accepted	0
Submitted	4
Rejected	0

[View More](#)

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2. Select "Individual" and "Current Client" then "Generate Report"

The screenshot shows the Admin Dashboard of the Kentucky Health Benefit Exchange. The top navigation bar includes "My Account", "Admin Dashboard", and "Help". The main navigation tabs are "Overview", "Book Of Business", "My Quotes", "My Delegates", "Messages", "kynect On Demand", and "Settings".

On the left sidebar, there are sections for "Quick Links" (Initiate an Application for Individual, Pre-Screening (Individual), Kentucky DOI, Training Materials, SHOP Tax Credit Estimator), "Announcements" (0 Urgent, 0 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.), and "Reports" (Agent Case Notes, Prospect Template (Individual)).

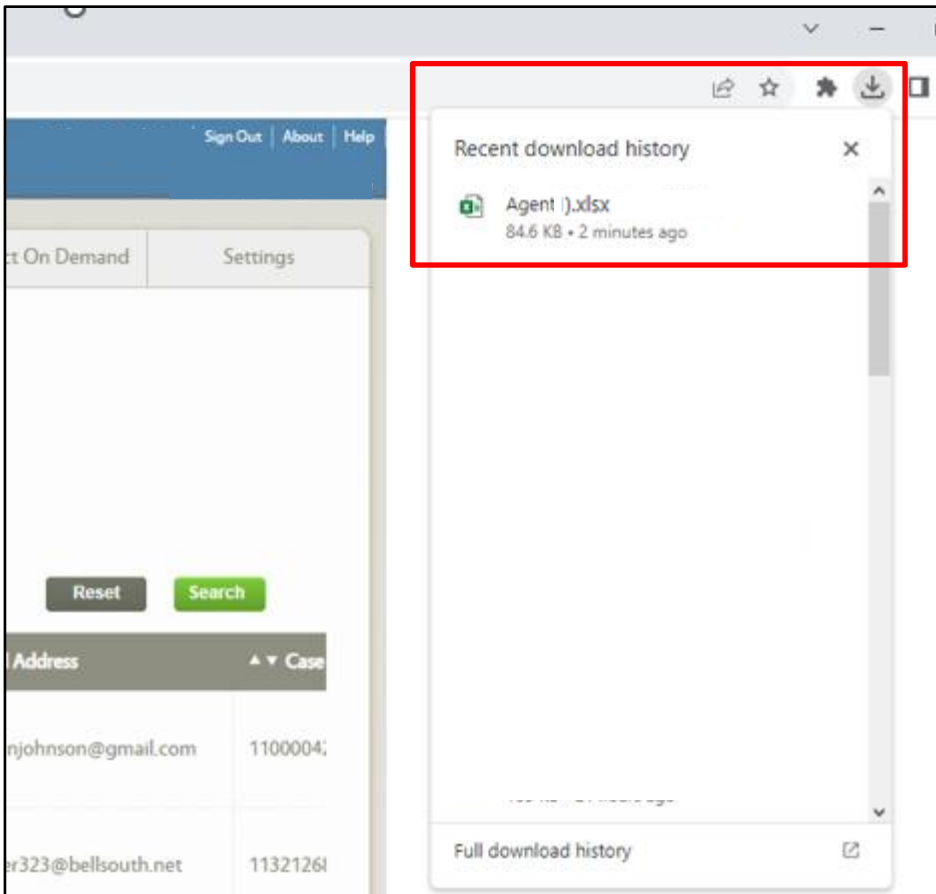
The main content area features search filters: "Market Segment" (Individual), "Choose Client/Prospect" (Current Client), "First Name", and "Last Name". There are "Reset" and "Search" buttons. Below the filters is a table of clients:

Primary Name	Phone Number	Email Address	Case
<a href="#">Client, John</a>	859-555-1212	email@email.com	1100004
<a href="#">Client, Sara</a>	859-555-1212		1132126
<a href="#">Client, Tom</a>	859-555-1212	email@email.com	1100160
<a href="#">Client, Tim</a>	859-555-1212	email@email.com	1100067
<a href="#">Client, Wayne</a>	859-555-1212		1100066

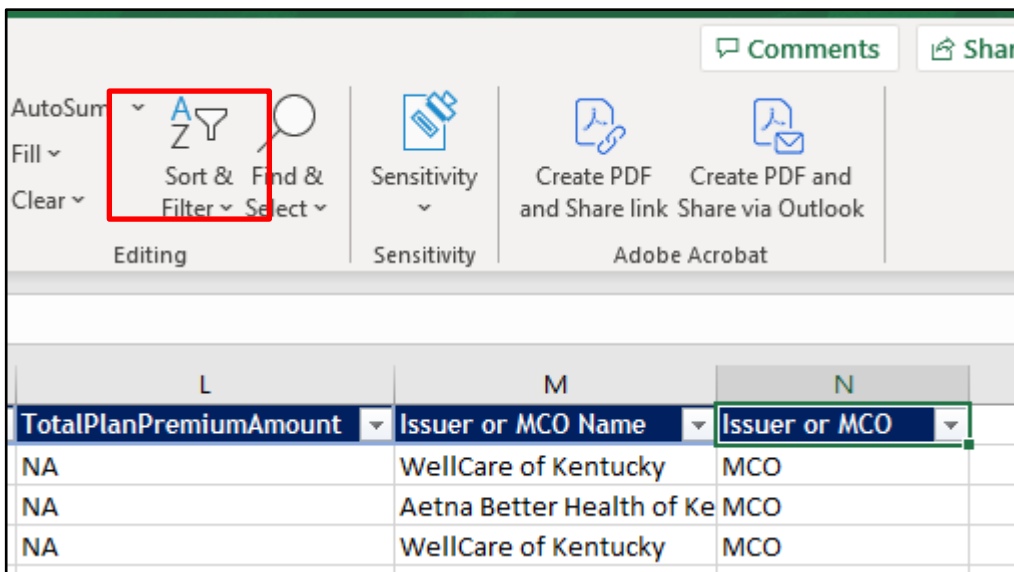
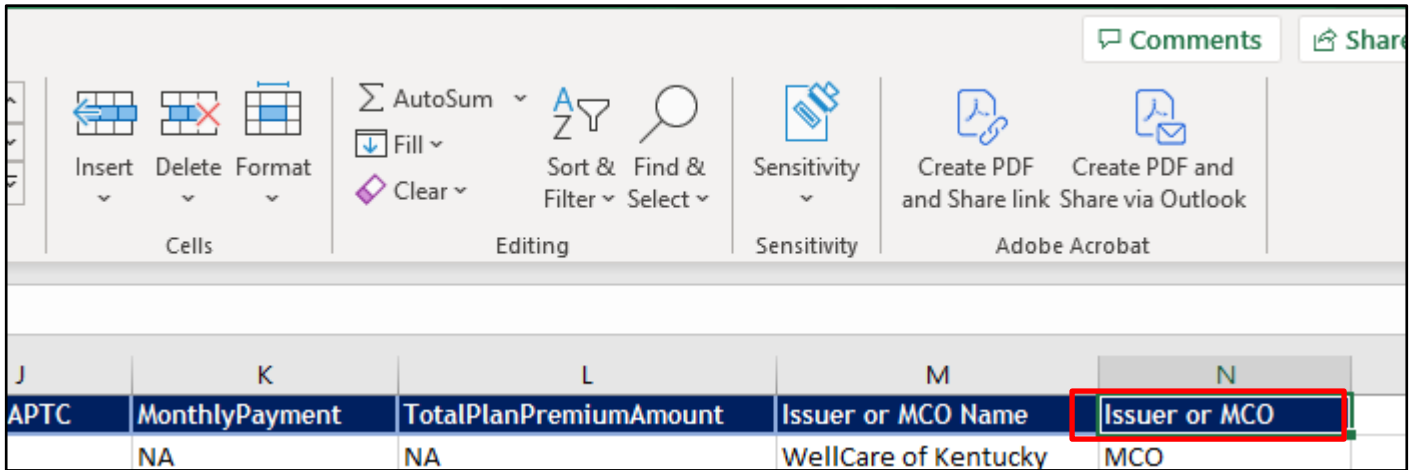
Below the table, it says "showing 1 - 10 of 539" with a pagination bar. A "Generate Report" button is highlighted with a red box in the bottom right corner of the main content area.

The footer contains "Privacy Policy | Terms of Use", social media icons for Facebook and Twitter, "Contact Us | www.khbe.ly.gov | (855) 326-4650".

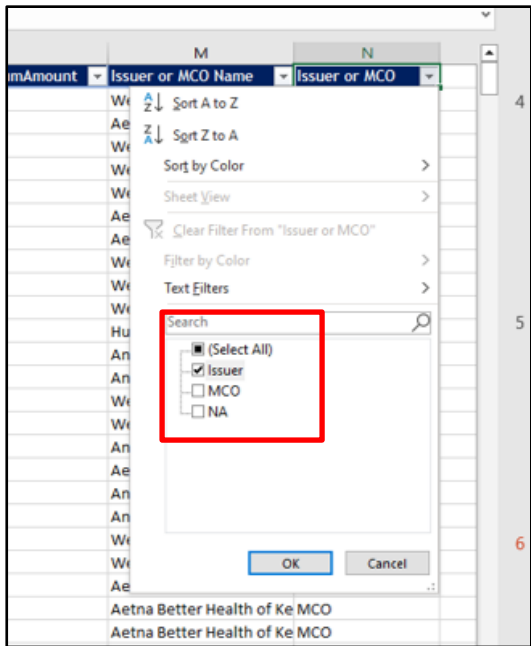
3. The Excel Report will download and may be in your download folder (click to open and view)



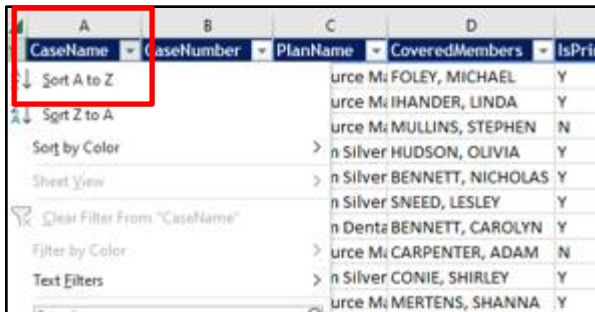
4. Click on Cell N1 and add filter.



5. Filter Column N to show Issuer only



6. Sort Column A by alpha order "Sort A to Z"



7. You may now see client by client their enrollment status for 2023 and 2024

CaseName	CaseNumber	PlanName	CoveredMembers	IsPrimarySubscriber	PlanType	CoverageStartDate	CoverageEndDate	EnrollmentStatus	AppliedAPTC	MonthlyPayment	TotalPlanPremiumAmount
Client, John	111990891	CareSource Mi Client, John	Y	Y	Medical	09/01/2023	12/31/2023	Enrolled	\$235.00	\$38.69	\$273.69
Client, John	111990891	CareSource Mi Client, John	Y	Y	Medical	01/01/2024	12/31/2024	Enrollment sent to issuer	\$252.00	\$77.87	\$329.87
Client, Sara	111900633	CareSource Mi Client, Sara	Y	Y	Medical	12/01/2023	12/31/2023	Enrollment sent to issuer	\$204.00	\$282.20	\$486.20
Client, Sara	111900633	CareSource Mi Client, Sara	Y	Y	Medical	01/01/2024	12/31/2024	Enrollment sent to issuer	\$230.00	\$321.30	\$551.30
Client, Tom	113079044	Anthem Silver Client, Tom	Y	Y	Medical	10/01/2023	12/31/2023	Enrolled	\$0.00	\$79.38	\$79.38
Client, Tom	113079044	Anthem Silver Client, Tom	N	N	Medical	10/01/2023	12/31/2023	Cancelled	\$1283.00	\$329.94	\$1612.94

8. You may also double check APTC, premiums, Issuer, Plan for both years

CaseName	CaseNumber	PlanName	CoveredMembers	IsPrimarySubscriber	PlanType	CoverageStartDate	CoverageEndDate	EnrollmentStatus	AppliedAPTC	MonthlyPayment	TotalPlanPremiumAmount
Client, John	111990891	CareSource Mi Client, John	Y	Y	Medical	09/01/2023	12/31/2023	Enrolled	\$235.00	\$38.69	\$273.69
Client, John	111990891	CareSource Mi Client, John	Y	Y	Medical	01/01/2024	12/31/2024	Enrollment sent to issuer	\$252.00	\$77.87	\$329.87
Client, Sara	111900633	CareSource Mi Client, Sara	Y	Y	Medical	12/01/2023	12/31/2023	Enrollment sent to issuer	\$204.00	\$282.20	\$486.20
Client, Sara	111900633	CareSource Mi Client, Sara	Y	Y	Medical	01/01/2024	12/31/2024	Enrollment sent to issuer	\$230.00	\$321.30	\$551.30
Client, Tom	113079044	Anthem Silver Client, Tom	Y	Y	Medical	10/01/2023	12/31/2023	Enrolled	\$0.00	\$79.38	\$79.38
Client, Tom	113079044	Anthem Silver Client, Tom	N	N	Medical	10/01/2023	12/31/2023	Cancelled	\$1283.00	\$329.94	\$1612.94

9. To create a filter for plan year 2025, select the CoverageStartDate Column. Select Filter and sort, then select the Filter option.

The screenshot shows the Microsoft Excel interface with a data table. The 'CoverageStartDate' column is selected, and the 'Filter (Ctrl+Shift+L)' menu is open. The table contains the following data:

CaseNumber	PlanName	CoveredMembers	IsPrimarySubscriber	PlanType	CoverageStartDate	CoverageEndDate	EnrollmentStatus	AppliedAPTC	MonthlyPayment	TotalPlanPremiumAmount
110234835	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$428.00	\$0.00	\$428.00
110055406	Anthem Silver Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$778.00	\$1.41	\$779.41
110012362	Ambetter Esse Coveredmembers	N	N	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$0.00	\$0.00	\$0.00
110067997	Ambetter Esse Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$360.20	\$0.00	\$360.20
110118360	Focused Silver Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$446.90	\$0.00	\$446.90
110262837	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$581.00	\$31.60	\$612.60
110471621	Ambetter Esse Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$299.00	\$31.02	\$330.02
110511783	Ambetter Esse Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$575.53	\$0.00	\$575.53
110514734	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$417.00	\$109.00	\$526.00
110961670	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$469.00	\$1.41	\$470.41
110684728	Ambetter Bala Coveredmembers	N	N	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$263.00	\$60.71	\$323.71
110714253	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2024	Cancelled	\$946.63	\$0.00	\$946.63
111254139	Ambetter Esse Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$122.00	\$177.01	\$299.01
111486500	Focused Silver Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$354.00	\$7.51	\$361.51
111896667	Ambetter Esse Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$679.28	\$0.00	\$679.28
111921492	Ambetter Esse Coveredmembers	N	N	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$719.58	\$0.00	\$719.58
112007776	Ambetter Esse Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$347.15	\$0.00	\$347.15
112183449	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$156.00	\$229.46	\$385.46
112308698	Ambetter Bala Coveredmembers	N	N	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$309.00	\$63.84	\$372.84
112850222	Constant Care Coveredmembers	N	N	Medical	01/01/2025	12/31/2025	Enrolled	\$1606.00	\$2.53	\$1608.53
112887053	Anthem Bronz Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$396.00	\$75.39	\$471.39
112891139	Anthem Bronz Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$396.00	\$40.46	\$436.46
112972922	Focused Silver Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$676.00	\$19.02	\$695.02
112980508	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$992.00	\$169.02	\$1161.02
113121243	CareSource Mi Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrolled	\$103.00	\$653.40	\$756.40
113356117	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$377.00	\$8.46	\$385.46
113368559	Anthem Silver Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$317.00	\$134.34	\$451.34
113373936	CareSource Mi Coveredmembers	N	N	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$760.00	\$96.08	\$856.08
113379011	Ambetter Esse Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$367.33	\$0.00	\$367.33
113390283	Anthem Silver Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$364.00	\$92.83	\$456.83
110055107	Ambetter Bala Coveredmembers	N	N	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$545.00	\$274.79	\$819.79
110065417	Anthem Bronz Coveredmembers	N	N	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$716.00	\$201.95	\$917.95
110217206	Ambetter Esse Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$463.77	\$14.54	\$478.31
110234835	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$428.00	\$26.49	\$454.49
110190870	CareSource Mi Coveredmembers	N	N	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$514.00	\$245.03	\$759.03
110297024	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$635.76	\$0.00	\$635.76
110249349	Ambetter Bala Coveredmembers	Y	Y	Medical	01/01/2025	12/31/2025	Enrollment sent to issuer	\$770.65	\$24.16	\$794.81

10. Select the Contains option to create a new Filter parameter.

The screenshot shows the Microsoft Excel interface with the 'Text Filters' menu open for the 'CoverageStartDate' column. The 'Contains...' option is selected. The background spreadsheet shows columns for 'IsPrimarySubscriber', 'PlanType', 'CoverageStartDate', 'CoverageEndDate', 'EnrollmentStatus', 'AppliedAPTC', 'MonthlyPayment', 'TotalPlanPremiumAmount', and 'Issuer or MCO Name'. The 'CoverageStartDate' column contains various dates, including 08/12/2019, 09/09/2019, 09/22/2019, 03/01/2020, 07/01/2020, 01/01/2021, and 01/01/2021.

11. In the custom filter, type in 2025.

The screenshot shows the 'Custom Autofilter' dialog box in Microsoft Excel. The 'CoverageStartDate' column is selected, and the filter is set to 'contains' with the value '2025' entered in the text box. The dialog box also shows options for 'And' and 'Or' conditions, and instructions on how to use wildcards like '?' and '\*'. The background spreadsheet shows columns for 'IsPrimarySubscriber', 'PlanType', 'CoverageStartDate', 'CoverageEndDate', and 'EnrollmentStatus'. The 'CoverageStartDate' column contains dates like 01/01/2021, 10/01/2024, 04/01/2016, 11/01/2022, 10/01/2024, and 01/01/2025.

12. You should now have your CoverageStartDate column filtered by Plan Year 2025.

Name	CoveredMembers	IsPrimarySubscriber	PlanType	CoverageStartDate	CoverageEndDate	EnrollmentStatus	AppliedAPTC	MonthlyPayment	TotalPlanPremiumAmount	ba
etter Bala Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$428.00	\$26.49	\$454.49	Wh
em Silver Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$778.00	\$196.18	\$974.18	An
etter Esse Coveredmembers	N	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$0.00	\$255.81	\$255.81	Wh
etter Esse Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$360.20	\$0.00	\$360.20	Wh
sed Silver Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$446.90	\$0.00	\$446.90	Wh
etter Bala Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$581.00	\$31.60	\$612.60	Wh
etter Esse Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$299.00	\$31.02	\$330.02	Wh
etter Esse Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$375.53	\$0.00	\$375.53	Wh
etter Bala Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$417.00	\$109.00	\$526.00	Wh
etter Bala Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$469.00	\$1.41	\$470.41	Wh
etter Bala Coveredmembers	N	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$263.00	\$60.71	\$323.71	Wh
etter Bala Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2024	Cancelled	\$946.43	\$0.00	\$946.43	Wh
etter Esse Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$122.00	\$177.01	\$299.01	Wh
sed Silver Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$354.00	\$7.51	\$361.51	Wh
etter Esse Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$679.28	\$0.00	\$679.28	Wh
etter Esse Coveredmembers	N	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$719.58	\$0.00	\$719.58	Wh
etter Esse Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$347.15	\$0.00	\$347.15	Wh
etter Bala Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$156.00	\$229.46	\$385.46	Wh
etter Bala Coveredmembers	N	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$309.00	\$63.84	\$372.84	Wh
tant Care Coveredmembers	N	Y	Medical	03/01/2025	12/31/2025	Enrolled	\$1606.00	\$2.53	\$1608.53	Nk
em Bronz Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$396.00	\$75.39	\$471.39	An
em Bronz Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$396.00	\$40.46	\$436.46	An
sed Silver Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$676.00	\$19.02	\$695.02	Wh
etter Bala Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$992.00	\$169.02	\$1161.02	Wh
Source M Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrolled	\$103.00	\$653.40	\$756.40	Ca
etter Bala Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$377.00	\$8.46	\$385.46	Wh
em Silver Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$317.00	\$114.34	\$431.34	An
Source M Coveredmembers	N	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$760.00	\$96.08	\$856.08	Ca
etter Esse Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$367.33	\$0.00	\$367.33	Wh
em Silver Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$364.00	\$92.83	\$456.83	An
etter Bala Coveredmembers	N	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$545.00	\$274.79	\$819.79	Wh
em Bronz Coveredmembers	N	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$716.00	\$201.95	\$917.95	An
etter Esse Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$463.77	\$14.54	\$478.31	Wh
etter Bala Coveredmembers	Y	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$428.00	\$26.49	\$454.49	Wh
Source M Coveredmembers	N	Y	Medical	03/01/2025	12/31/2025	Enrollment sent to issu	\$514.00	\$245.03	\$759.03	Ca

13. There are many other ways this data could be manipulated and used for larger books of business