The Commonwealth of Kentucky
kynect State-Based Marketplace

Navigating the kynect Dashboard Certification Training Guide

July 18, 2025

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Introduction

This Certification Course will help Agents understand the functionalities of the Agent Dashboard, identify the kynect On Demand program expectations, and outline the kynect health coverage Prescreening Tool process to best support Residents.

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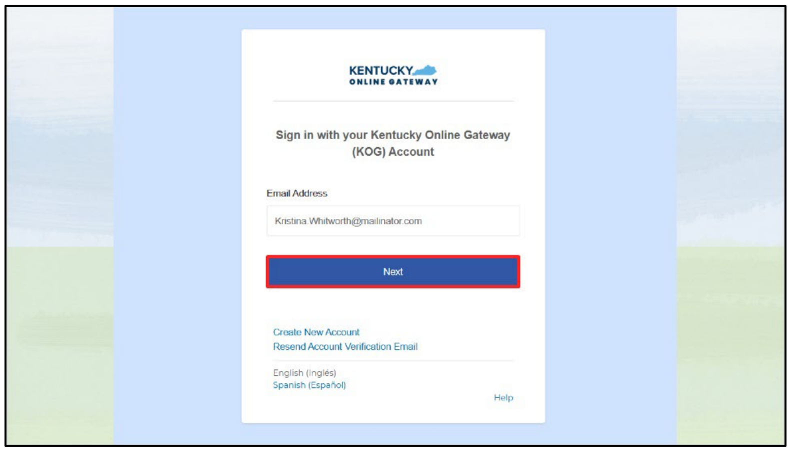
1. Agent Dashboard Overview

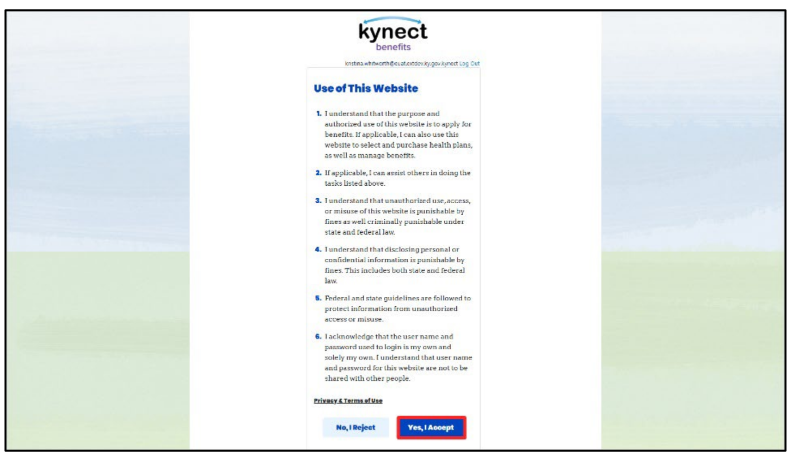
1.1 Agent Log-in process

Slide Voice-over: We will now outline the steps to log into **Agent portal**. This demonstration will begin with the **Kentucky Online Gateway Homepage**.

1. Here users will enter **their email address** and click **Next**.
2. Users would then enter their **created password**, then click **Verify**.



3. Users will then land on the **kynect benefits consent** page. Here users will need to review the privacy and terms of use, then confirm consent by clicking **Yes, I accept**.



1.2 Agent Dashboard

Slide Voice-over: Agents have now successfully entered **Agent Portal**! Users will utilize **Agent Portal** to:

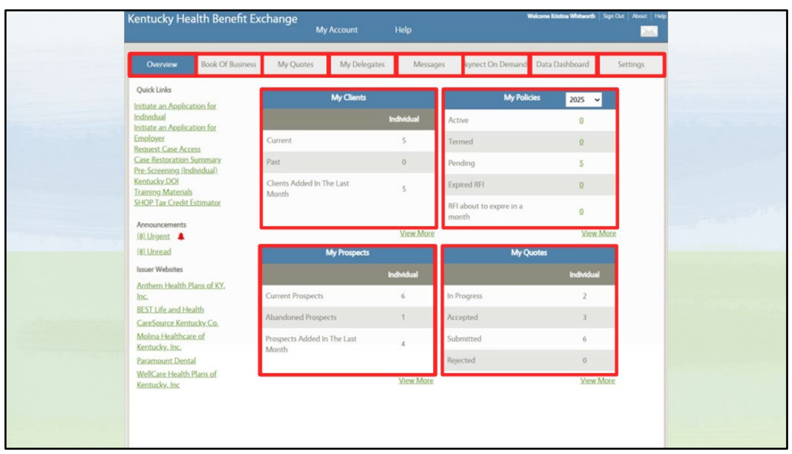
- Intake new Prospects
- Initiate a benefits application
- Monitor policy information through summary data
- Generate useful reports

Slide Voice-over: Upon entering **Agent Portal**, users will automatically be taken to the **Agent Portal Dashboard** screen. The **Agent Portal Dashboard** screen consists of eight (8) tabs going left to right across the top of the screen, these tabs include:

- Overview
- Book of Business
- My Quotes
- My Delegates
- Messages
- kynect On Demand
- Data Dashboard
- Settings

Slide Voice-over: The Dashboard also displays four (4) sections that provide a summary of the user's business. Sections include:

- My Prospects
- My Quotes
- My Clients
- My Policies

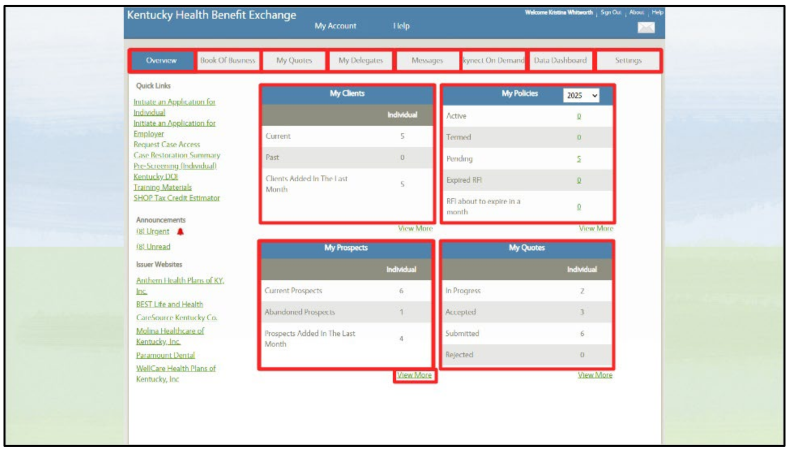


1.3 My Prospects

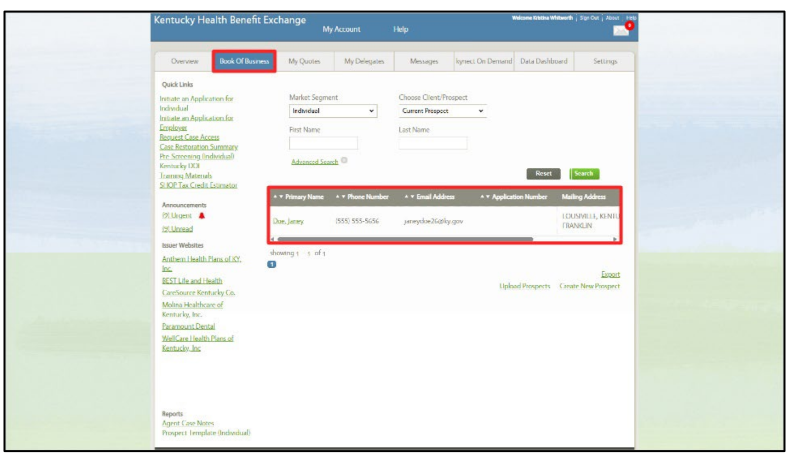
Slide Voice-over: The first section we will review is *My Prospects***.** The *My Prospects* section of the Dashboard displays totals for the user's:

- Current Prospects
- Abandoned Prospects
- Prospects Added in The Last Month

1. To search for a Prospect, click **View More** at the bottom right of the *My Prospect* section to navigate to the **Book of Business** screen.



Slide Voice-over: Users will be directed to the **Book of Business** screen. Here, users may search for Prospects, manage Prospects, and intake new Prospects.



Slide Voice-over: In the *Prospect Search* section, users may search through defined criteria such as:

- Market Segment
- Prospect Type
- First and Last Name

Slide Voice-over: Using the *Advanced Search* section, users may also search for Prospects by:

- Application Number
- Application Status
- Member Match Status

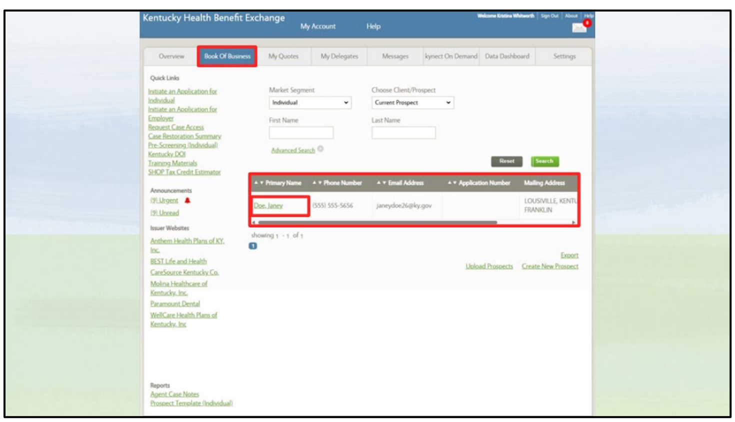
Slide Voice-over: In the middle of the screen, users will locate the *Prospect Details* section which allows the user to see a list of Prospects, along with their application information.

Slide Voice-over: Moving toward the bottom of the screen, users will locate a *Quick Links* section which allows the user to:

- **Export:** Allows users to export their Prospect list into one centralized excel document
- **Upload prospects:** Allows the user to mass upload a large number of potential Clients using an excel sheet
- **Create New Prospect:** Allows the user to complete an intake form for a new lead

Please note: A Prospect is defined as a potential Client that has initiated but not submitted an application and has assigned the user as the Agent of Record.

2. **Prospect Profile** screen: From the **Book of Business** screen, users may navigate to a Prospect's profile by clicking on the **name of the prospect**.



Slide Voice-over: Once users land on the **Prospect Profile** screen, the *Contact Information* section found at the top of the screen displays the Prospects contact information and preferred communication.

Slide Voice-over: In the middle of the screen, starting on the left, users will find a *Quick Links* section to:

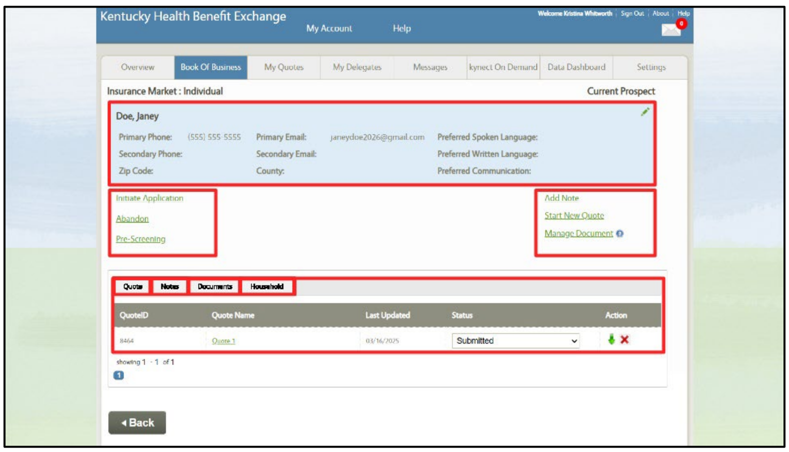
- Initiate Application
- Abandon the Prospect
- Pre-screening

Slide Voice-over: In the *Quick Links* section on the right users may:

- Add Notes
- Start New quote
- Manage Documents

Slide Voice-over: At the bottom of the screen, there are four (4) tabs:

- **Quotes tab:** Lists the quotes created by the user for the Resident.
- **Notes tab:** Contains notes added for the Resident.
- **Documents tab:** Houses documents uploaded via the *Manage Document* link.
- **Household tab:** Provides details for all covered household members.



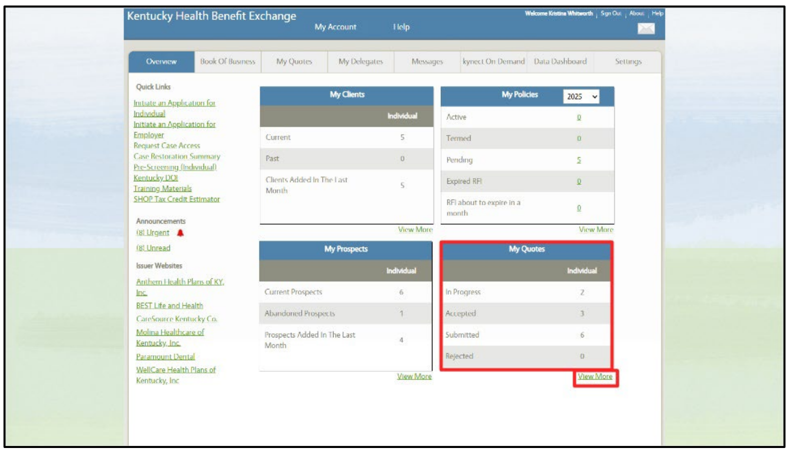
Please note: Documents uploaded through the *Manage Document* link located on the **Prospect Profile** screen will not transfer to the **kynect dashboard**.

1.4 My Quotes

Slide Voice-over: The *My Quotes* section of **Agent Portal Dashboard** provides the user with a summary of their total quotes that are:

- In progress
- Accepted
- Submitted
- Rejected

1. Users will click on **View More** under the *My Quotes* section to navigate to the **My Quotes** tab and view additional information regarding the user's quotes.

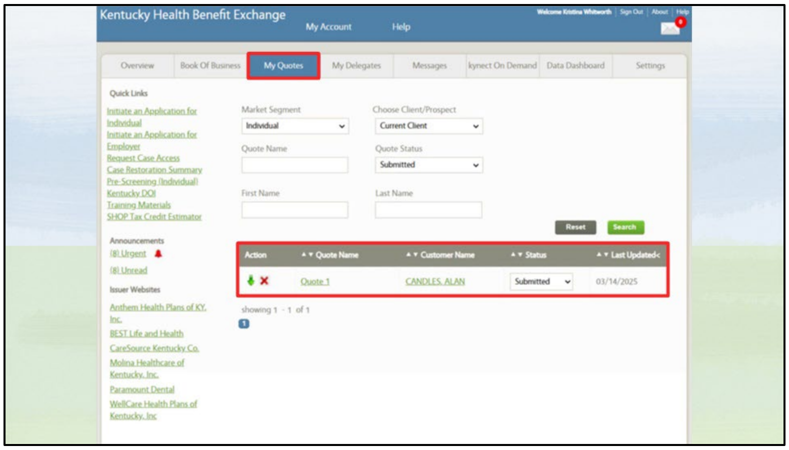


Slide Voice-over: **My Quotes** screen: Information regarding quotes will be housed under the **My Quotes** screen. Here, users may search for quotes that have been created by criteria such as:

- Market Segment
- Client/Prospect
- Quote Name and Status

Slide Voice-over: In the *Quote Detail* section found in the middle of the users' screen, users will see a list of:

- Saved Quotes
- Quote Status
- Latest Quote Update Date

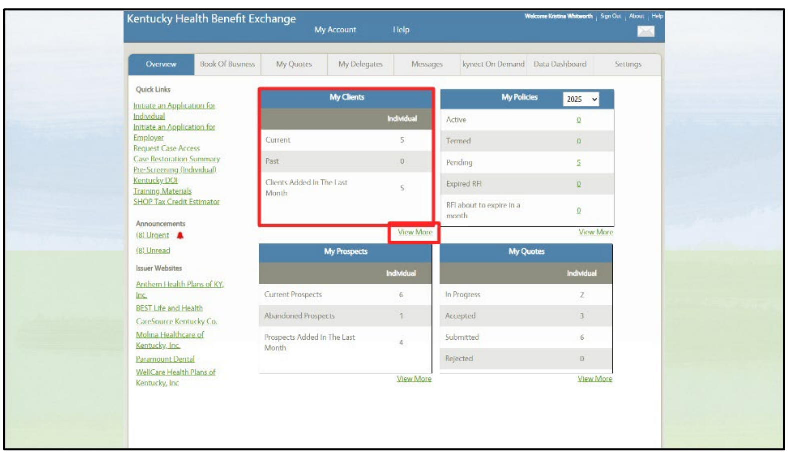


1.5 My Clients

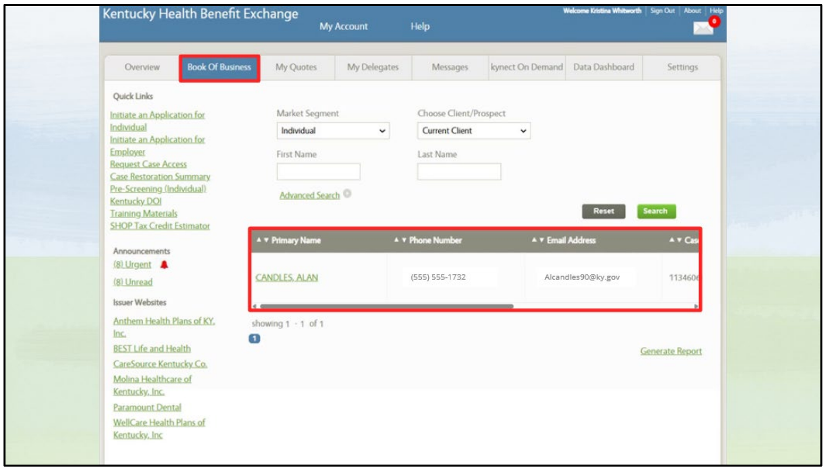
Slide Voice-over: The *My Clients* section of the **Agent Portal Dashboard** provides the user with totals for the users':

- Current Clients
- Past Clients
- Clients Added in The Last Month

1. To proceed to the **Book of Business** screen to search for clients, click **View More** at the bottom right of the *My Clients* section.



Slide Voice-over: Users will be directed to the ***Book of Business*** screen. Here, users may search for Clients and generate useful reports to efficiently manage their Book of Business.



Slide Voice-over: In the *Client Search* section, users may search through defined criteria such as:

- Market Segment
- Client Type (Past or present)
- First and Last name

Slide Voice-over: Using the *Advanced Search* section, users may also search for Clients by:

- Phone Number or Email Address (Primary Policyholders)
- First or Last name (Covered members within the household)
- Case Number or Status

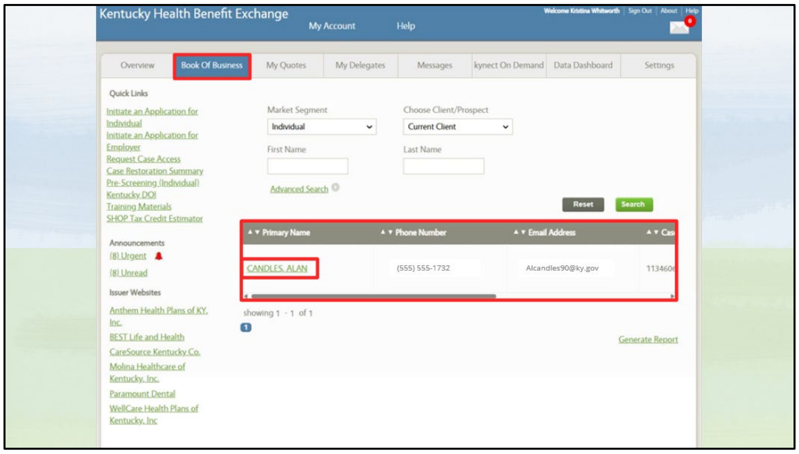
Slide Voice-over: In the middle of the screen, users will locate the *Client Details* section which allows the user to see a list of Clients, along with their case information.

Slide Voice-over: Moving toward the bottom of the screen, users will locate a *Quick Links* section which allows the user to:

- **Generate Report:** Users may compile a list of the users' Clients into an Excel document to monitor and manage the user's book of business more efficiently.

Please note: A Client is defined as a Resident that has completed the application process and now holds a case number.

2. **Client Profile** Screen: Navigate to a **Client Profile** screen by clicking on the **name of the Client**.



Slide Voice-over: **Client Profile** screen**:** The *Contact Information* section found at the top of the screen displays the Prospect's contact information, case Information, and preferred communication.

Slide Voice-over: In the middle of the screen, starting on the left, users will find a *Quick Links* section to:

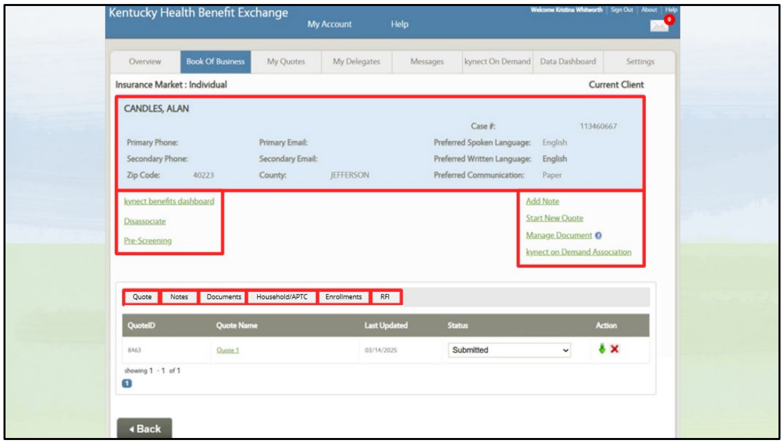
- kynect Benefits Dashboard
- Disassociate from the Client
- Pre-screening

Slide Voice-over: In the *Quick Links* section on the right users may:

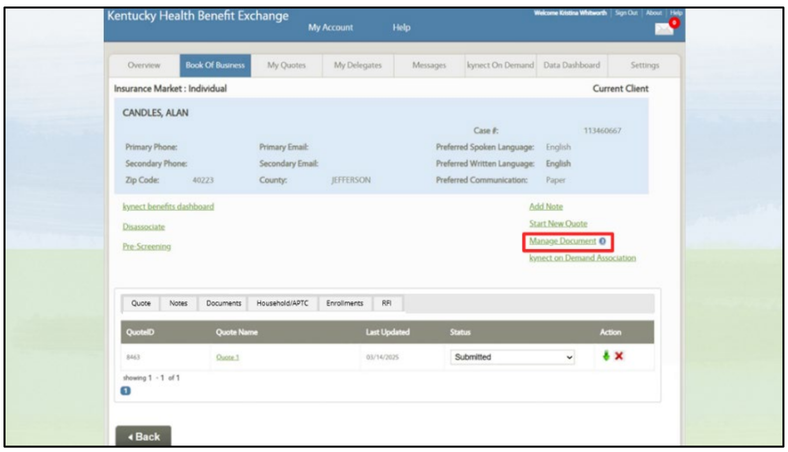
- Add Note
- Start New Quote
- Manage Document
- kynect On Demand Association

Slide Voice-over: At the bottom of the screen, there are six (6) tabs:

- **Quotes tab:** Lists the quotes users have created for the Client.
- **Notes tab:** Displays notes added for the Resident.
- **Documents tab:** Houses documents uploaded via the Manage Document link.
- **Household/APTC tab:** Provides APTC details for covered household members.
  Enrollments tab: Displays applied APTC amounts, monthly payments, and additional details.
- **RFI tab:** Displays any requests for information for the Resident.



Please note: Documents uploaded through the *Manage Document* link located on the **Prospect Profile** screen will not transfer to the **kynect dashboard**. Documents needed for verification will need to be uploaded directly to the **kynect benefits dashboard**.



Slide Voice-over: Managing Documents for Residents:

- **Special Enrollments:** When managing documents for Special Enrollments, often, delayed documents are the hold up in the enrollment process. Users should ensure that any verification needed in these cases is uploaded as quickly as possible, as these must be uploaded prior to the first payment being made and the enrollment becoming effective.
  - Documents must be verified by someone other than the Client.

1.6 My Policies

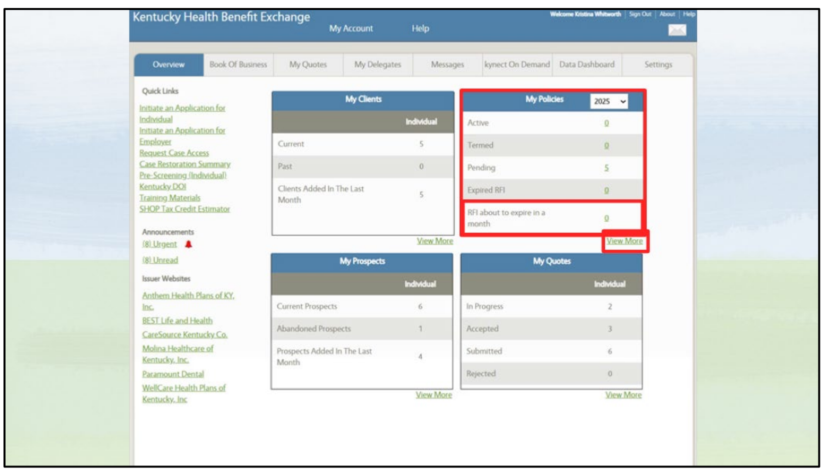
Slide Voice-over: The *My Policies* section of the **Agent Portal Dashboard** outlines the users':

- Active Policies
- Terminated Policies
- Pending Policies

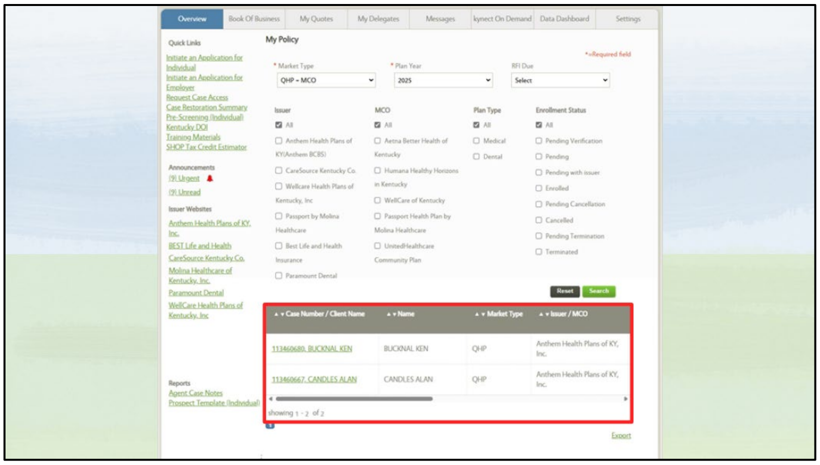
Slide Voice-over: The *My Policies* section also displays the totals for:

- Expired Requests for Information (RFIs)
- RFI about to expire in a month
    - As a best practice, it is encouraged that users consistently monitor this metric closely and check at least twice per week. By consistently monitoring any requests for information that are set to expire within the next 30 days and taking needed action, users greatly reduce the risk or loss of APTC for their Residents.

1. **My Policy Screen**: To navigate to the ***My Policy*** screen, users will click **View More** at the bottom right of the *My Policies* section.



Slide Voice-over: Users will be directed to the **My Policy** screen. Here, users may search for the more information regarding a Client's policy.



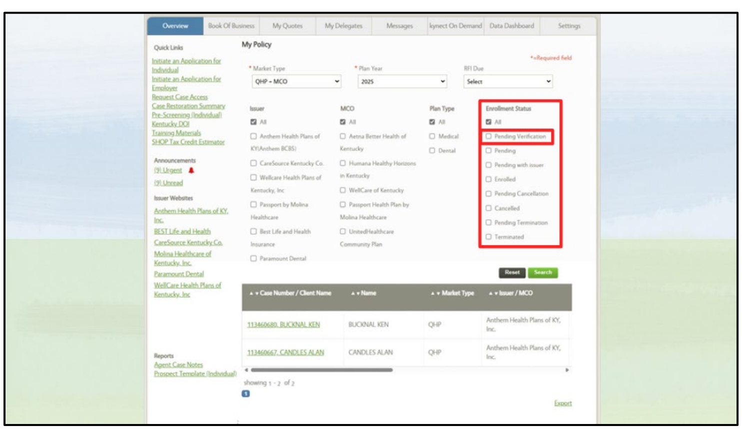
Slide Voice-over: In the *My Policy Search* section, users may search for policies through defined criteria such as:

- Market Type
- Plan Year or
- RFI Due
- Issuer
- Managed Care Organization (MCO)
- Plan Type
- Enrollment Status

Slide Voice-over: Towards the bottom of the screen, users will locate the *Policy Details* section which provides the user with a list of their Policies, along with their case information.

Slide Voice-over: Below the *Policy Details* section, users will locate a *Quick Links* section which allows the user to:

- **Export:** Allows users to create an Excel spreadsheet to efficiently monitor policy information for their Clients.



Please note: A case pending verification will require verification to be returned prior to the premium payment being made and the enrollment becoming effective.

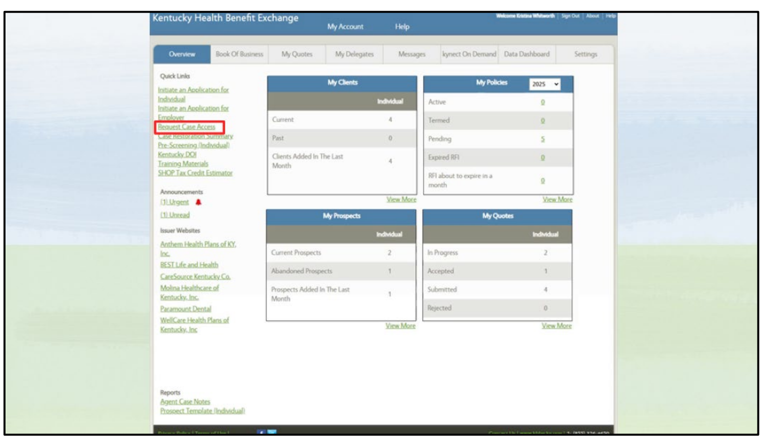
1.7 Quick Links

Slide Voice-over: Located on the left of **Agent Portal Dashboard** screen, is the *Quick Links* section. This section provides users with quick links to:

- **Initiate an Application for Individual:** Navigates users to the benefits application page.
- **Initiate an Application for Employer:** Allows small businesses and non-profits to check eligibility for self-coverage.
- **Request Case Access:** Allows users the ability to request access to a Resident's case either verbally or electronically.
- **Case Restoration Summary:** Allows users to view a summary of submitted restoration requests.
- **Pre-screening (Individual):** Allows users to check eligibility for tax credits to help pay the Resident's premium and Qualified Health Plans.
- **Kentucky DOI:** Provides access to the Kentucky Department of Insurance website.
- **Training Materials:** Provides users with access to training materials from the Kentucky Health Benefit Exchange.
- **SHOP Tax Credit Estimator:** Provides a link to the Taxpayer Advocate Service within the Internal Revenue Service (IRS).
- **Announcements and Alerts:** Provides notices on required actions.
- **Issuer websites:** Offers access to commonly used information.
- **Reports:** Allows users to quickly access case notes and intake new potential leads.

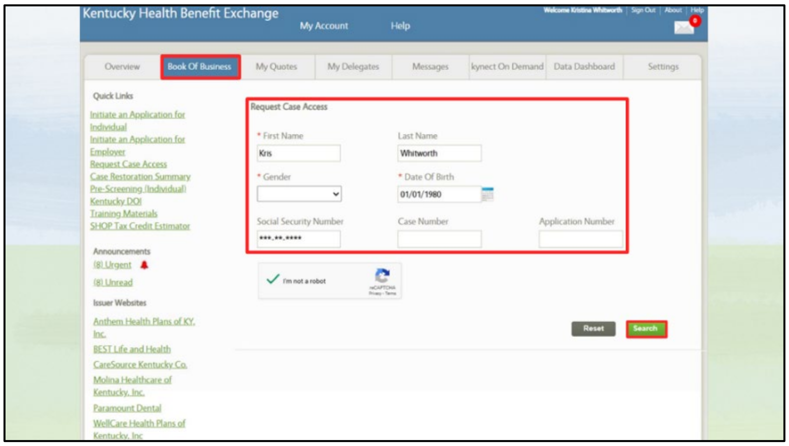
1.8 Request Case Access

1. **Request Case Access**: To request case access, the user would click **Request Case Access** which directs users to the *Request Case Access* section of the **Book of Business** screen.



Slide Voice-over: Users will be directed to the *Request Case Access* section, found under the **Book of Business** screen. By completing and submitting the information needed on screen, users may request access to a Client's case:

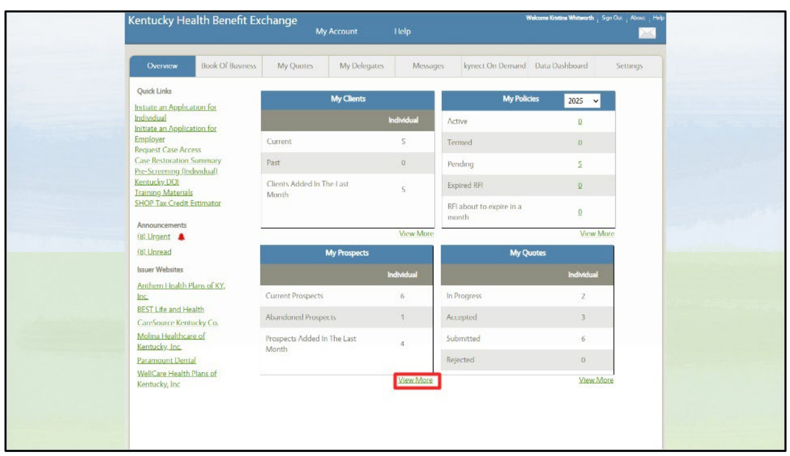
- The system will then validate whether the case is or is not associated with another Agent.
- Access to an existing case may be requested electronically or verbally.
- Electronic consent sends a message to the Client through their preferred communication method and provides the Client ninety seconds to accept.
    - If the Client prefers paper communication, or does not have an email or phone number, and has no kynect benefits account, the Agent must create an account with the Client or contact the PSL line with the Client to be added to the case.



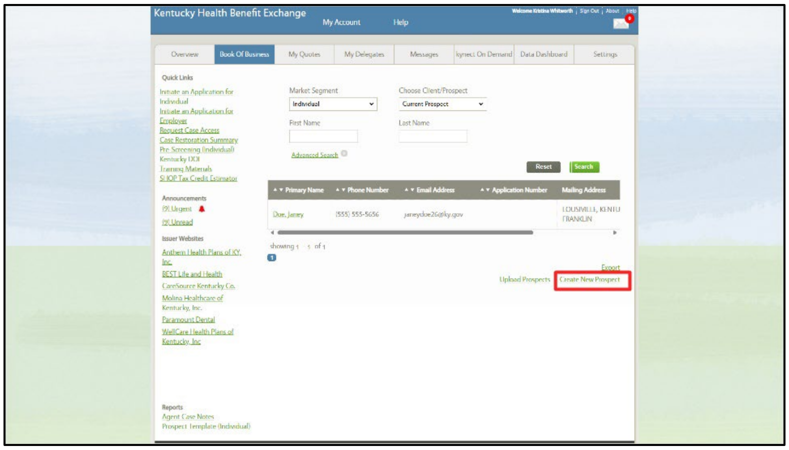
1.9 Process to Intake New Lead

Slide Voice-over: A key functionality of **Agent Portal** is the ability to intake new Prospects.

1. **Intake New Lead**: To complete the intake form for a new Prospect, click **View More** under the *My Prospects* section of **Agent Portal Dashboard.**

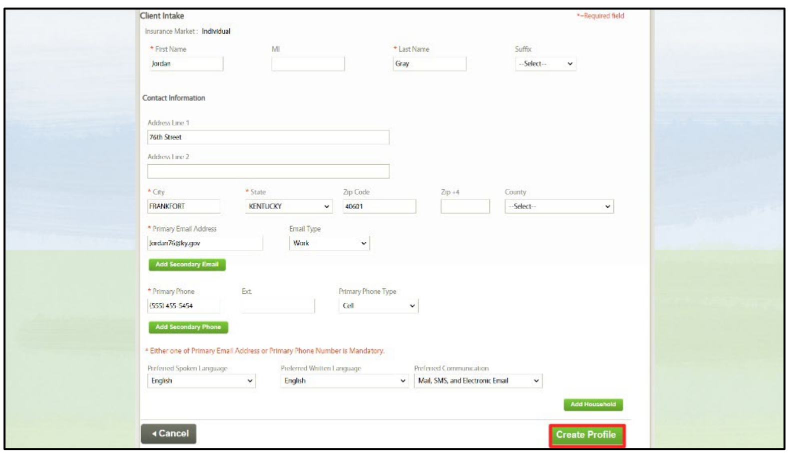


2. Click **Create New Prospect.**

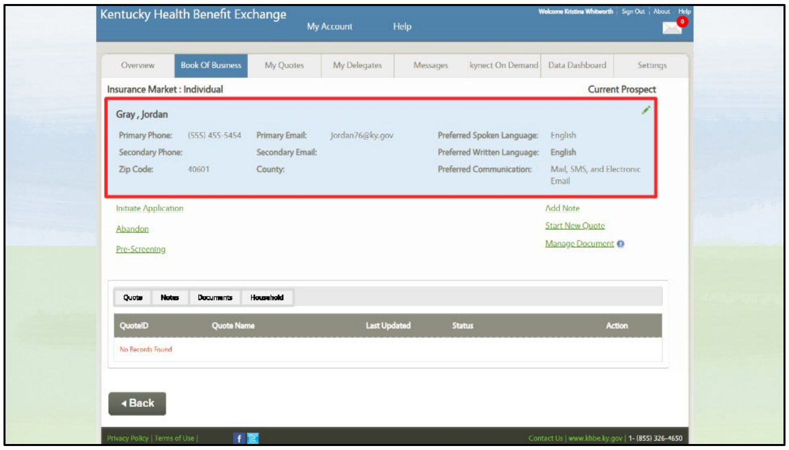


Slide Voice-over: Users will then be directed to the **Client Intake** screen. Here, users may save information about potential leads to convert them to a current Prospect. Minimal information is required when creating a profile for a lead.

3. Once all required fields have been filled in, click **Create Profile.**



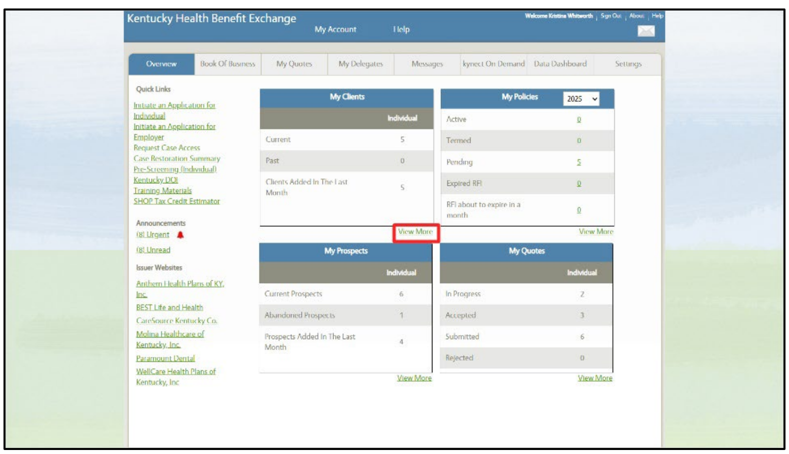
Slide Voice-over: Information for the now Prospect will then be displayed under the *Prospect Profile* section of the **Book of Business** screen.



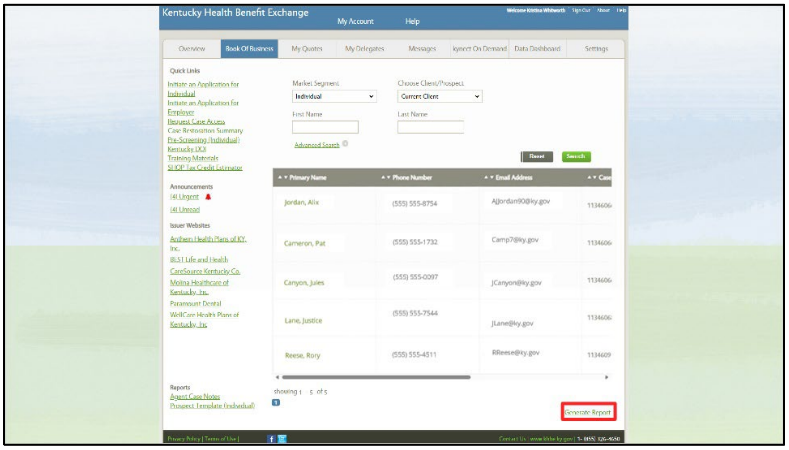
1.10 Process to Generate a Report

Slide Voice-over: Another commonly used functionality is the ability to generate a report. By generating a report, users may compile a list of their Clients into an Excel document to monitor and manage the user's book of business more efficiently.

1. **Generate Report**: To generate a report, click **View More** under the *My Clients* section of the **Agent Portal Dashboard.**

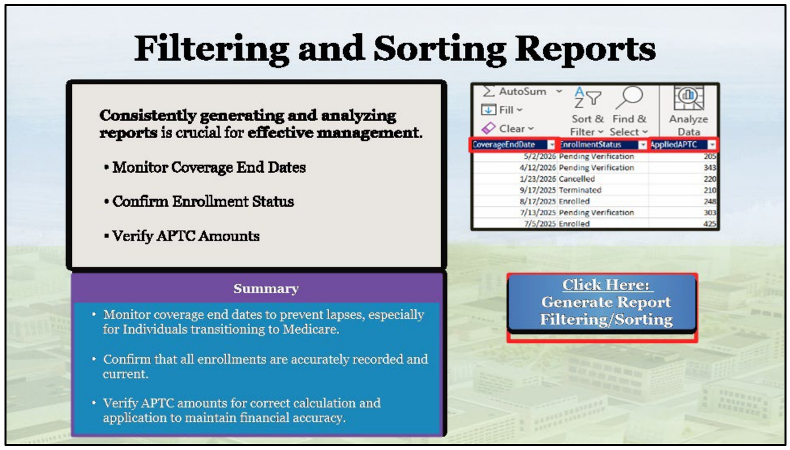


2. Click **Generate Report.**



Slide Voice-over: As the users' business continues to grow, it will be important to generate, sort, filter, and analyze reports consistently as a best practice. Here are three (3) metrics users are strongly encouraged to monitor:

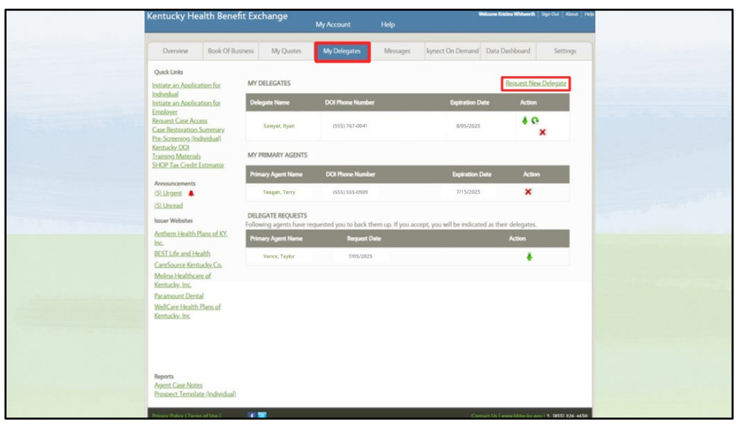
- **Coverage End Dates:** Users should keep a close eye on the coverage end dates to avoid any lapses in coverage. This is crucial for ensuring continuous coverage and avoiding any potential gaps that could affect the Client. The largest demographic group is pre-retirees, and with that said, there is a lot of movement throughout the year of Clients going to Medicare. In an instance where a Client will be transitioning to Medicare soon, users will need to be sure that their QHP terminates the day before their Medicare goes active.
- **Enrollment Status:** Users should ensure that all enrollments are accurately recorded and current. This will help in maintaining the integrity of the data and ensuring that all participants are correctly accounted for.
- **Verify APTC amounts**: Users should make a practice of verifying the Advance Premium Tax Credit (APTC) amounts to ensure they are correctly calculated and applied. This will help in maintaining financial accuracy and compliance with relevant regulations for Clients.
    - While these three (3) metrics are being emphasized, it is important to review other metrics in the report as well. Comprehensive monitoring of all metrics will provide a more complete understanding of the data and help in making informed decisions.



1.11 My Delegates

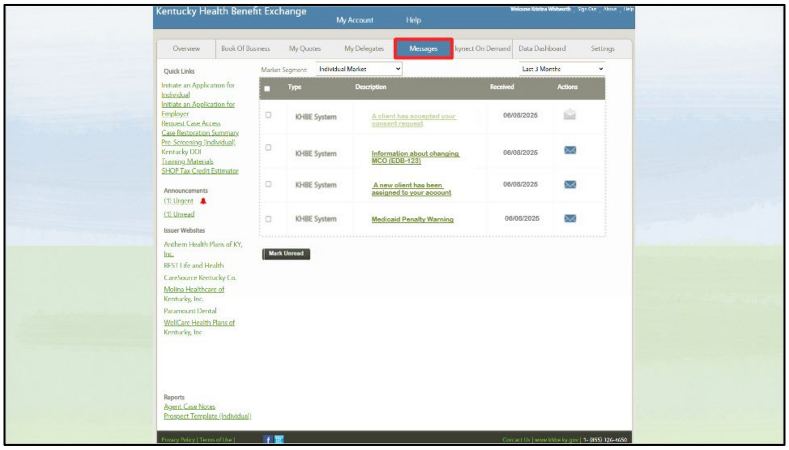
Slide Voice-over: The **My Delegates** screen is a valuable tool for improving efficiency and collaboration. Agents may share their caseload when unavailable or when extra support is needed. This allows secondary Agents to access and assist with cases.

1. To request a new delegate, users would navigate to the **My Delegates** screen, then click the **Request New Delegate** link.



1.12 Messages

Slide Voice-over: The **Messages** screen allows users to see messages received from kynect. Here, users may monitor messages such as a Client accepting consent for case access, or a new Client being added to the account. As a best practice, it is recommended to check messages as often as possible.

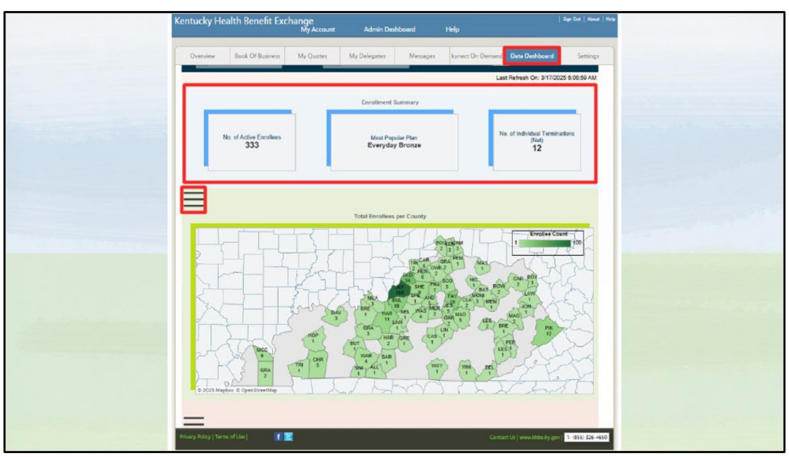


1.13 Data Dashboard

Slide Voice-over: The **Data Dashboard** screen serves as a visualization and analysis tool containing the users enrollment and termination data for the past seven (7) years. Here, users will be provided an overall enrollment summary. Users may monitor various metrics by clicking the **Filter Icons** located to the left. The **Data Dashboard** screen allows the user to monitor metrics such as:

- Total Enrollees per County
- Total Active Enrollees
- Most Popular Plans
- Net Terminations by County, Age Group, or Month

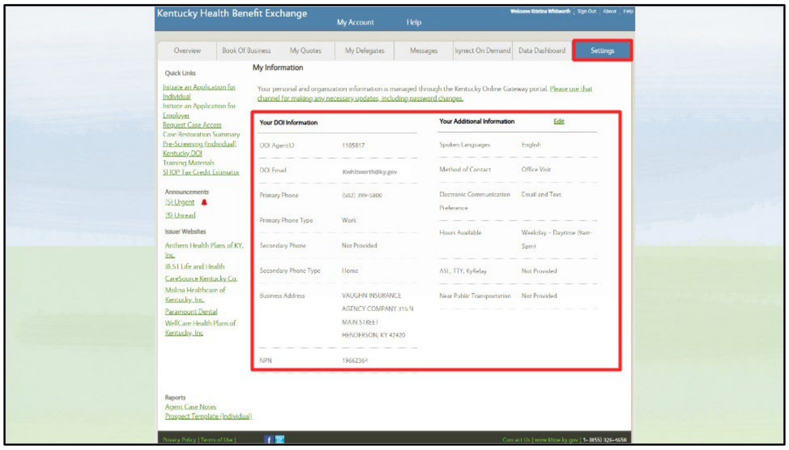
Slide Voice-over: In summary, the **Data Dashboard** screen is a valuable tool for tracking specific trends and taking effective action based on key metrics.



1.14 Settings

Slide Voice-over: In the **Settings** screen users may view:

- The user's DOI Information in the *Your DOI Information* section
- The user's additional information in the *Your Additional Information* section

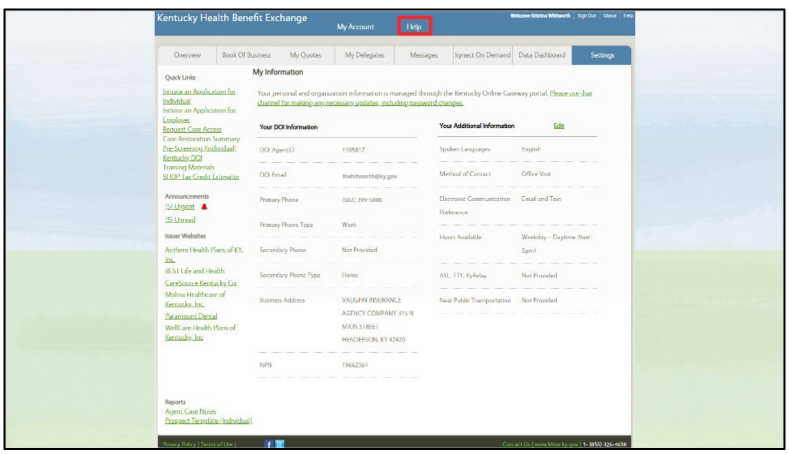


Please note: DOI information must be updated through the Department of Insurance and may not be updated from the **Settings** screen or through the **Kentucky Online Gateway**.

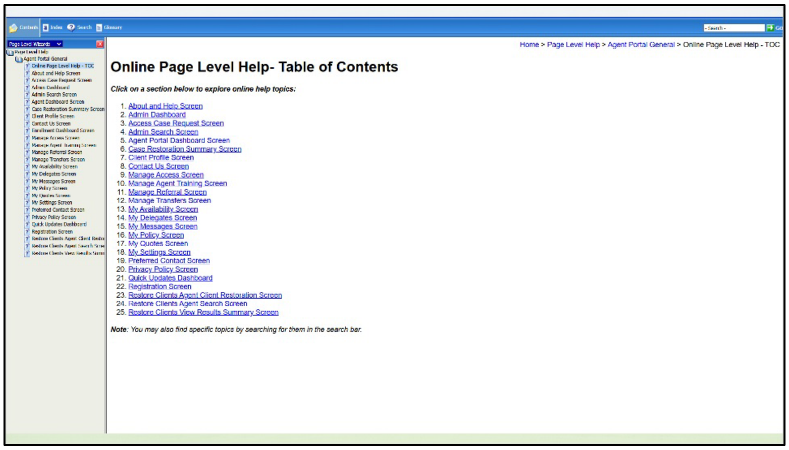
1.15 Help Center

Slide Voice-over: The **Help Center** screen contains links to individual screens in **Agent Portal**. By clicking on any of these links, users will see descriptions and instructions for completing tasks within that screen.

1. Click the **Help** link found at the top of the **Agent Portal Dashboard.**



Slide Voice-over: Users will the Navigate to the **Help Center** screen. The **Help Center** screen contains links to individual screens in **Agent portal**. By clicking on any of these links, users will see descriptions and instructions for completing tasks within that screen.


Home > Page Level Help > Agent Portal General > Online Page Level Help - TOC
Online Page Level Help- Table of Contents
Click on a section below to explore online help topics:
1. About and Help Screen
2. Admin Dashboard
3. Access Case Request Screen
4. Admin Search Screen
5. Agent Portal Dashboard Screen
6. Case Restoration Summary Screen
7. Client Profile Screen
8. Contact Us Screen
9. Manage Access Screen
10. Manage Agent Training Screen
11. Manage Referral Screen
12. Manage Transfers Screen
13. My Availability Screen
14. My Delegates Screen
15. My Messages Screen
16. My Policy Screen
17. My Quotes Screen
18. My Settings Screen
19. Preferred Contact Screen
20. Privacy Policy Screen
21. Quick Updates Dashboard
22. Registration Screen
23. Restore Clients Agent Client Restoration Screen
24. Restore Clients Agent Search Screen
25. Restore Clients View Results Summary Screen
Note: You may also find specific topics by searching for them in the search bar.

2. kynect On Demand

Slide Voice-over: In this section of the guide, we will navigate the kynect On Demand process.

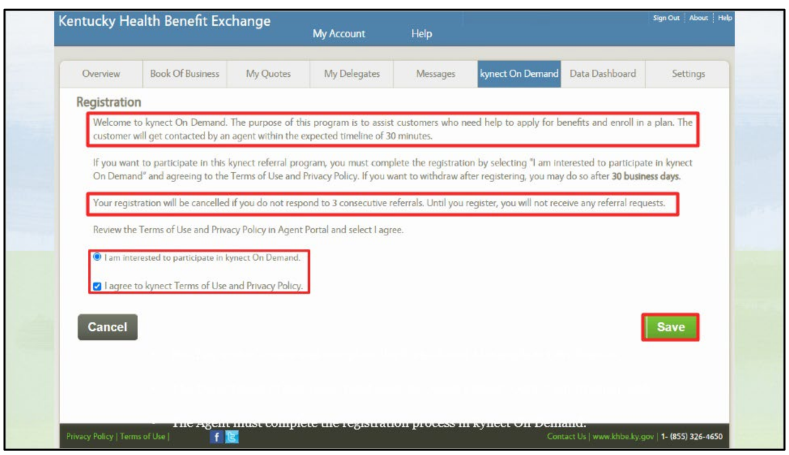
2.1 Registration

Slide Voice-over: kynect On Demand enables Residents to request assistance with kynect benefits applications, plan enrollments, or both, and receive a call back from an Agent within 30 minutes. To begin, Agents must meet the following minimum criteria:

- Hold an active license and complete the State-Based Marketplace Certification.
- The Department of Insurance must have the Agent's latest contact information.
- The Agent must have the registration process in kynect On Demand complete.

1. To begin the Registration process, users will review and acknowledge the **Terms of use and privacy policy.**
2. Check the box labeled **I am interested to participate in kynect On Demand.**
3. Check the box labeled **I agree to kynect Terms of Use and Privacy Policy.**
4. Click **Save.**

Slide Voice-over: Agents must be aware that if an Agent fails to accept or reject three (3) consecutive referrals, that Agent's kynect On Demand registration will be cancelled and the Agent will need to complete the registration process again. This rule only applies to General Referrals but does not apply to Mass Referrals.



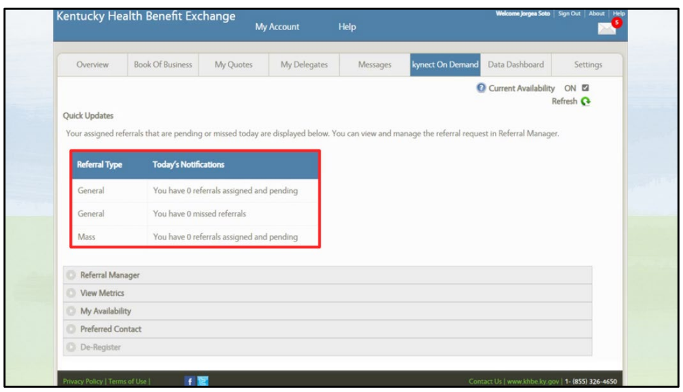
2.2 Quick Updates

Slide Voice-over: The **Quick Updates** screen Is the landing screen for the kynect On Demand Dashboard. This section displays notifications about the number of:

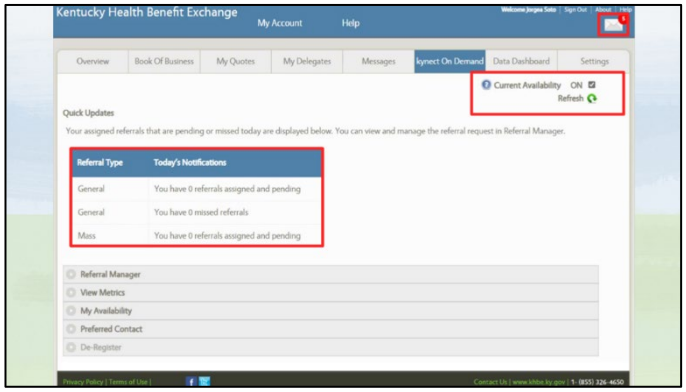
- The users Pending and assigned referrals (General and Mass)
- The users Missed referrals for the current day

Slide Voice-over: There are two (2) types of referrals:

- **General Referral:** Occurs when a Resident submits a kynect On Demand request.
  - The system identifies the appropriate path and assigns the General Referral to the available Agent, who is expected to take action within 15 minutes from the time of assignment.
  - If no action is taken or the referral is rejected, it will expire and be sent to the next available individual.
- **Mass Referral:** Occurs when a General Referral is not accepted by any Agent within the allotted 15 minutes.
  - This will be assigned to whoever accepts it first, so any Agents must take action by either accepting or rejecting the referral as quickly as possible.
  - If a Mass Referral is accepted by someone else, it may still appear on the list, but nothing will be available when accept is clicked.



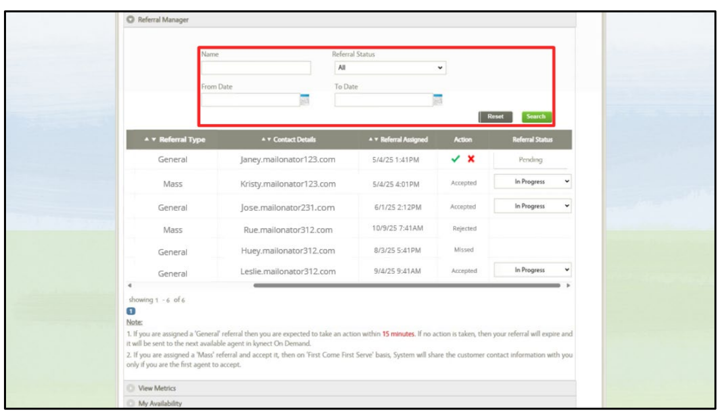
5. Click the **Checkbox** in the right corner to modify availability in the top right corner.
6. Click the **Mail icon** to monitor referral notifications.
7. To manage referrals, click **Referral Manager** at the bottom of the screen.



2.3 Referral Manager

Slide Voice-over: The **Referral Manager** screen allows users to leverage the *Referral Search* section to search for referrals by:

- Name
- Referral Status
- Date Range

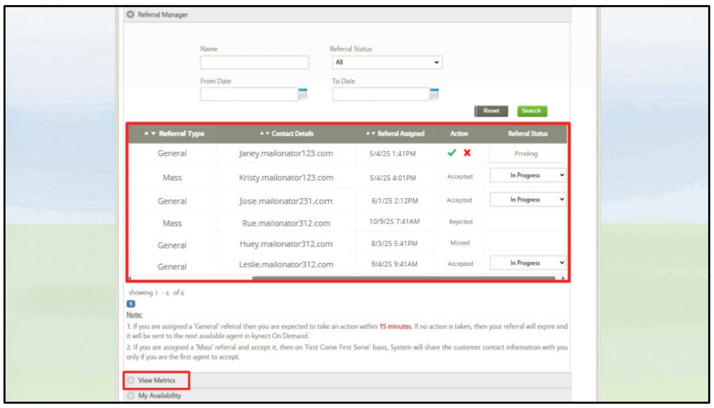


Slide Voice-over: The **Referral Manager** screen also displays a *Detailed Referral* section that shows:

- **Referral Type:** Displays whether the referral is a General or Mass Referral.
- **Referral Assigned:** Displays the date and time the referral was received.
  - This is important, especially for General Referrals, as the user will only have 15 minutes to accept or reject any General Referrals that come in.
  - If a General Referral is not accepted within 15 minutes, it will be routed to the next available Agent in kynect On Demand as a Mass Referral.
- **Action:** *A*llows the user to accept or reject a referral.

  - Users will click the **green check mark** to accept or click the **red X** to reject.
  - A missed referral will display as missed. It will then be sent as a Mass Referral to all Agents. If a General Referral is not accepted or rejected in the 15-minute time frame, it becomes a Mass Referral on a 'First Come, First Serve' basis.
- **Referral Status:** Conveys the status of the referral and should be updated after assisting the Resident. Status options are:
  - Pending
  - In progress
  - Complete

8. To view referral metrics, click **View Metrics** at the bottom of the screen.

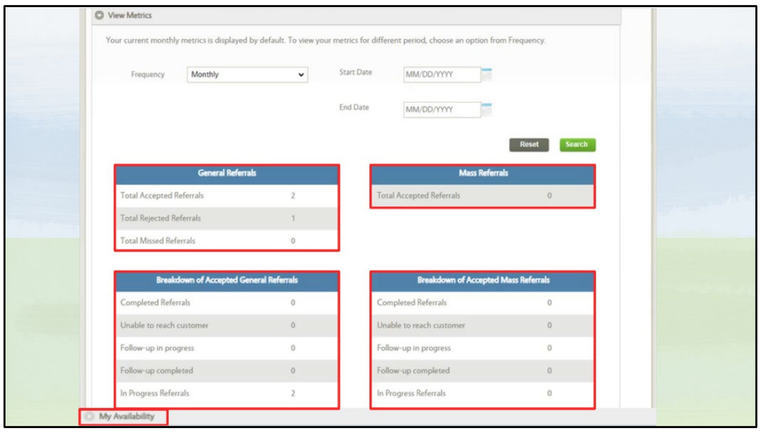


2.4 View Metrics

Slide Voice-over: The **View Metrics** screen displays the current month's metrics by default, but the user may view different periods by adjusting the *Frequency* or *Start Date and End Date* section. Additionally, the **View Metrics** screen displays:

- **General Referrals box:** Displays the user's number of accepted, rejected, and missed General Referrals.
- **Mass Referrals box:** Displays the number of accepted Mass Referrals.
- **Breakdown of Accepted General Referrals**, and the **Breakdown of Accepted Mass Referrals:** Displays a breakdown of accepted referrals by action status.

9. To set availability, click **My Availability** at the bottom of the screen.

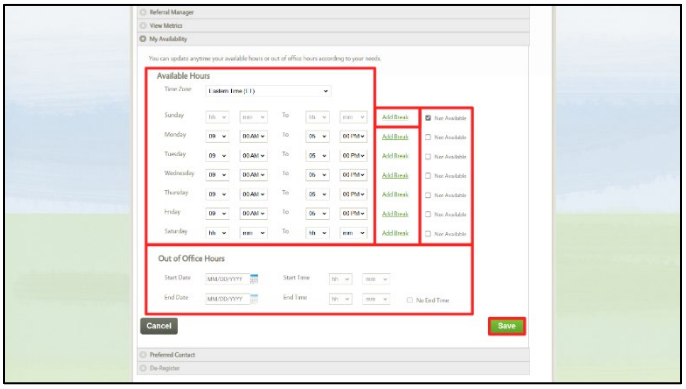


2.5 Setting Availability

Slide Voice-over: In the **Setting Availability** screen, users may update available or out of office hours according to their needs. Users may set:

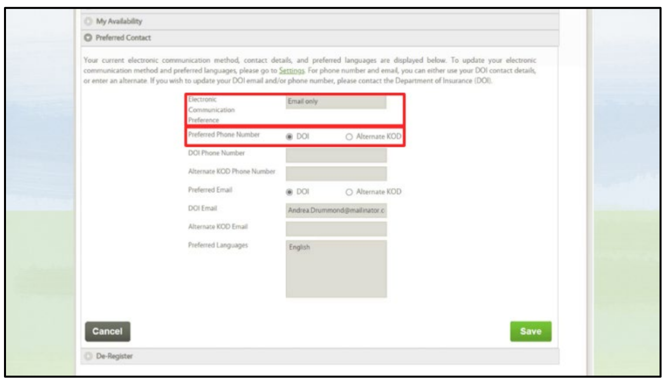
- Available Hours
- Break times
- Times Not Available
- Out of Office Hours

10. Once confirmed, click **Save** at the bottom of the screen to move to the **Preferred Contact** screen.



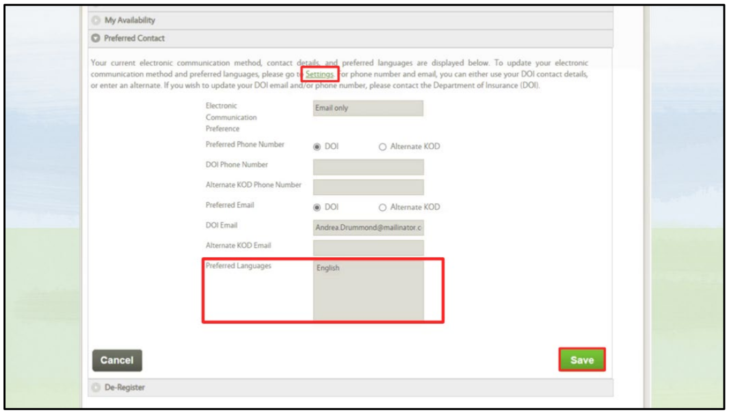
2.6 Preferred Contact

Slide Voice-over: In the **Preferred Contact** screen, this provides the Agent's DOI contact details. Review the details and select the preferred contact method to receive notifications.



Slide Voice-over: Details may be updated by clicking the **Settings** hyperlink or the **Settings** tab. *Preferred Language* section will display the selection made in the **Settings** tab.

11. Once confirmed, click **Save** at the bottom of the screen.

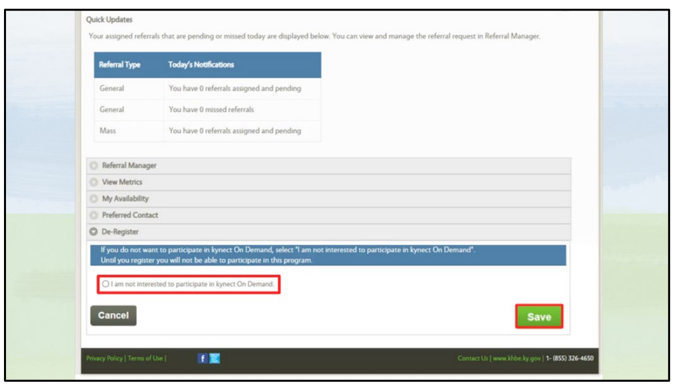


2.7 De-Register

Slide Voice-over: The **De-Register** screen allows users to disenroll themselves from the kynect On Demand program. To no longer participate in kynect On Demand:

12. Select the **I am not interested to participate in kynect On Demand** checkbox.
13. Click **Save.**

Slide Voice-over: Once de-registered, the referral information will be maintained in kynect On Demand tables.



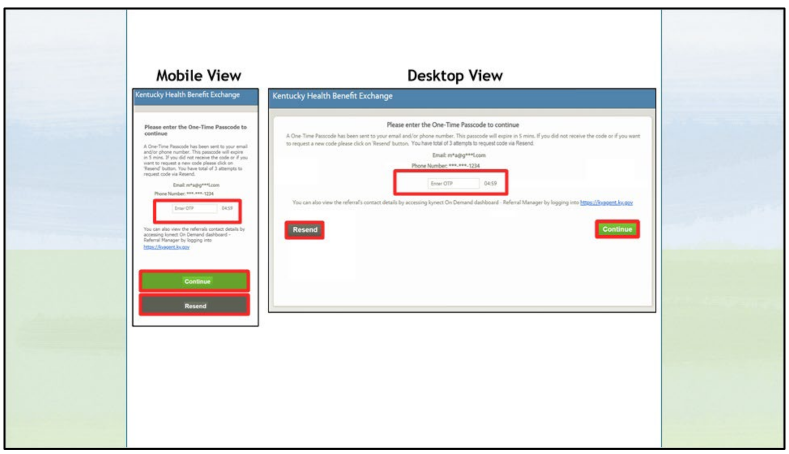
Please note: For Agents, the **De-Register** screen will only be enabled for those who have been registered for at least 30 days.

2.8 Manage Referrals via Mobile/Desktop

Slide Voice-over: We will now walk through the process of accepting referrals when a Resident submits a kynect On Demand request for healthcare assistance.

1. To begin, an **Email or SMS text notification** is sent to the Agent containing a link to a **mobile or desktop** view of the **Manage Referral** web page.
2. The Agent has 30 minutes to select **accept or reject** from this web page.
    a. The Manage Referral link is active for 30 minutes.
    b. If **reject** is selected, the referral link expires, and an expiration message displays for the Agent.

3. When **accept** is selected, a **one-time passcode** web page displays in the mobile or desktop view.
4. A **five (5) minute response window timer** begins for the Agent to enter the **passcode** and click the **Continue** button to validate it.
    a. If the one-time passcode expires or is not validated, the Agent has three (3) more attempts to request a new one via the **Resend** button.



5. When the one-time passcode is validated, the **Resident Details** screen displays for the Agent.
6. Upon clicking the **Close** button, a message confirms that the referral has been successfully reviewed.
    - If close is not clicked, an automated message appears after five (5) minutes indicating that the page has expired.

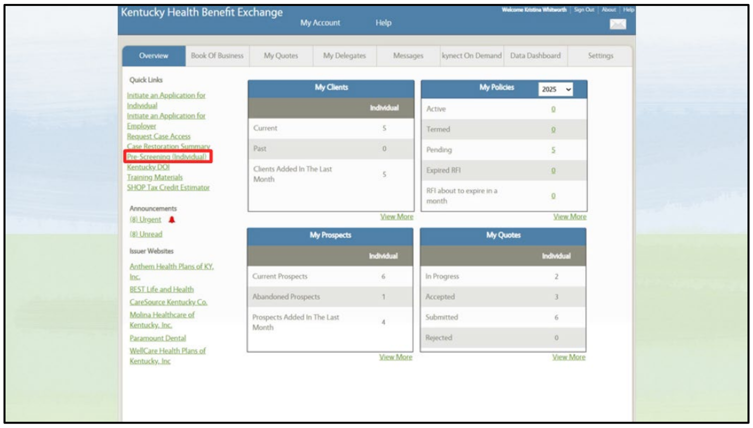
3. kynect health coverage Prescreening Tool

Slide Voice-over: In this section, users will learn to navigate the kynect health coverage Prescreening Tool.

3.1 Navigating to the kynect health coverage Prescreening Tool

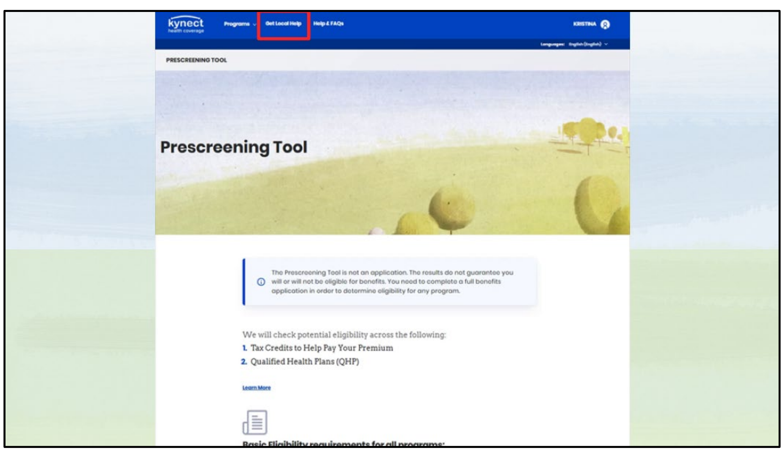
Slide Voice-over: To access the kynect health coverage Prescreening Tool, Agents will navigate to **Agent portal**.

1. Click the **Pre-screening (Individual)** link.



3.2 kynect health coverage Prescreening Tool Home screen

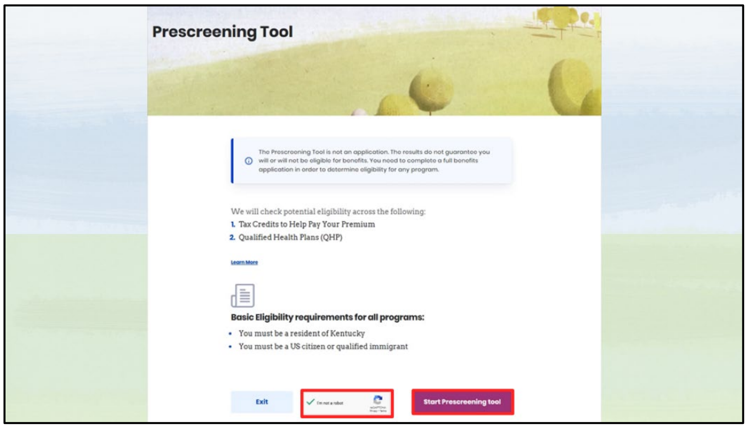
Slide Voice-over: The kynect health coverage Prescreening Tool allows Residents to anonymously enter information to check potential eligibility for Qualified Health Plans (QHP) with or without financial assistance.



Please note: To get in contact with a Local Insurance Agent, Residents may click on the **Get Local Help** tab at the top of the screen. This navigates Residents to the kynect On Demand screen where they may submit a referral to connect with an Agent. 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.

After reviewing the Prescreening information, users will:

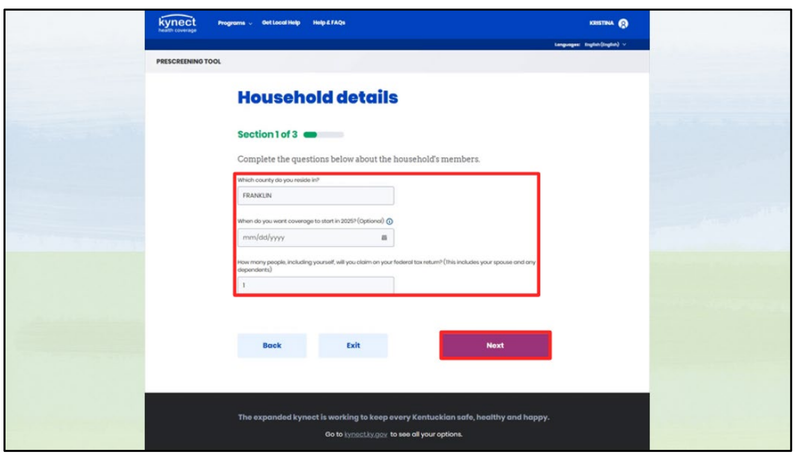
2. Click the box **confirming the Resident is not a robot.**
3. Click **Start Prescreening Tool.**



3.3 kynect health coverage Prescreening Tool: Household Details

Slide Voice-over: The **Household Details** screen asks about the county the Resident resides in and how many household members will be included in health coverage.

4. Enter the **county the Resident resides in.**
5. Enter **date for coverage to start** (this is optional).
6. Enter **number of household members.**
7. Click **Next.**

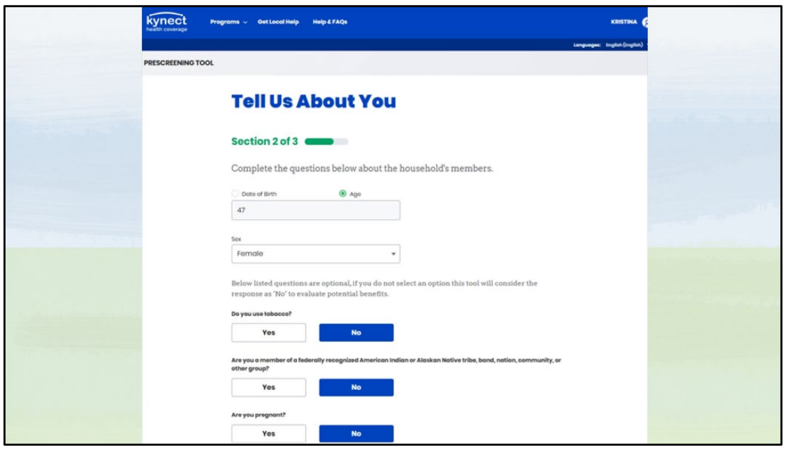


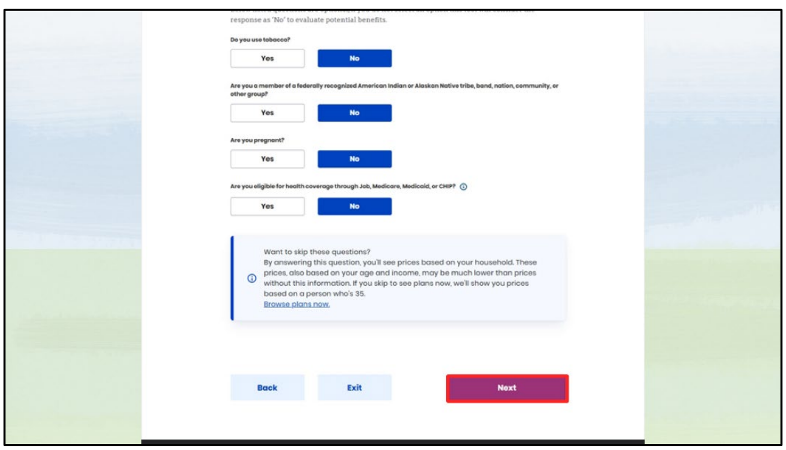
Please note: During Open Enrollment, the **Household Details** screen displays an additional question, requesting the user to verify the year the Resident is looking for coverage. The user would then select the **appropriate year from the drop-down**.

3.4 kynect health coverage Prescreening Tool: Tell Us About You

Slide Voice-over: The **Tell Us About You** screen, asks personal information about the Resident.

8. Enter the **Resident's age and sex.**
9. Click **Yes or No** for *tobacco use.*
10. Click **Yes or No** if the *Resident is a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group.*
11. Click **Yes or No** for *Are you Pregnant?*
    a. If Yes, users will enter the number of children expected from the pregnancy.
12. Click **Yes or No** if the *Resident is or is not eligible for health coverage through Job, Medicare, Medicaid, or CHIP.*
13. Click **Next.**

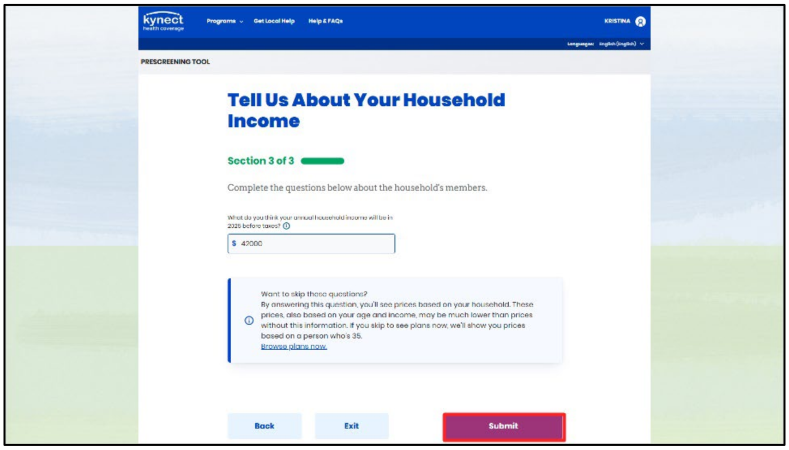




3.5 kynect health coverage Prescreening Tool: Tell Us About Your Household Income

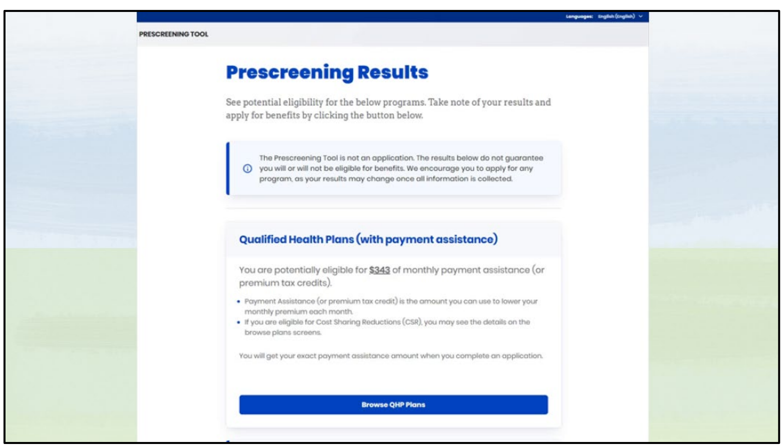
Slide Voice-over: The **Tell Us About Your Household Income** screen asks about the household's projected annual income.

14. Enter the **number the Resident believes the annual household income will be in the year before taxes.**
15. Click **Submit.**

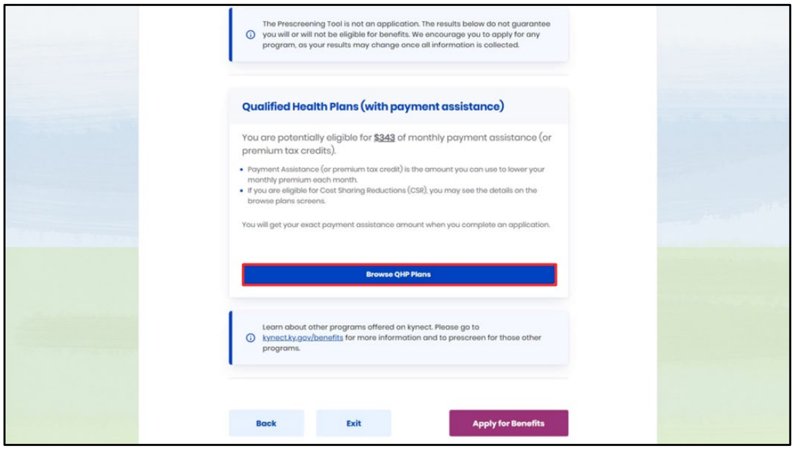


3.6 Prescreening Results

Slide Voice-over: The **Prescreening Results** screen displays potential eligibility results after submitting the kynect health coverage Prescreening Tool. From here, Residents may anonymously browse plans or submit a formal benefits application.



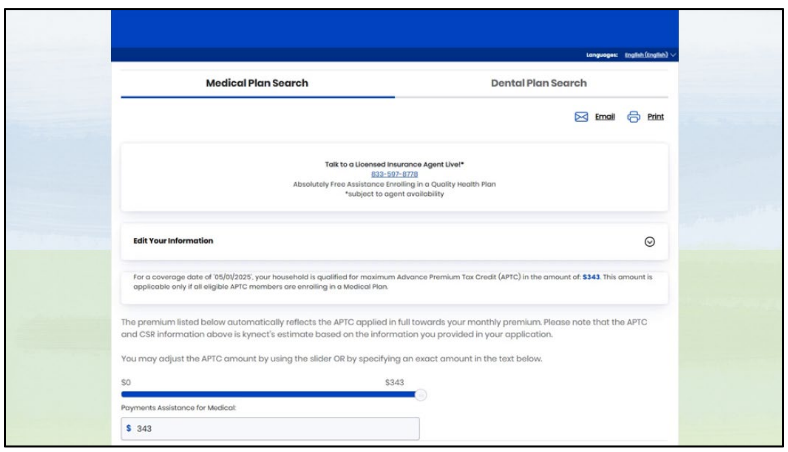
16. To browse plans, click **Browse Plans** to view plans and prices.

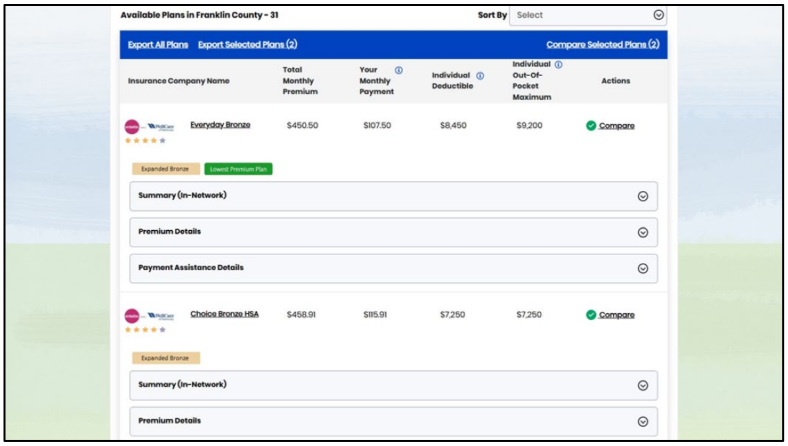


3.7 Browse Medical Plans

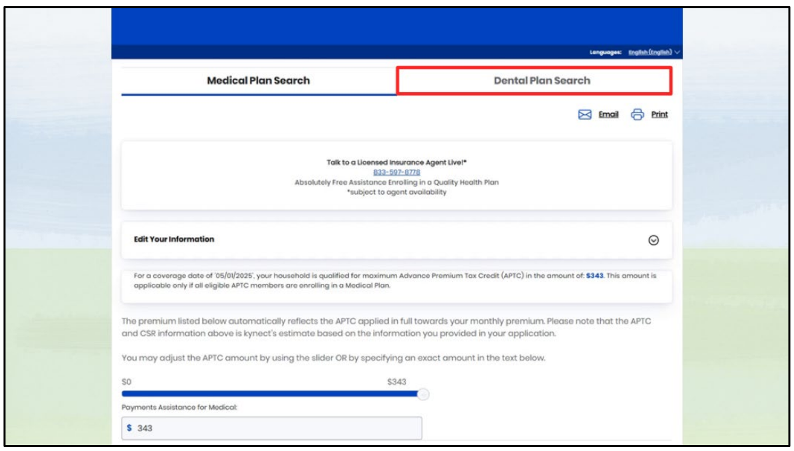
Slide Voice-over: The **Medical Plan Search** screen allows users to search for and compare medical plans. Users will be able to see the county provided in the *Household Details* section. This screen also displays:

- **Summary:** Displays costs to the Resident for doctor visits and prescription benefits.
- **Premium Details:** Displays the total premiums.
- **Payment Assistance Details:** Displays the total premium, assistance eligible portion, assistance amount, as well as the amount that may be applied to the monthly premium, and monthly payment with payment assistance applied.



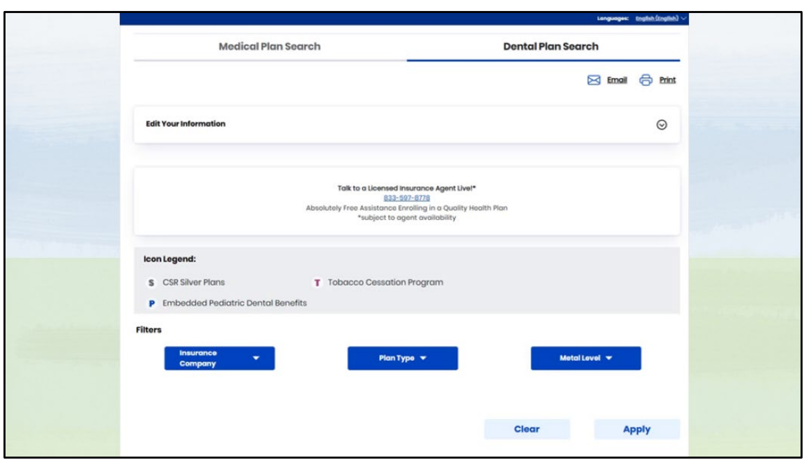


17. Click **Dental Plan Search** to browse dental plans.



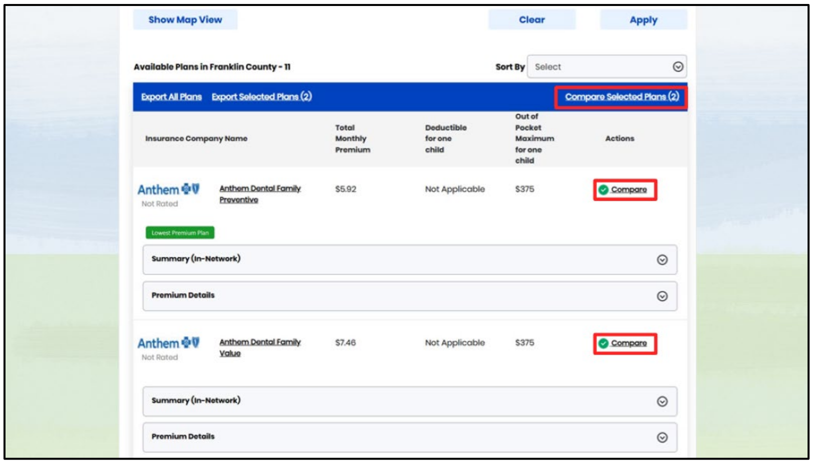
3.8 Browse Dental Plans

Slide Voice-over: The **Dental Plan Search** screen allows users to shop for and compare dental plans on behalf of a Resident.



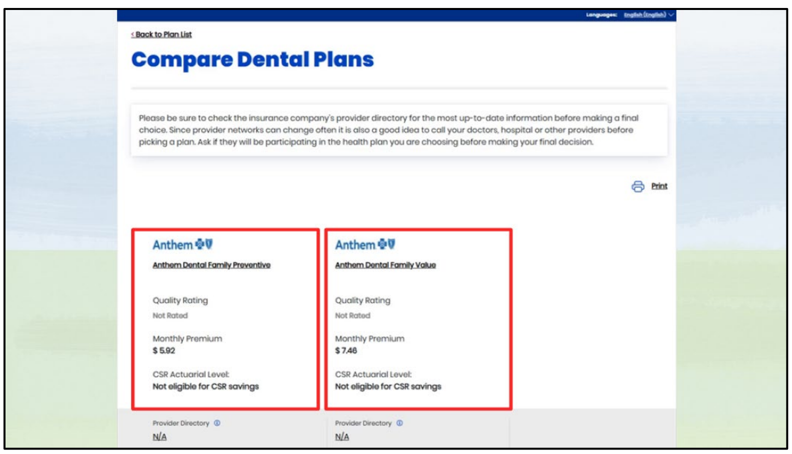
Slide Voice-over: Another feature is the ability to compare plans by selecting the **plans the user would like to compare**.

18. Check the box **next to compare for the plans** they would like to compare.
19. Click **Compare Selected Plans** to compare the selected dental plans.



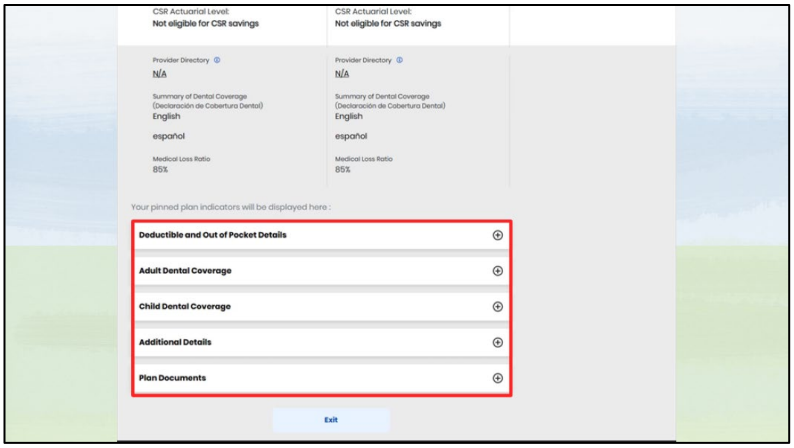
3.9 Compare Dental Plans

Slide Voice-over: The **Compare Dental Plans** screen allows users to do a side-by-side comparison of the plans chosen. Users will be able to see different benefits to compare, such as deductible and out-of-pocket details.



Slide Voice-over: Users may also compare benefit information for:

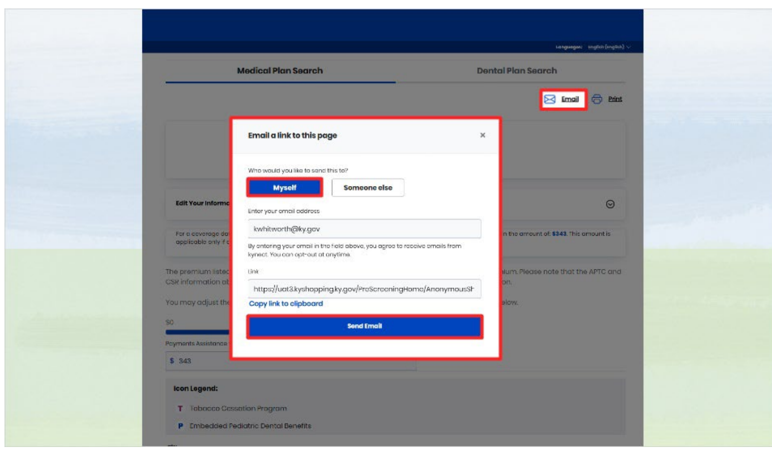
- Adult Dental Coverage
- Child Dental Coverage
- Additional Details
- Plan Documents



3.10 Email Plans to Myself

Slide Voice-over: By Navigating back to the **medical and dental plan search** screen, users may email both medical and dental plans to themselves or to someone else. To do so:

20. Click on the **Email Icon** displayed to the right of the screen.
21. Users will enter their **Email Address.**
22. Click **Send Email.**



3.11 Email Plans to Someone Else

Slide Voice-over: Users also have the option to email both medical and dental plans to someone else. If emailing to someone else, the user will:

23. Click on the link labeled **Someone else.**
24. Users will enter their **Email Address** as well as the **Email Address** of the Individuals they would like the plans to go to.
25. Enter **comments** or use the **automated text.**
26. Click **Send Email.**