Kentucky will transition to a State-Based Marketplace (SBM) called kynect health coverage beginning with Open Enrollment on November 1, 2021. After the transition, kynect health coverage will offer Individuals, families, and small business owners an integrated eligibility and enrollment system to shop and apply for Qualified Health Plans (QHPs), with coverage effective January 1, 2022.
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Introduction

This Training Guide is intended to aid Agents in understanding and navigating Agent Portal and the kynect health coverage Prescreening Tool. Reference this guide to understand the steps to use Agent Portal and the kynect health coverage Prescreening Tool as demonstrated in the Agent Portal Dashboard Walkthrough Web-Based Training.

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1 Agent Portal Dashboard

The Agent Portal Overview screen gives Agents quick insight into their business. They may view information on clients, prospects, policies, quotes, delegates, and messages. Agents may also access quick links to initiate a benefits application and utilize the kynect health coverage Prescreening Tool.

1.1 Agent Portal Sign In

1. Click Sign In to navigate to the Agent Portal Overview screen.
2. Enter the Agent's Kentucky Online Gateway (KOG) Credentials and click Sign In.

3. Review the Terms of Use and click Yes, I Accept.
1.2 My Clients

4. From the Agent Portal Overview screen, Agents may navigate to the Book of Business screen. The Book of Business screen allows Agents to view information on current clients.

5. Click View More under My Clients to navigate to the Book of Business screen.
6. From the **Book of Business** screen, Agents may view information on current clients.
7. Click the **Primary Name** hyperlink to view client details. Agent may export their client list to an Excel file by clicking **Export**.
8. Enter **information** into the fields and click **Search** to search for clients.
9. Click **Overview** to navigate back to the **Overview** screen.
1.3 My Policy Screen

10. From the **Overview** screen, Agents may navigate to the **My Policy** screen. The **My Policy** screen allows Agents to search for and view information on their policies.
11. Click **View More** under **My Policies** to navigate to the **My Policy** screen.
12. The My Policy screen displays the Agent’s policies.
13. Click the policy Name hyperlink to view additional details.
14. Enter information into the fields and click Search to search for policies.
15. Click Overview to navigate back to the Overview screen.
1.4 My Prospects

16. From the **Overview** screen, Agents may navigate to the **Book of Business** screen. The **Book of Business** screen allows Agents to view information on their prospects.

17. Click **View More** under **My Prospects** to navigate to the **Book of Business** screen.

**Please note:** Agents may initiate a benefits application by clicking **Initiate an Application for Individual** or utilize the Prescreening Tool by clicking **Pre-Screening (Individual).**
18. The **Book of Business** screen displays the Agent’s current prospects.

19. Prospects are potential clients that do not have an existing policy with the Agent. Click **Export**, **Upload Prospects**, or **Create New Prospects** to manage prospects.

20. Enter **information** into the fields and click **Search** to search for prospects.

21. Click **Overview** to navigate back to the **Overview** screen.
1.5 My Quotes Screen

22. From the **Overview** screen, Agents may navigate to the **My Quotes** screen. The **My Quotes** screen allows Agents to view information on quotes they have created.

23. Click **View More** under **My Quotes** to navigate to the **My Quotes** screen.
24. The **My Quotes** screen displays the Agent’s quotes along with the status.
25. Click the **Quote Name** hyperlink to view additional quote details, the **Customer Name** hyperlink to view client details, or take action by editing or deleting the quote from the **Action** column.
26. Enter **information** into the fields and click **Search** to search for quotes.
27. Click **Overview** to navigate back to the **Overview** screen.
1.6 Create Quote

28. To create a quote, Agents click **Book of Business** to navigate to the **Book of Business** screen.

29. On the **Book of Business** screen, Agents may search for clients or prospects and select a **Name** that displays in the table to create a quote.

30. Click the **Primary Name** hyperlink to view a client’s details.
31. After selecting the appropriate client or prospect, click **Start New Quote** to enter quote information.

32. Enter **information** on the client or prospect and the quote.

33. Enter the **Quote Name**. The **Quote Name** will be sent to the client or prospect.
34. Enter the number for *Monthly Household Income*.

35. Select the **date** for *Coverage Effective Date* from the drop-down.
36. Select the **County** the client or prospect resides in from the drop-down.

37. Select **Yes** or **No** for *Default Tobacco Use* from the drop-down.
38. Enter the **number** for # of Dependents between 0-20 years old.

39. Click **Generate Plans** to begin shopping for plans for the client or prospect.
40. A list of health plans displays that the Agent may view, or they may narrow the search results by selecting filter criteria such as **Silver Metal Level**.

41. Click **Apply** to filter search results based on the selected filter criteria.
42. Select **Silver Metal Level** to only display Silver Metal Level Qualified Health Plans for the Agent to choose from.

43. Click **Compare** on multiple plans to compare them.

**Please note:** The number for **Compare Selected Plans** changes depending on the number of plans selected.
45. The **Compare Medical Plans** screen displays information on the selected plans so the Agent may compare them.

46. Click any of the **tabs** below such as **Summary** to display additional plan information.
47. Review the plan information.

48. Click Add to Cart to add a plan to the quote.
49. After adding a plan to their cart, the Agent may click **Back To Plan List** to compare additional plans as applicable.

50. Click **Next** to shop for dental plans.
51. Agents may add a Stand-Alone Dental Plan (SADP) as applicable to the quote by following the same process outlined above for health plans. Click **Next** to continue the quote without a dental plan.

52. Confirm the Quote Summary information is correct and click **Send to Client.**
53. An automated message to the client displays with a hyperlink to view the Agent’s quote. Click **Send Quote** to send the quote to the selected client or prospect.

![Agent Portal Dashboard](image)

54. A pop-up displays stating the quote was sent successfully. Click **OK** to continue.

![Pop-up successful quote sent](image)

**Please note:** The quote is sent to the client and now displays in the table where the Agent may take action including editing or deleting the quote.
55. Click **My Delegates** to view the **My Delegates** screen.

1.7 **My Delegates Screen**

56. The **My Delegates** screen displays Agent delegates. Agents may view the Agents they are a delegate for and assign delegates to act on their behalf.

57. Click **Messages** to navigate to the **Messages** screen.
1.8 Messages Screen

58. The **Messages** screen displays the Agent’s recent messages they have received from kynect. Filter messages by clicking **Market Segment** and/or **Time Period**.

59. Click **Settings** to navigate to the **Settings** screen.

1.9 Settings Screen

60. The **Settings** screen displays the Agent’s personal and organization information. This is also where Agents will update their KOG password.
1.10 Agent Portal Help Screen

61. From the Overview screen, Agents may access the Agent Portal Help screen. The Agent Portal Help screen displays information on the different screens within Agent Portal detailing their functionality and steps that may need to be taken by the Agent.

62. Click Help to navigate to the Agent Portal Help screen.

63. The Agent Portal Help screen displays in a new browser window where the Agent may click different links to view information on the selected Agent Portal screen.
2  **kynect health coverage Prescreening Tool**

The kynect health coverage Prescreening Tool allows Residents to anonymously enter minimal information to check potential eligibility for Qualified Health Plans (QHPs), Advance Premium Tax Credit (APTC), and Cost-Sharing Reductions (CSRs). The Prescreening Tool is not an application and does not guarantee eligibility. To determine eligibility for any program a full benefits application must be completed.

2.1  **Navigating to the kynect health coverage Prescreening Tool**

1. Navigate to the kynect health coverage website.[website]
2. Click **Prescreening Tool** to view prescreening information.
3. After reviewing the prescreening information, check the **box** to confirm the Resident is not an automated program.

4. Click **Start Prescreening tool**.
2.2 Section 1: Household Details Screen

5. Enter information on the Household Details screen. The Household Details screen asks about the county the Resident resides in and how many people will be included in coverage.

6. Enter the County the Resident resides in.

Please note: During Open Enrollment, the Household Details screen displays an additional question Looking for coverage in [Year] or [Year]? for the current and following year. Select the appropriate Year from the drop-down.
7. Select the **County** from the search results.

8. Enter the **number** for *How many people, including yourself, do you want to include as you explore healthcare coverage options?*
9. Click **Next** to proceed to **Section 2** of the kynect health coverage Prescreening Tool. The number of sections in the kynect health coverage Prescreening Tool is dynamic based upon the number of people entered in the previous step.

\[
\text{Please note: The number of sections in the kynect health coverage Prescreening Tool is dynamic based on the number of persons the user wants to include as they explore health coverage options. Personal Information will need to be entered for all household members. After clicking Next, the section numbers may increase.}
\]

### 2.3 Section 2: Tell Us About You Screen

10. Enter **information** on the **Tell Us About You** screen. The **Tell Us About You** screen asks personal information about the Resident.

11. Select the appropriate **Year**, **Month**, and **Day** for the Resident’s Date of Birth from the calendar.
12. Select the Resident’s **Sex** from the drop-down.

13. Click **Yes** or **No** for *Do you use tobacco?*
14. Click **Yes** or **No** for *Are you a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group?*

15. Click **Next** to proceed to **Section 3** of the kynect health coverage Prescreening Tool.
2.4 Section 3: Tell Us About Household Member 2 Screen

16. Enter information on the Tell Us About Household Member 2 screen. The Tell Us About Household Member 2 screen asks personal information about the other household members.

17. Select the appropriate Year, Month, and Day for the Second Household Member’s Date of Birth from the calendar.

18. Select the Sex of the Second Household Member from the drop-down.
19. Click **Yes** or **No** for *Do you use tobacco?*

20. Click **Yes** or **No** for *Are you a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group?*
21. Click Yes or No for Are you pregnant?

Please note: Are you Pregnant? populates if the Resident is Female.

22. Click Next to proceed to Section 4 of the kynect health coverage Prescreening Tool.
2.5 Section 4: Tell Us About Your Household Income Screen

23. Enter information on the Tell Us About Your Household Income screen. The Tell Us About Your Household Income screen asks about the household’s projected annual income.

24. Enter the number for What do you think your annual household income will be in [Year] before taxes?

25. Click Submit to submit the kynect health coverage Prescreening Tool.
2.6 Prescreening Results Screen

26. Potential eligibility results display after submitting the kynect health coverage Prescreening Tool. From here, Residents may anonymously browse plans or submit a formal benefits application.

27. Click **Apply for Benefits** to initiate a formal benefits application.
3 Assessment

1. Agents initiate a benefits application or begin anonymous Prescreening on the Agent Dashboard via...
   a) Internet Explorer
   b) Quick Links
   c) Help
   d) KOG

2. Where may Agents search for Clients and Prospects?
   a) Special Requests and Inquiries
   b) My Quotes
   c) Account Management
   d) Book of Business

3. My Quotes are searchable by all of the following, EXCEPT:
   a) Quote Status
   b) Quote Name
   c) Market Segment
   d) Family Members

4. ______ is the anonymous tool used to determine potential eligibility without completing a formal benefits application.
   a) Tax Estimator
   b) Full Time Equivalent Employee Calculator
   c) 1095 Portal
   d) Prescreening

5. The kynect health coverage Prescreening Tool determines potential eligibility for:
   a) Qualified Health Plans (QHPs), Advance Premium Tax Credit (APTC), and Cost-Sharing Reductions (CSRs)
   b) SNAP and KTAP
   c) Employer Insurance
   d) Unemployment

6. If an Individual completes the kynect health coverage Prescreening Tool, what must they do if they wish to receive benefits?
   a) Nothing, the Prescreening Tool applies for benefits
   b) Contact their employer
   c) Submit a formal benefits application
   d) Send KHBE an email

7. Agents may view the following sections on the Overview screen EXCEPT:
   a) My Clients
b) My Policies
c) My Tasks
d) My Quotes

8. On the My Delegates screen, Agents may NOT:
   a) View Agents they are a delegate for
   b) Assign delegates to act on their behalf
   c) View delegate requests
   d) Assign tasks to other Agents

9. On which screen may Agents search for their policies
   a) My Quotes screen
   b) My Policy screen
   c) My Clients screen
   d) Messages screen

10. What action may Agents take on the My Prospects screen?
    a) Assign tasks
    b) Upload applications
    c) Create new prospects
    d) View delegates