The Commonwealth of Kentucky
kynect State-Based Marketplace

kynect
health coverage
Together for a better Kentucky

Agent Portal Dashboard Training Guide

November 21, 2023

Document Control Information

Document Information

Document Name	Agent Portal Dashboard Training Guide
Project Name	kynect health coverage (SBM)
Client	Kentucky Cabinet for Health and Family Services
Document Author	Deloitte Consulting
Document Version	8.0
Document Status	Revised Submission
Date Released	August 4, 2023

Document Edit History

Version	Date	Additions/Modifications	Prepared/Revised by
1.0	August 27, 2021	Final Submission	Deloitte Consulting
2.0	September 17, 2021	Revised Submission	Deloitte Consulting
3.0	December 10, 2021	Revised Submission	Deloitte Consulting
4.0	August 16, 2022	Revised Submission	Deloitte Consulting
5.0	August 24, 2022	Revised Submission	Deloitte Consulting
6.0	December 16, 2022	Revised Submission	Deloitte Consulting
7.0	August 4, 2023	Revised Submission	Deloitte Consulting
8.0	November 21, 2023	Revised Submission	Deloitte Consulting

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

During this module, Agents will learn about Agent Portal. Agent Portal gives Agents quick insight into their business. They may view information on clients, prospects, policies, quotes, delegates, messages.

1.1 Agent Dashboard

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.

Agent Role within kynect health coverage

Agent Portal provides health insurance agents with a customer management tool to help manage and create new business in Kentucky. Agent Portal provides the functionality to quickly manage existing customers as well as initiate common tasks.

What will be covered in this section?

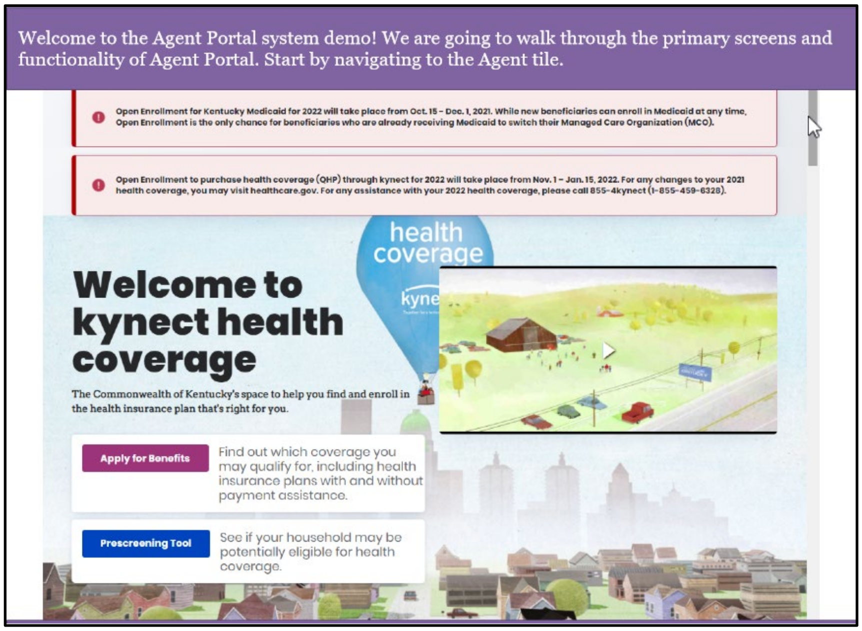
Primary Tabs within Agent Portal such as the Overview screen, Book of Business, My Quotes, My Delegates, Messages, kynect On Demand and Settings.

Quick Links to the benefits application, Prescreening Tool, Announcements, Issuer Websites, and Reports.

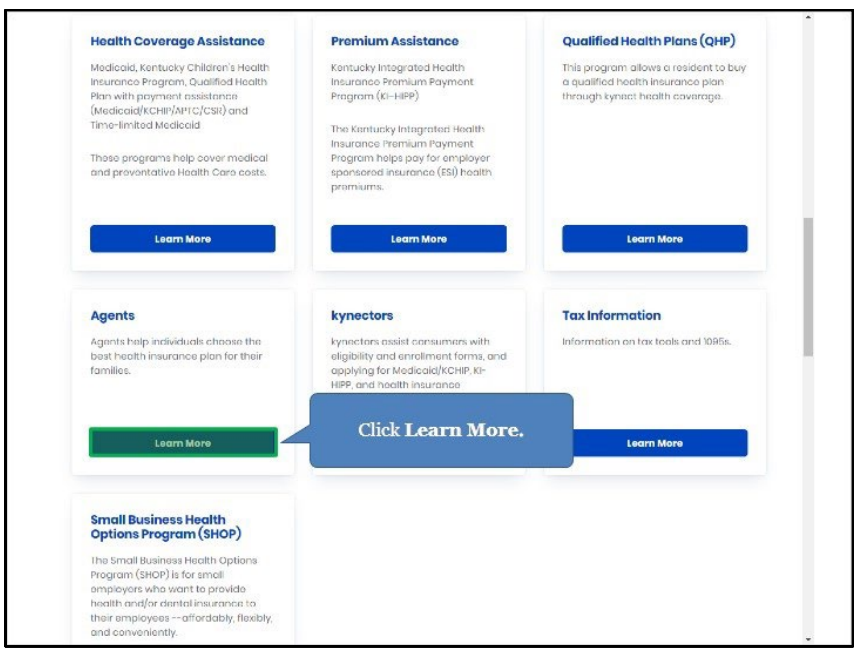
Help Screen within Agent Portal which can be used as a resource to help navigate Agent Portal.

1.2 Agent Portal Sign In

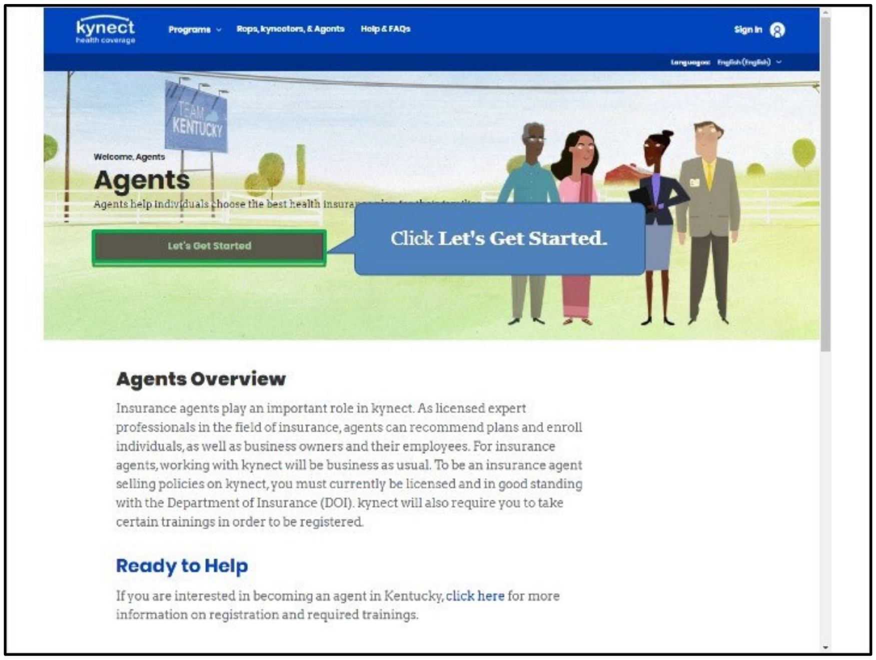
1. Navigate to the kynect health coverage website.



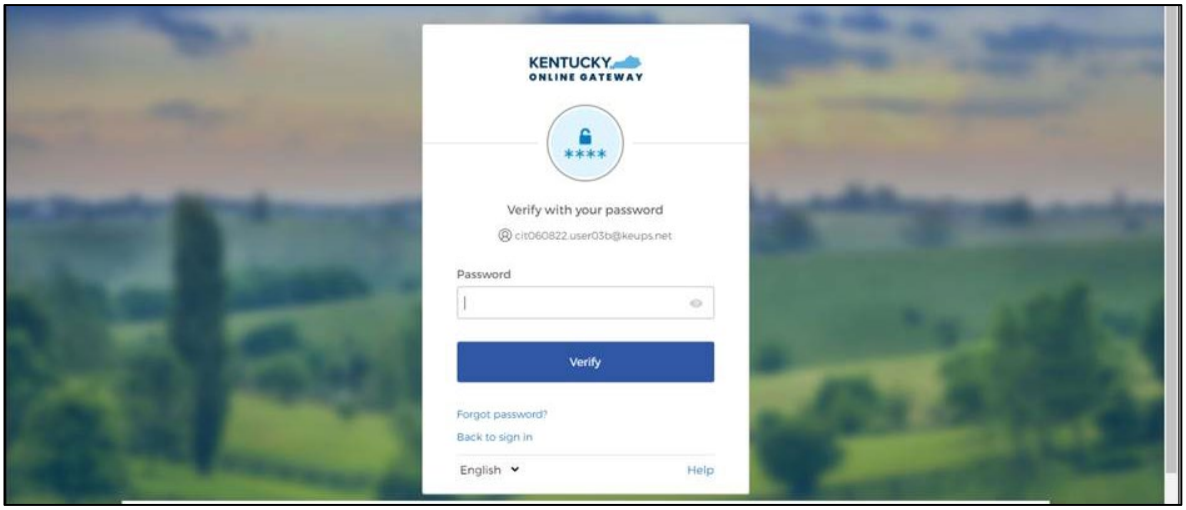
2. Click **Learn More** on the *Agents* tile.



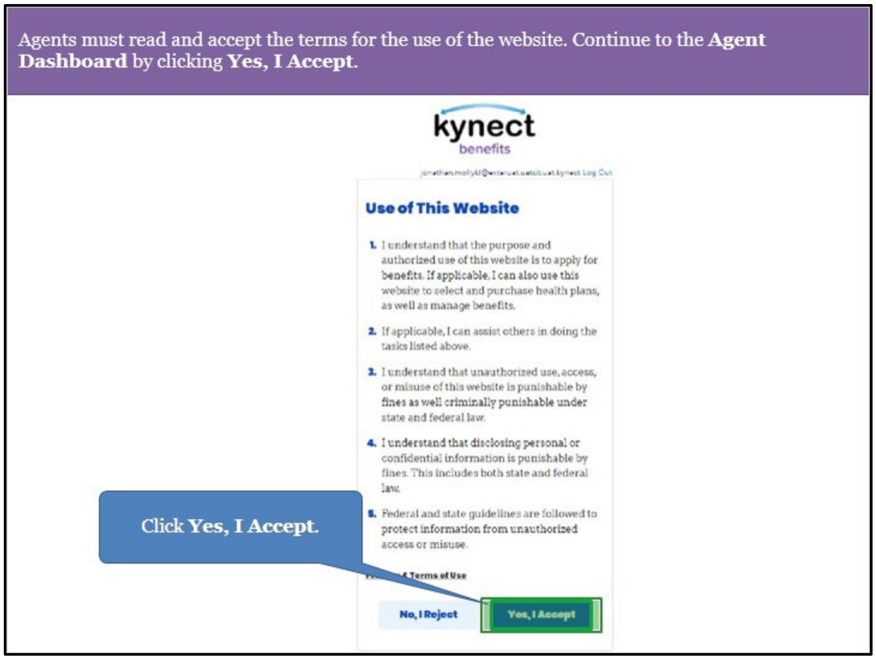
3. Click **Let's Get Started** to navigate to the Kentucky Online Gateway (KOG).



4. Enter the Agent's **Kentucky Online Gateway (KOG) Credentials** and click **Verify**.



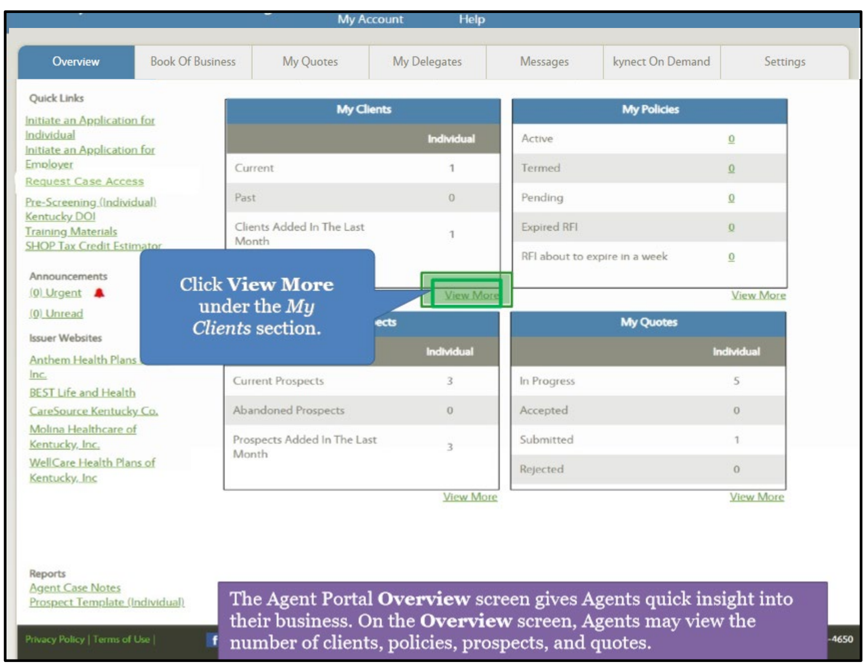
5. Review the Terms of Use and click **Yes, I Accept**.



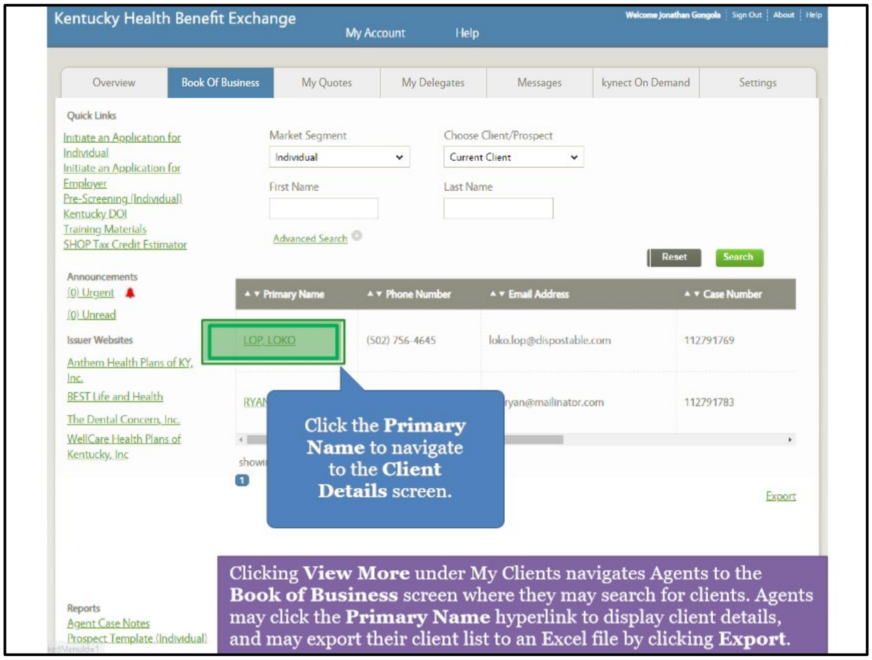
1.3 My Clients

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.

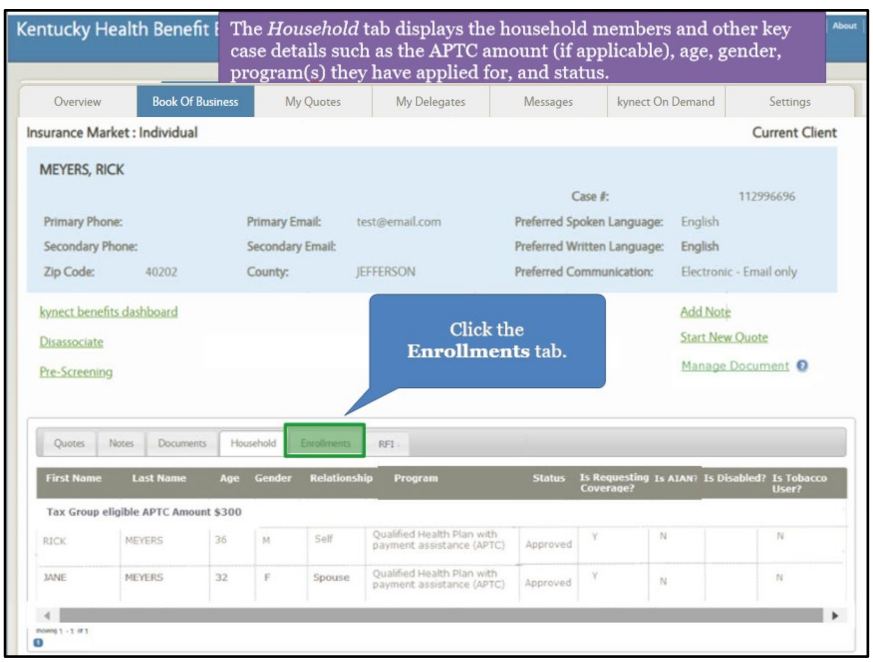
6. Click **View More** under *My Clients* to navigate to the **Book of Business** screen.



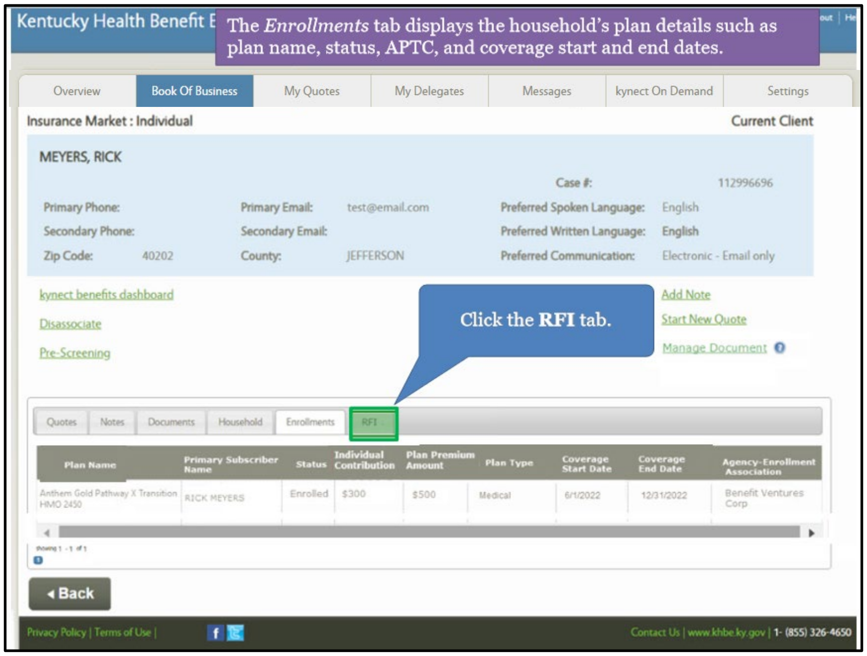
7. From the **Book of Business** screen, Agents may view information on current clients.
8. Click the **Primary Name** hyperlink to view client details. Agent may export their client list to an Excel file by clicking **Export**.



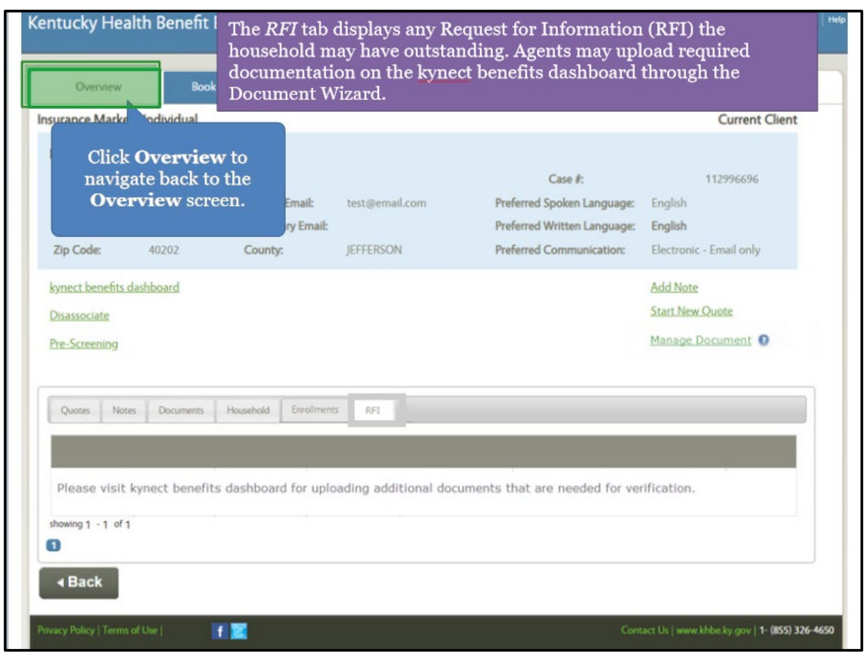
9. The *Household* tab displays the household members and other key case details such as the APTC amount (if applicable), age, gender, program(s) they have applied for, and status. Click the **Enrollments** tab to view health plan details.



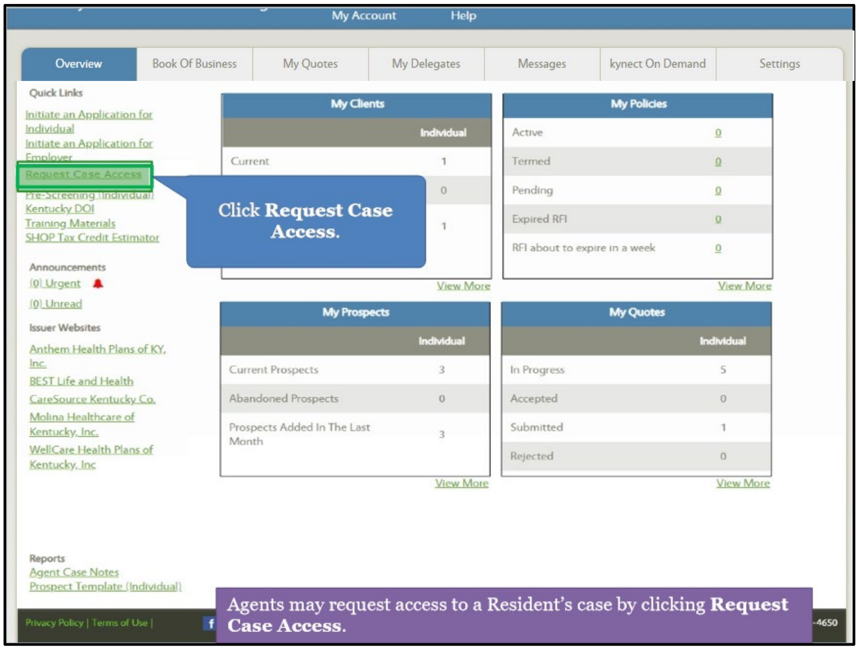
10. The *Enrollments* tab displays the household's plan details such as plan name, status, APTC, and coverage start and end dates. Click the **RFI tab**.



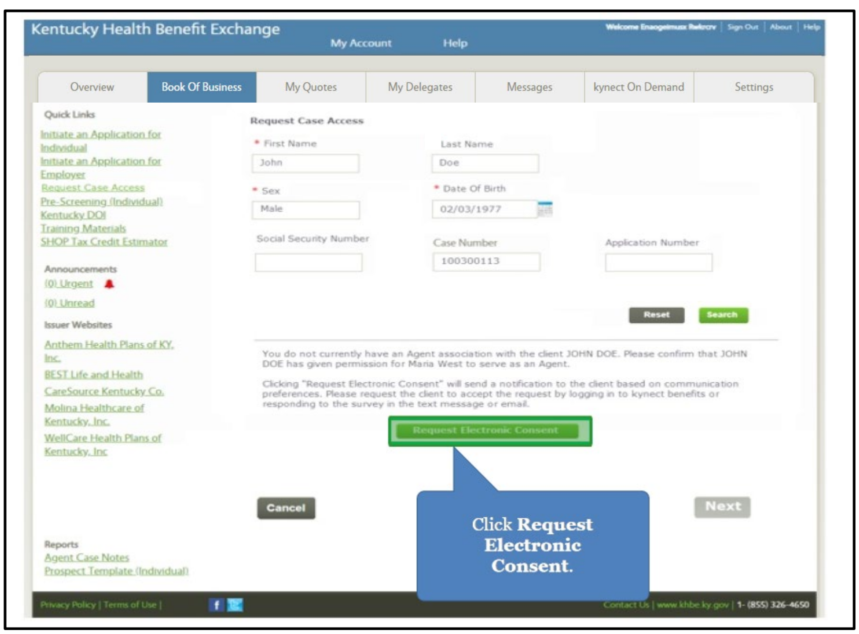
11. The *RFI* tab displays any Request for Information (RFI) the household may have outstanding. Agents may upload required documentation on the kynect benefits dashboard through the Document Wizard. Click **Overview** to navigate back to the **Overview** screen.



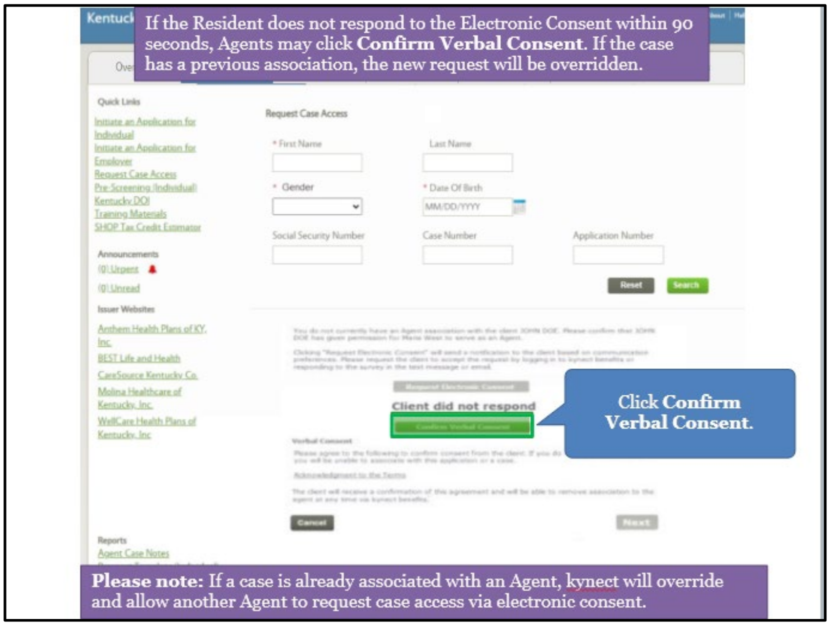
12. Click **Request Case Access**.



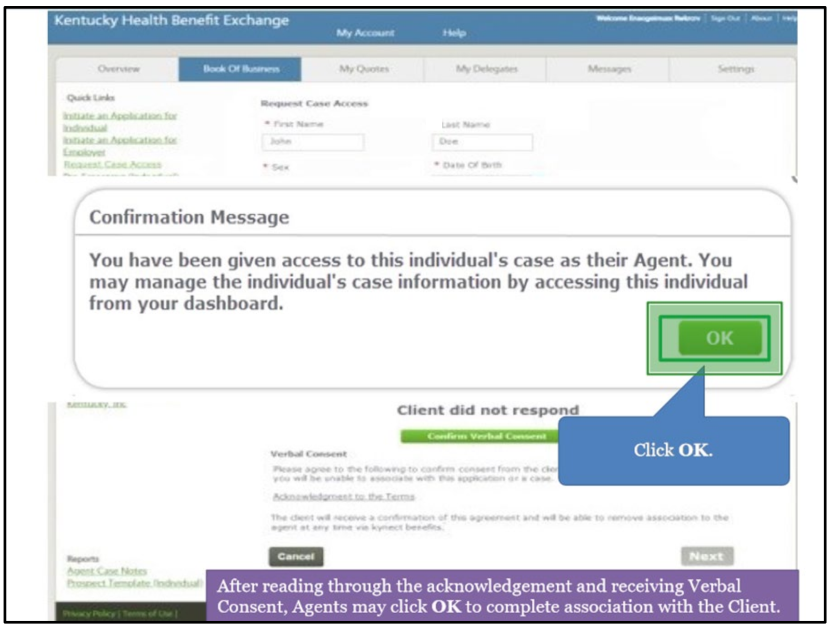
13. Click **Request Electronic Consent**.



14. Click **Confirm Verbal Consent**.



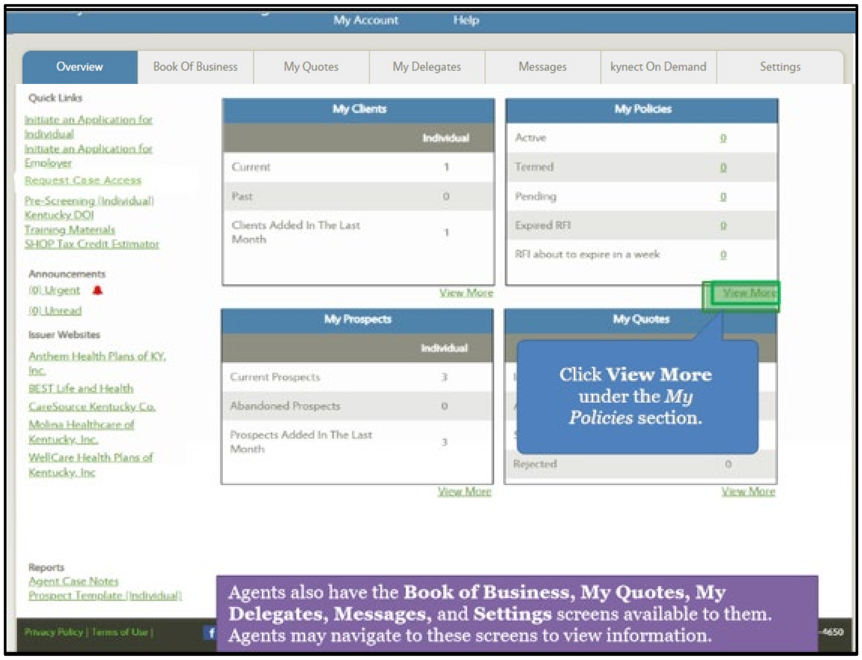
15. Read through the acknowledgements and click **OK**.



1.4 My Policy Screen

From the **Overview** screen, Agents may navigate to the **My Policy** screen. The **My Policy** screen allows Agents to search for, filter, and view information on their policies.

16. Click **View More** under *My Policies* to navigate to the **My Policy** screen.

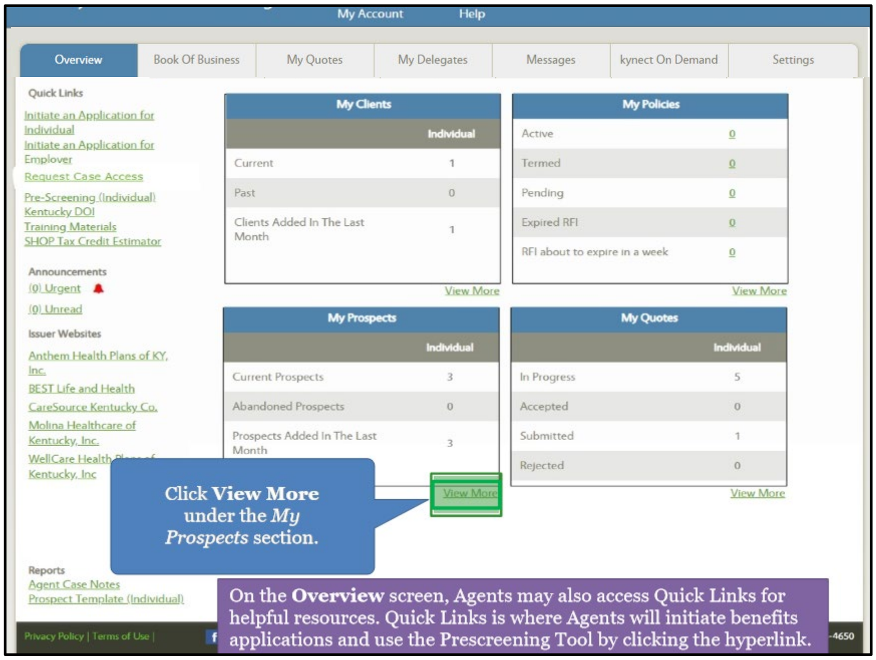


17. The **My Policy** screen displays the Agent's policies.
    - Users can filter My Policy searches by Active, Termed, Pending, Issuer, MCO, Expired RFI, RFI about to Expire, Plan Type, and Enrollment Status.
18. Click the policy **Name** hyperlink to view additional details.
19. Enter **information** into the fields and click **Search** to search for policies.
20. Click **Overview** to navigate back to the **Overview** screen.

1.5 My Prospects

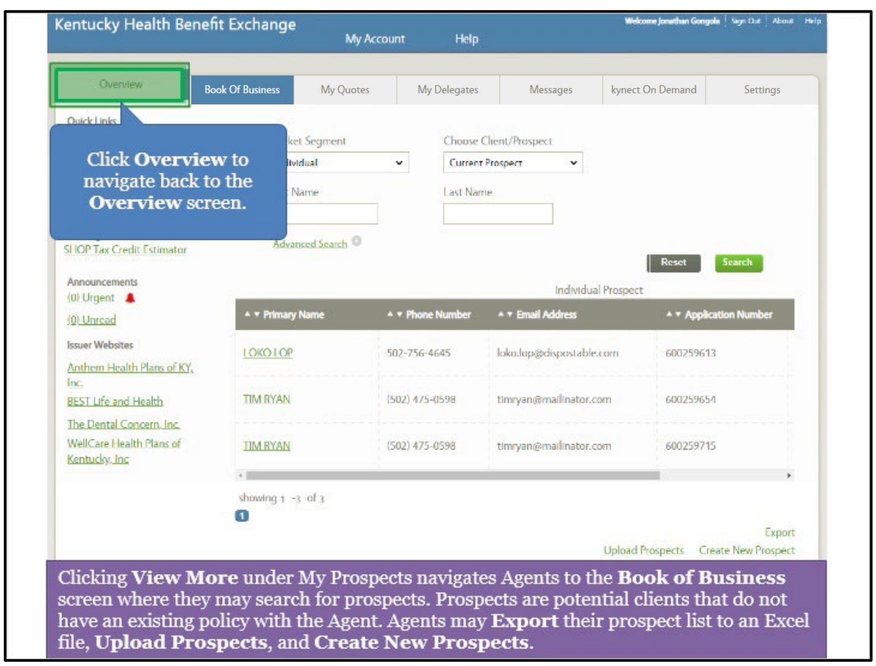
From the **Overview** screen, Agents may navigate to the **Book of Business** screen. The **Book of Business** screen allows Agents to view information on their Prospects. Prospects are potential clients that do not have an existing policy with the Agent.

21. 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 kynect health coverage Prescreening Tool by clicking **Pre-Screening (Individual)**.

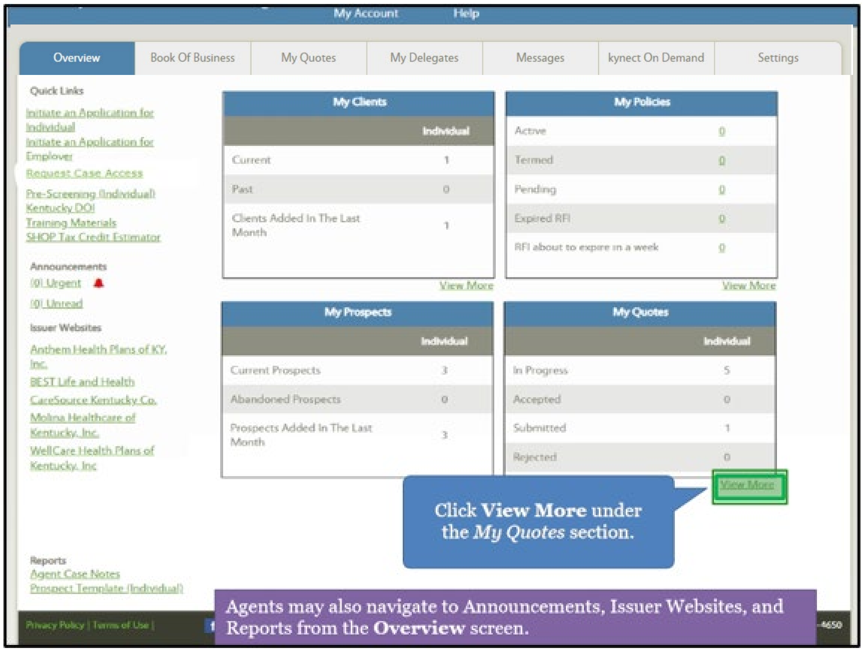
22. The **Book of Business** screen displays the Agent's current Prospects.
23. Click **Export**, **Upload Prospects**, or **Create New Prospects** to manage Prospects.
24. Enter **information** into the fields and click **Search** to search for Prospects.
25. Click **Overview** to navigate back to the **Overview** screen.



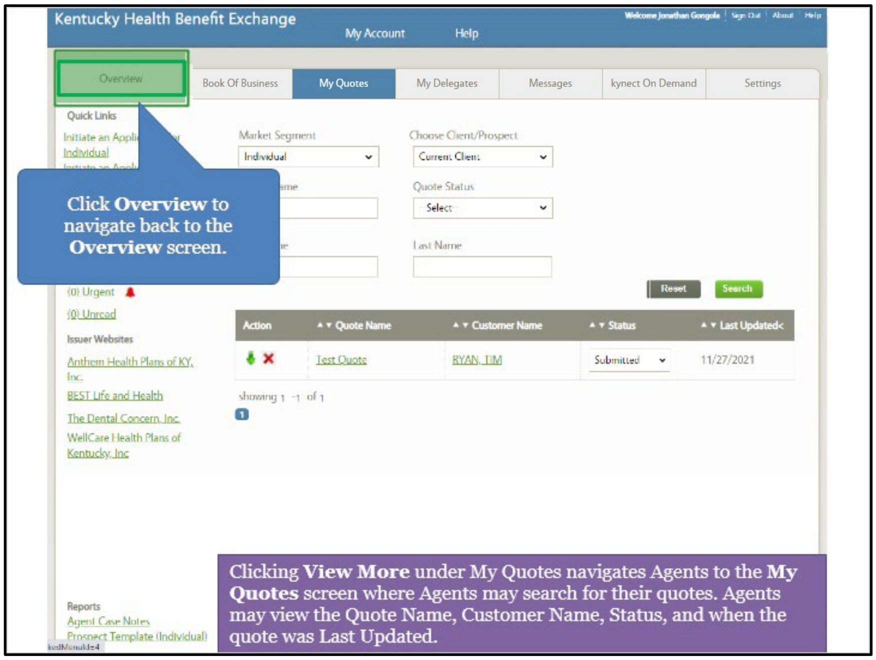
1.6 My Quotes Screen

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.

26. Click **View More** under *My Quotes* to navigate to the **My Quotes** screen.



27. The **My Quotes** screen displays the Agent's quotes along with the status.
28. 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.
29. Enter **information** into the fields and click **Search** to search for quotes.
30. Click **Overview** to navigate back to the **Overview** screen.

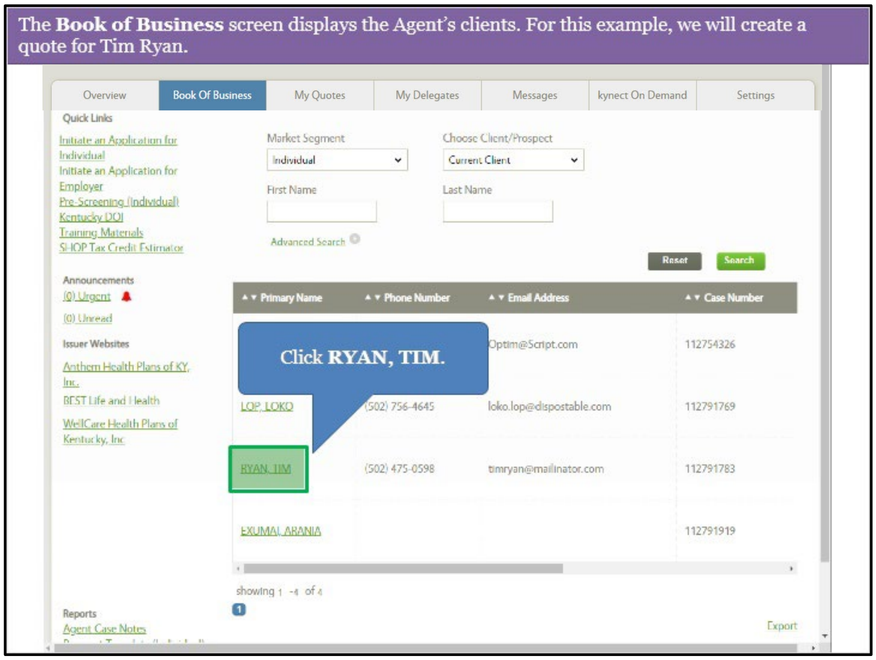


1.7 Create Quote

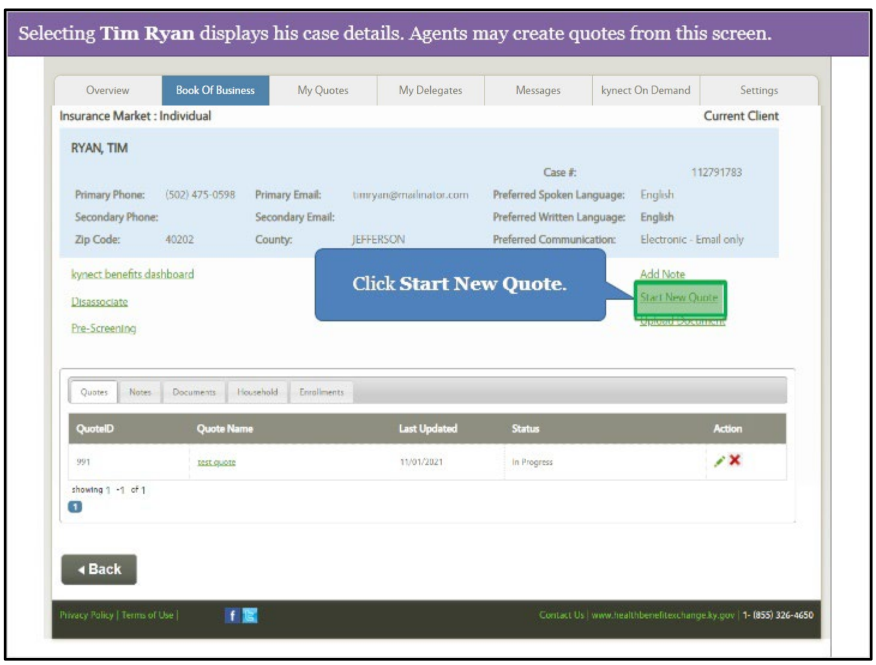
31. To create a quote, Agents click **Book of Business** to navigate to the **Book of Business** screen.

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.

32. Click the **Primary Name** hyperlink to view a Client's details.

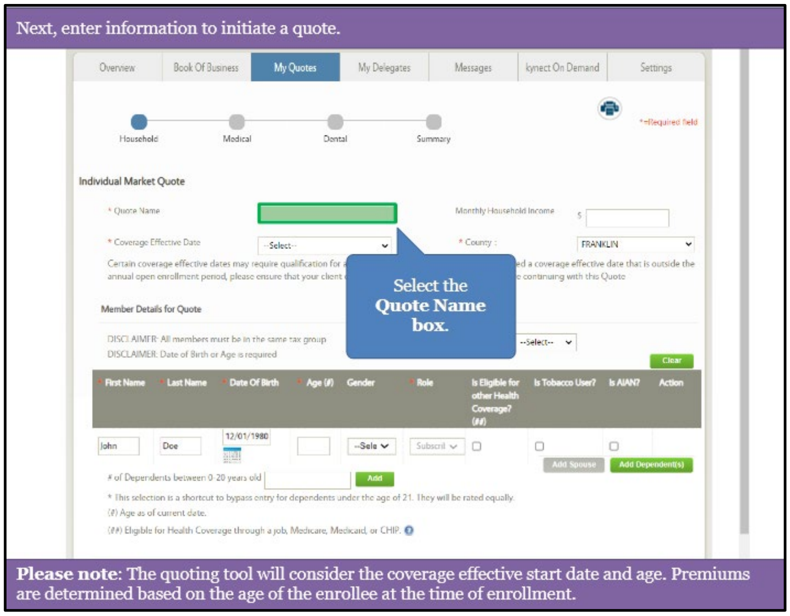


33. After selecting the appropriate Client or Prospect, click **Start New Quote** to enter quote **information**.

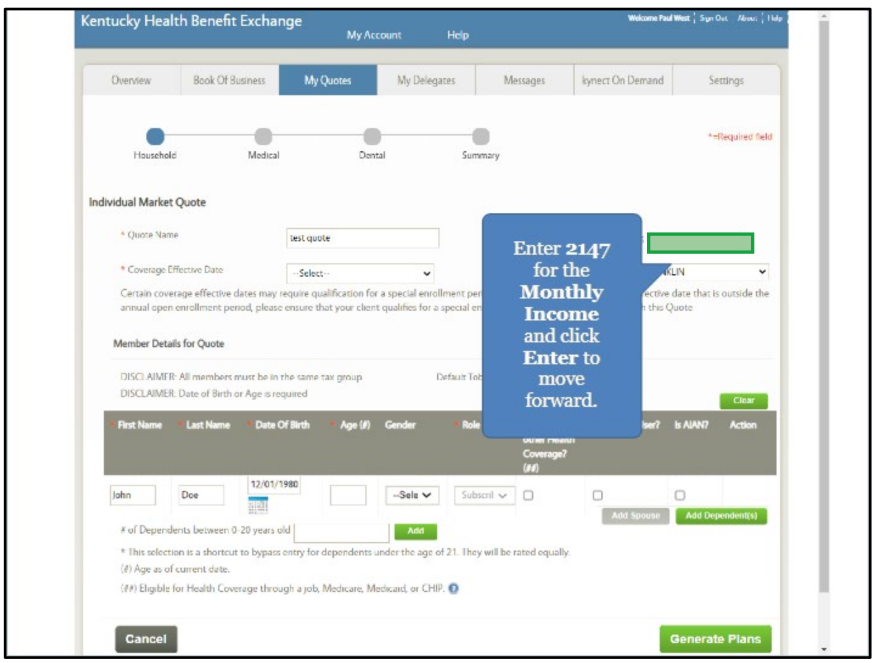


Enter **information** on the Client or Prospect and the quote.

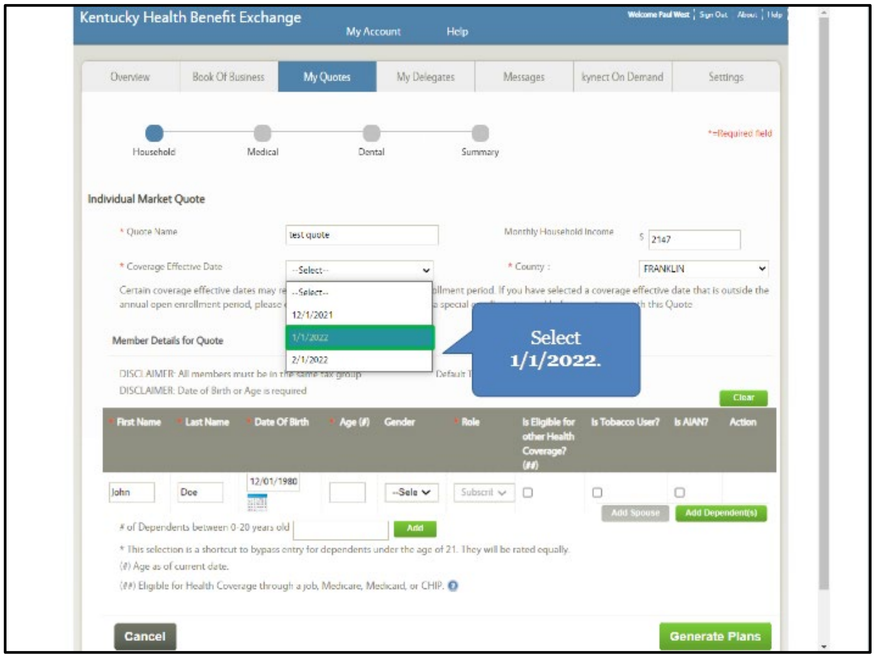
34. Enter the **Quote Name**. The **Quote Name** will be sent to the Client or Prospect.



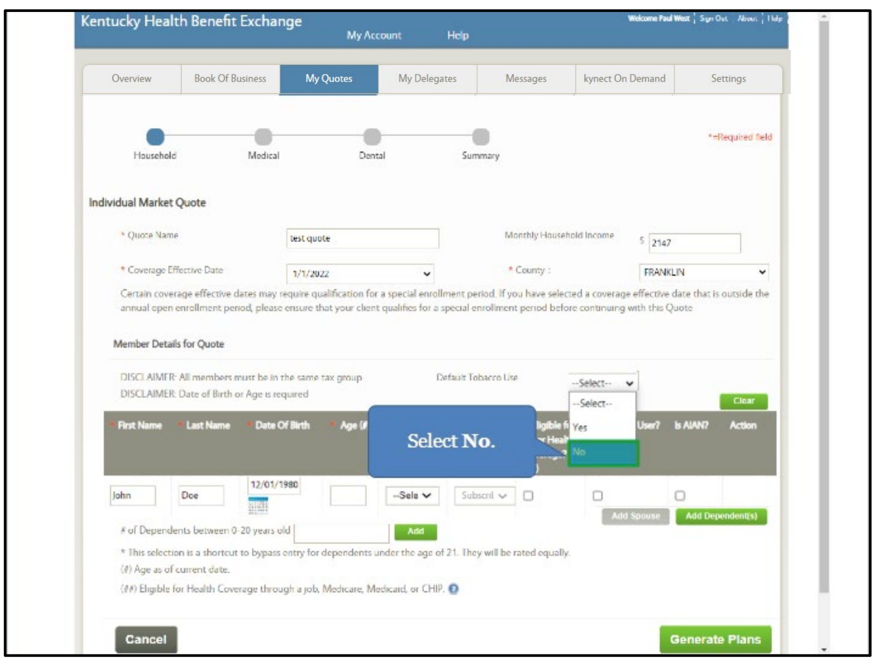
35. Enter the **number** for *Monthly Household Income*.



36. Select the **Date** for *Coverage Effective Date* from the drop-down.

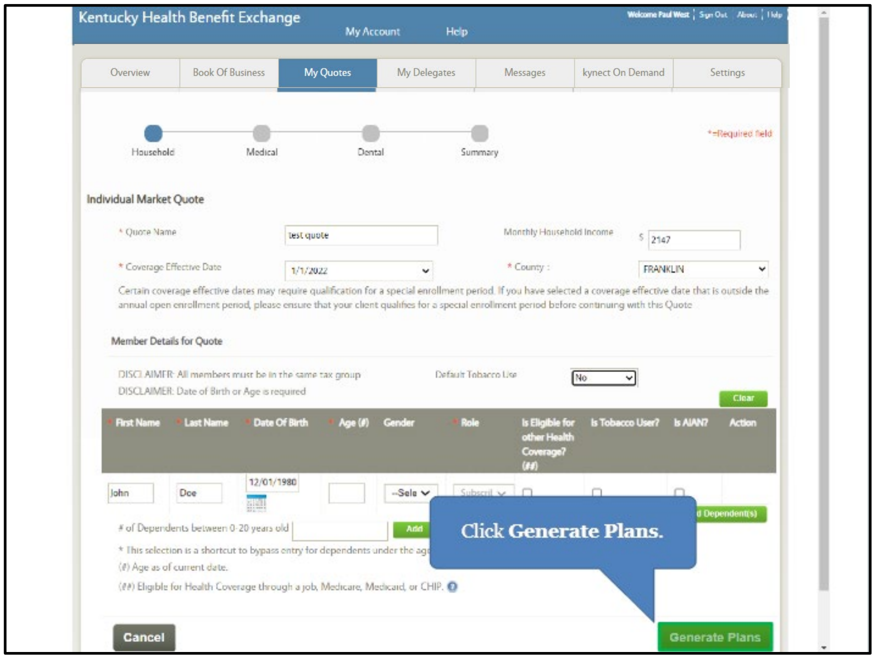


37. Select **Yes** or **No** for *Default Tobacco Use* from the drop-down.



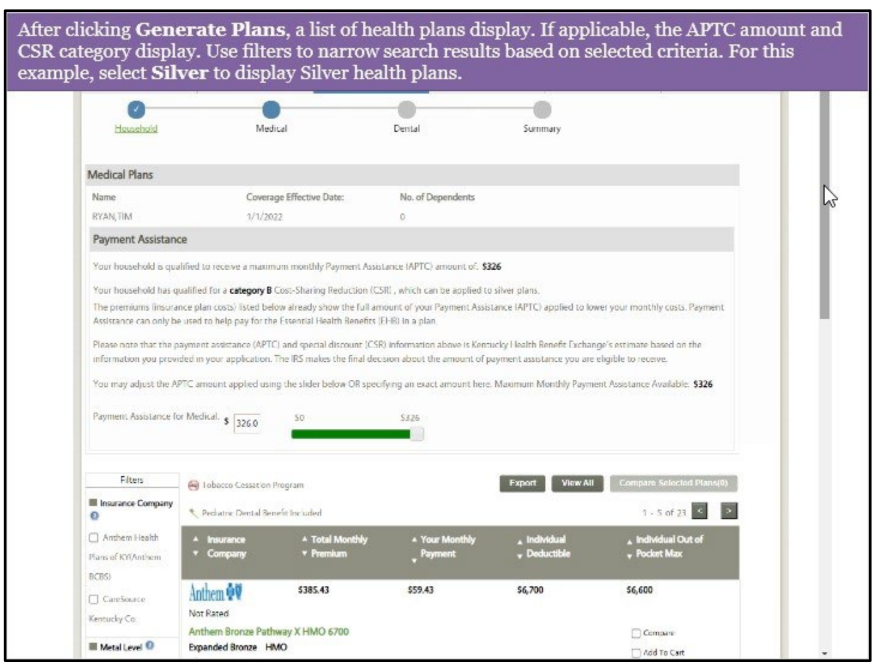
Please note: If the Resident has a spouse and/or dependent(s), Agents may add those members to the quote by clicking **Add Spouse** or **Add Dependents**.

38. Click **Generate Plans** to begin shopping for plans for the Client or Prospect.

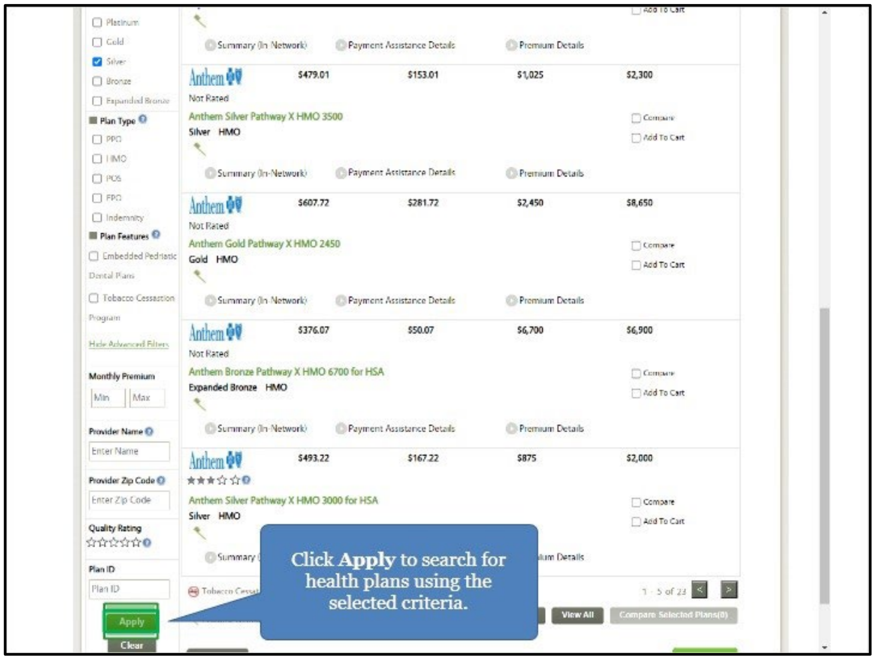


> **Please note**: The Client/Prospect automatically generates in *Member Details* when initiating a quote, however the **Age** and **Gender** must be entered. Additionally, Agents should indicate whether each household member is eligible for other health coverage or if they use tobacco by checking the applicable **box(es)**.

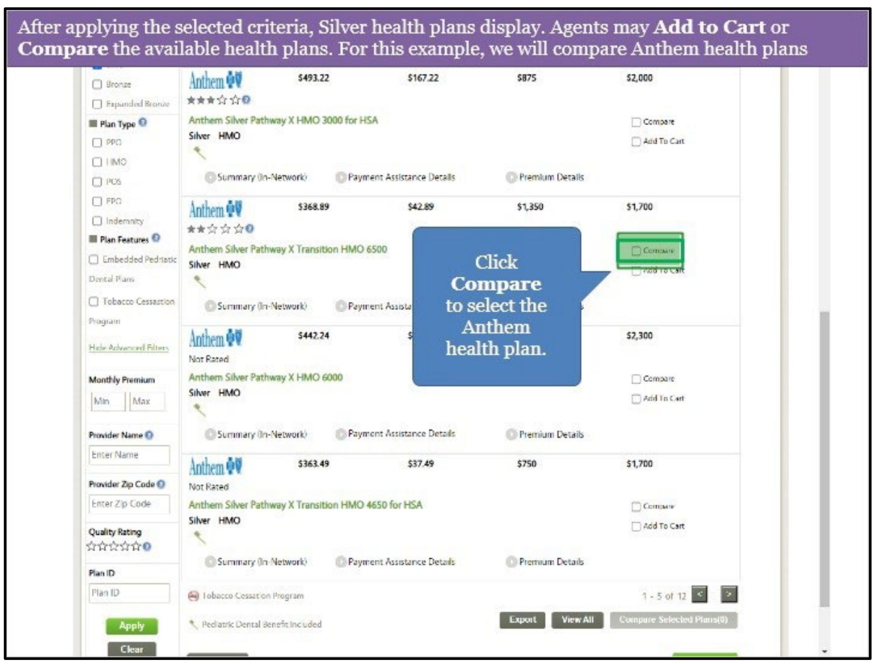
39. A list of Medical plans displays that the Agent may view, or they may narrow the search results by selecting filter criteria such as **Silver Metal Level**. At the top of the screen, the Resident's APTC and CSR category display, if applicable.



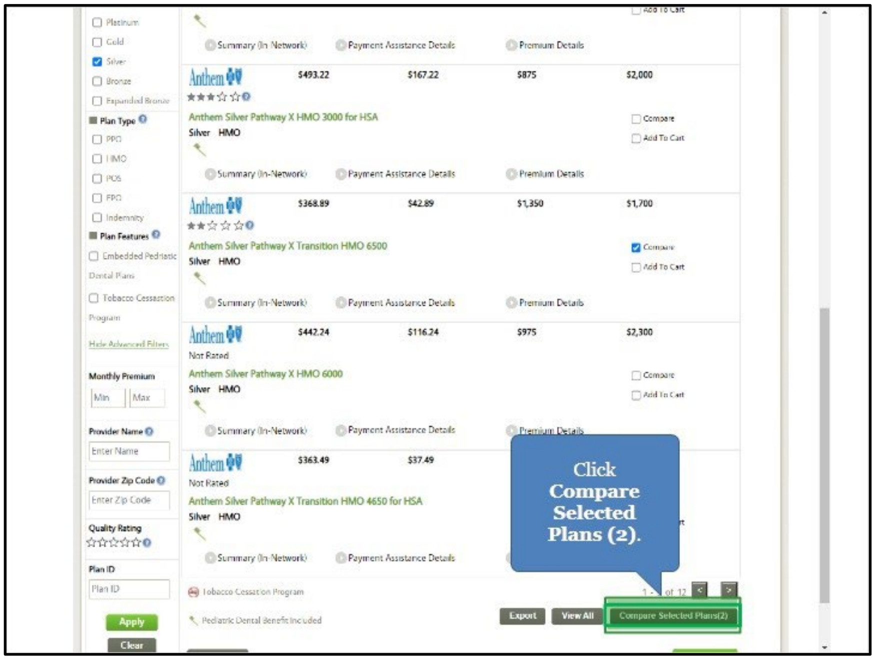
40. Click **Apply** to filter search results based on the selected filter criteria.



41. Click **Compare** on multiple Medical plans to compare.

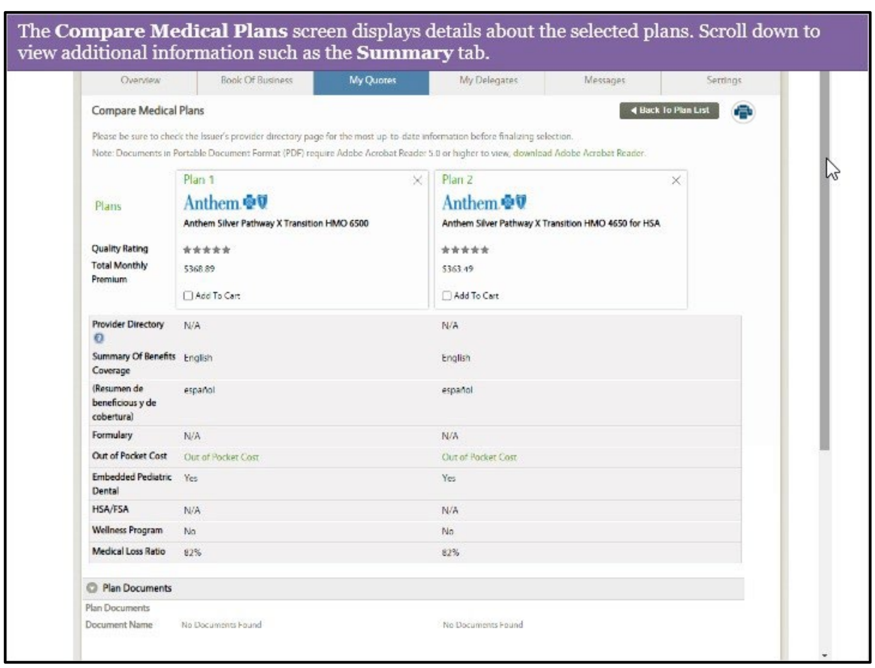


42. Click **Compare Selected Plans (2)**.

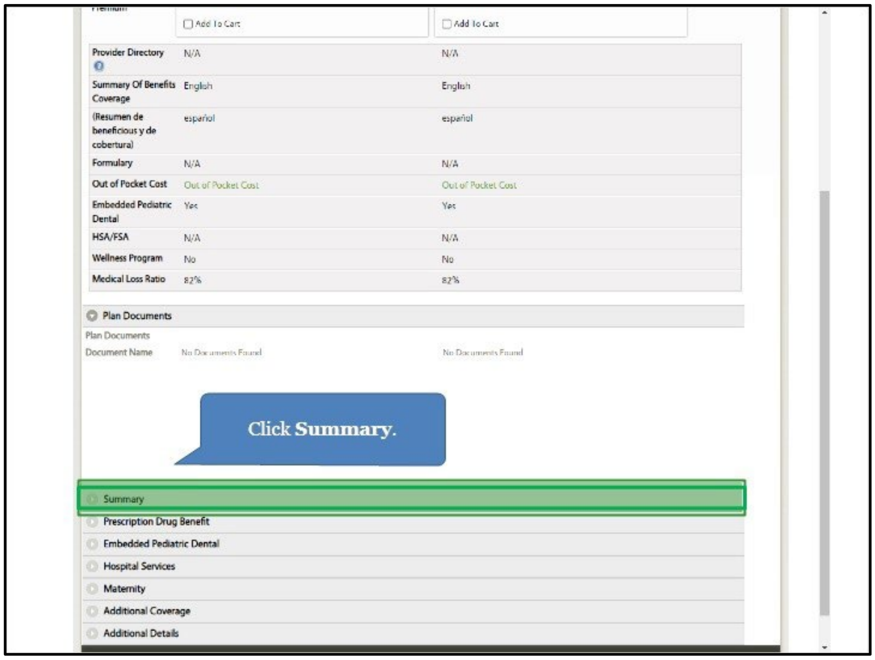


Please note: The number for **Compare Selected Plans** changes depending on the number of plans selected.

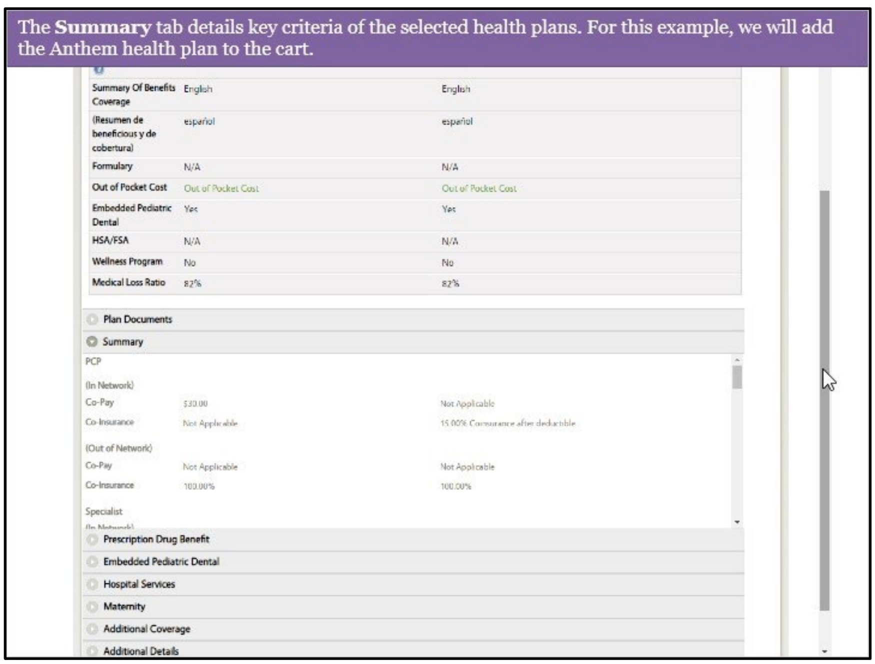
43. The **Compare Medical Plans** screen displays information on the selected plans so the Agent may compare.



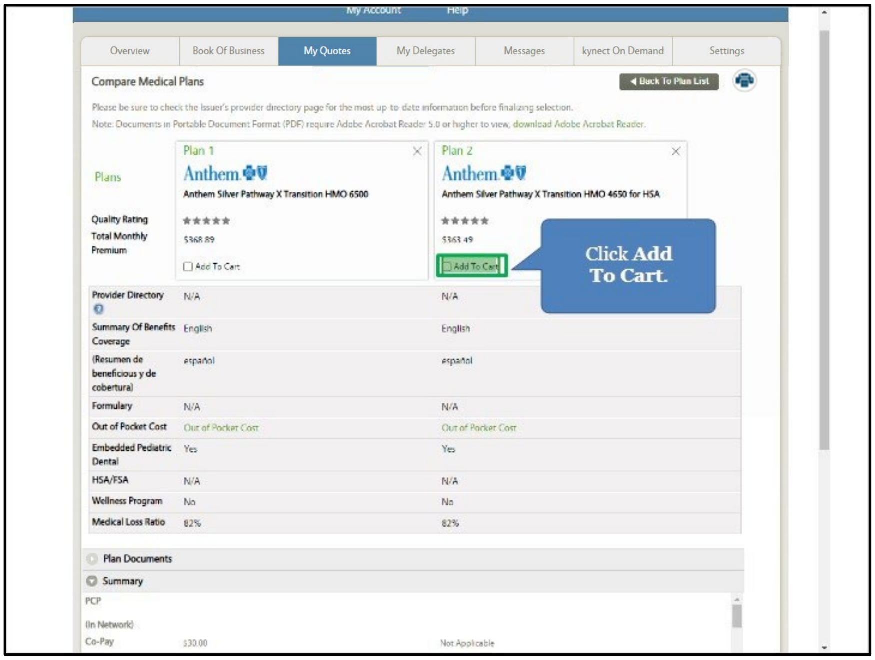
44. Click any of the **tabs** below such as **Summary** to display additional plan information.



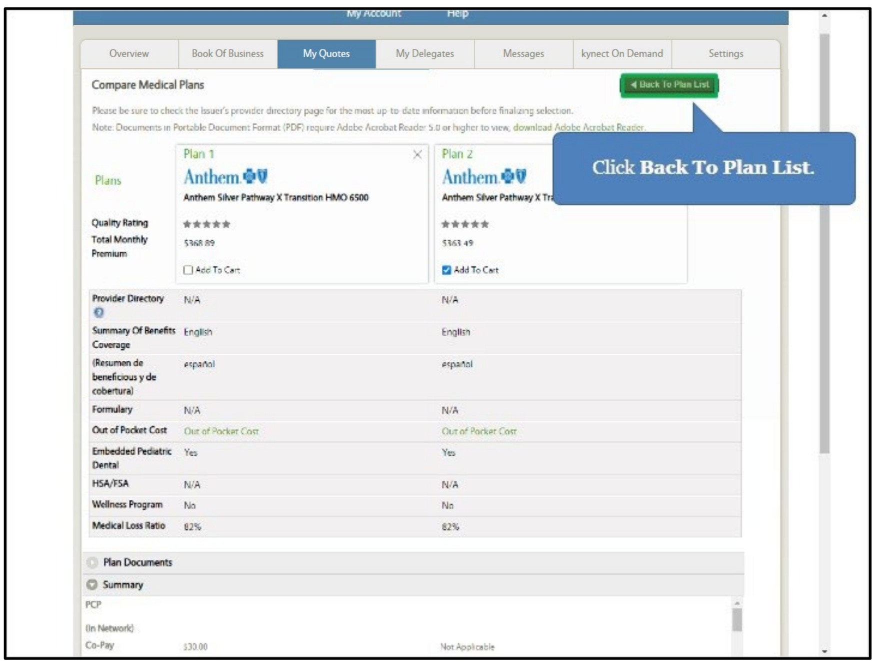
45. Review the plan information.



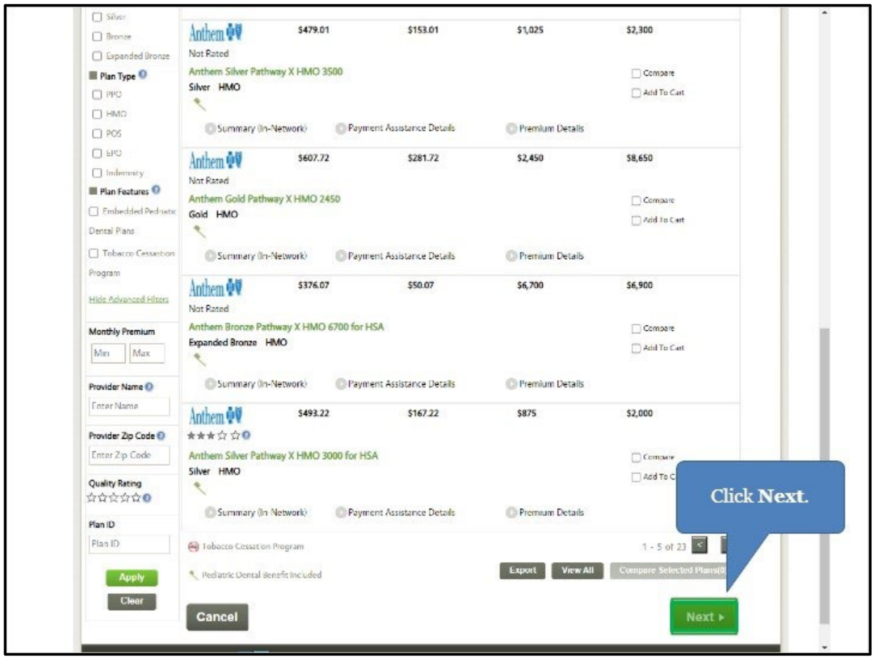
46. Click **Add to Cart** to add a Medical plan to the quote.



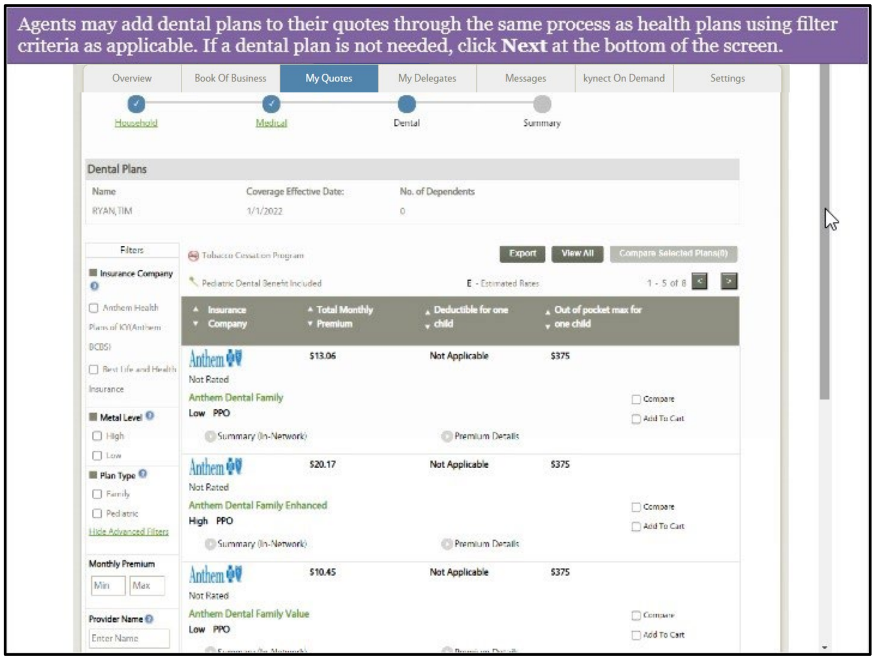
47. After adding a Medical plan to their cart, the Agent may click **Back To Plan List** to compare additional plans as applicable.



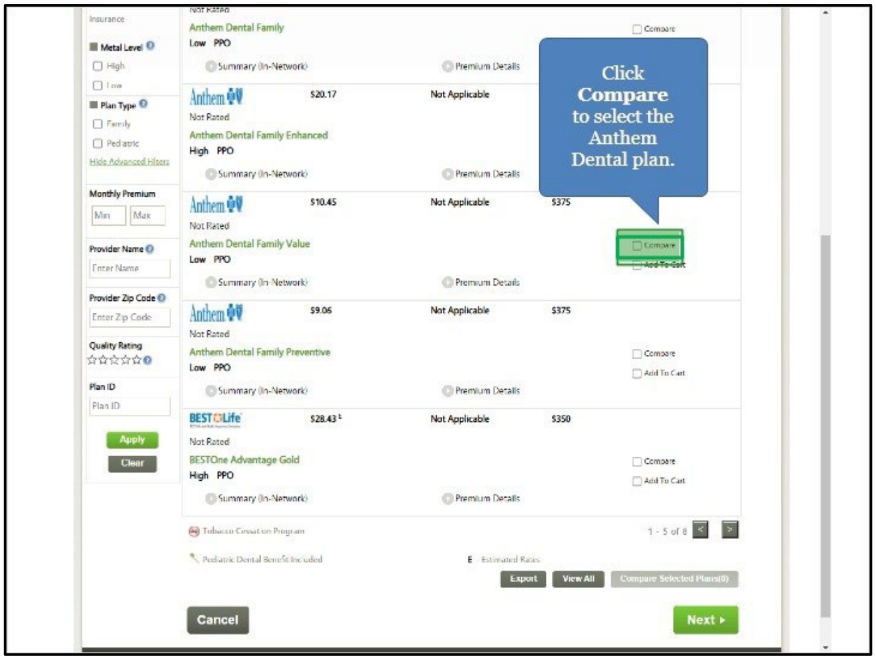
48. Click **Next** at the bottom of the screen to shop for Dental plans.



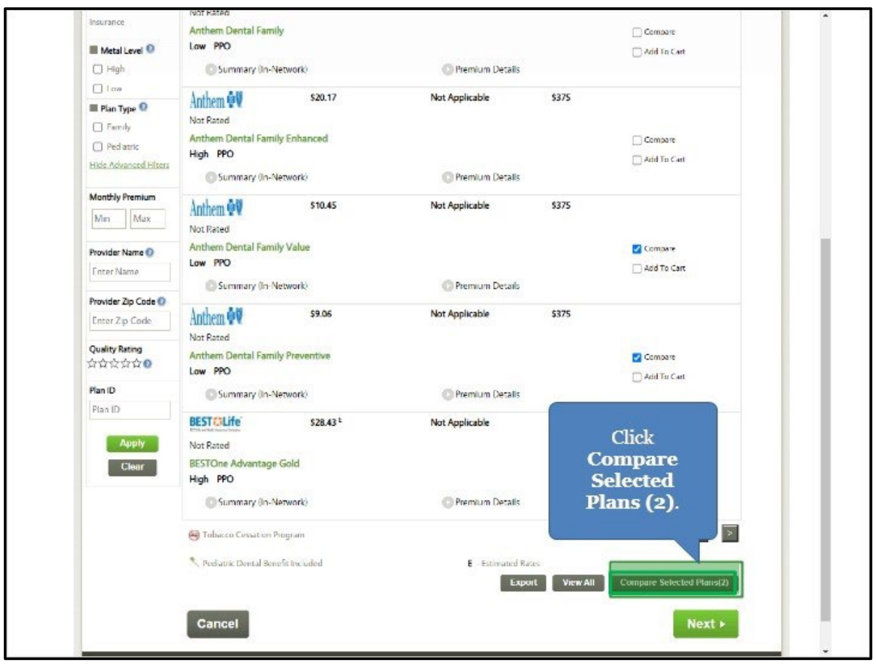
49. Agents may add a Stand-Alone Dental Plan (SADP) as applicable to the quote by following the same process outlined above for health plans.



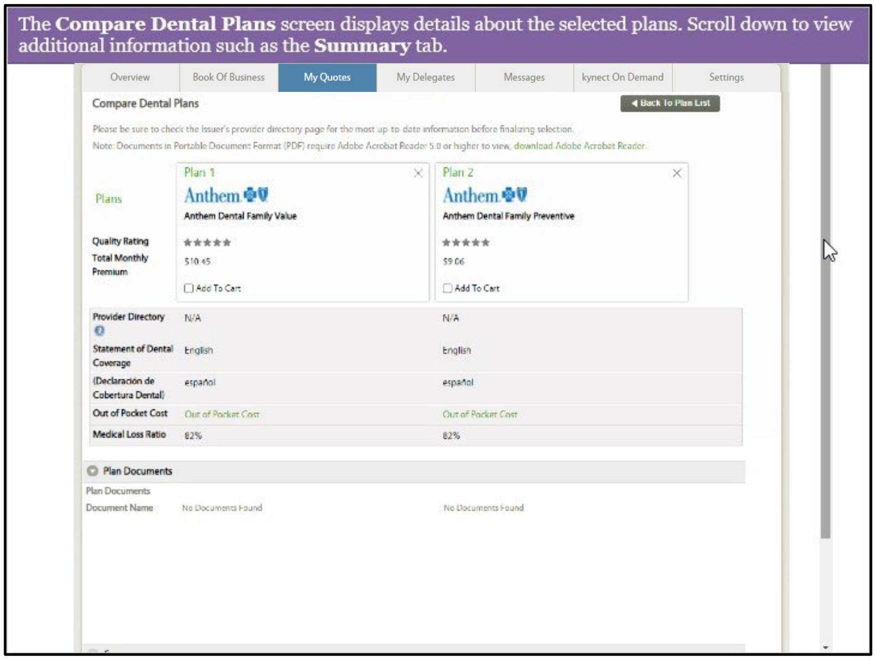
50. Click **Compare** on multiple Dental plans to compare.



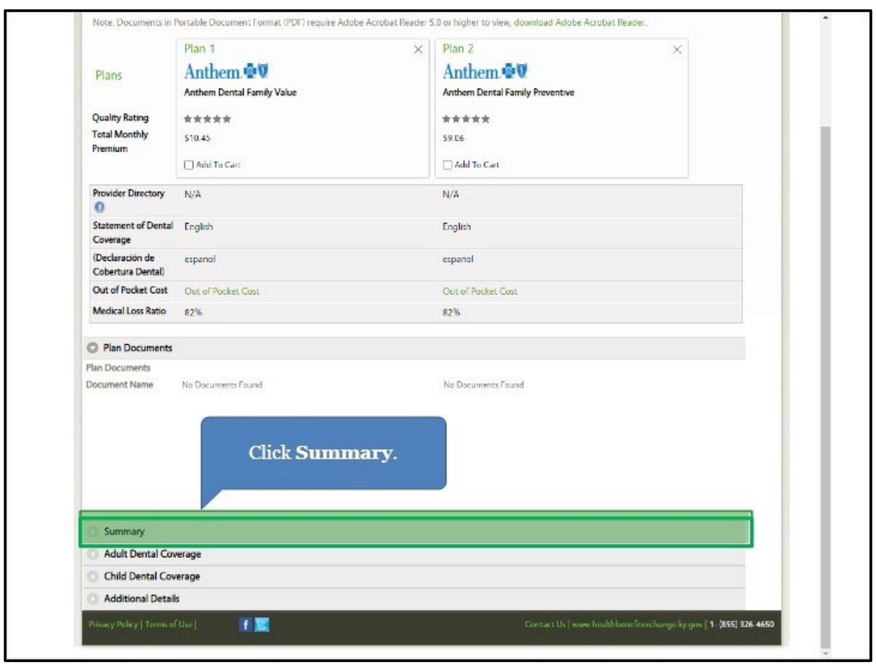
51. Click **Compare Selected Plans (2)**.



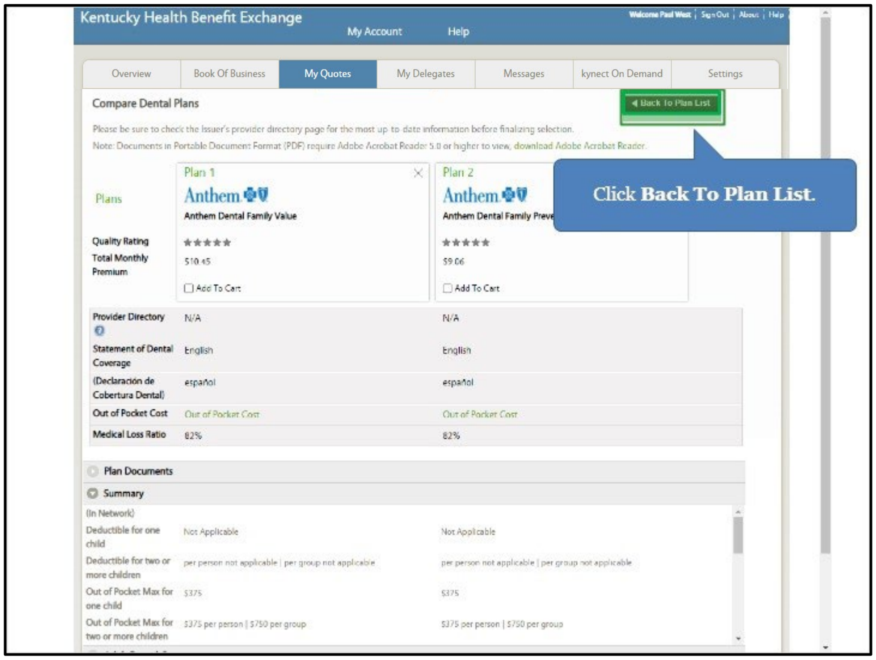
52. Review the plan information.



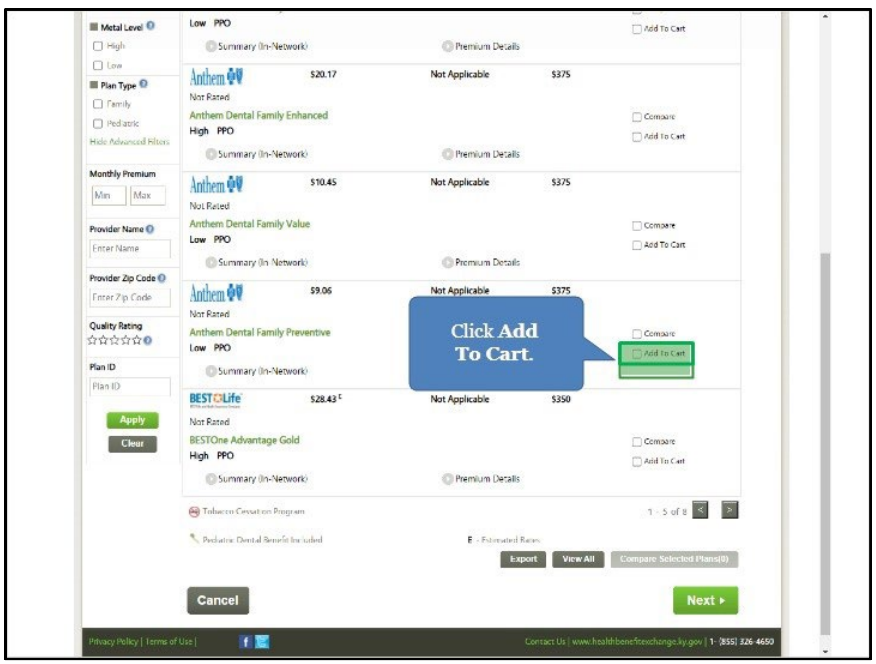
53. Click any of the **tabs** below such as **Summary** to display additional plan information.



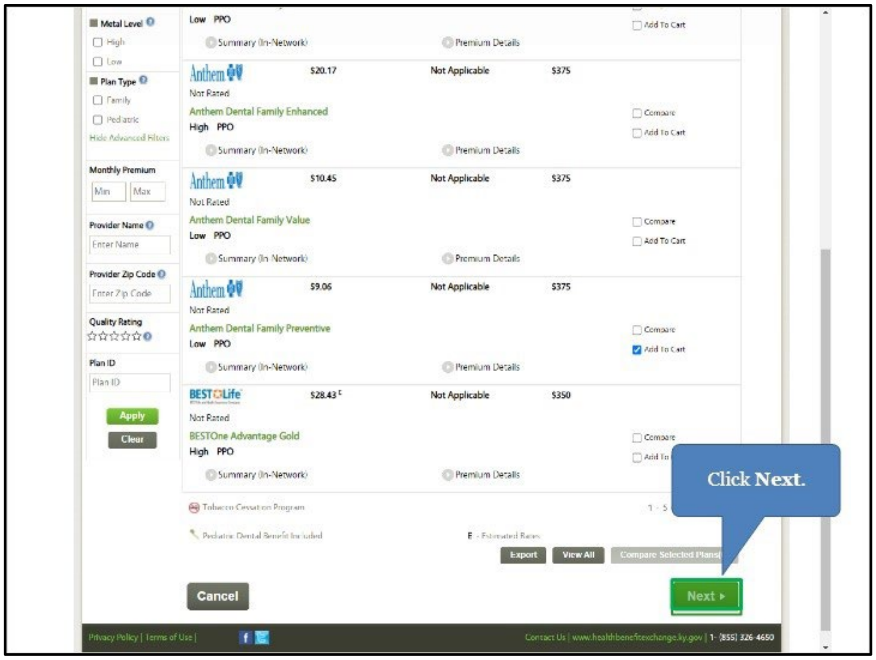
54. Click **Back To Plan List**.



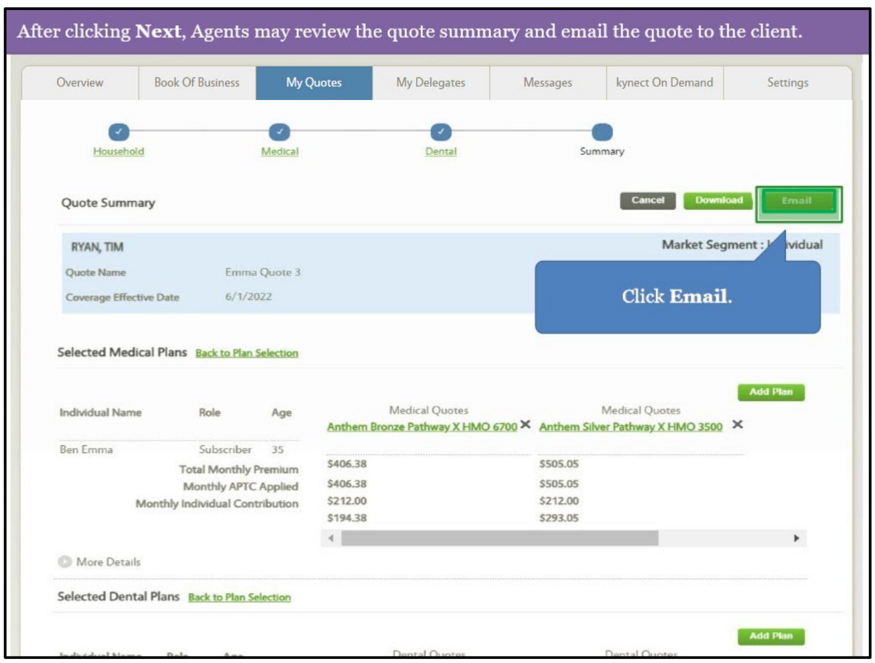
55. Click **Add To Cart** to add the desired Dental plan to the quote.



56. Click **Next** to review the Quote Summary.



57. Confirm the Quote Summary information is correct and click **Email**.



Please note: If there is no Email Address associated with the Client or Prospect, Agents may click **Download** to send the quote in which case it will display in the Resident's **Messages**.

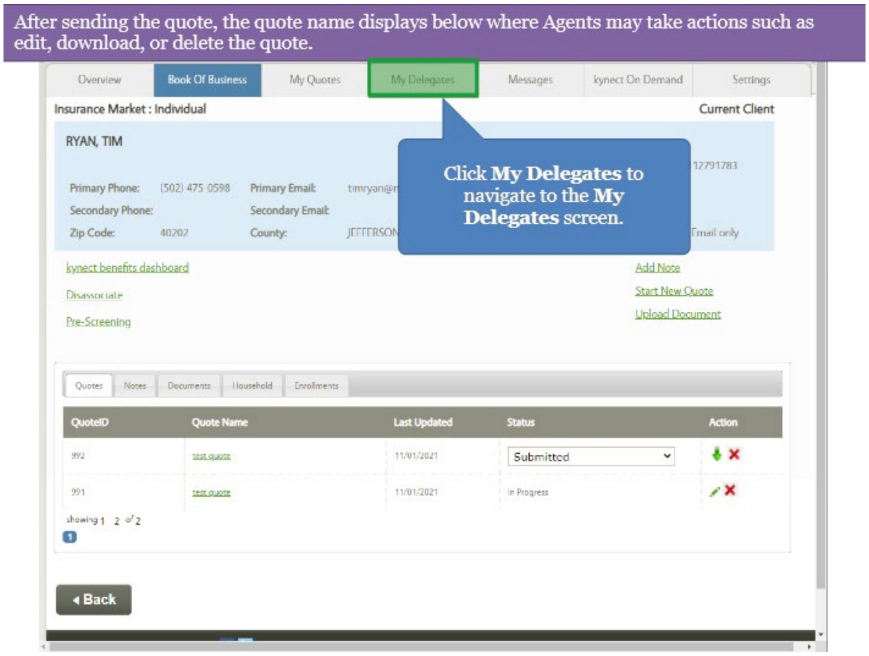
58. An automated message to the Client displays with a hyperlink to view the Agent's quote. Click **Send Email** to send the quote to the selected Client or Prospect.

Please note: The quote is sent to the Client and now displays in the table where the Agent may take action including editing, downloading, or deleting the quote.

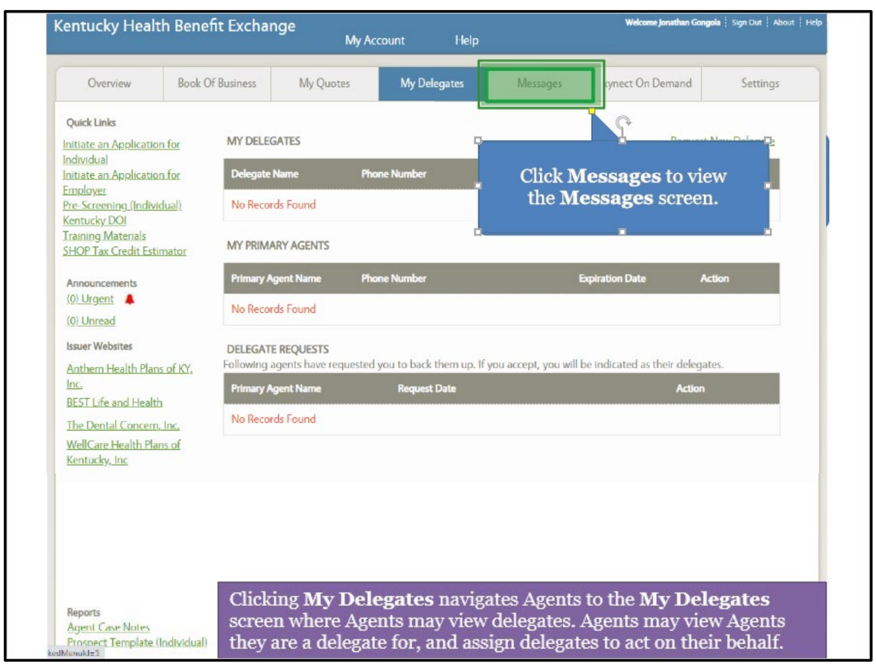
1.8 My Delegates Screen

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.

59. Click **My Delegates** to view the **My Delegates** screen.



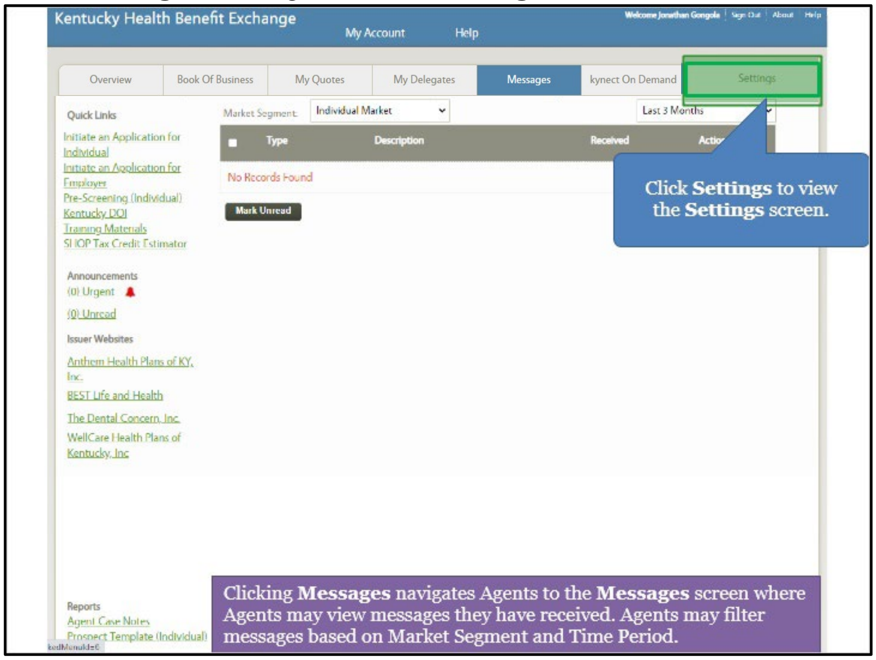
60. Click **Messages** to navigate to the **Messages** screen.



1.9 Messages Screen

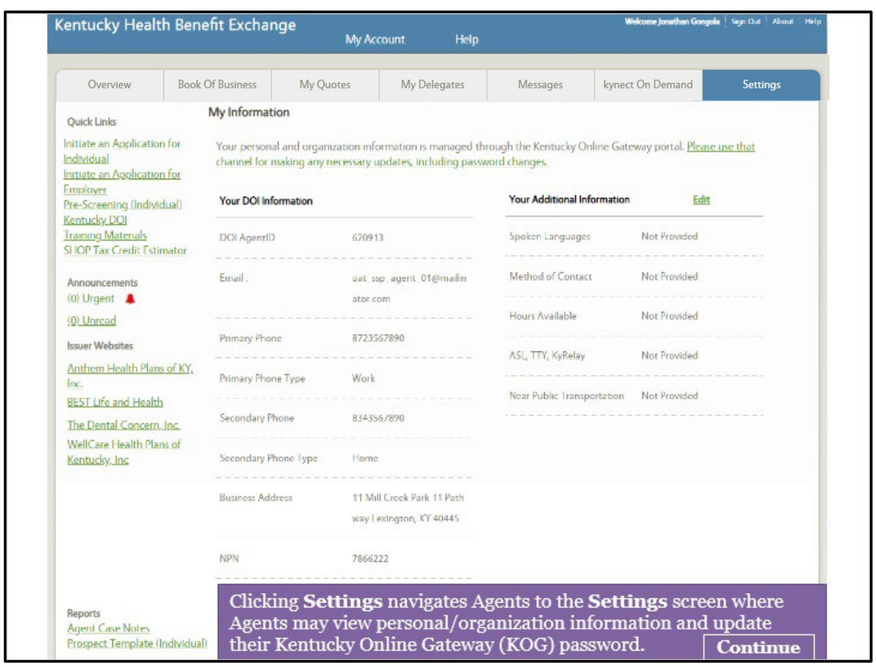
The **Messages** screen displays the Agent's recent messages they have received from kynect. Filter messages by clicking **Market Segment** and/or **Time Period**.

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



1.10 Settings Screen

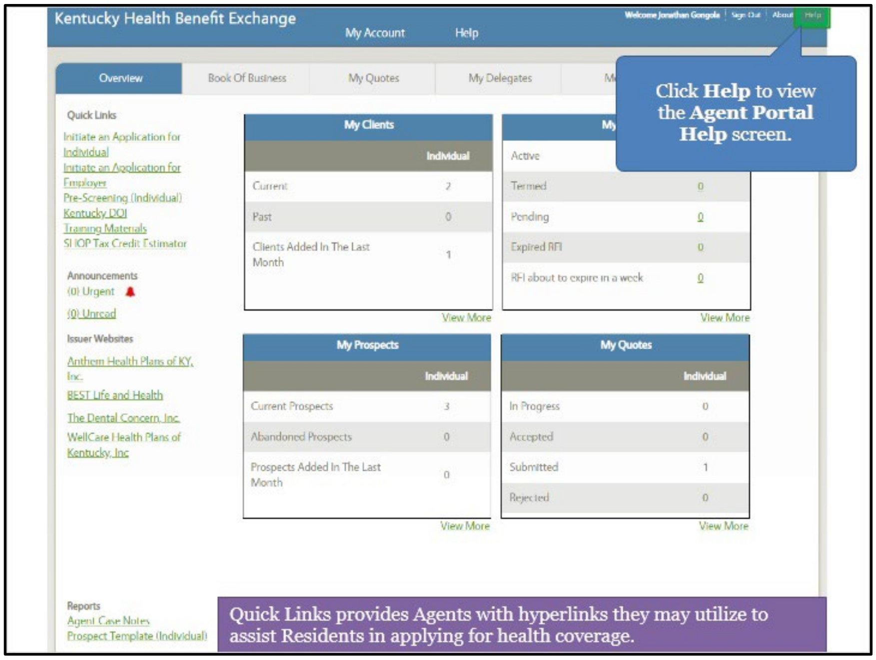
62. The **Settings** screen displays the Agent's personal and organization information. This is also where Agents update their KOG password.



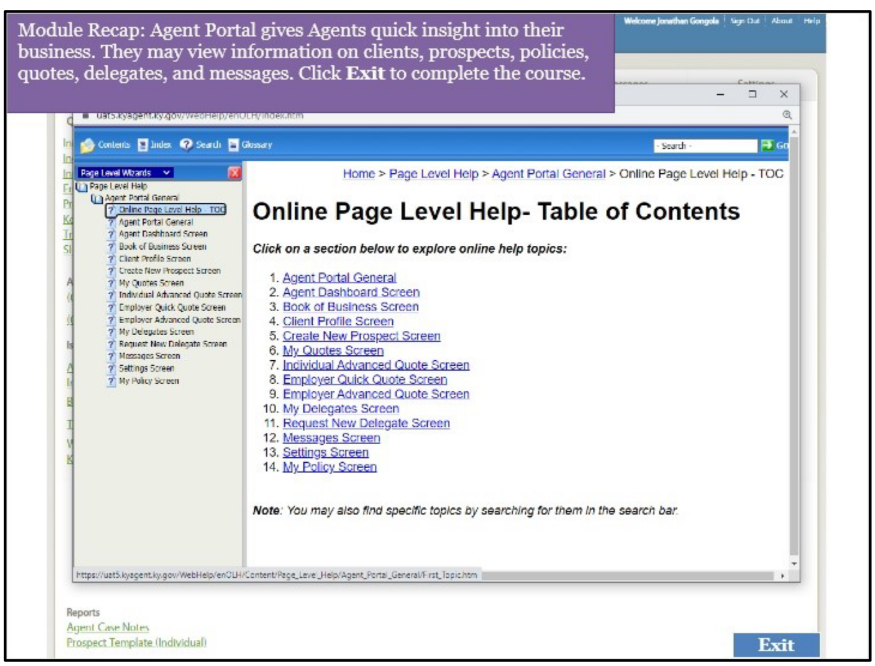
1.11 Agent Portal Help Screen

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.

63. Click **Help** to navigate to the **Agent Portal Help** screen.



64. 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 On Demand

kynect On Demand

> **kynect On Demand is an optional program that allows Agents to provide real time assistance to Individuals applying for benefits or choosing a plan. Agents will contact customers within the expected timeline of 30 minutes. Agents can easily set their availability and preferences from their Dashboard in Agent Portal.**

What will be covered in this section?

Walkthrough of the kynect On Demand Registration

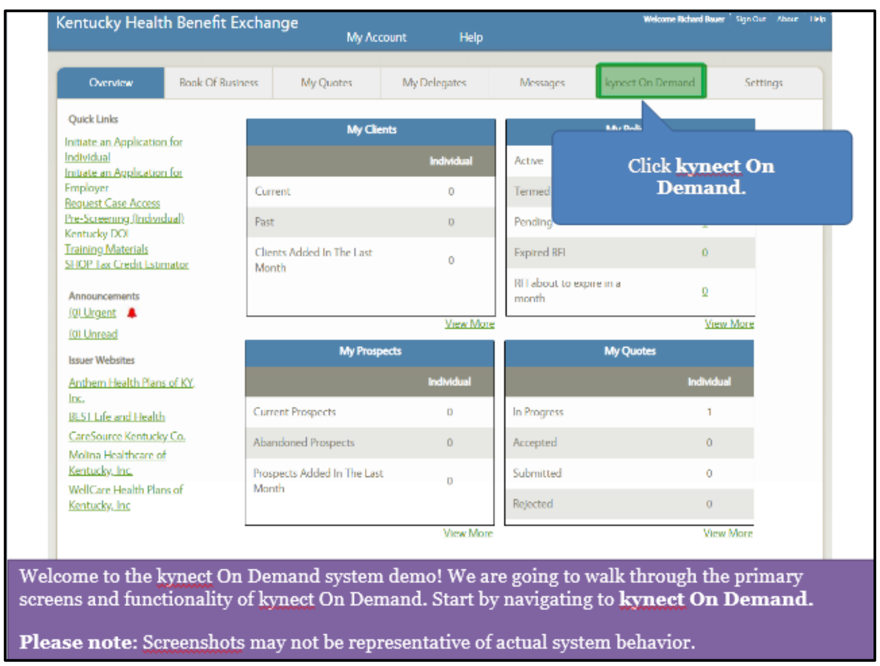
Walkthrough of the Quick Updates section
- Referral Manager
- View Metrics
- My Availability
- Preferred Contact
- De-Register

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

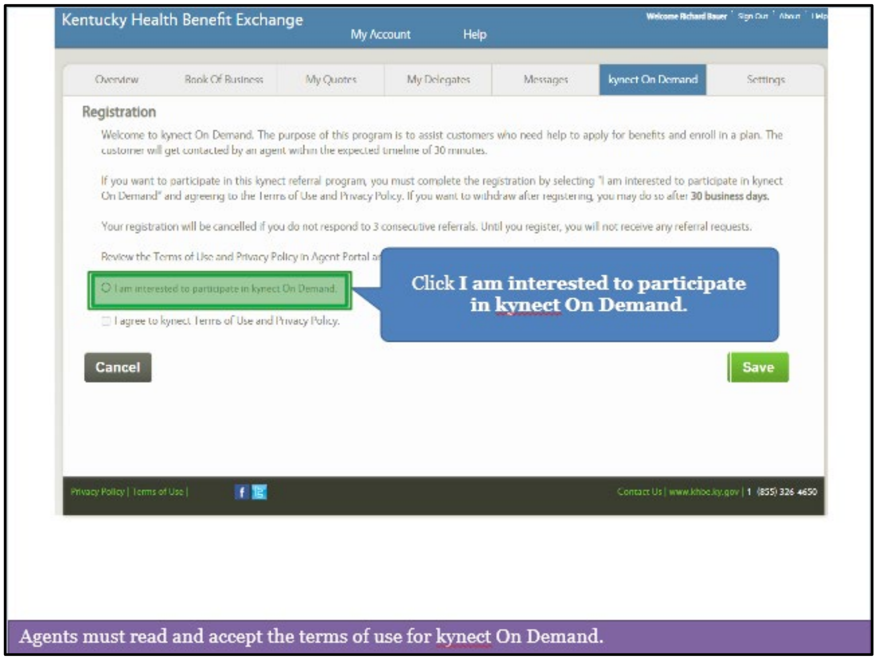
kynect On Demand is an optional program that allows Agents to provide assistance to Individuals within a 30-minute period. Agents who choose to register for kynect On Demand will be able to manage referrals, view their metrics, update they availability and preferred contact information, and de-register,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

2.1 Registering for kynect On Demand

1. Click **kynect On Demand**.



2. Agents must read and accept the terms of use for kynect On Demand. Click **I am interested to participate in kynect On Demand**.

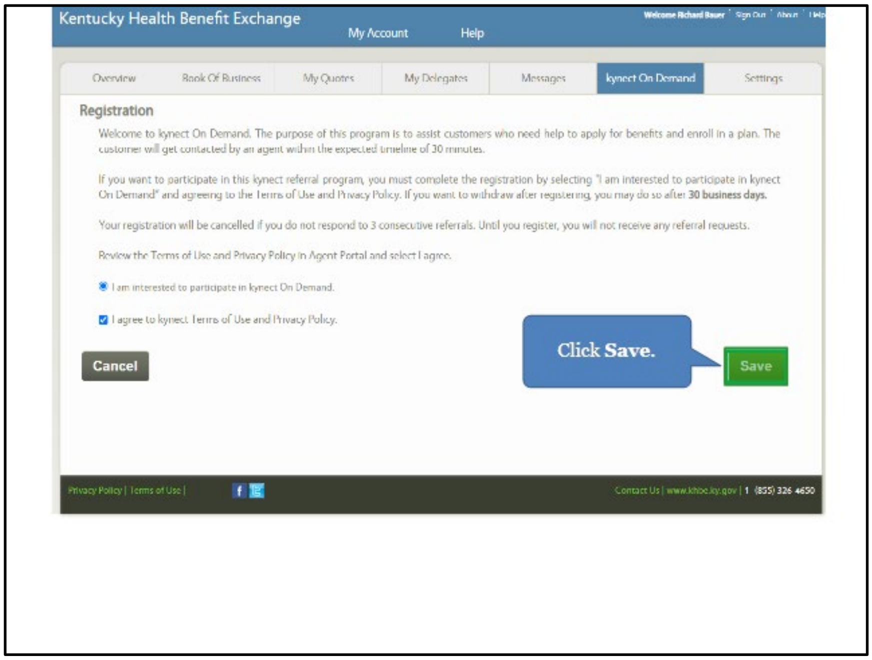


Agents must read and accept the terms of use for kynect On Demand.

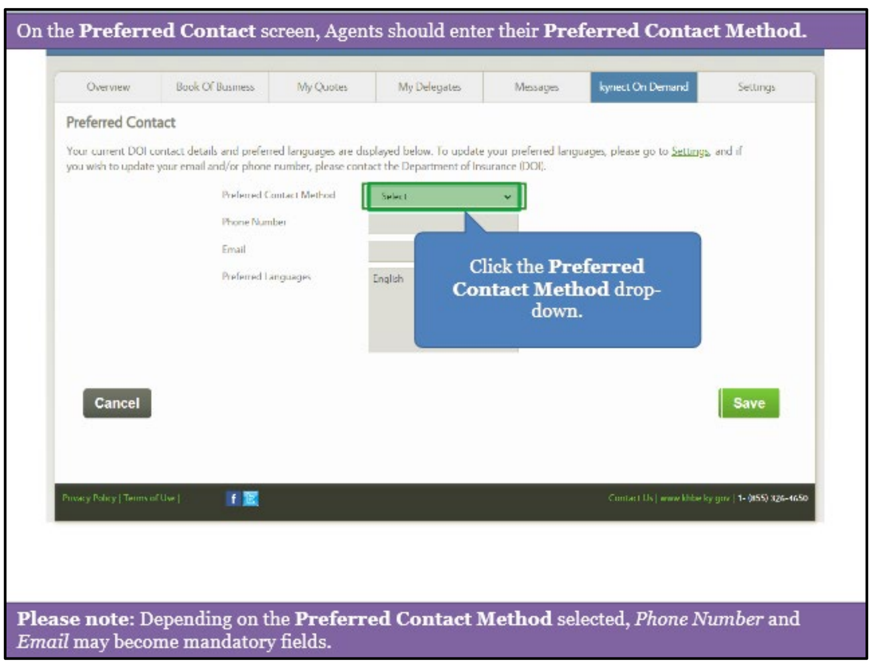
3. Click **I agree to kynect Terms of Use and Privacy Policy**.

Agents must read and accept the terms of use for kynect On Demand.

4. Click **Save**.

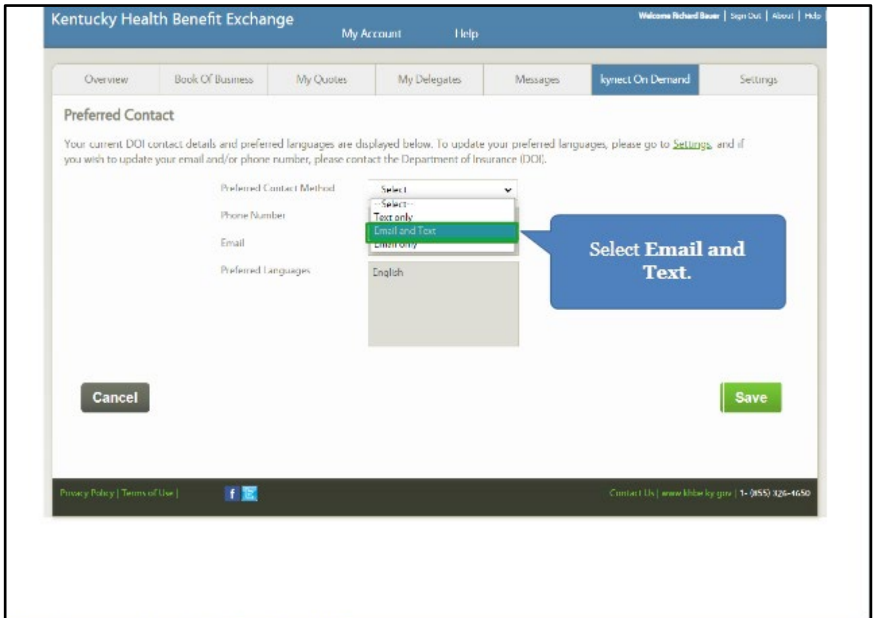


5. On the **Preferred Contact** screen, Agents should enter their **Preferred Contact Method**. Click the **Preferred Contact Method** drop-down.



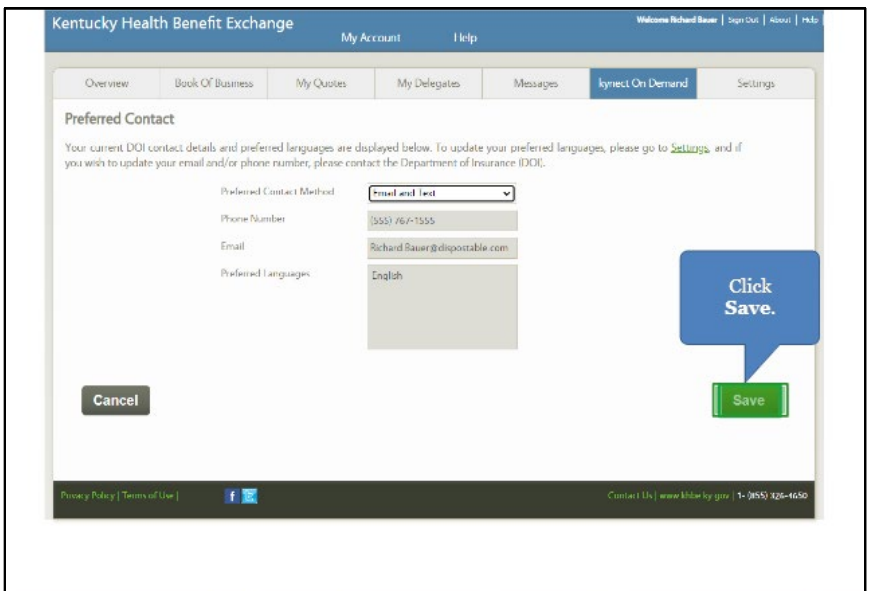
Please note: Depending on the **Preferred Contact Method** selected, *Phone Number* and *Email* may become mandatory fields.

6. For this example, select **Email and Text**.



For this example, select **Email and Text**.

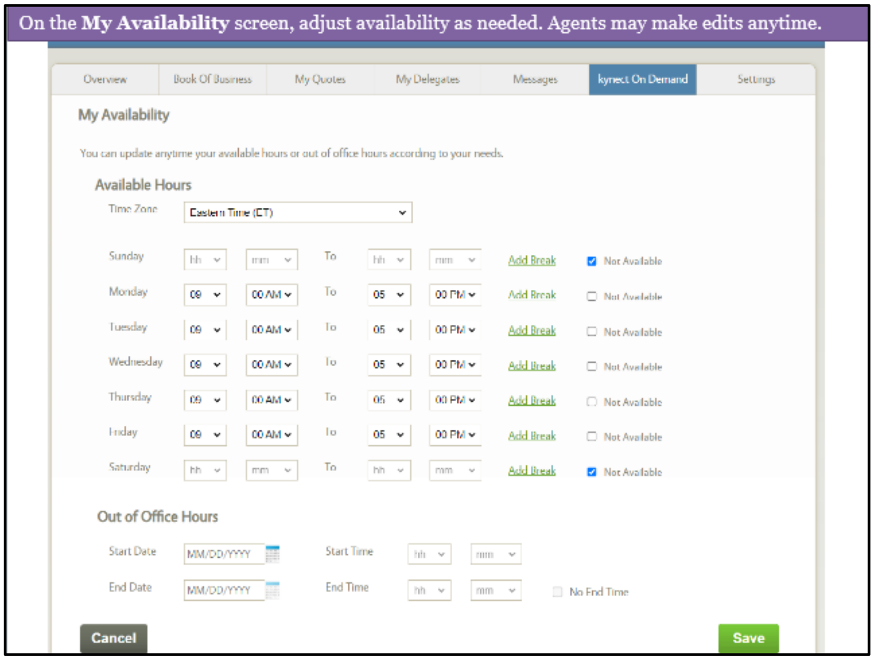
7. Click **Save**.



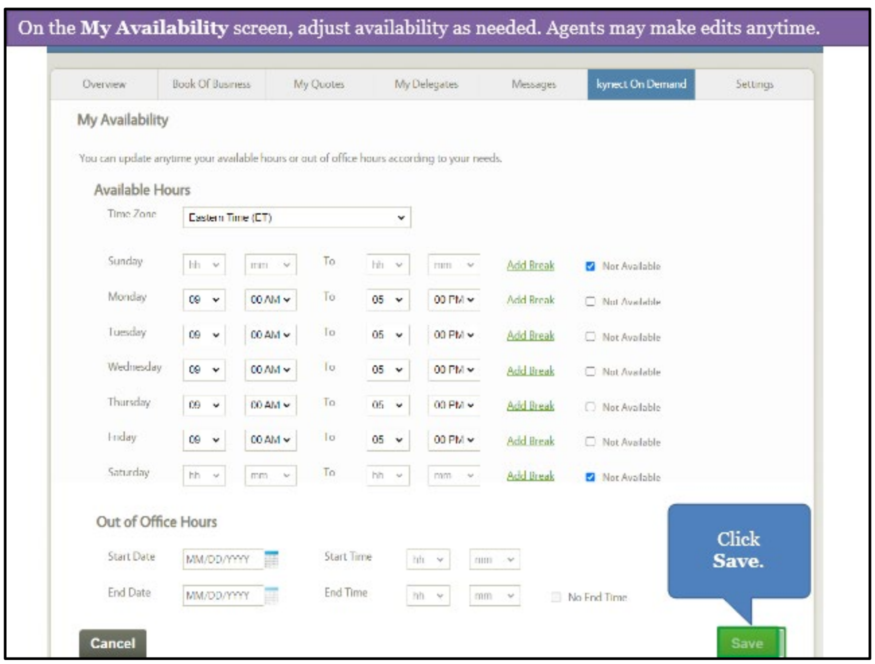
Please note: Agents should contact the Department of Insurance (DOI) to update their email and/or phone number, if applicable.

Please note: Agents should contact the Department of Insurance (DOI) to update their email and/or phone number, if applicable.

8. On the **My Availability** screen, adjust availability as needed. Agents can make edits at any time.

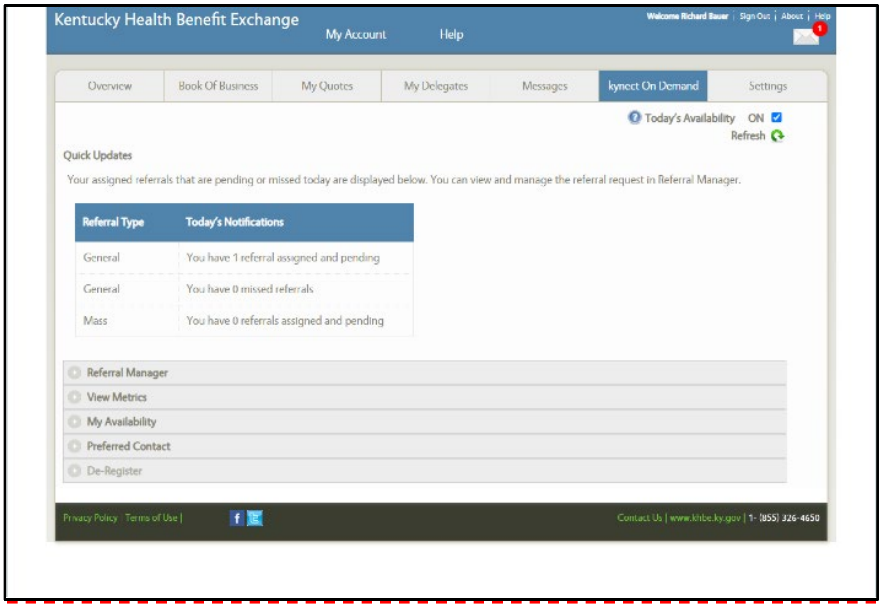


9. Click **Save**.



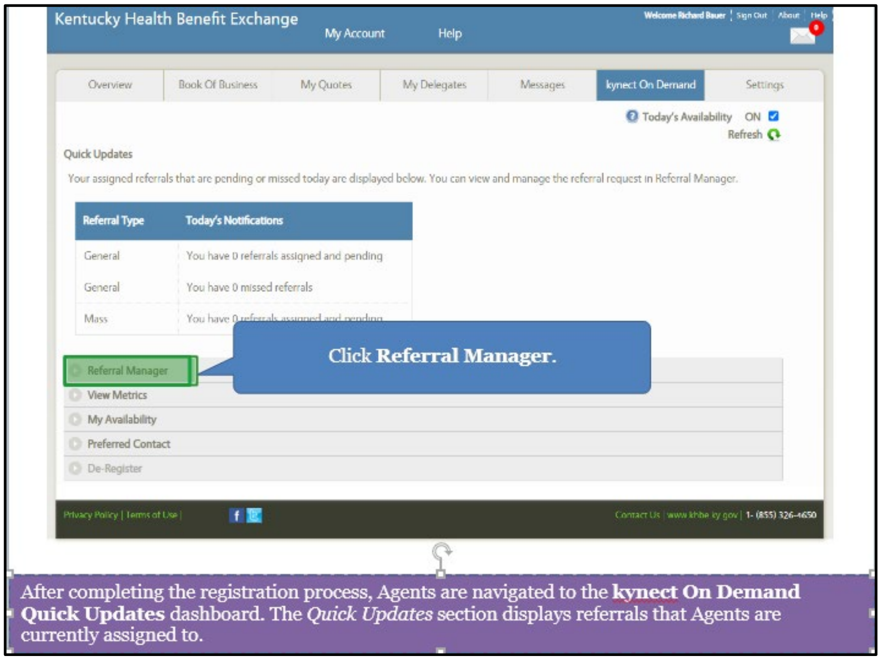
2.2 Quick Updates

10. After completing the registration process, Agents are navigated to the **Quick Updates dashboard**. The **Quick Updates dashboard** displays referrals that Agents are currently assigned to. There are two types of referrals: General and Mass Referrals. General referrals should be accepted or rejected by an agent within 15 minutes of being assigned to the referral. Mass referrals are meant to be completed on a first come first serve basis once a mass referral is accepted. Agents can view their referral notifications by clicking the **Mail** icon. Agents can uncheck **Today's Availability** if they briefly leave their desk or do not want to participate for the day.

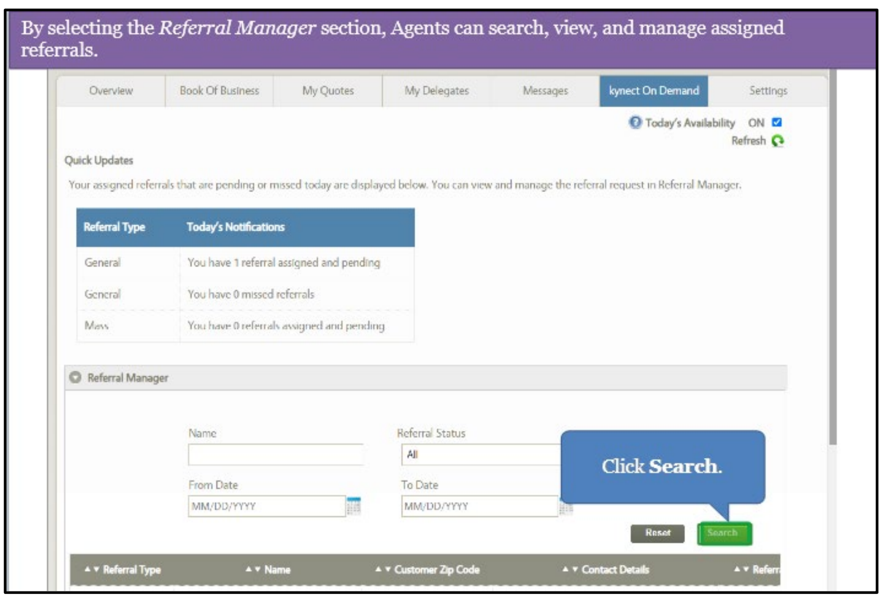


Please note: While Residents are asked before using kynect On Demand to only submit a request for assistance for health coverage, Agents may receive a referral for another program (e.g., SNAP, Child Care). Agents should refer any of these requests to a kynector or the Department for Community Based Services (DCBS) 1-855-306-8959. Agents cannot receive general referrals outside of their selected available hours, but they can receive mass referrals outside their selected available hours.

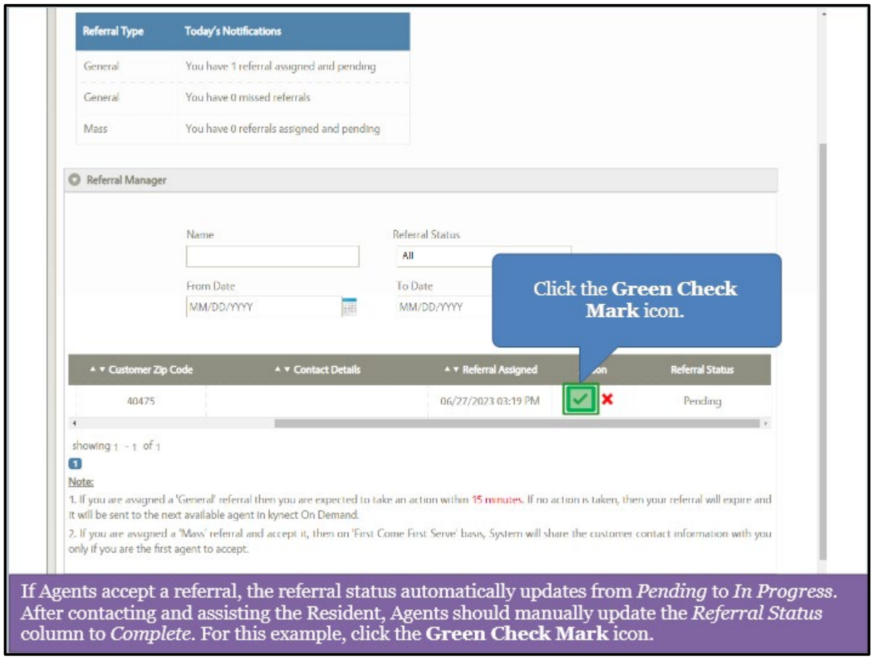
11. Click **Referral Manager**.



12. By selected the **Referral Manager** section, Agents can search, view, and manage assigned referrals. To search for a specific referral, enter **identifying information** such as *Name*, *Referral Status*, *From Date*, and *To Date*. Click **Search**.

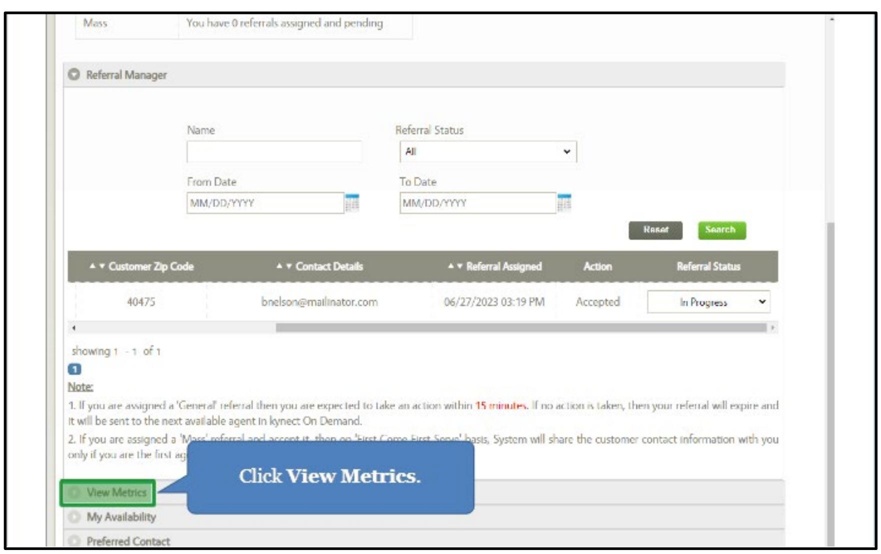


13. If Agents wish to accept a new referral, click the **Green Check Mark** icon within 15 minutes of being assigned. If Agents wish to decline a referral, click the **Red X** icon. If Agents decline a referral, the *Action* column automatically updates from Pending to Rejected and the referral is then reassigned as a general referral to another Agent or sent as a mass referral depending on when the referral is rejected. If Agents accept a referral, the referral status automatically updates from *Pending* to *In Progress*. After the Resident completes enrollment, Agents should manually update the Referral Status column to *Complete*. For this example, click the **Green Check Mark icon**.

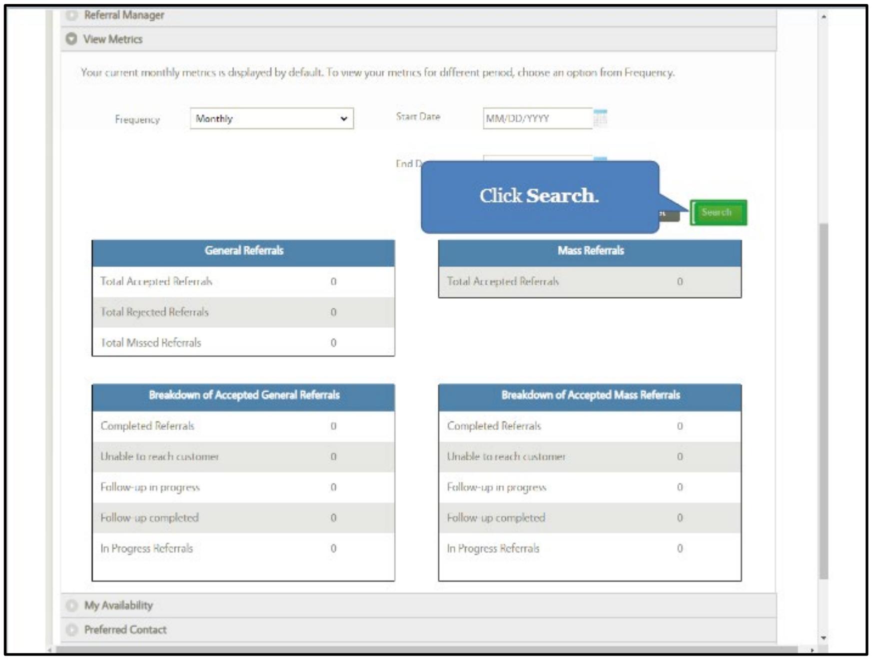


Please note: The Contact Details remain blank until Agents accept the referral.

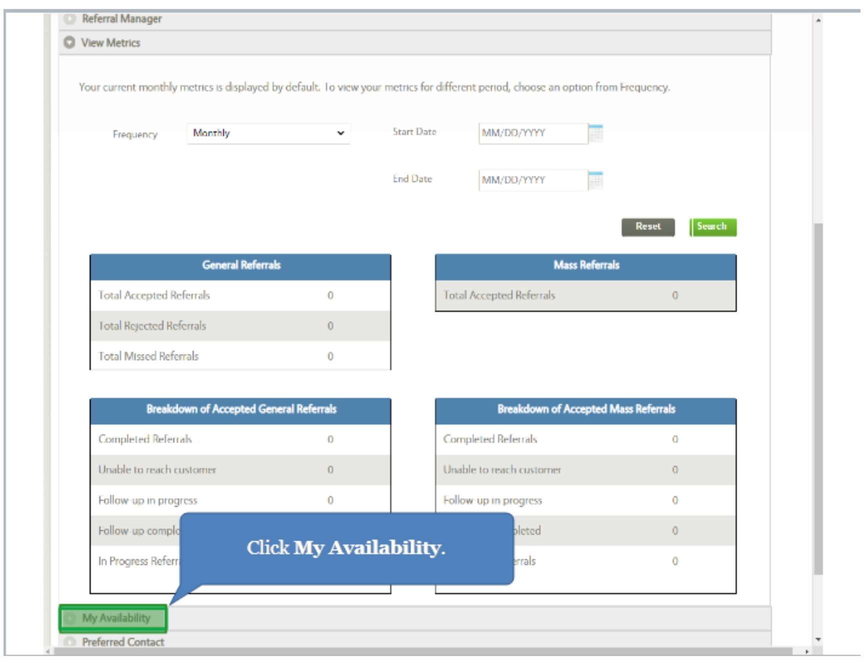
14. Click **View Metrics**.



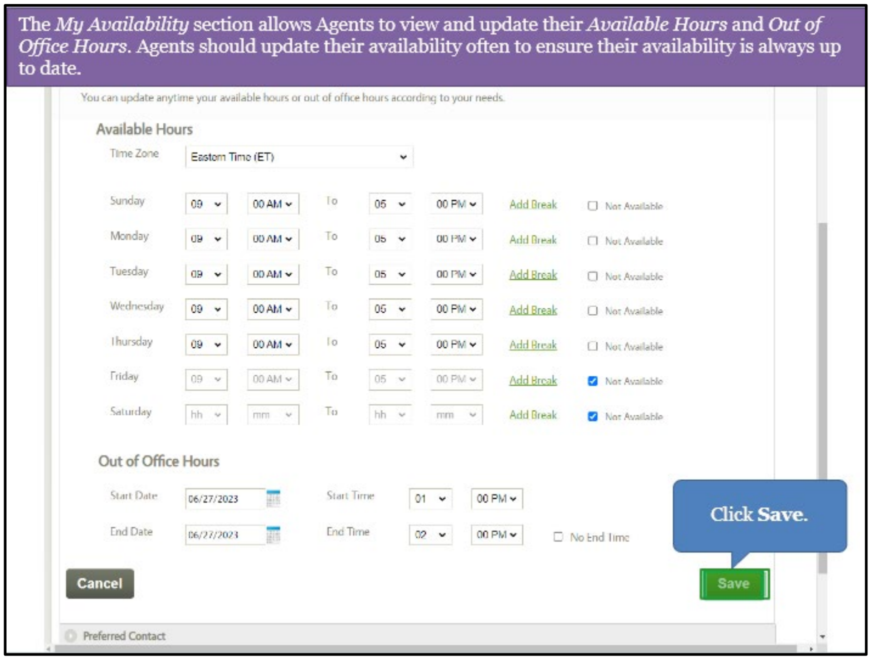
15. The *View Metrics* section displays how many referrals were completed, failed to reach the Resident, have a follow up in progress, or canceled. To filter the displayed metrics more, Agents may search by *Frequency*, *Start Date*, and *End Date*. Click **Search**.



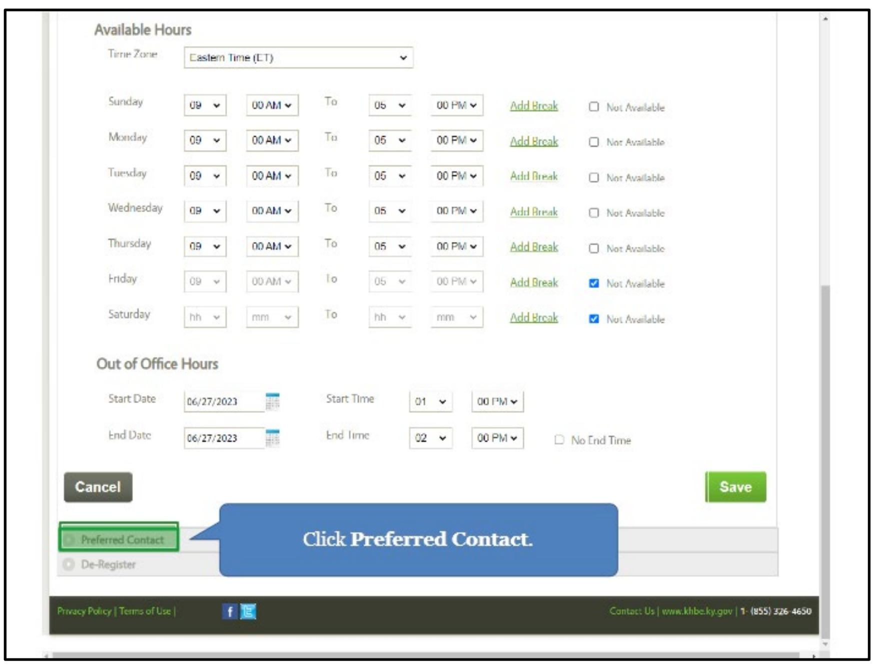
16. Click **My Availability**.



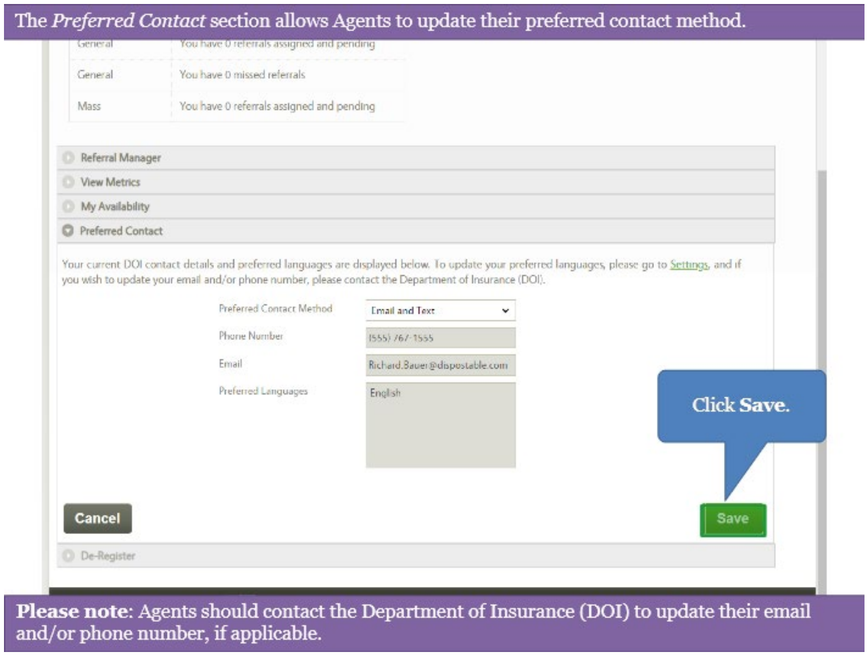
17. The **My Availability** section allows Agents to view and update their *Available Hours* and *Out of Office Hours*. Agents should update their availability often to ensure their availability is always up to date.



18. Click **Preferred Contact**.

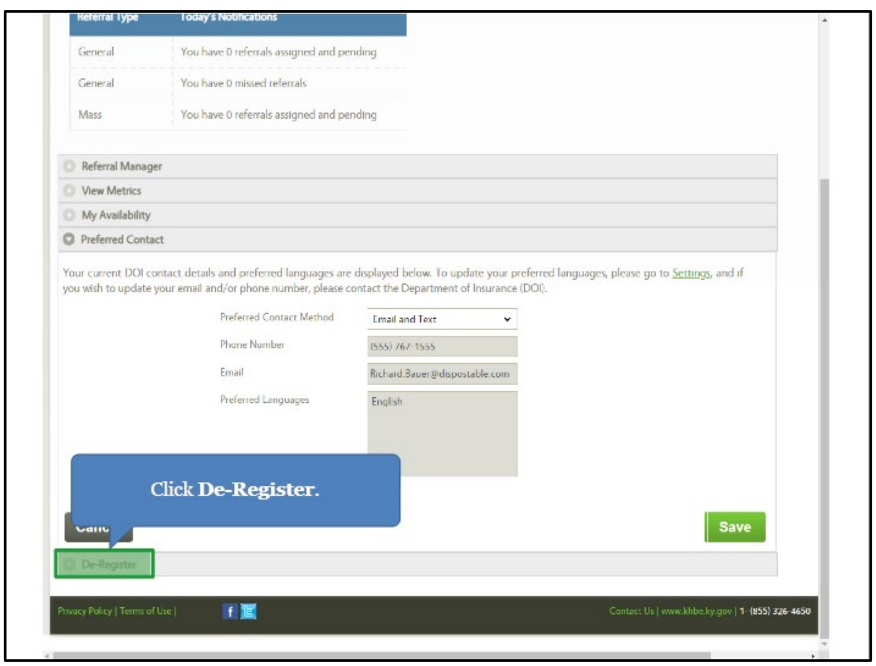


19. The **Preferred Contact** section allows Agents to update their preferred contact method.

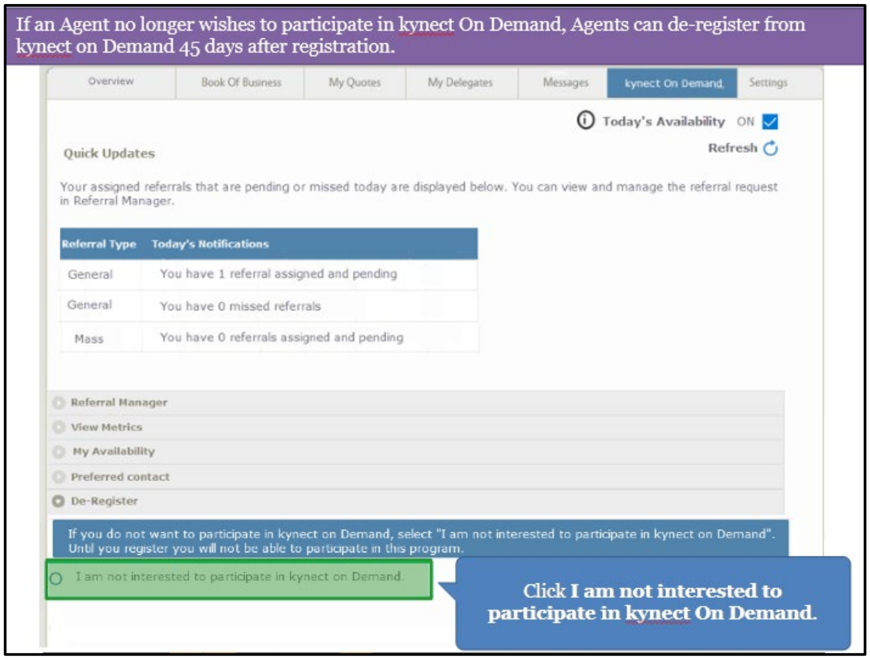


Please note: Agents should contact the Department of Insurance (DOI) to update their email and/or phone number, if applicable.

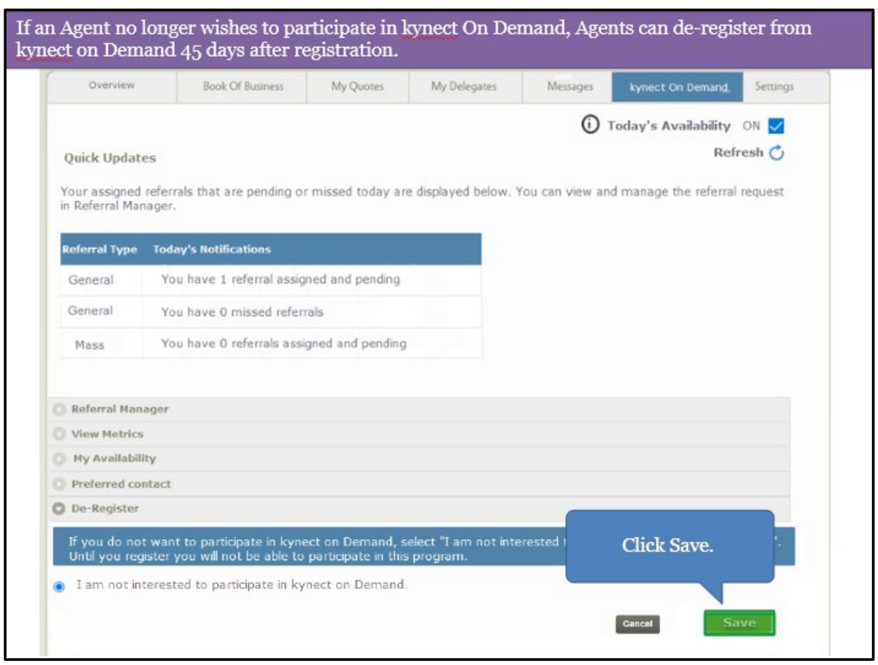
20. Click **De-Register**.



21. If an Agent no longer wishes to participate in kynect On Demand, Agents can de-register from kynect on Demand 45 days after registration. Click **I am not interested to participate in kynect On Demand**.

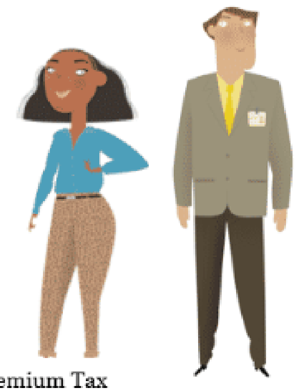


22. Click **Save**.



3 kynect health coverage Prescreening Tool

kynect health coverage Prescreening Tool



The kynect health coverage Prescreening Tool allows users to anonymously enter minimal information to receive a potential eligibility determination for Qualified Health Plans (QHPs), Advance Premium Tax Credit (APTC), and Cost-Sharing Reductions (CSR).

What will be covered in this section?

How to enter information on the household's members.

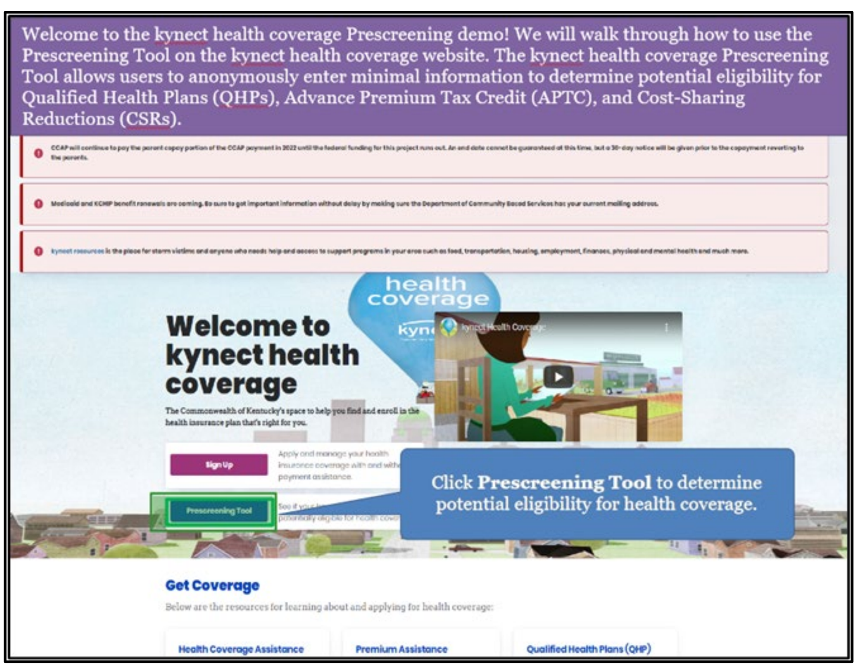
Prescreening results and how to view potential eligibility for Qualified Health Plans (QHPs), Advance Premium Tax Credit (APTC), and Cost-Sharing Reductions (CSR).

During this module, Agents will learn how to use the kynect health coverage Prescreening Tool.

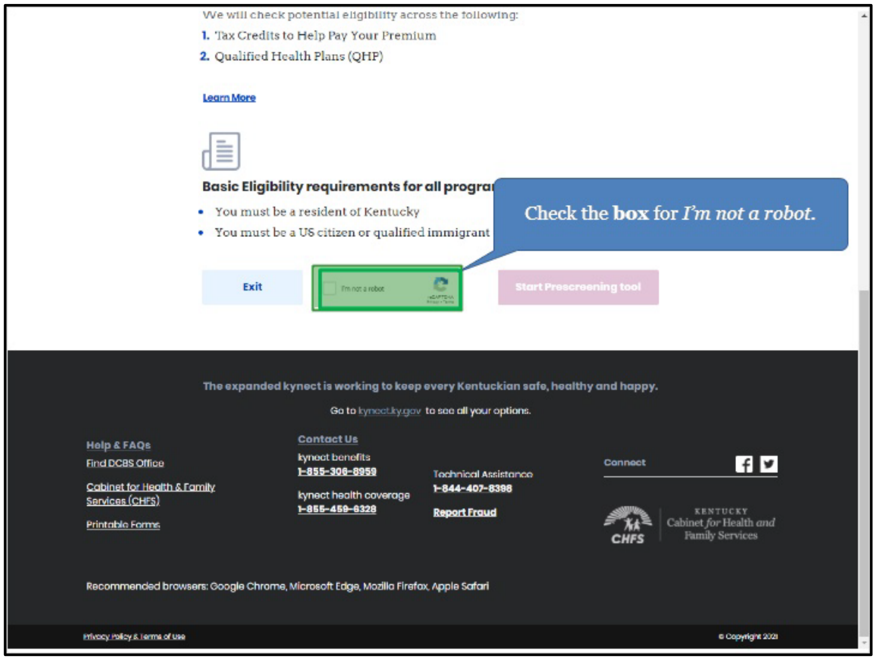
The kynect health coverage Prescreening Tool allows Residents to anonymously enter minimal information to check potential eligibility for Qualified Health Plans (QHPs), Advance Premium Tax Credit (APTC), and Cost-Sharing Reductions (CSR). The Prescreening Tool is not an application and does not guarantee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

3.1 Navigating to the kynect health coverage Prescreening Tool

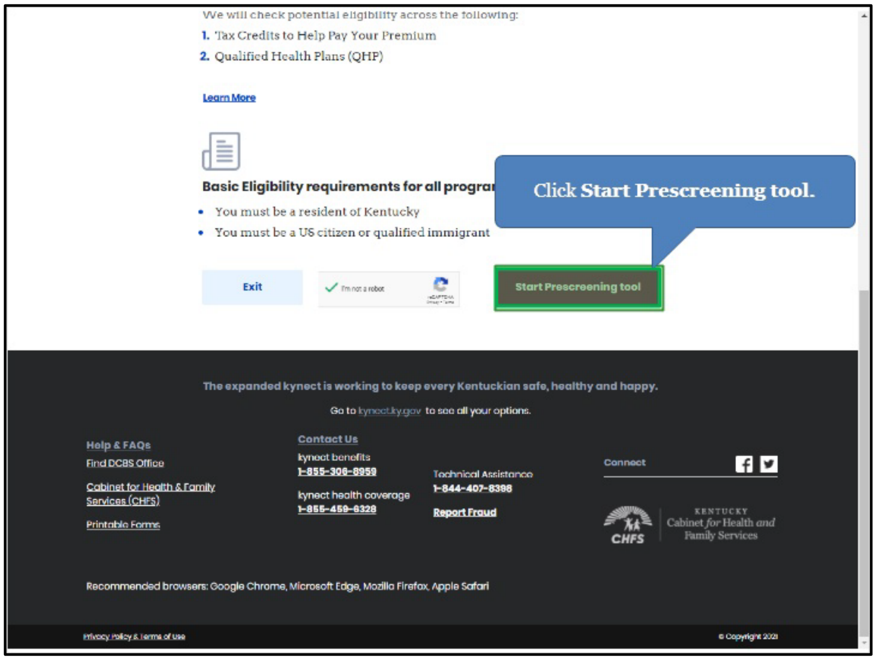
1. Navigate to the kynect health coverage website.
2. Click **Prescreening Tool** to view prescreening information.



3. After reviewing the prescreening information, check the **box** to confirm the Resident is not an automated program.



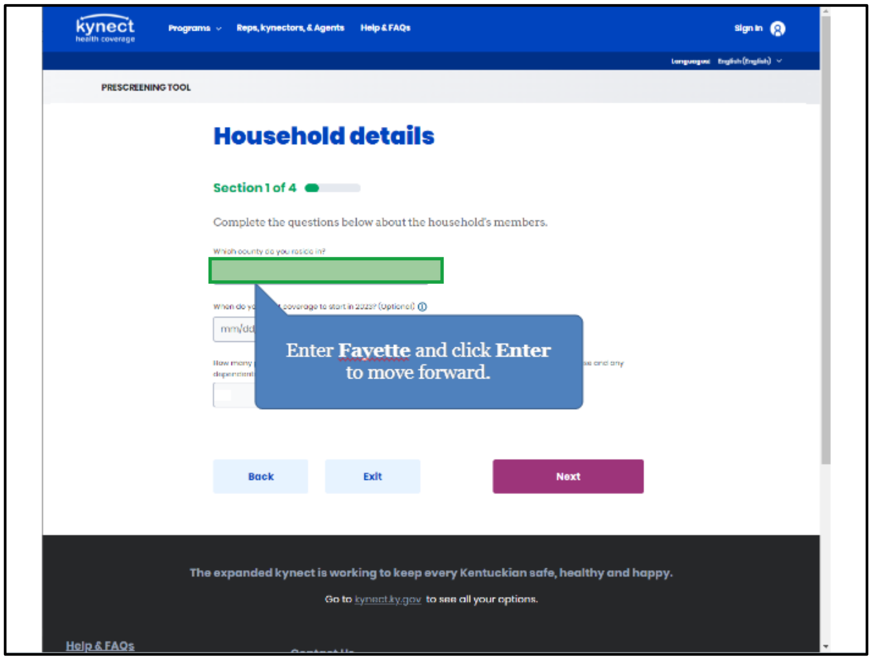
4. Click **Start Prescreening tool**.



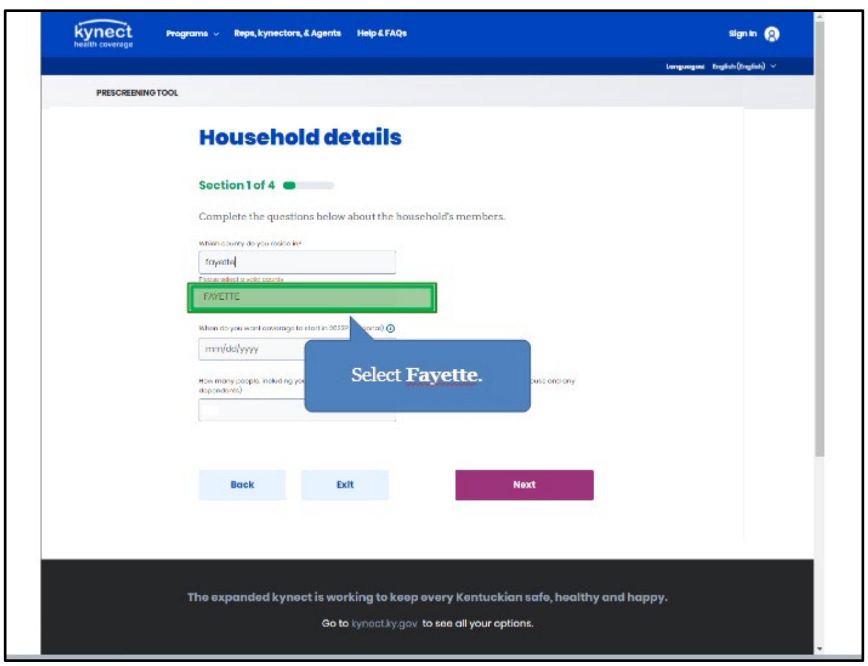
3.2 Section 1: Household Details Screen

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.

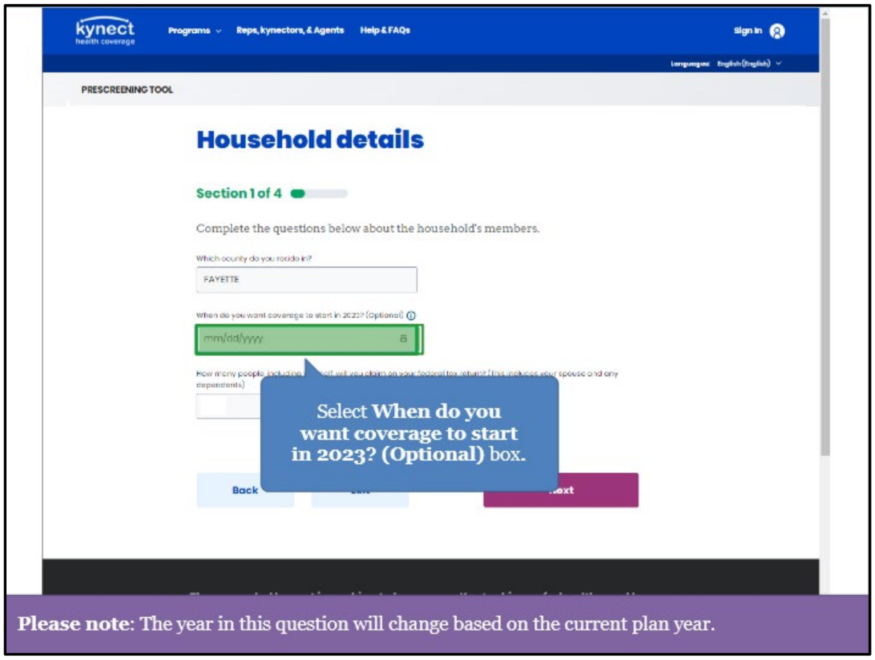
5. Enter the **County** the Resident resides in.



6. Select the **County** the Resident resides in from the search results.

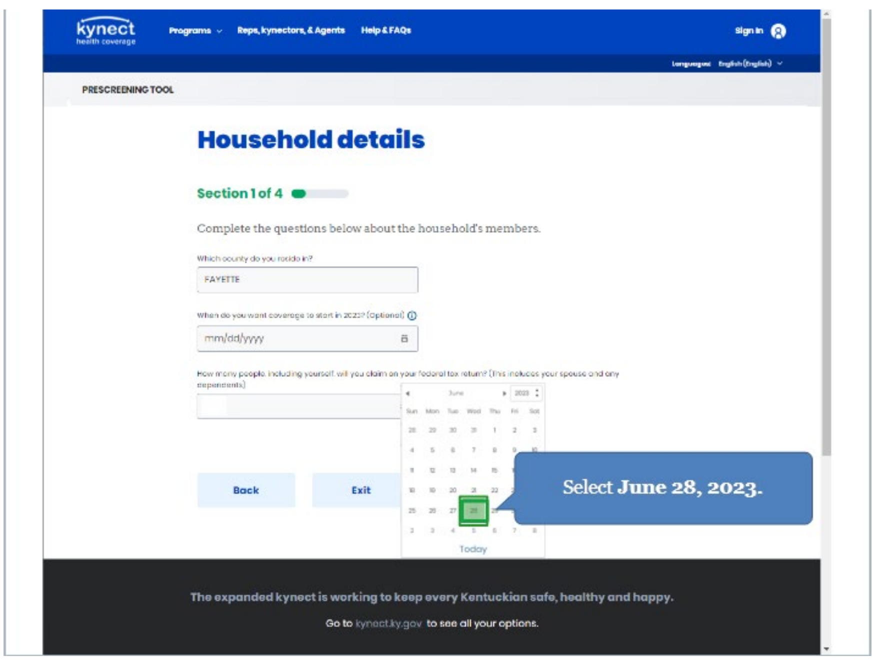


7. Select *When do you want coverage to start in 2023 (Optional)* box.

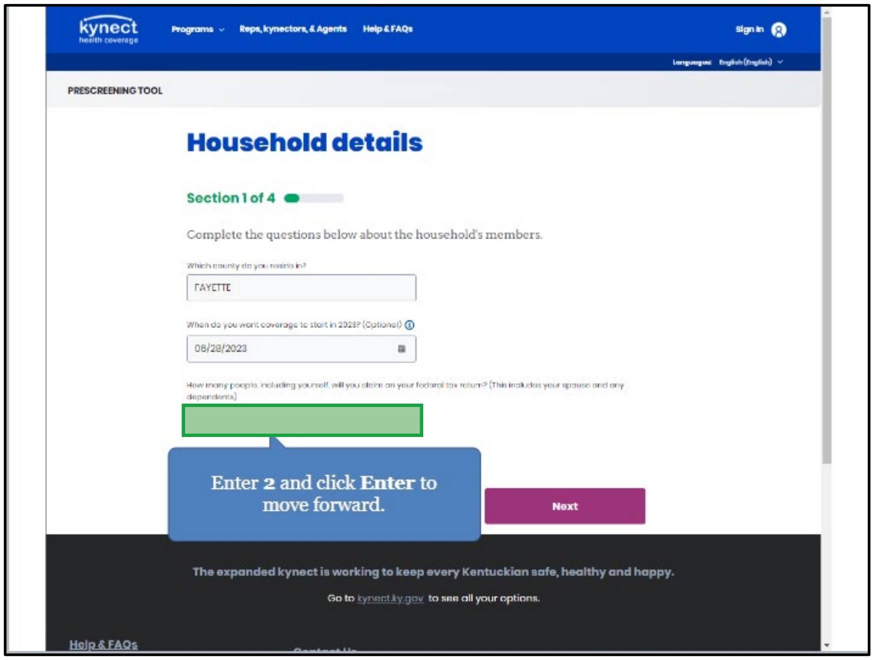


Please Note: The year in this question will change based on the current plan year.

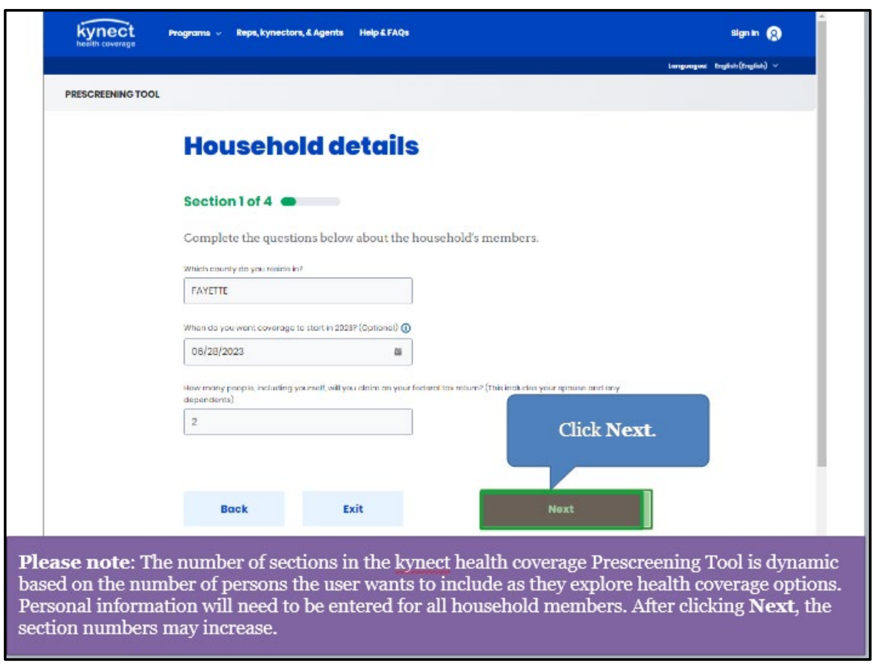
8. Select **June 28, 2023**.



9. Enter the **number** for *How many people, including yourself, will you claim on your federal tax return (this includes your spouse and any dependents)?.*



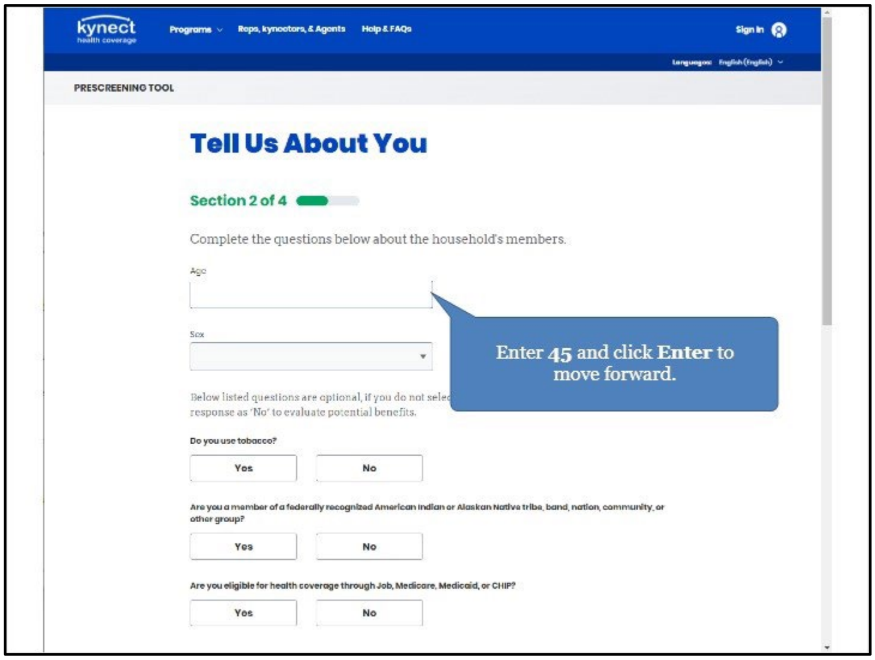
10. Click **Next** to proceed to **Section 2** of the kynect health coverage Prescreening Tool. The number of sections in the kynect health coverage Prescreening Tool is dynamic based upon the number of people entered in the previous step.



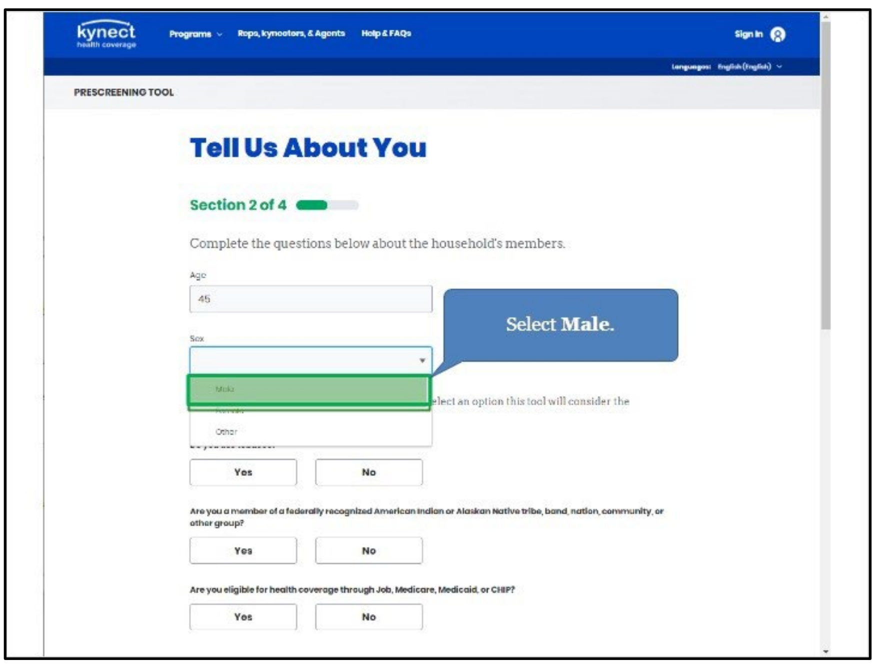
3.3 Section 2: Tell Us About You Screen

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

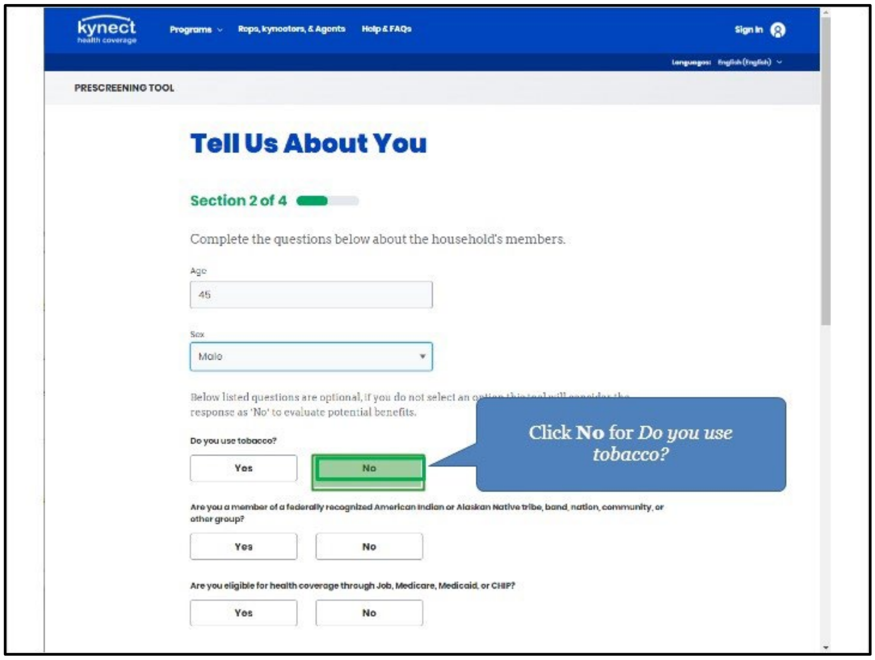
11. Enter the Resident's **Age**.



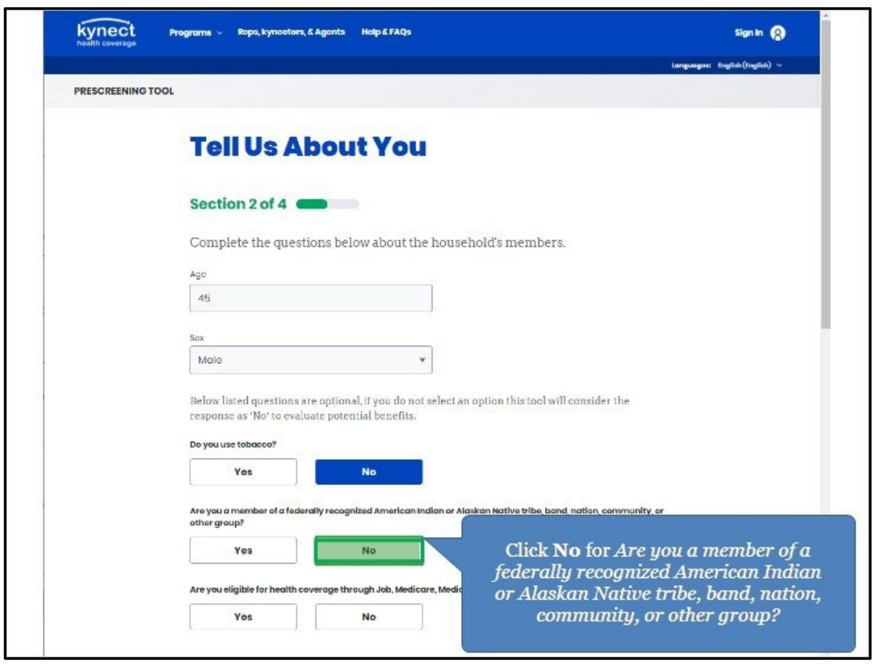
12. Select the Resident's **Sex** from the drop-down.



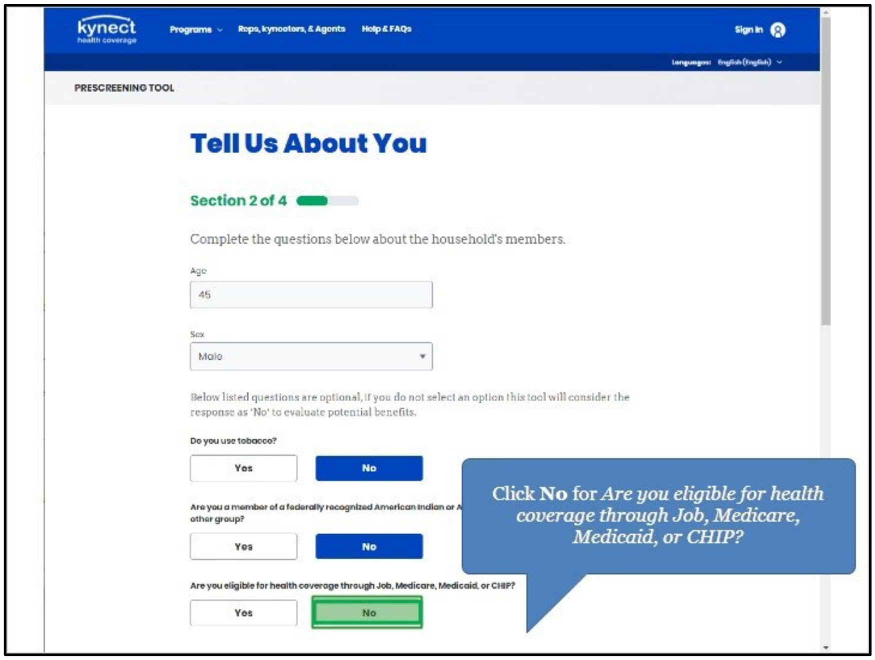
13. Click **Yes** or **No** for *Do you use tobacco?.*



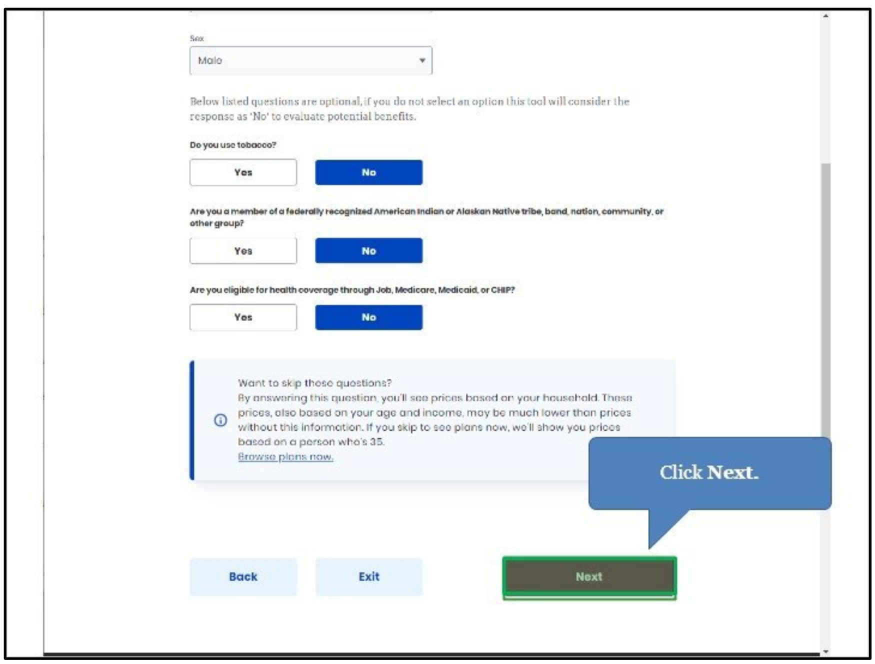
14. Click **Yes** or **No** for *Are you a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group?.*



15. Click **Yes** or **No** for *Are you eligible for health coverage through Job, Medicare, Medicaid, or CHIP?.*



16. Click **Next** to proceed to **Section 3** of the kynect health coverage Prescreening Tool.

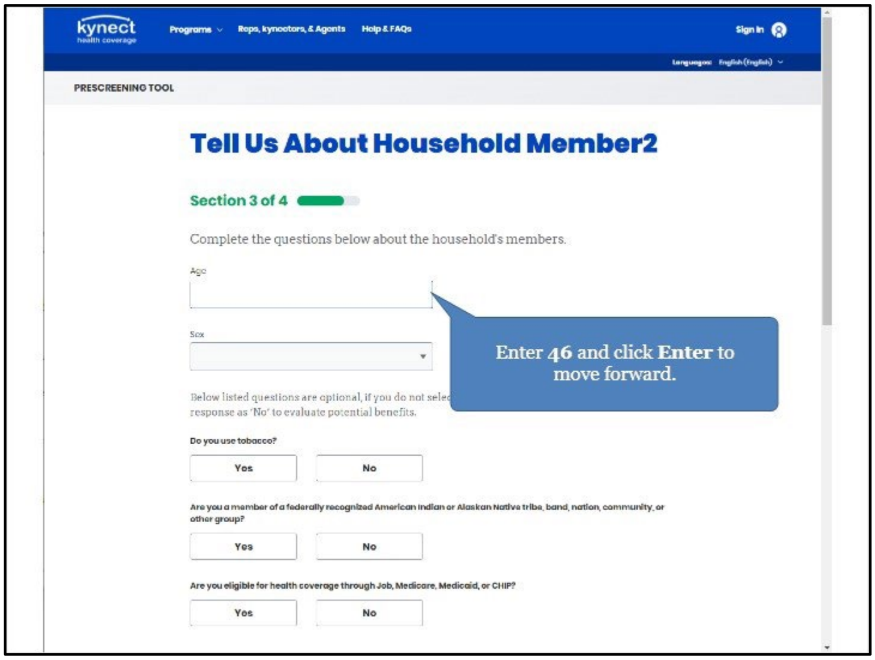


Please note: If there is a female member of the household, a conditional question appears. Click **Yes** or **No** for *Are you Pregnant?.* If **Yes**, enter the **Number** for *How many children are expected from the pregnancy?.*

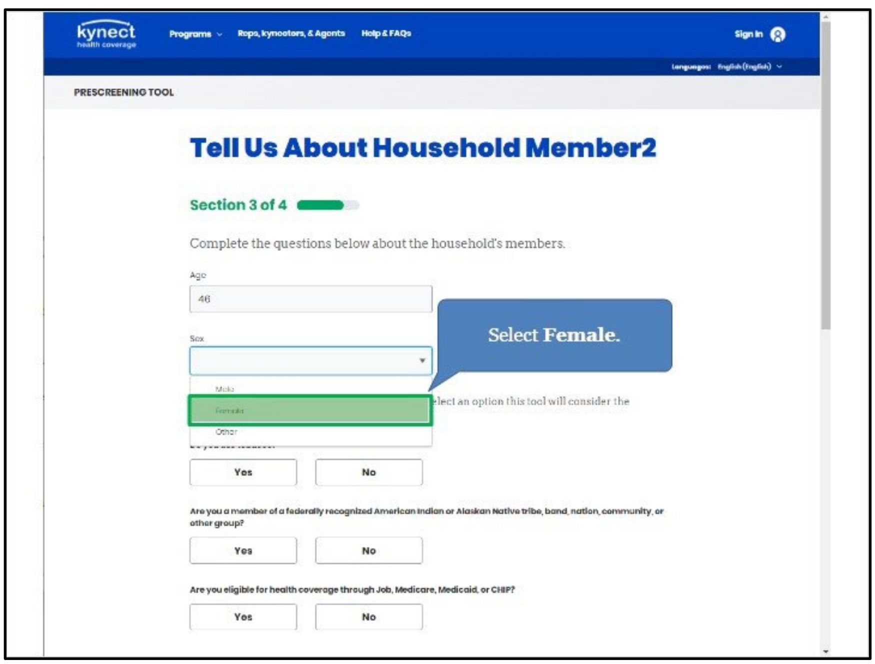
3.4 Section 3: Tell Us About Household Member 2 Screen

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.

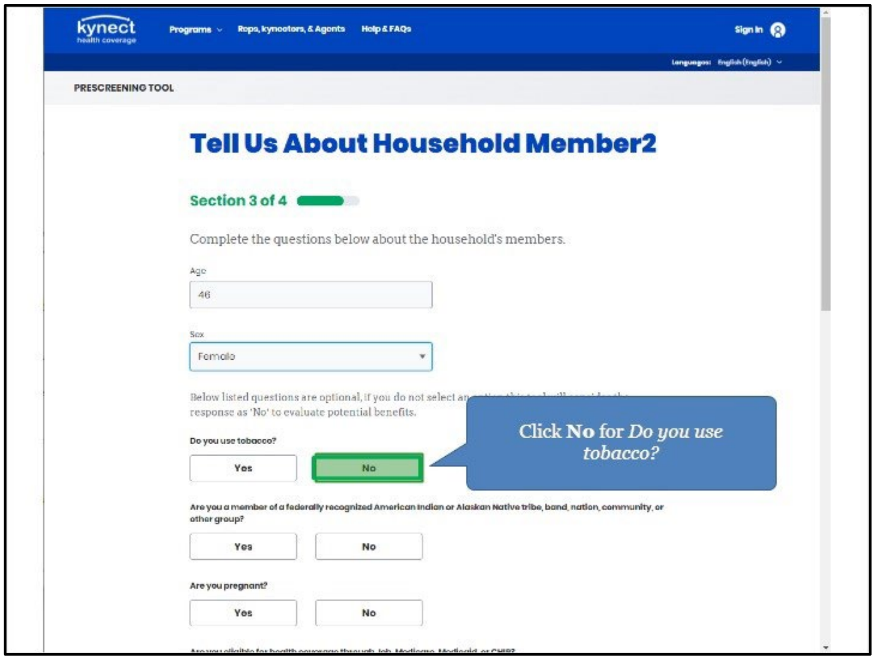
17. Enter the **Age** of the Second Household Member.



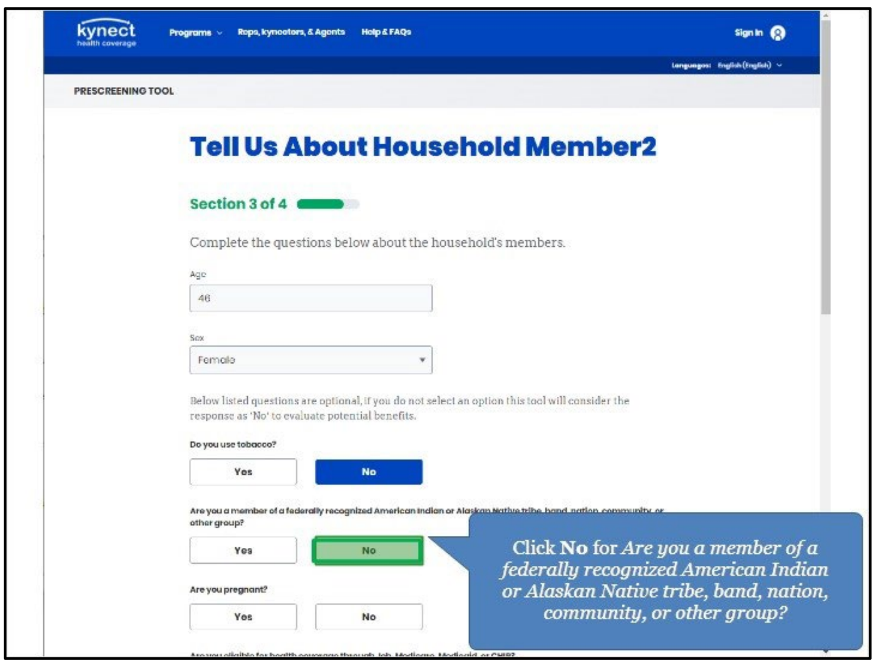
18. Select the **Sex** of the Second Household Member from the drop-down.



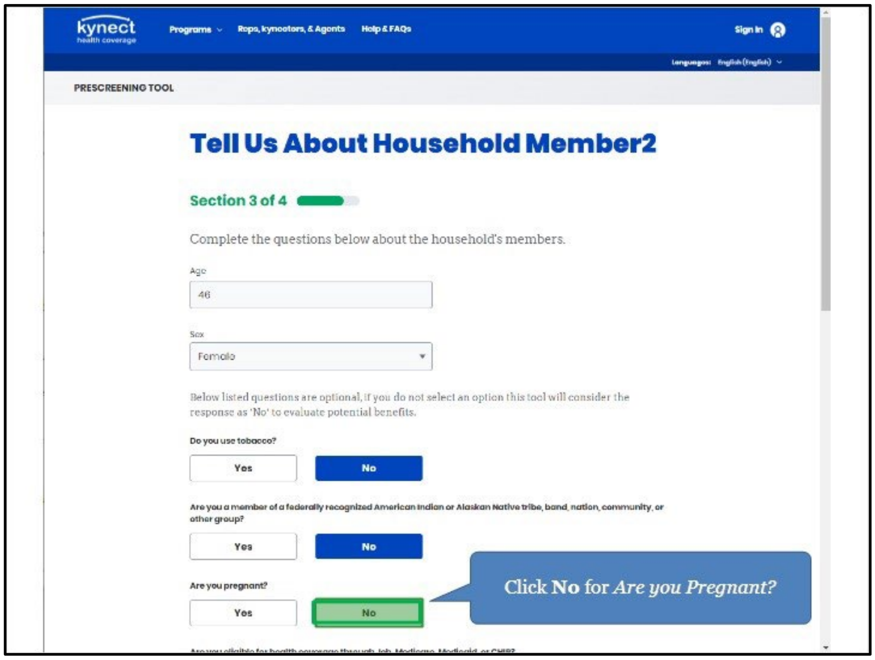
19. Click **Yes** or **No** for *Do you use tobacco?*.



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?*.

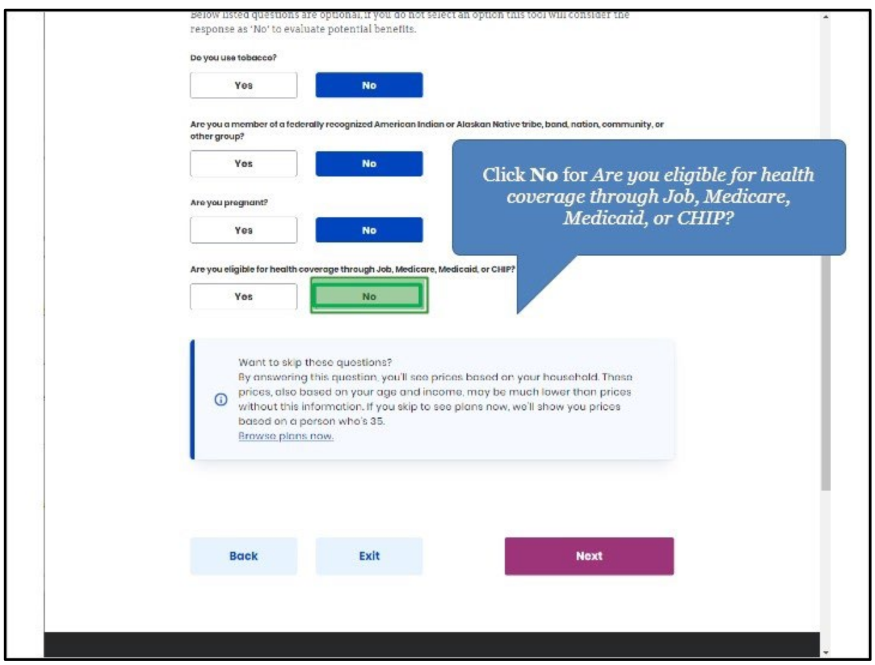


21. Click **Yes** or **No** for *Are you pregnant?.*

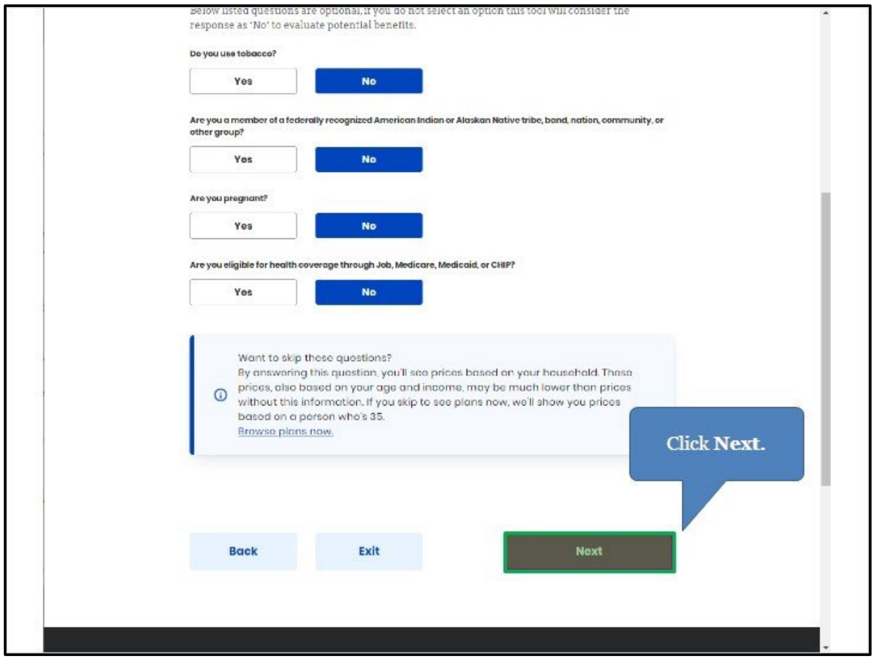


Please note: *Are you Pregnant?* populates if the Resident is female.

22. Click **Yes** or **No** for *Are you eligible for health coverage through Job, Medicare, Medicaid, or CHIP?.*



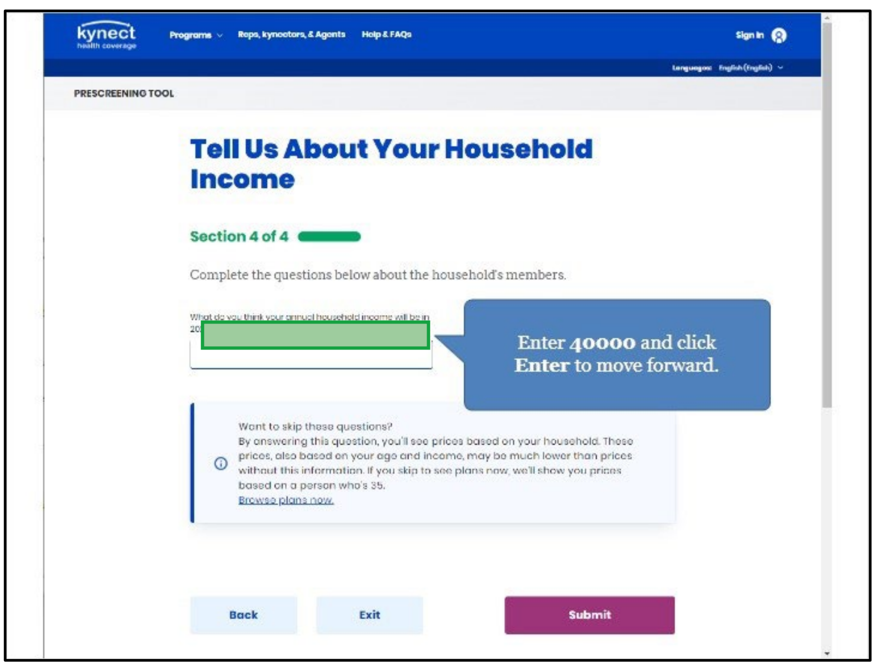
23. Click **Next** to proceed to **Section 4** of the kynect health coverage Prescreening Tool.



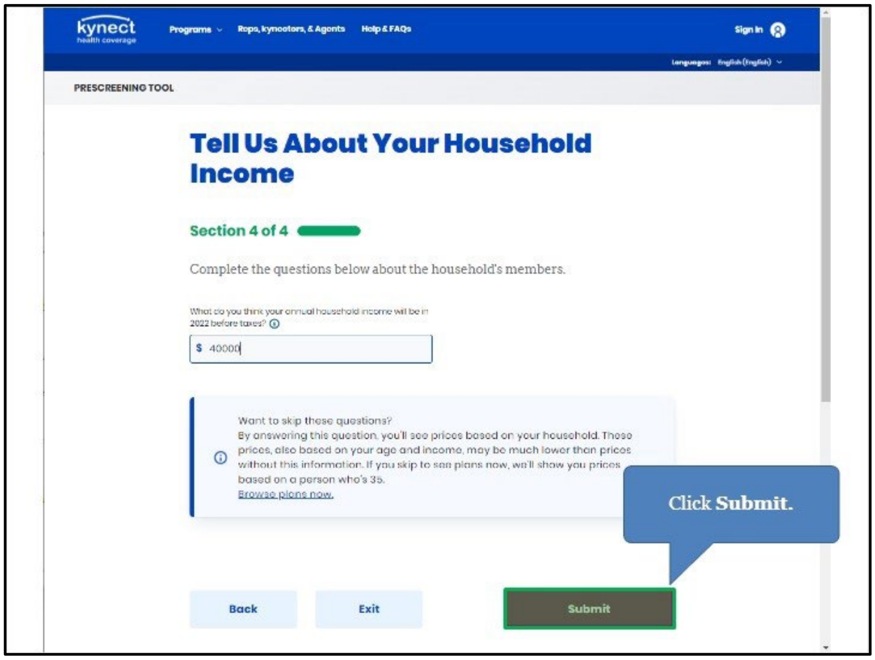
3.5 Section 4: Tell Us About Your Household Income Screen

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?.*

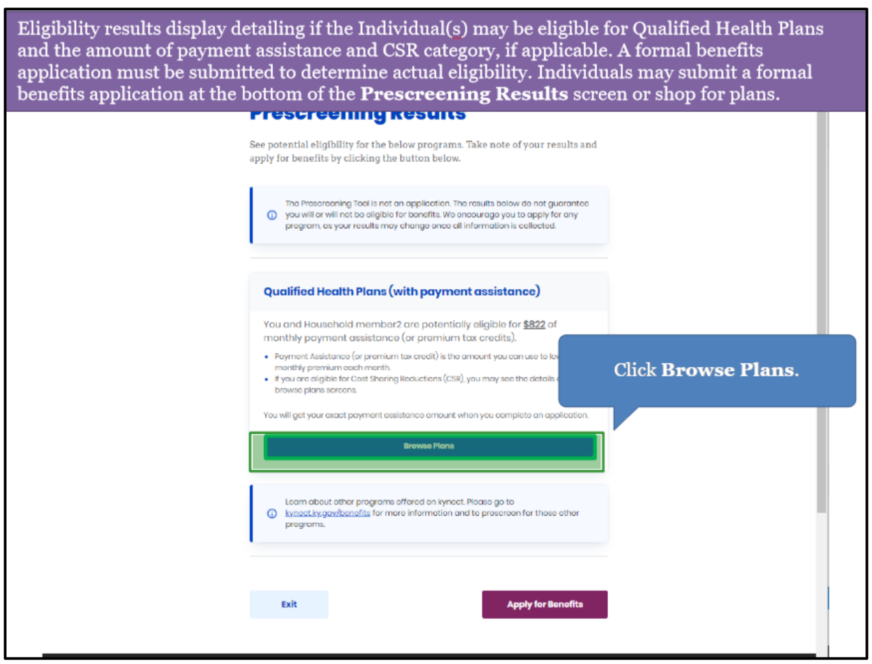


25. Click **Submit** to submit the kynect health coverage Prescreening Tool.

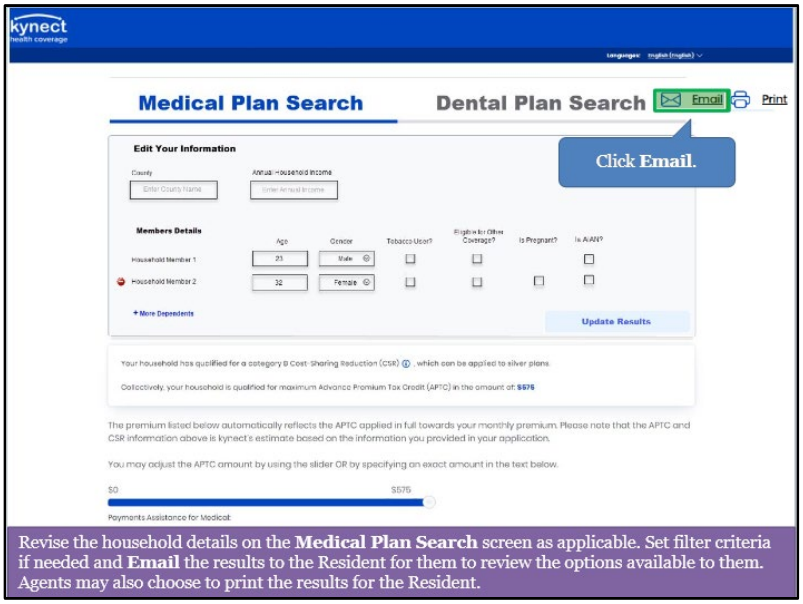


3.6 Prescreening Results Screen

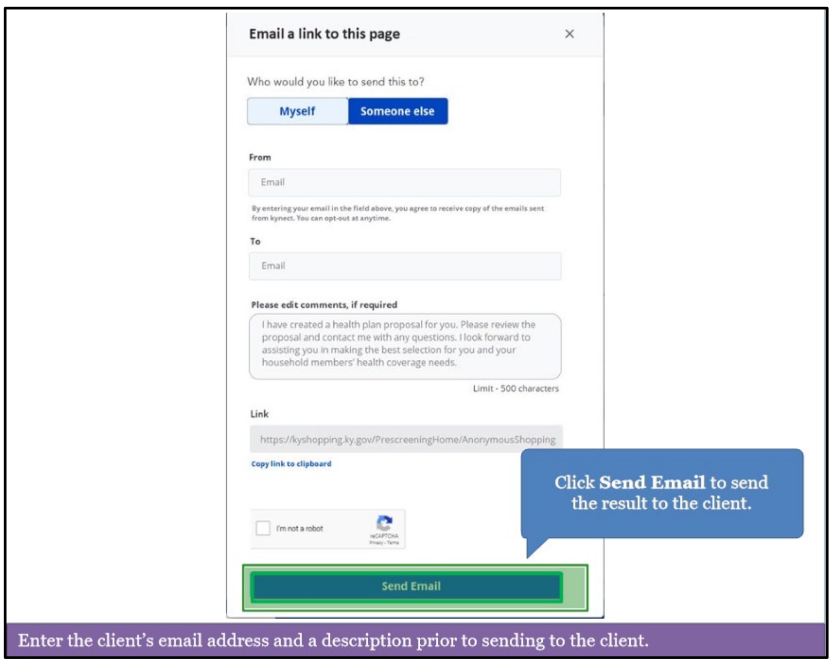
26. Prescreening results display. Click **Browse Plan** to shop for QHPs.



27. Click **Email**.



26. Click **Send Email** to send the results to the Client.



4 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