



Professional Services Line (PSL) Best Practices

Professional Services Line

The Professional Services Line (PSL) provides Agents with direct access to professional help with questions related to kynect and Agent Portal. After referencing applicable training and communication material, Agents may call the PSL when they encounter issues at 1-855-326-4650. Before calling and if relevant, Agents should confirm they are associated with the Client's case, have the Case Number or Application ID ready, and be able to provide any relevant details/context.

Before the Call With the Professional Services Line:

- **Follow the Escalation Process:** Utilize the [Agent/kynector Escalation Process](#) to escalate issues to the appropriate party.
- **Reference Training and/or Communications Material:** Utilize applicable QRGs, One-Pagers, Micro Videos, Training Guides and other sources of information developed for Agents on the [KHBE Agent Training Materials page](#).
- **Verify Case Association:** Agents should confirm they are [associated](#) with the case they are calling about. If not, the PSL will need to speak with the Primary Applicant directly in order to add the Agent to the case.
- **Have DOI Information Ready:** Have information available such as the associated Insurance Agency, DOI number, and role with the Agency (Agent or Delegate).
- **Have Case Details Ready:** If calling about technical issues, have details available such as the system affected, screen name, the error the Agent receives, the browser used, case and/or application numbers, members effected by the issue, enrollment information if applicable, and if the Agent has attempted to troubleshoot the issue.

During the Call With the Professional Services Line:

- **Provide Applicable Detail:** Include as much detail as possible when communicating with the PSL Representative.
- **Answer PSL Questions:** Answer all questions from the PSL Representative to help diagnose root causes.
- **Get a Ticket/Reference Number:** Ask for a ticket/reference number if one is not provided before ending the call.

After the Call With the Professional Services Line:

- **Follow-Up With the Applicable Parties:** Keep the ticket/reference number for reference to call back for updates. Follow-up with the applicable parties as needed.
- **Act on the PSL Representative's Suggestions:** If not completed, follow the PSL Representative's instructions.
- **Utilize the Issue Tracker:** If unresolved, submit the issue using the Open Enrollment Issue Tracker.

Please note: Agents may not include multiple issues under a single ticket. Each time an Agent calls, the PSL will create a new case with a unique ticket/reference number assigned.

