The Commonwealth of Kentucky

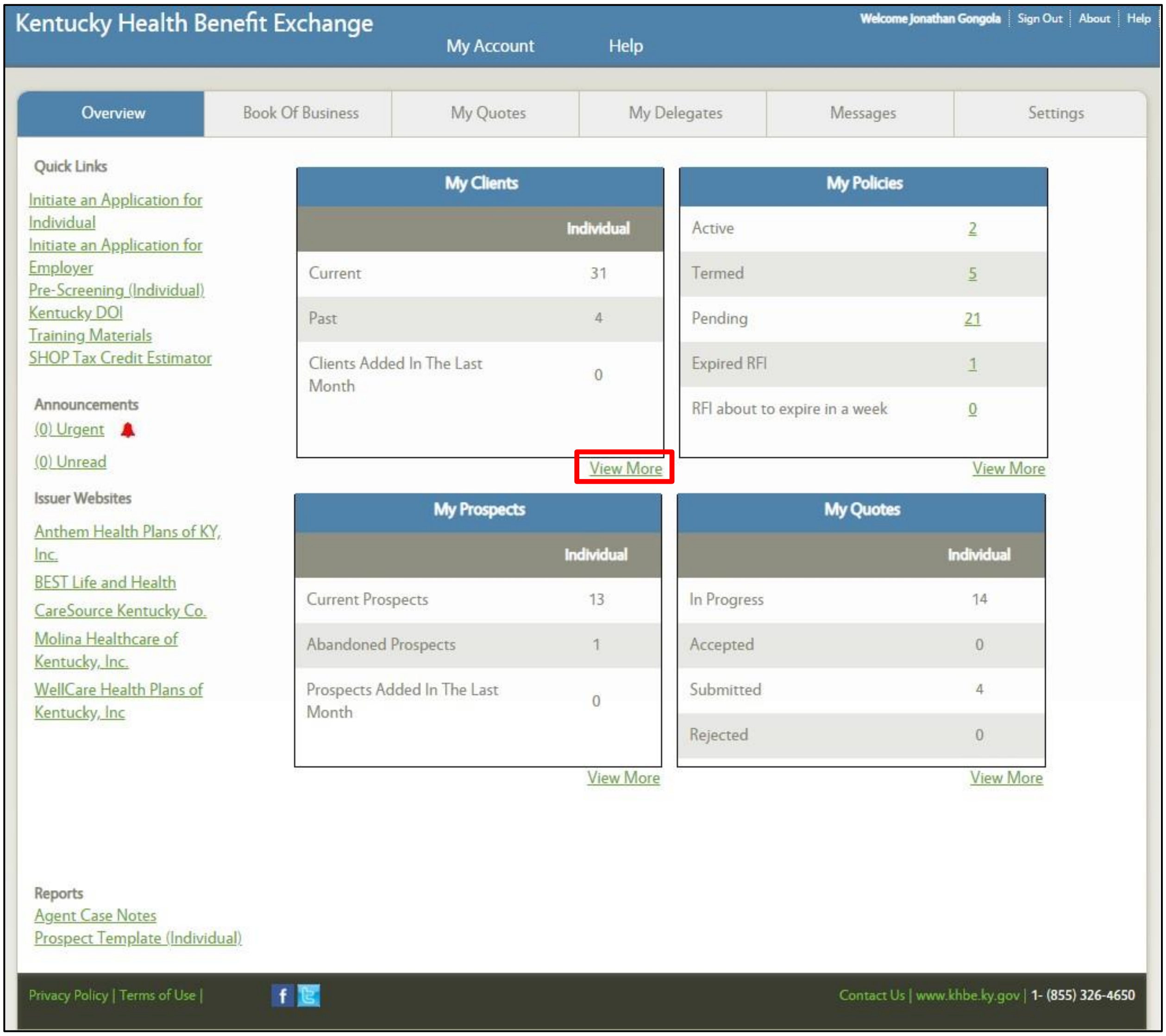
kynect State-Based Marketplace

Filtering and Sorting Reports in Agent Portal

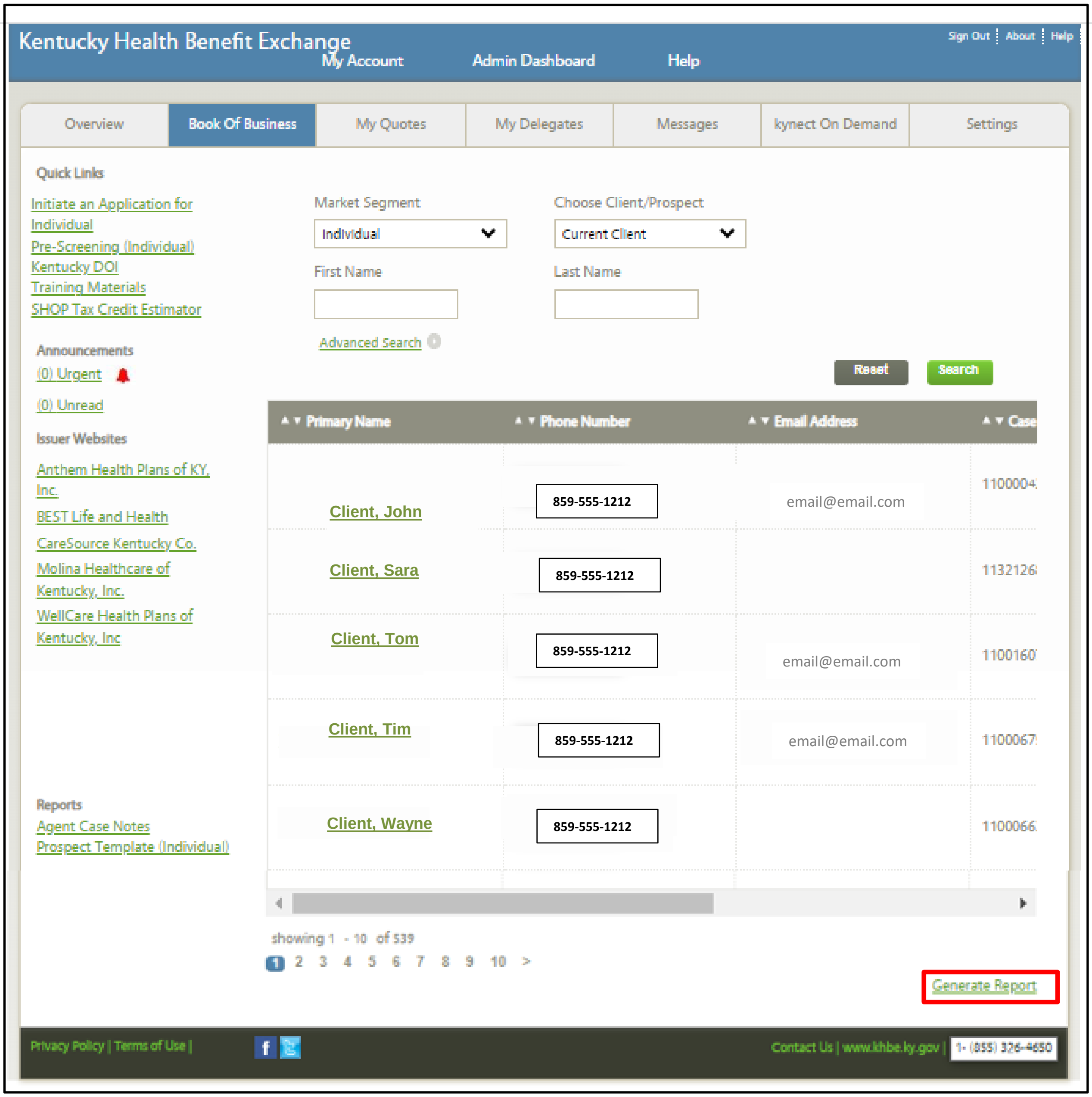
How to Update Additional Information in Agent Portal

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

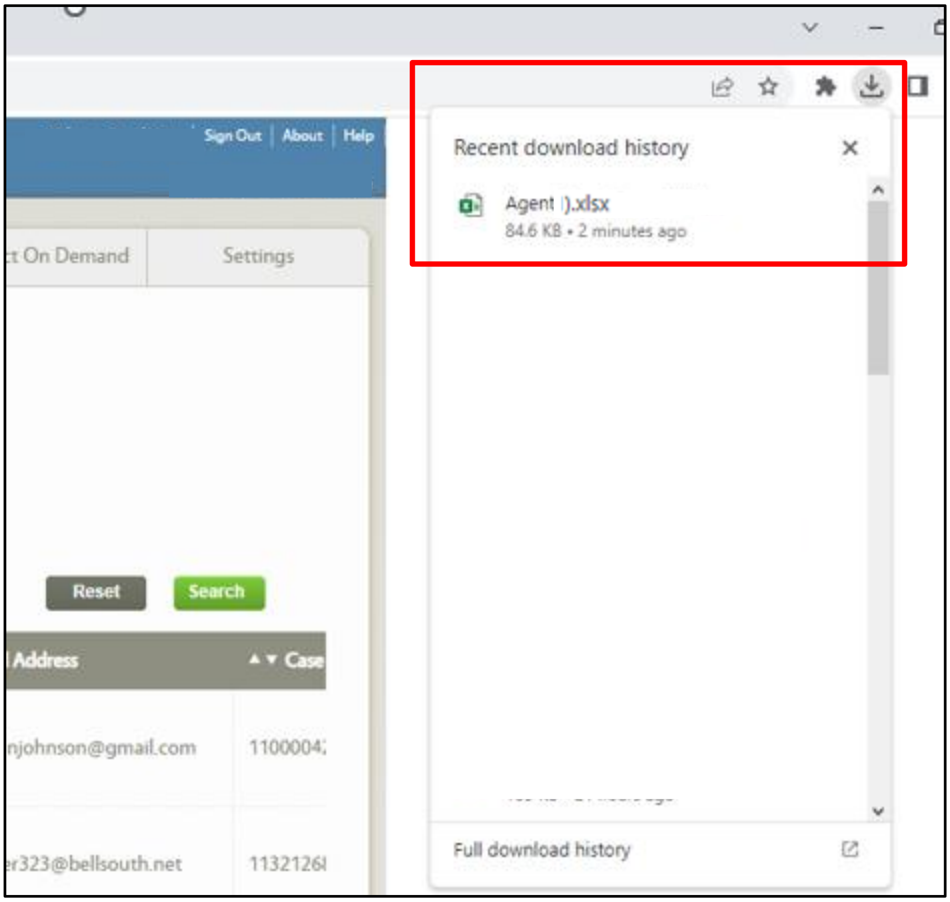
1. Log into Agent Portal and select "View More" under "My Clients"



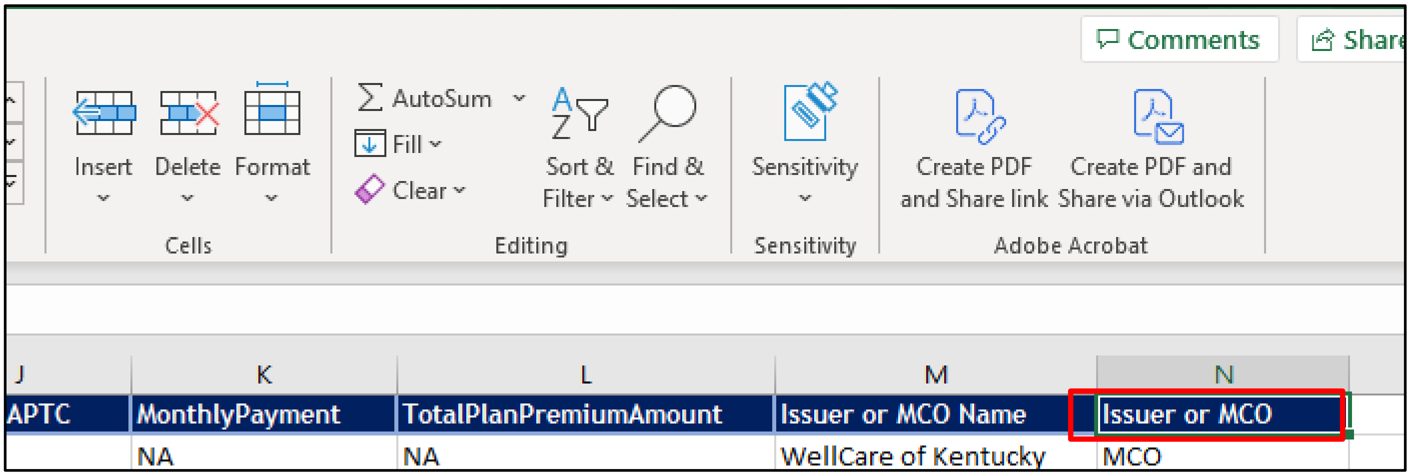
2. Select “Individual” and “Current Client” then “Generate Report”

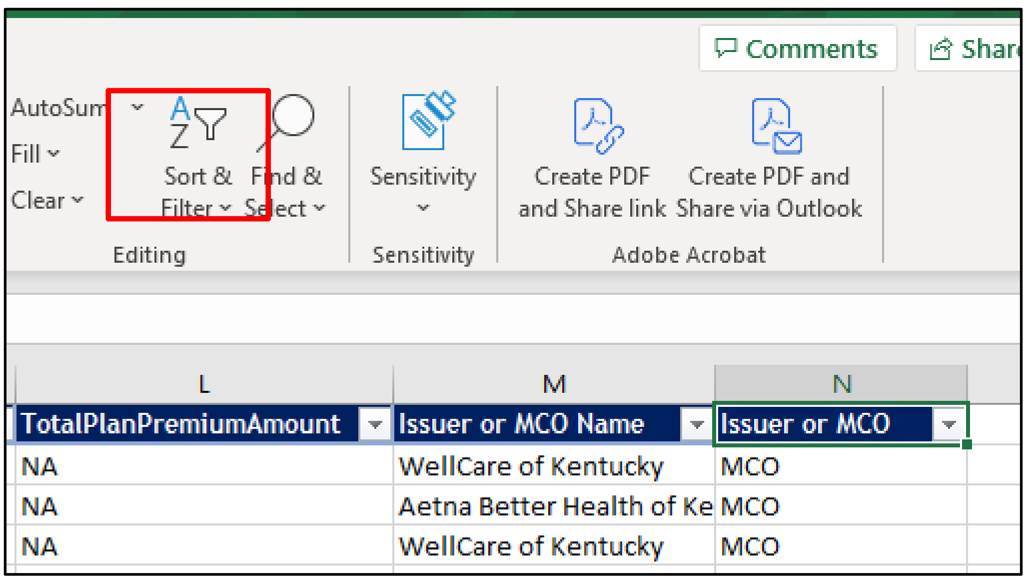


3. The Excel Report will download and may be in your download folder (click to open and view)

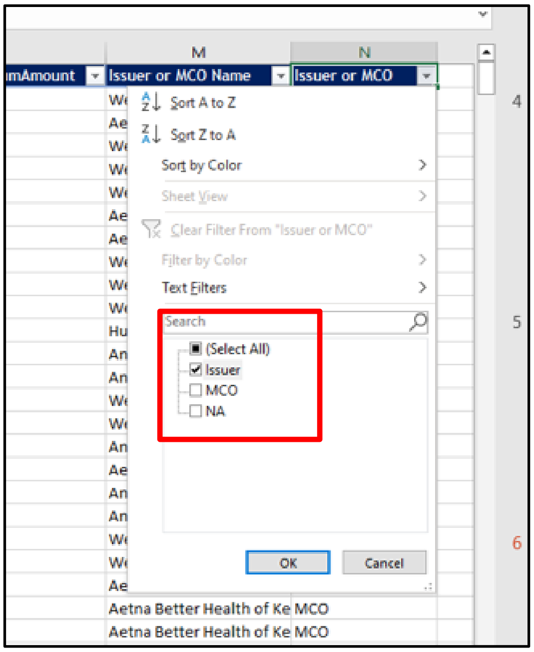


4. Click on Cell N1 and add filter.

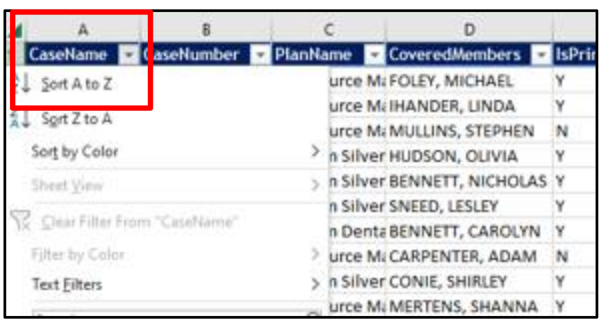




5. Filter Column N to show Issuer only



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 Ma	Client, John	Y	Medical	09/01/2023	12/31/2023	Enrolled	$235.00	$38.69	$273.69
Client, John	111990891	CareSource Ma	Client, John	Y	Medical	01/01/2024	12/31/2024	Enrollment sent to issu	$252.00	$77.87	$329.87
Client, Sara	111900633	CareSource Ma	Client, Sara	Y	Medical	12/01/2023	12/31/2023	Enrollment sent to issu	$204.00	$282.20	$486.20
Client, Sara	111900633	CareSource Ma	Client, Sara	Y	Medical	01/01/2024	12/31/2024	Enrollment sent to issu	$230.00	$321.30	$551.30
Client, Tom	113079044	Anthem Silver	Client, Tom	Y	Medical	10/01/2023	12/31/2023	Enrolled	$0.00	$79.38	$79.38
Client, Tom	113079044	Anthem Silver	Client, Tom	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 Ma	Client, John	Y	Medical	09/01/2023	12/31/2023	Enrolled	$235.00	$38.69	$273.69
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Client, Sara	111900633	CareSource Ma	Client, Sara	Y	Medical	12/01/2023	12/31/2023	Enrollment sent to issu	$204.00	$282.20	$486.20
Client, Sara	111900633	CareSource Ma	Client, Sara	Y	Medical	01/01/2024	12/31/2024	Enrollment sent to issu	$230.00	$321.30	$551.30
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Client, Tom	113079044	Anthem Silver	Client, Tom	N	Medical	10/01/2023	12/31/2023	Cancelled	[illegible]	[illegible]	[illegible]

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