The Commonwealth of Kentucky

kynect State-Based Marketplace

Agent Portal Dashboard Training Guide

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Document Control Information

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Introduction

This Training Guide presents Agents with instructional navigation and system demonstration of key functionality for Agent Portal and the kynect health coverage Prescreening Tool.

Table of Contents

Please note: Screenshots may not be representative of actual system behavior. All specific information found in this training guide is test data and not representative of any kynect client.

1 Agent Portal Dashboard

Welcome to KHBE's Refresher of the Agent Portal Dashboard!

Agent Portal gives Agents quick insight into their business. They may view information on clients, prospects, policies, quotes, delegates, messages and kynect On Demand.

Agent Portal Dashboard Overview.

The Overview screen serves as the Agent's Dashboard. Agents may gain quick insight into their business on this page including the Total Number of Clients, Prospects or Quotes generated. It also details the status of policies the Agent has submitted. Agents may also access various quick links and perform appropriate actions.

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1.2 Agent Portal Dashboard Overview.

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Listed below are the key features that will be highlighted in the prescreening process:

1 **My Clients:** This section provides information on Agent's clients such as current clients, past clients, and clients added in the last month.

2 **My Policies:** This section provides information on Agent's policies such as the number of policies that are active, termed, pending, expired Request for information (RFI), and RFI about to expire in a week.

3 **My Prospects:** This section provides information on clients that have initiated an application and assigned the user as the Agent of Record, as well as the clients they have added. It also displays the number of Current Prospects, Abandoned Prospects, and Prospects Added in the Last Month.

4 **My Quotes:** This section provides the status of Agent's quotes, showing which are In Progress, Accepted, Submitted, or Rejected.

5 **Agent Quoting Tool:** The quoting tool displays programs that an Individual qualifies for, and emails quote results to the Resident after the Agent has completed the quote.

6 **Book of Business:** The Book of Business screen serves as a record of the Agent's clients and prospects. Agents may search for clients and prospects based on defined criteria and Disenroll/Cancel policies before their coverage effective date in enrollment manager.

7 **My Delegates:** The My Delegates screen allows Agents to assign up to 6 other licensed and certified Agents as delegates on their account, or they may become a delegate for another licensed and certified Agent.

8 **Messages:** The Messages screen allows Agents to view and filter messages from kynect. The results table displays the messages and includes information such as Type, Description, Date Received, and Actions. Agents may click on the Description to access the message details.

9 **Settings:** The Settings screen displays personal information about an Agent. At the bottom of the screen, an Agent's designated agency information displays.

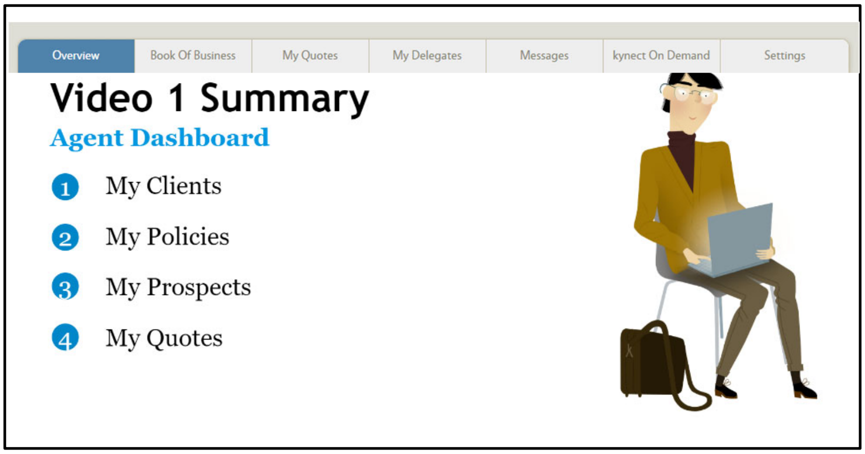
10 **Quick Links:** The Quick Links sidebar provides additional navigation on the left-hand side of the screen.

11 **Agent Portal Help:** The Agent Portal Help screen opens in a new browser and details the functionality and steps associated with the different screens of Agent Portal.

Agent Portal Dashboard Video

To maximize the learning experience, headphones are recommended for viewing the Refresher videos.

Users may use skip the below video if a refresher is not needed. Please note: Users must pass the Assessment at the end of the course.



To view the Agent Portal Dashboard video, click this link: https://youtu.be/NHfunDgJdDI

2 kynect On Demand

During this module, Agents will learn how navigate kynect On Demand.

kynect On Demand is an optional program that allows Agents to provide assistance to Individuals within a 30-minute period. Agents who choose to register for kynect On Demand will be able to manage referrals, view their metrics, update they availability and preferred contact information, and de-register, if desired.

2.1 kynect on Demand

1 **kynect on Demand Referral Manager:** The Referral Manager allows Agents to search, view and manage assigned referrals.

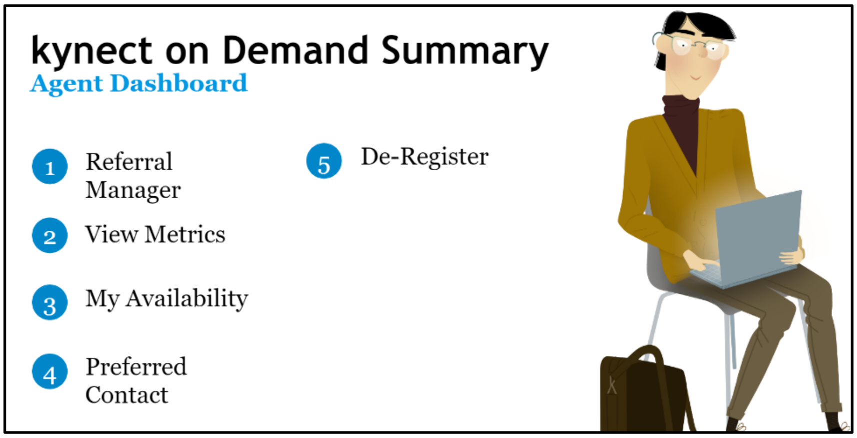
2 **kynect on Demand View Metrics:** The View Metrics section displays how many referrals were completed, failed to reach the Resident, have a follow up in progress, or canceled.

3 **kynect on Demand My Availability:** The My Availability section allows Agents to view and update their Available Hours and Out of Office Hours. Agents should update their availability often to ensure their availability is always up to date.

4 **kynect on Demand Preferred Contact:** The Preferred Contact section allows Agents to update their preferred contact method.

4 **kynect on Demand De-Register**: The De-Register section allows agents to de-register from kynect on Demand 30 days after registration*.*

2.2 kynect on Demand Video



To view the kynect on Demand Summary video, click this link: https://youtu.be/B6soFb4AFpE

3 Assessment

1. Agents may view the following sections on the Overview screen EXCEPT

    a. My Clients
    b. My Policies
    c. My Tasks (Correct)
    d. My Quotes

1. The Current Client screen displays various case attributes including all of the following EXCEPT:

    e. Program Type
    f. Age
    g. Religious Affiliation
    h. Gender

2. Agents may assign up to how many delegates to assist with their Clients and Prospects

    i. 1
    j. 6
    k. 4
    l. 0

2. Which tab can an Agent find their DOI information?

    m. Overview
    n. My Quotes
    o. Messages
    p. Settings

4. Which screen may Agents search for their policies:

    a. My Quotes Screen
    b. My Policies Screen
    c. My Clients Screen
    d. Messages Screen

5. On which screen may Agents search for their policies

    a. My Quotes screen
    b. My Policy screen
    c. My Clients screen
    d. Messages screen