

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 displays the Admin Dashboard for the Kentucky Health Benefit Exchange. The top navigation bar includes "My Account", "Admin Dashboard", and "Help". The main navigation menu has "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)).

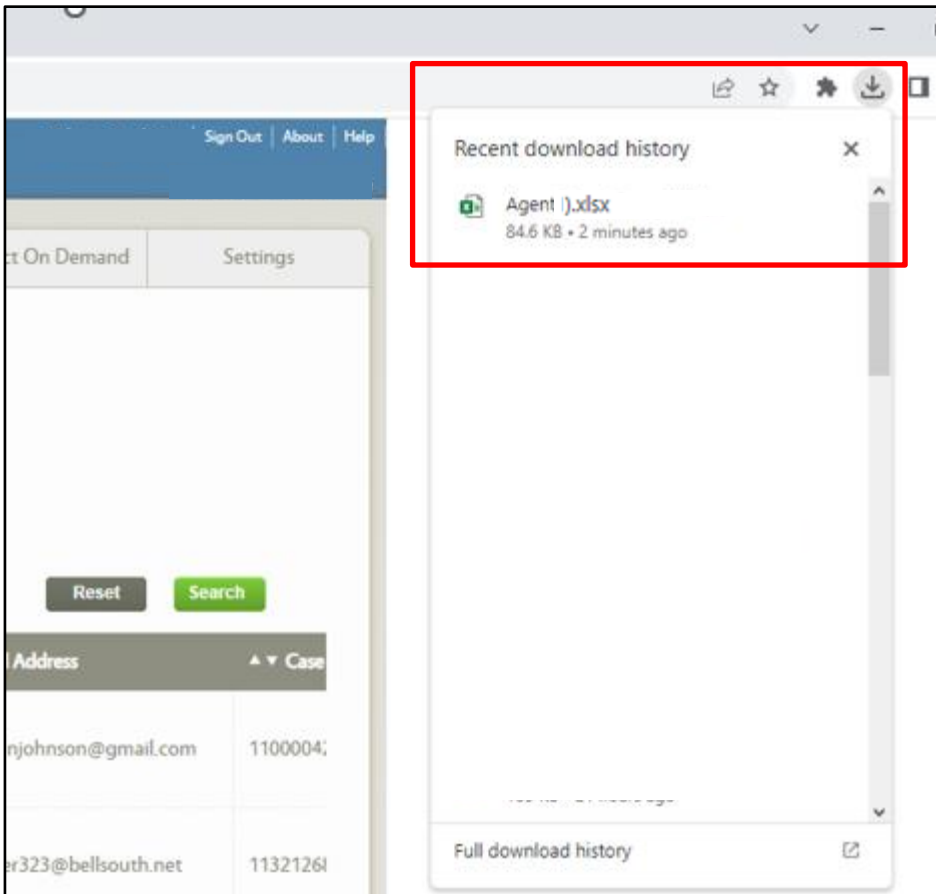
The main content area features search filters: "Market Segment" (Individual), "Choose Client/Prospect" (Current Client), "First Name", and "Last Name". There are "Reset" and "Search" buttons. Below the filters is a table of clients:

Primary Name	Phone Number	Email Address	Case
Client, John	859-555-1212	email@email.com	1100004
Client, Sara	859-555-1212		1132126
Client, Tom	859-555-1212	email@email.com	1100160
Client, Tim	859-555-1212	email@email.com	1100067
Client, Wayne	859-555-1212		1100066

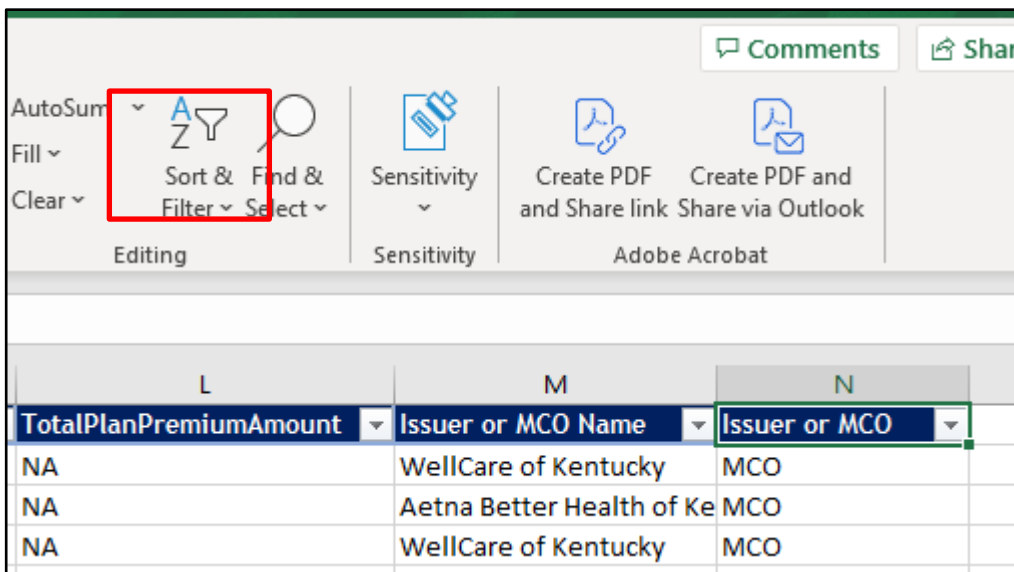
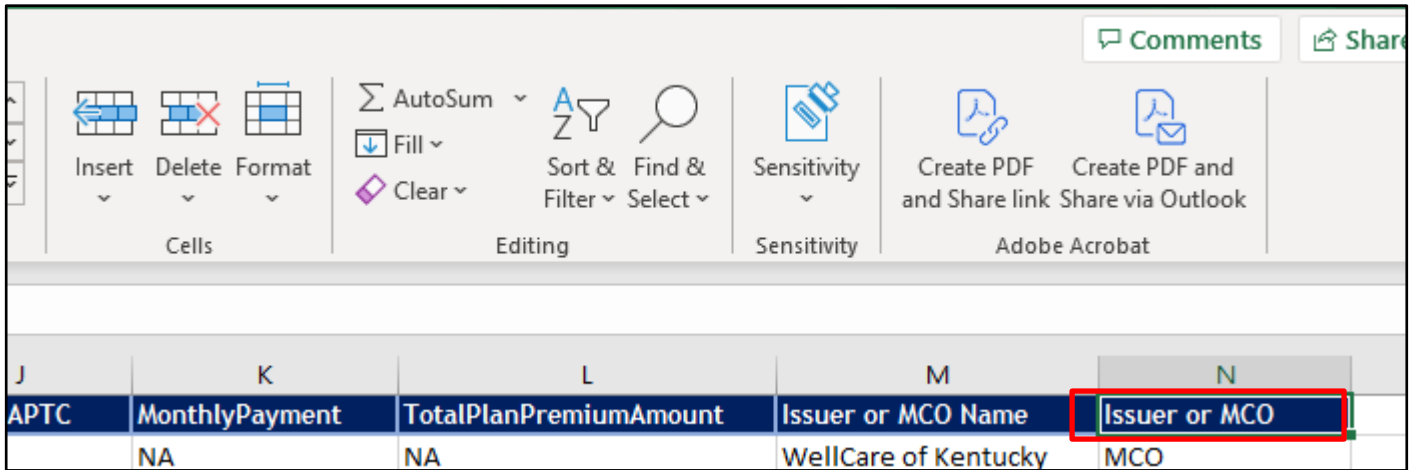
Below the table, it says "showing 1 - 10 of 539" with a pagination bar showing numbers 1 through 10. A "Generate Report" button is highlighted with a red box in the bottom right corner of the main content area.

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

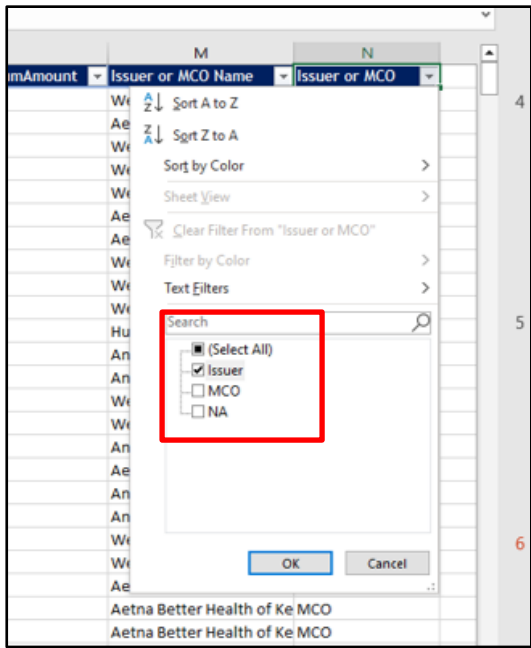
3. The Excel Report will download and may be in your download folder (click to open and view)



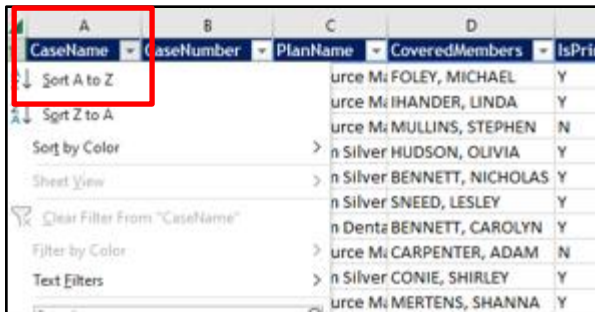
4. Click on Cell N1 and add filter.



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

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