

The Commonwealth of Kentucky
kynect State-Based Marketplace



**Agent Portal Dashboard
Training Guide**

November 21, 2023

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Introduction

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

Table of Contents

1	Agent Portal Dashboard	4
1.1	Agent Dashboard	4
1.2	Agent Portal Sign In.....	5
1.3	My Clients.....	7
1.4	My Policy Screen	12
1.5	My Prospects	12
1.6	My Quotes Screen.....	14
1.7	Create Quote	15
1.8	My Delegates Screen.....	30
1.9	Messages Screen.....	31
1.10	Settings Screen.....	31
1.11	Agent Portal Help Screen	32
2	kynect On Demand	33
2.1	Registering for kynect On Demand	33
2.2	Quick Updates.....	38
3	kynect health coverage Prescreening Tool	45
3.1	Navigating to the kynect health coverage Prescreening Tool.....	45
3.2	Section 1: Household Details Screen	47
3.3	Section 2: Tell Us About You Screen	50
3.4	Section 3: Tell Us About Household Member 2 Screen	53
3.5	Section 4: Tell Us About Your Household Income Screen	56
3.6	Prescreening Results Screen.....	57
4	Assessment	59

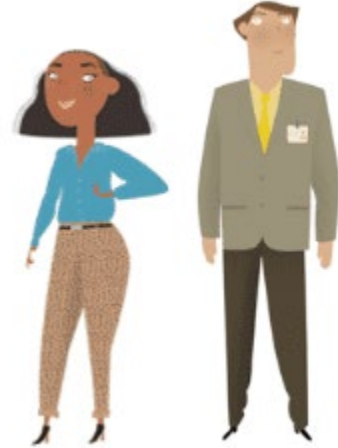
Please note: Screenshots may not be representative of actual system behavior. All specific information found in this training guide is test data and not representative of any kynect client.

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

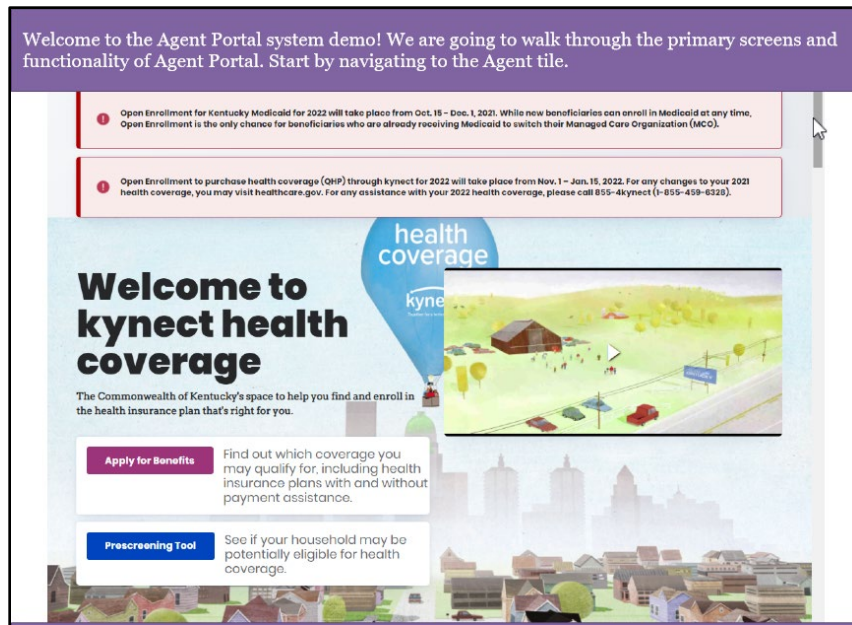
Agent Portal provides health insurance agents with a customer management tool to help manage and create new business in Kentucky. Agent Portal provides the functionality to quickly manage existing customers as well as initiate common tasks.

What will be covered in this section?

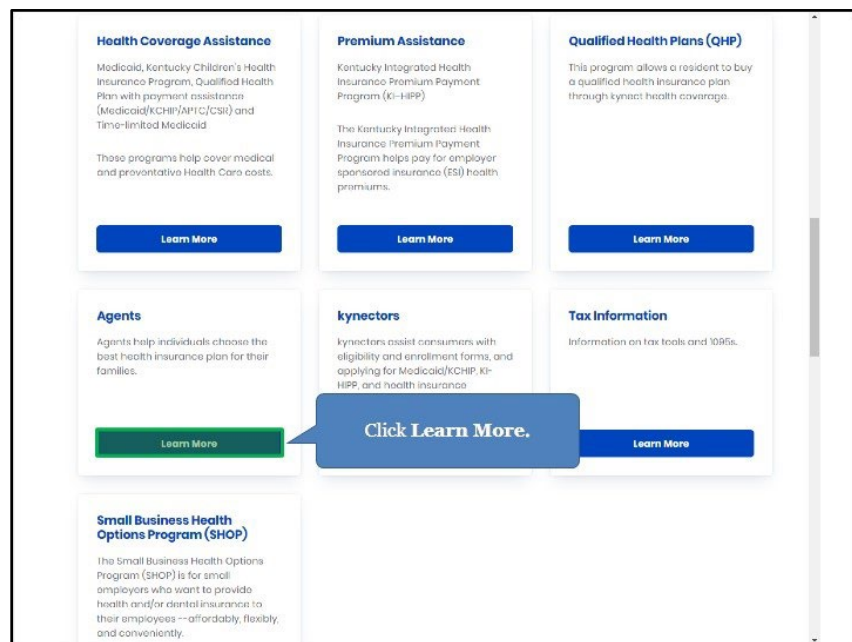
- Primary Tabs within Agent Portal such as the Overview screen, Book of Business, My Quotes, My Delegates, Messages, kynect On Demand and Settings.
- Quick Links to the benefits application, Prescreening Tool, Announcements, Issuer Websites, and Reports.
- Help Screen within Agent Portal which can be used as a resource to help navigate Agent Portal.

1.2 Agent Portal Sign In

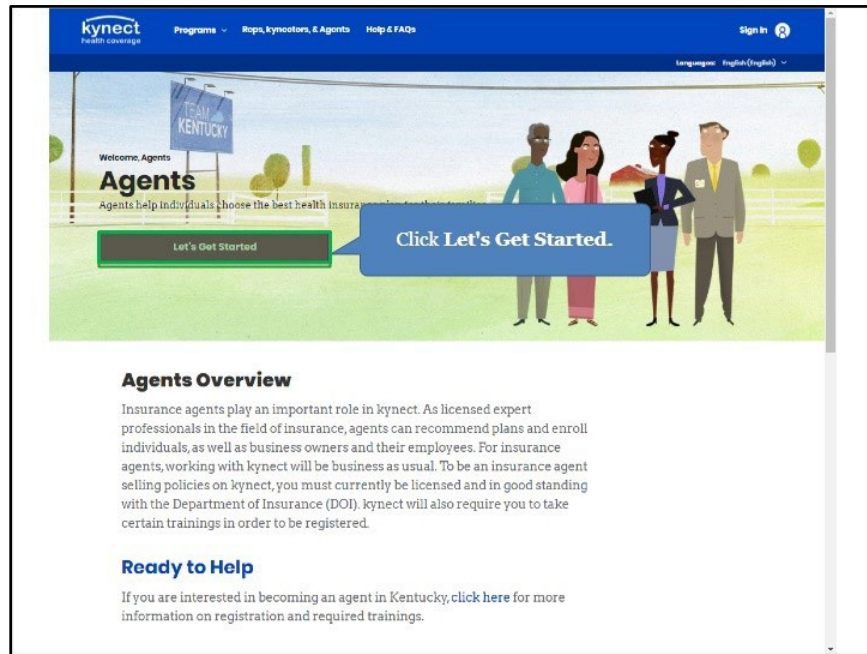
1. Navigate to the kynect health coverage [website](#).



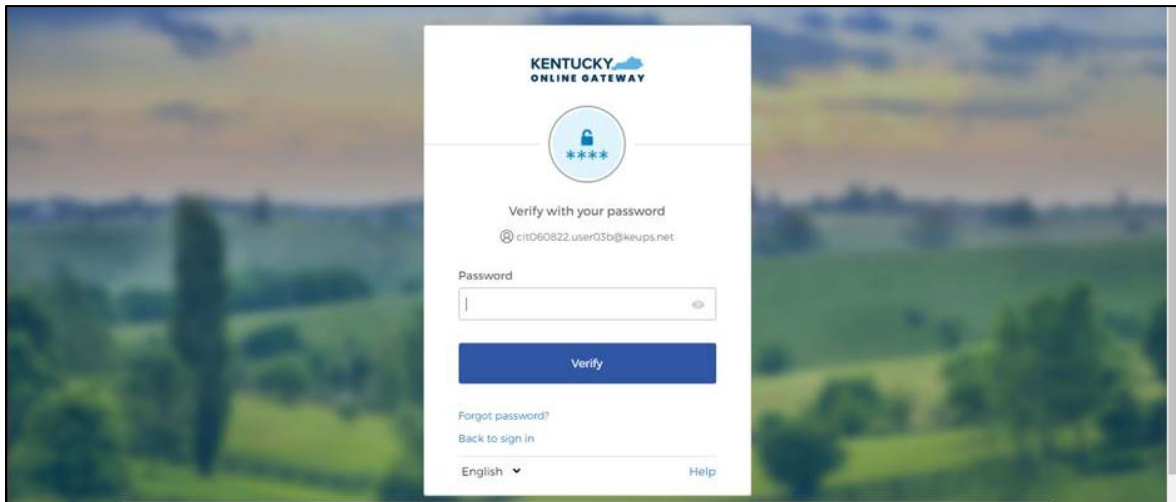
2. Click **Learn More** on the *Agents* tile.



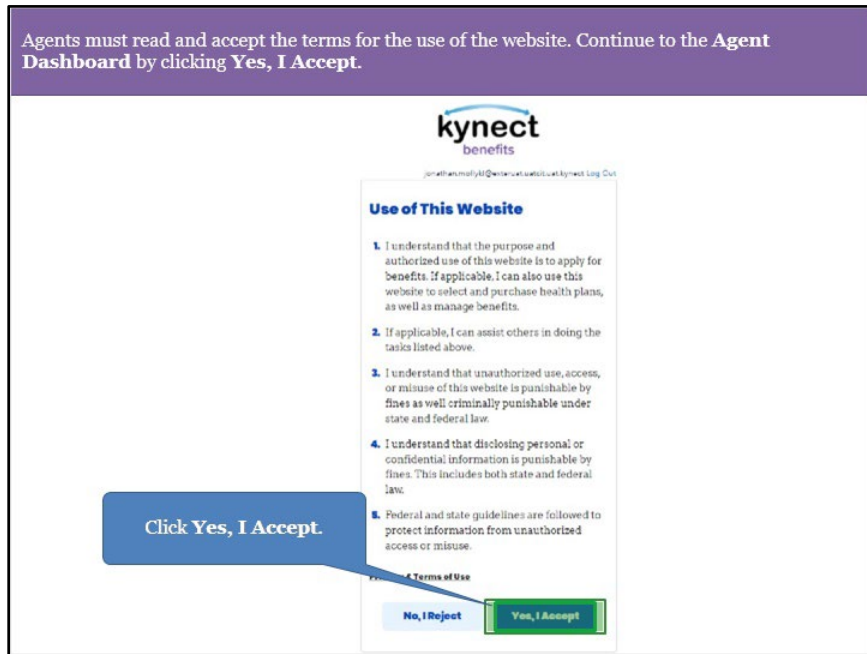
3. Click **Let's Get Started** to navigate to the Kentucky Online Gateway (KOG).



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



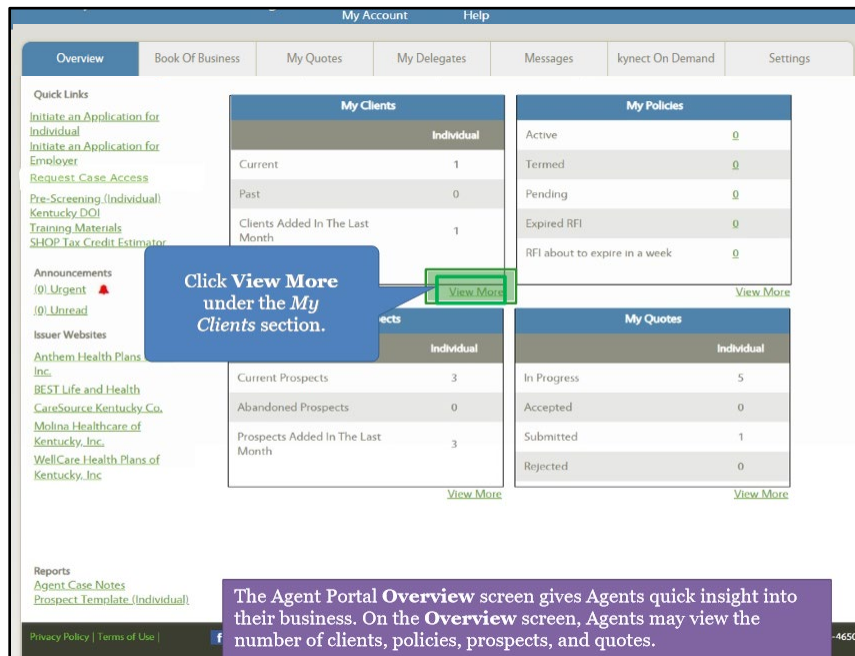
5. Review the Terms of Use and click **Yes, I Accept**.



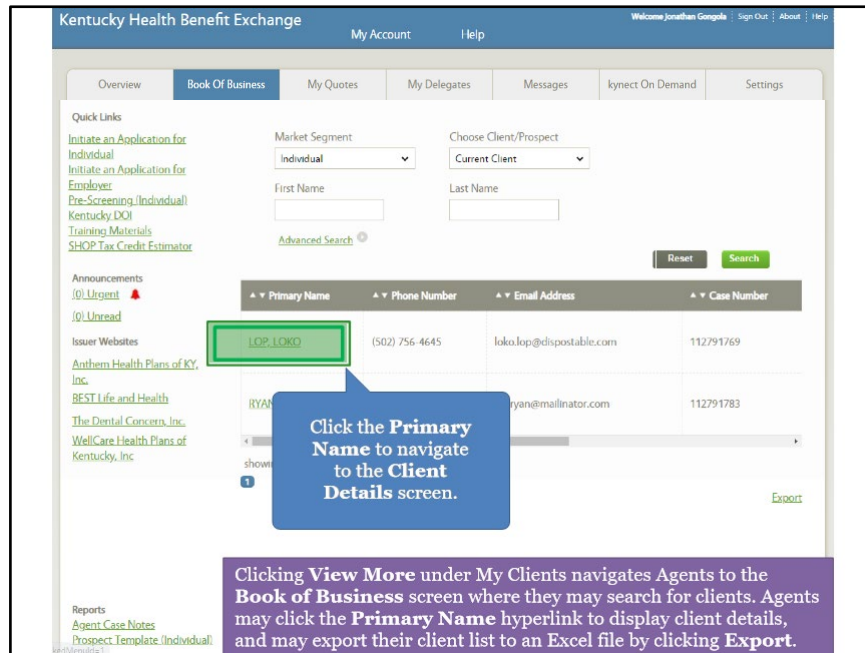
1.3 My Clients

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.

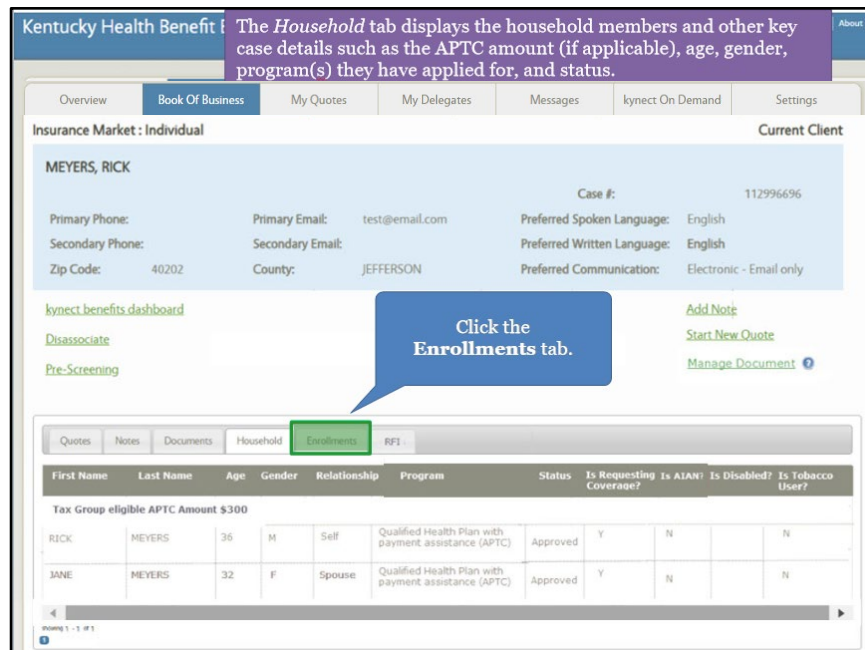
6. Click **View More** under *My Clients* to navigate to the **Book of Business** screen.



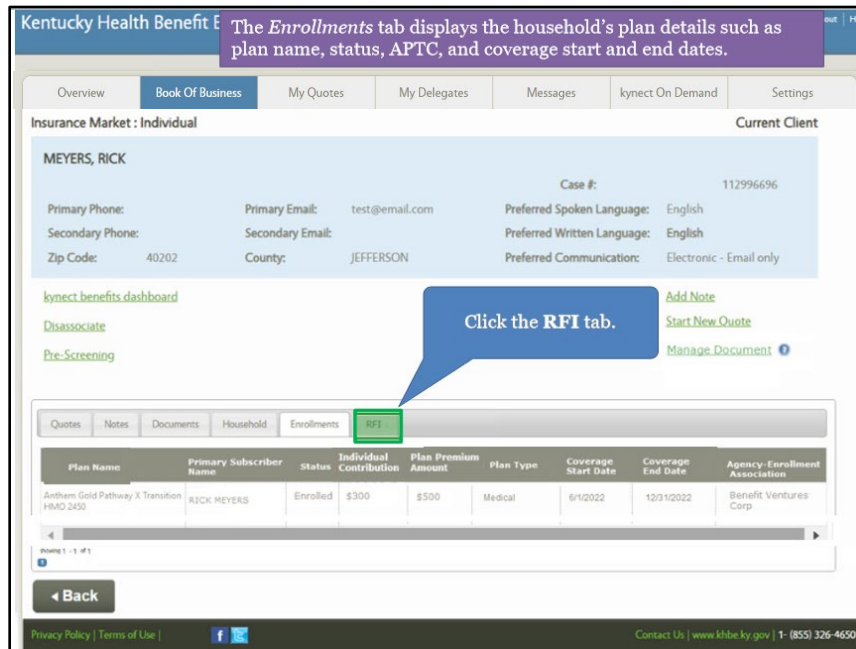
- From the **Book of Business** screen, Agents may view information on current clients.
- Click the **Primary Name** hyperlink to view client details. Agent may export their client list to an Excel file by clicking **Export**.



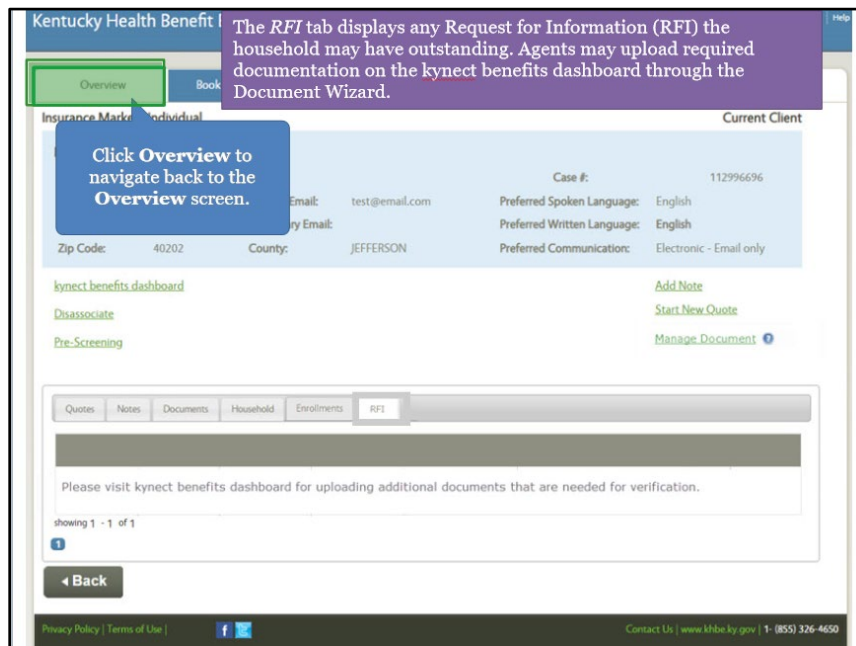
- The **Household** tab displays the household members and other key case details such as the APTC amount (if applicable), age, gender, program(s) they have applied for, and status. Click the **Enrollments** tab to view health plan details.



- 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.



- 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**.

The screenshot shows the 'My Account' dashboard with a navigation bar at the top containing 'Overview', 'Book Of Business', 'My Quotes', 'My Delegates', 'Messages', 'kynect On Demand', and 'Settings'. The 'Quick Links' section on the left has 'Request Case Access' highlighted with a green box. A blue callout box with a white border and a pointer to the link contains the text 'Click Request Case Access.' Below the callout, a purple banner reads 'Agents may request access to a Resident's case by clicking **Request Case Access**.' The dashboard also features several data tables: 'My Clients' (Current: 1, Individual: 0), 'My Policies' (Active, Termed, Pending, Expired RFI, RFI about to expire in a week), 'My Prospects' (Current Prospects: 3, Abandoned Prospects: 0, Prospects Added In The Last Month: 3), and 'My Quotes' (In Progress: 5, Accepted: 0, Submitted: 1, Rejected: 0). A footer contains 'Privacy Policy | Terms of Use' and a small '4650' number.

13. Click **Request Electronic Consent**.

The screenshot shows the 'Request Case Access' form in the 'Kentucky Health Benefit Exchange' dashboard. The form has the following fields: 'First Name' (John), 'Last Name' (Doe), 'Sex' (Male), 'Date Of Birth' (02/03/1977), 'Social Security Number' (empty), 'Case Number' (100300113), and 'Application Number' (empty). There are 'Reset' and 'Search' buttons. Below the form, a message states: 'You do not currently have an Agent association with the client JOHN DOE. Please confirm that JOHN DOE has given permission for Maria West to serve as an Agent. Clicking "Request Electronic Consent" will send a notification to the client based on communication preferences. Please request the client to accept the request by logging in to kynect benefits or responding to the survey in the text message or email.' A green box highlights the 'Request Electronic Consent' button. A blue callout box with a white border and a pointer to the button contains the text 'Click Request Electronic Consent.' At the bottom, there are 'Cancel' and 'Next' buttons. The footer includes 'Privacy Policy | Terms of Use', social media icons, and contact information: 'Contact Us | www.khbe.ky.gov | 1-(855) 326-4650'.

14. Click **Confirm Verbal Consent**.

Kentucky If the Resident does not respond to the Electronic Consent within 90 seconds, Agents may click **Confirm Verbal Consent**. If the case has a previous association, the new request will be overridden.

Quick Links
[Initiate an Application for Individual](#)
[Initiate an Application for Employer](#)
[Request Case Access](#)
[The Screening Individual](#)
[Kentucky DOI](#)
[Training Materials](#)
[SHOP Tax Credit Estimator](#)

Announcements
 (0) Latest
 (0) Unread

Issue Websites
[Anthem Health Plans of KY, Inc.](#)
[BEST Life and Health](#)
[CareSource Kentucky Co.](#)
[Medina Healthcare of Kentucky, Inc.](#)
[WellCare Health Plans of Kentucky, Inc.](#)

Reports
[Agent Case Notes](#)

Request Case Access

* First Name:
 Last Name:
 * Gender:
 * Date Of Birth: MM/DD/YYYY
 Social Security Number:
 Case Number:
 Application Number:

You do not currently have an Agent association with this client. **Client did not respond**. Please confirm that Client DID give permission for Please Stop to serve as an Agent.

Clicking "Request Electronic Consent" will send a notification to the client based on communication preferences. Please require the client to accept the request by logging in to kyncent benefits or responding to the survey in the last message or email.

Click Confirm Verbal Consent.

Verbal Consent
 Please agree to the following to confirm consent from the client. If you do, you will be unable to associate with this application or a case.

Acknowledgment to the Terms
 The client will receive a confirmation of this agreement and will be able to remove association to the agent at any time via kyncent benefits.

Please note: If a case is already associated with an Agent, kyncent will override and allow another Agent to request case access via electronic consent.

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

Kentucky Health Benefit Exchange My Account Help

Overview Book Of Business My Quotes My Delegates Messages Settings

Quick Links
[Initiate an Application for Individual](#)
[Initiate an Application for Employer](#)
[Request Case Access](#)

Request Case Access

* First Name: John Last Name: Doe
 * Sex: * Date Of Birth:

Confirmation Message

You have been given access to this individual's case as their Agent. You may manage the individual's case information by accessing this individual from your dashboard.

Client did not respond

Click OK.

Verbal Consent
 Please agree to the following to confirm consent from the client. If you do, you will be unable to associate with this application or a case.

Acknowledgment to the Terms
 The client will receive a confirmation of this agreement and will be able to remove association to the agent at any time via kyncent benefits.

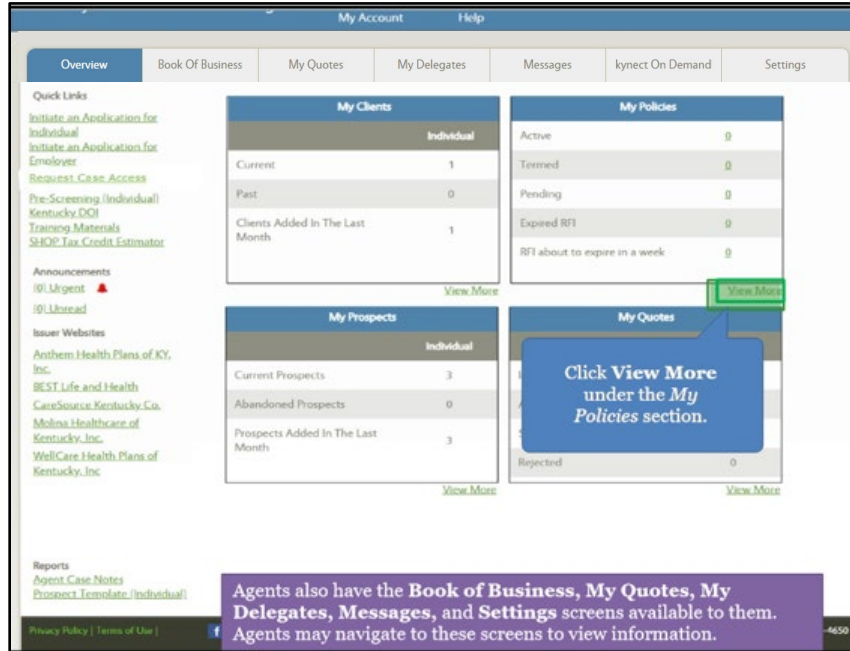
Reports
[Agent Case Notes](#)
[Inspect Template Individual](#)

After reading through the acknowledgement and receiving Verbal Consent, Agents may click OK to complete association with the Client.

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, Termined, Pending, Issuer, MCO, Expired RFI, RFI about to Expire, Plan Type, and Enrollment Status.

18. Click the policy **Name** hyperlink to view additional details.

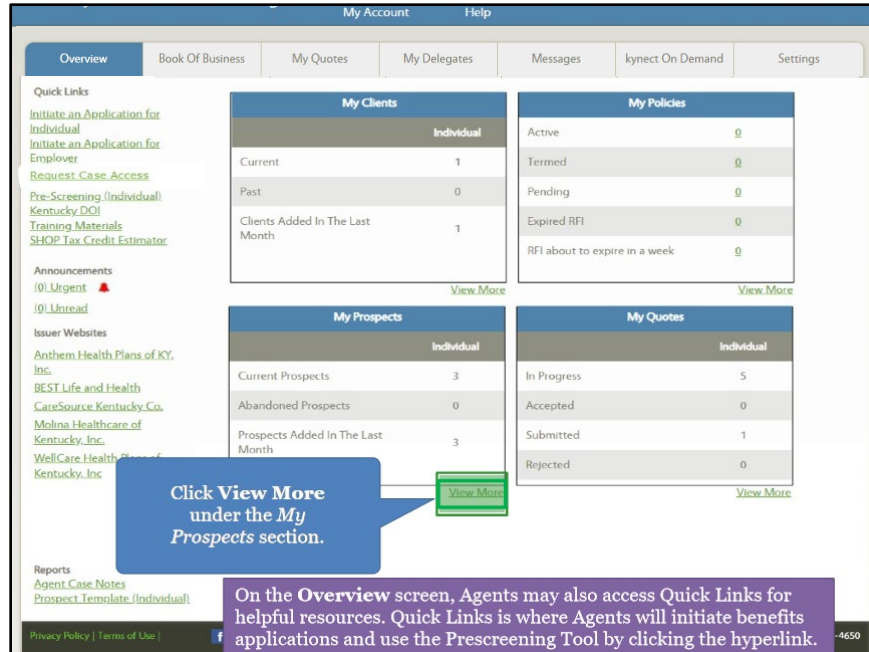
19. Enter **information** into the fields and click **Search** to search for policies.

20. Click **Overview** to navigate back to the **Overview** screen.

1.5 My Prospects

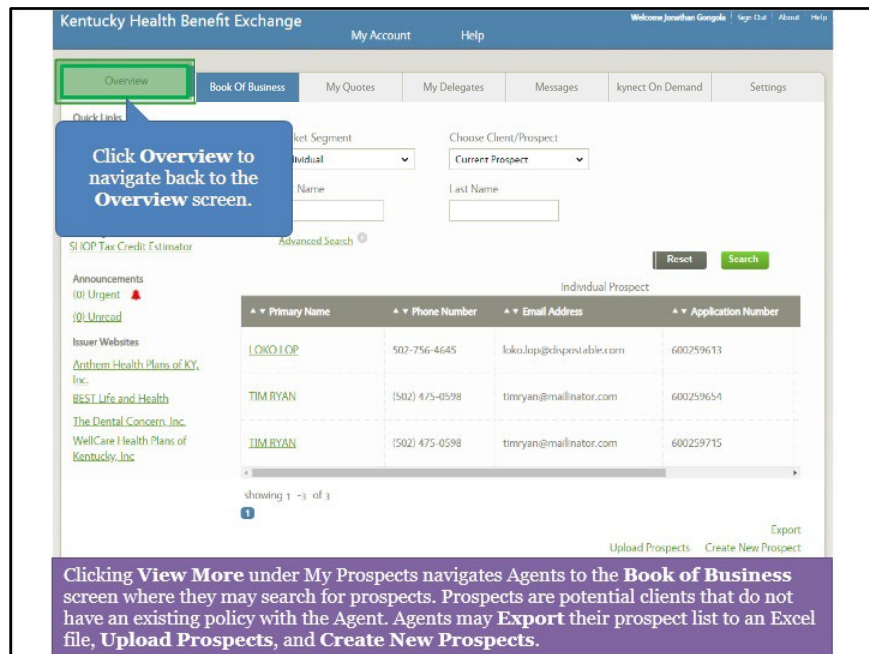
From the **Overview** screen, Agents may navigate to the **Book of Business** screen. The **Book of Business** screen allows Agents to view information on their Prospects. Prospects are potential clients that do not have an existing policy with the Agent.

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.



Clicking **View More** under My Prospects navigates Agents to the **Book of Business** screen where they may search for prospects. Prospects are potential clients that do not have an existing policy with the Agent. Agents may **Export** their prospect list to an Excel file, **Upload Prospects**, and **Create New Prospects**.

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.

The screenshot shows the 'My Account' dashboard with a navigation bar at the top containing 'Overview', 'Book Of Business', 'My Quotes', 'My Delegates', 'Messages', 'kynect On Demand', and 'Settings'. The 'Overview' section is active, displaying a sidebar with 'Quick Links', 'Announcements', 'Issuer Websites', and 'Reports'. The main content area features four summary tables: 'My Clients', 'My Policies', 'My Prospects', and 'My Quotes'. The 'My Quotes' table has a 'View More' link highlighted by a blue callout box with the text 'Click View More under the My Quotes section.' A purple banner at the bottom states 'Agents may also navigate to Announcements, Issuer Websites, and Reports from the Overview screen.'

My Clients		My Policies	
	Individual		
Current	1	Active	0
Past	0	Termed	0
Clients Added In The Last Month	1	Pending	0
		Expired RFI	0
		RFI about to expire in a week	0

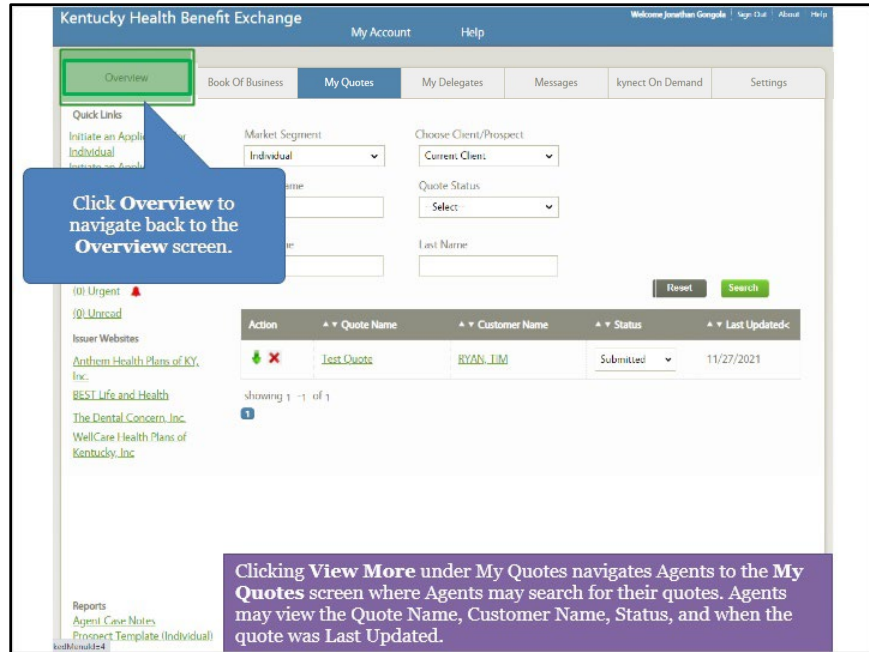
My Prospects		My Quotes	
	Individual		Individual
Current Prospects	3	In Progress	5
Abandoned Prospects	0	Accepted	0
Prospects Added In The Last Month	3	Submitted	1
		Rejected	0

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.

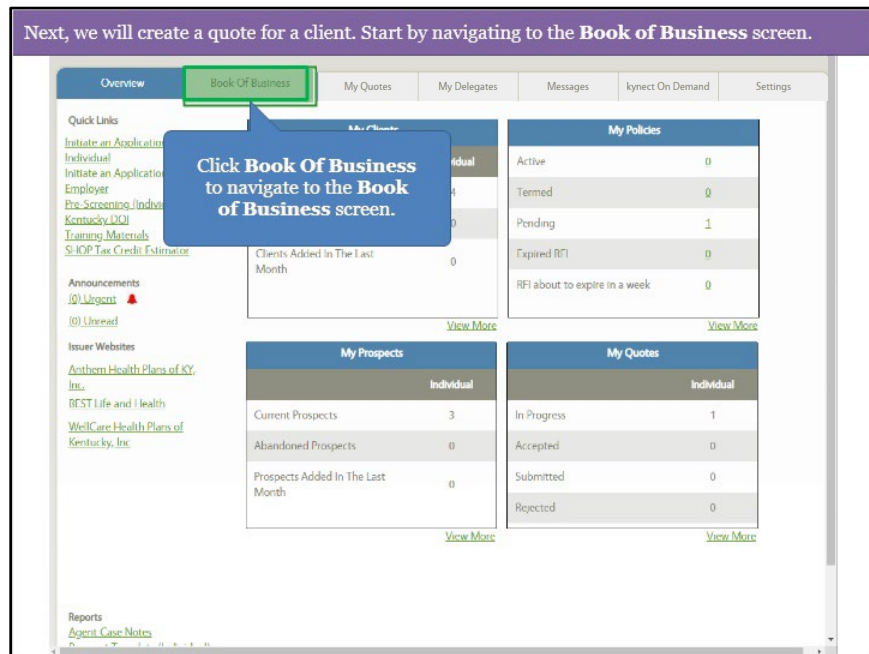
29. Enter **information** into the fields and click **Search** to search for quotes.

30. Click **Overview** to navigate back to the **Overview** screen.



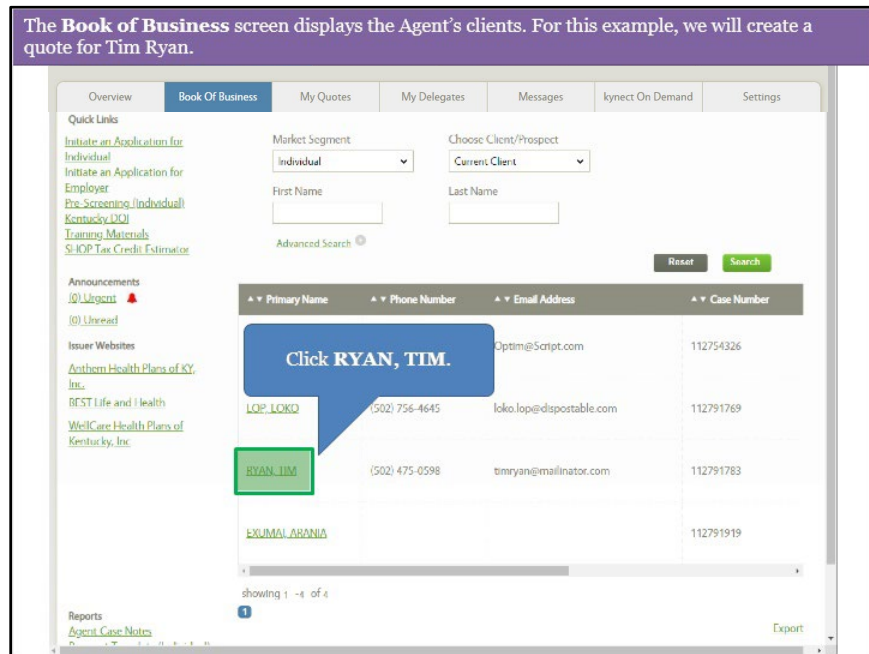
1.7 Create Quote

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

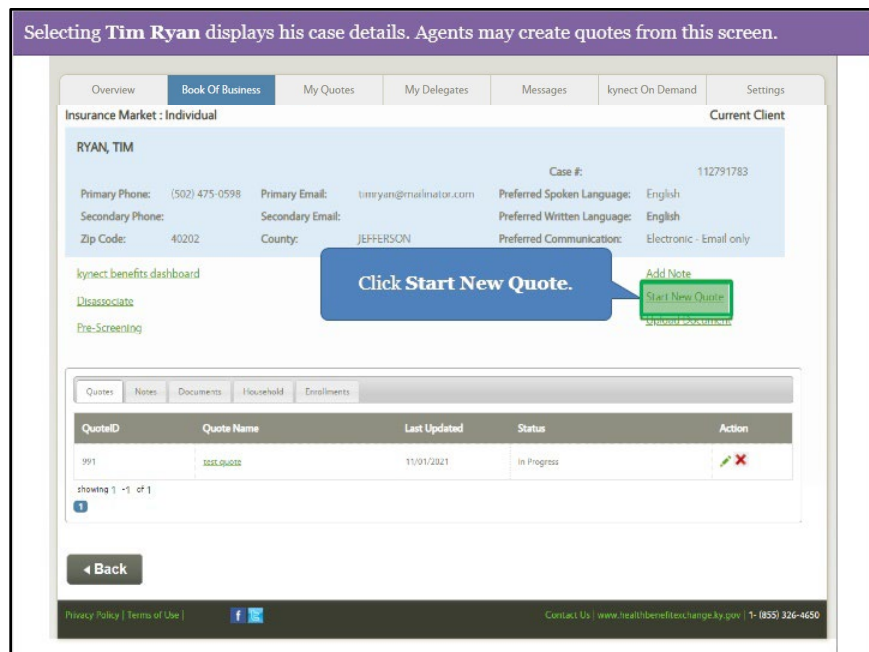


On the **Book of Business** screen, Agents may search for Clients or Prospects and select a **Name** that displays in the table to create a quote.

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.

Next, enter information to initiate a quote.

Select the Quote Name box.

Please note: The quoting tool will consider the coverage effective start date and age. Premiums are determined based on the age of the enrollee at the time of enrollment.

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

Enter 2147 for the Monthly Income and click Enter to move forward.

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

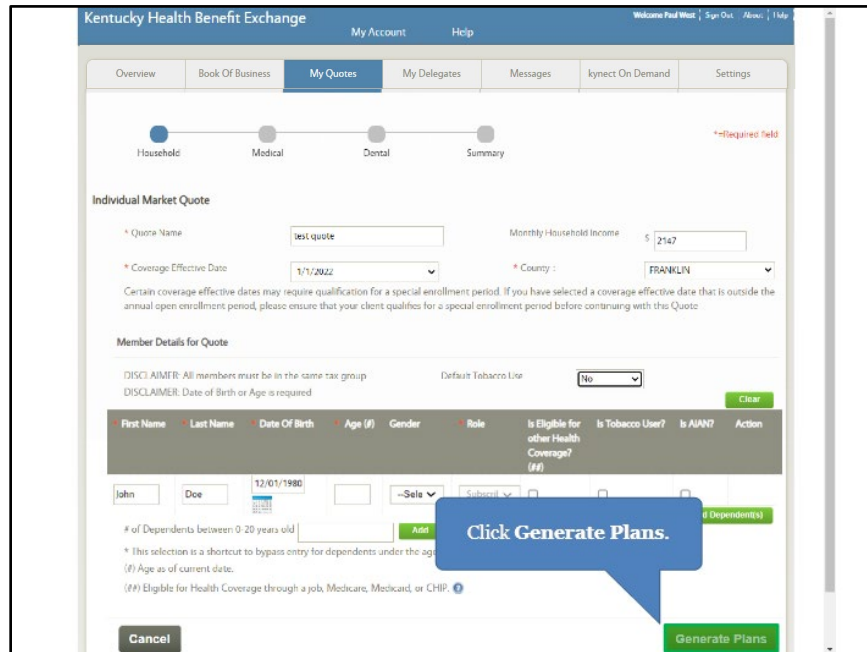
The screenshot shows the 'Individual Market Quote' form. The 'Coverage Effective Date' dropdown is open, and a blue callout box highlights the '1/1/2022' option. The form includes fields for 'Quote Name' (test quote), 'Monthly Household Income' (\$ 2147), and 'Country' (FRANKLIN). Below the form is a table for 'Member Details for Quote' with columns for First Name, Last Name, Date Of Birth, Age (if), Gender, Role, Is Eligible for other Health Coverage?, Is Tobacco User?, Is AIAAD?, and Action. The first member listed is John Doe, born 12/01/1980, with a role of 'Self'. There are 'Add Spouse' and 'Add Dependents' buttons at the bottom right.

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

The screenshot shows the 'Individual Market Quote' form. The 'Default Tobacco Use' dropdown is open, and a blue callout box highlights the 'No' option. The form includes fields for 'Quote Name' (test quote), 'Monthly Household Income' (\$ 2147), and 'Country' (FRANKLIN). Below the form is a table for 'Member Details for Quote' with columns for First Name, Last Name, Date Of Birth, Age (if), Gender, Role, Is Eligible for other Health Coverage?, Is Tobacco User?, Is AIAAD?, and Action. The first member listed is John Doe, born 12/01/1980, with a role of 'Self'. There are 'Add Spouse' and 'Add Dependents' buttons at the bottom right.

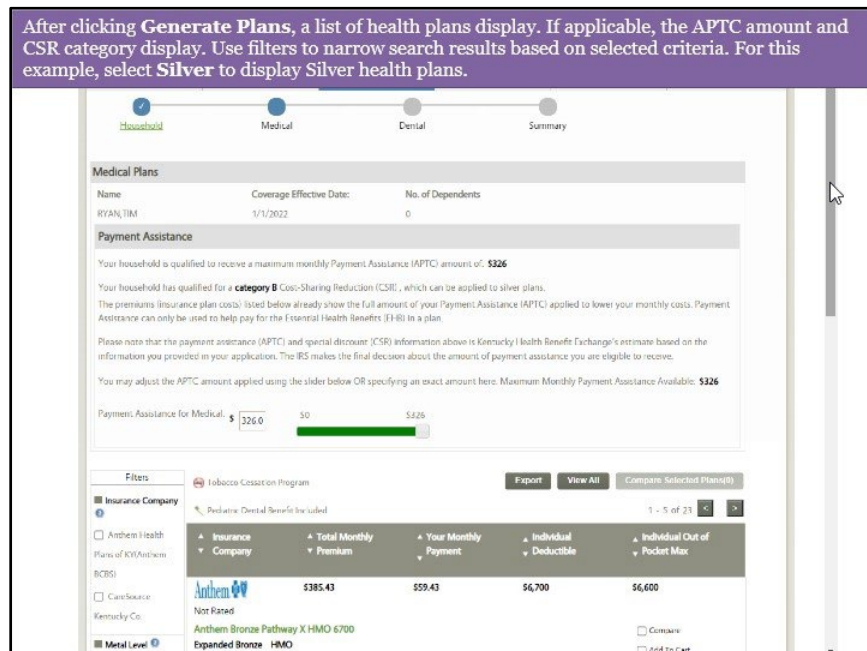
Please note: If the Resident has a spouse and/or dependent(s), Agents may add those members to the quote by clicking **Add Spouse** or **Add Dependents**.

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

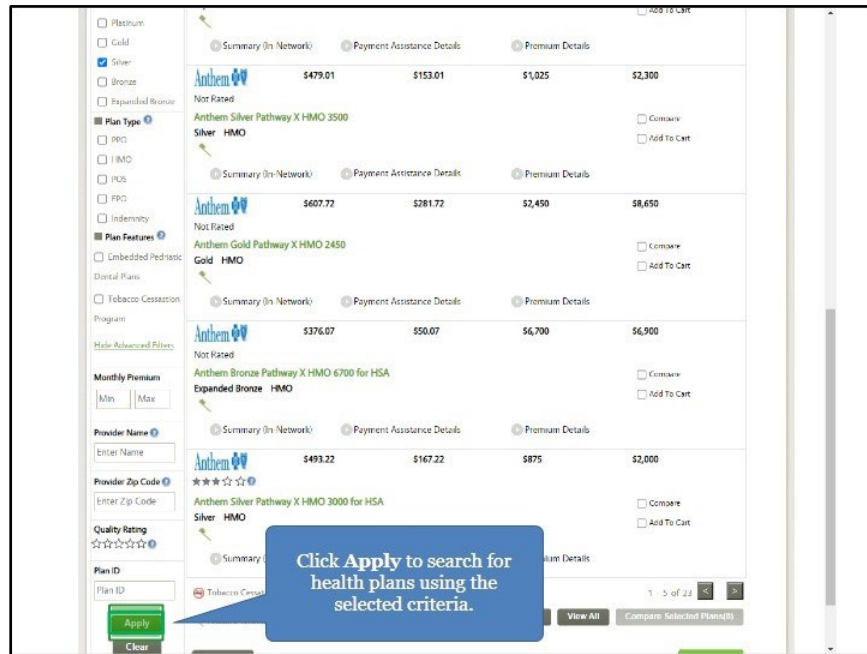


Please note: The Client/Prospect automatically generates in *Member Details* when initiating a quote, however the **Age** and **Gender** must be entered. Additionally, Agents should indicate whether each household member is eligible for other health coverage or if they use tobacco by checking the applicable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

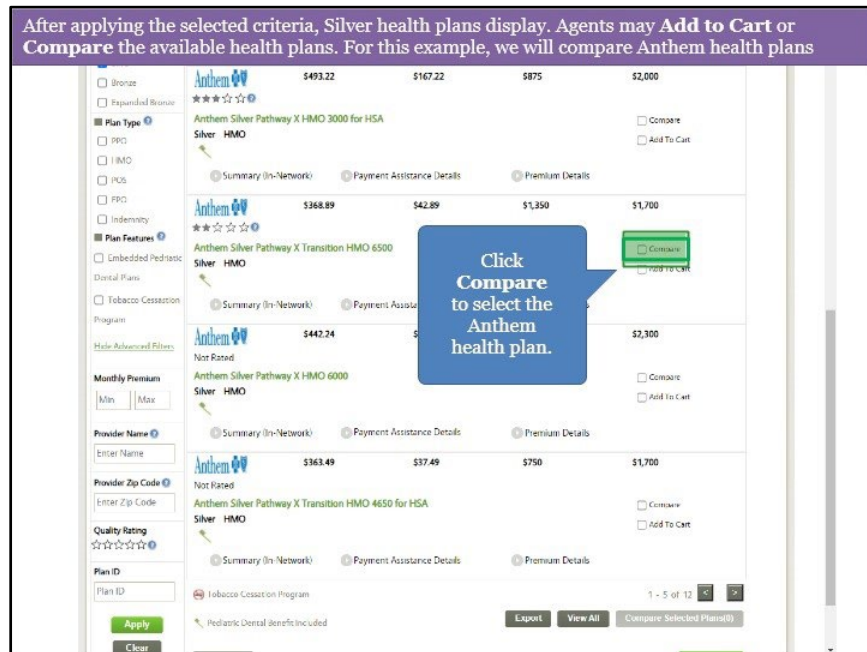
39. A list of Medical plans displays that the Agent may view, or they may narrow the search results by selecting filter criteria such as **Silver Metal Level**. At the top of the screen, the Resident's APTC and CSR category display, if applicable.



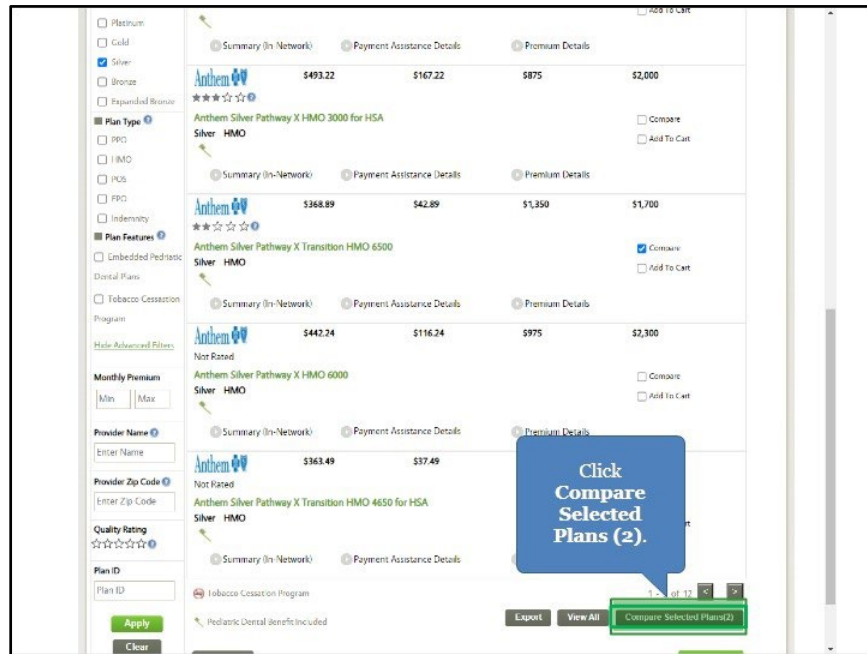
40. Click **Apply** to filter search results based on the selected filter criteria.



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

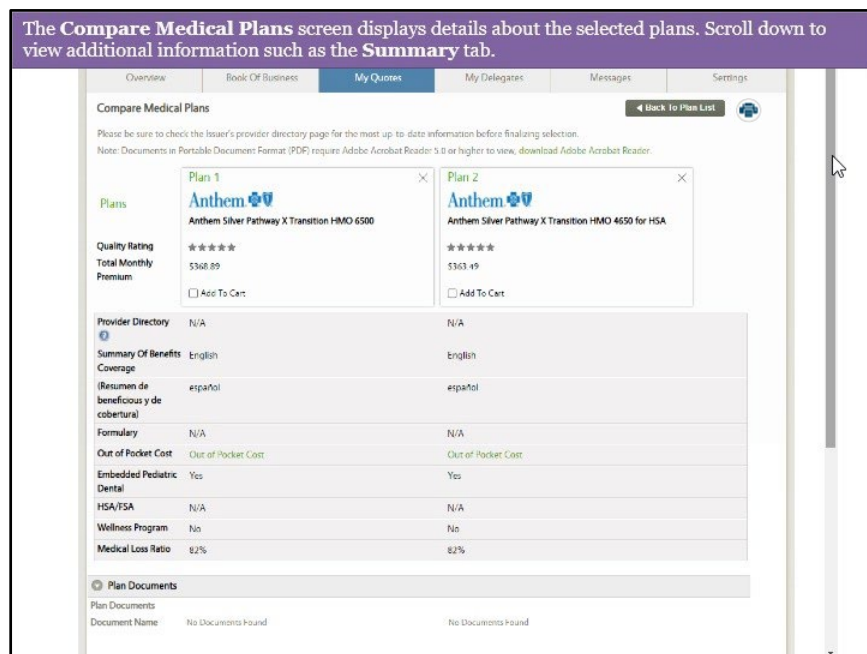


42. Click **Compare Selected Plans (2)**.

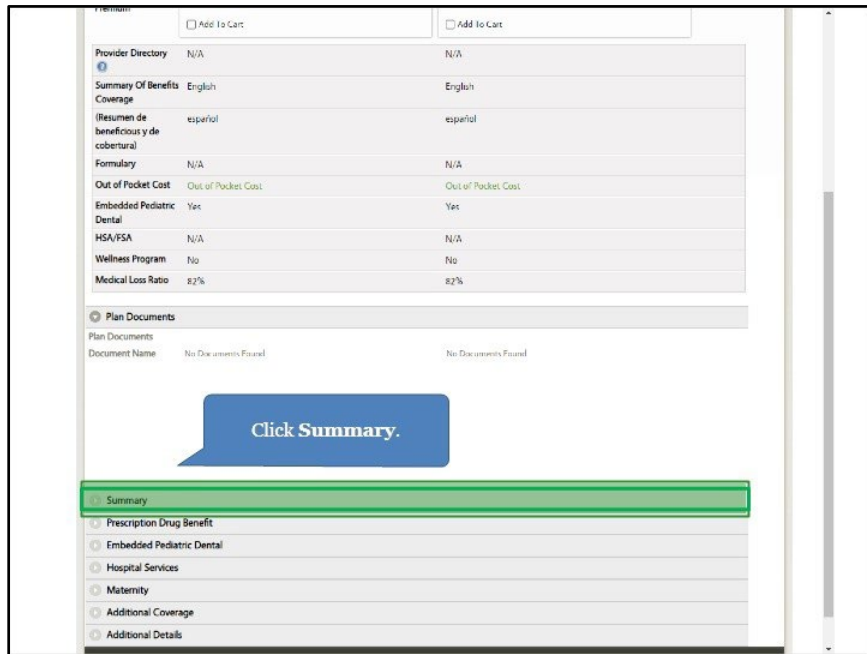


Please note: The number for **Compare Selected Plans** changes depending on the number of plans selected.

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



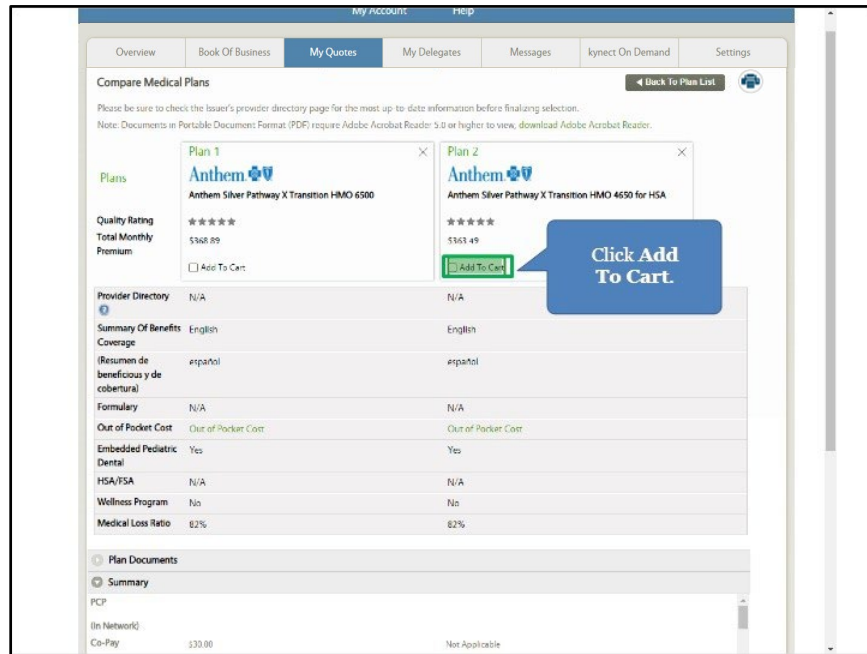
44. Click any of the **tabs** below such as **Summary** to display additional plan information.



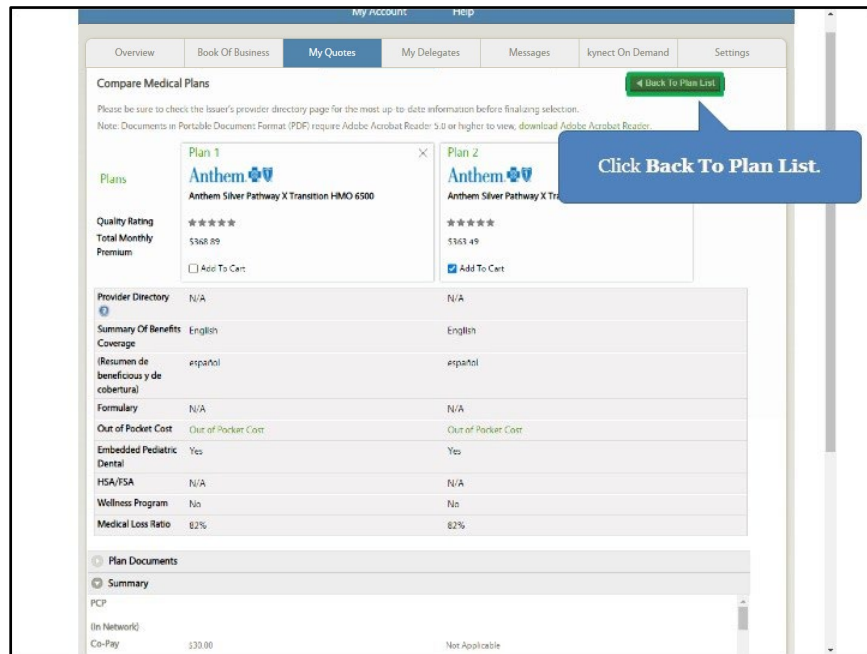
45. Review the plan information.



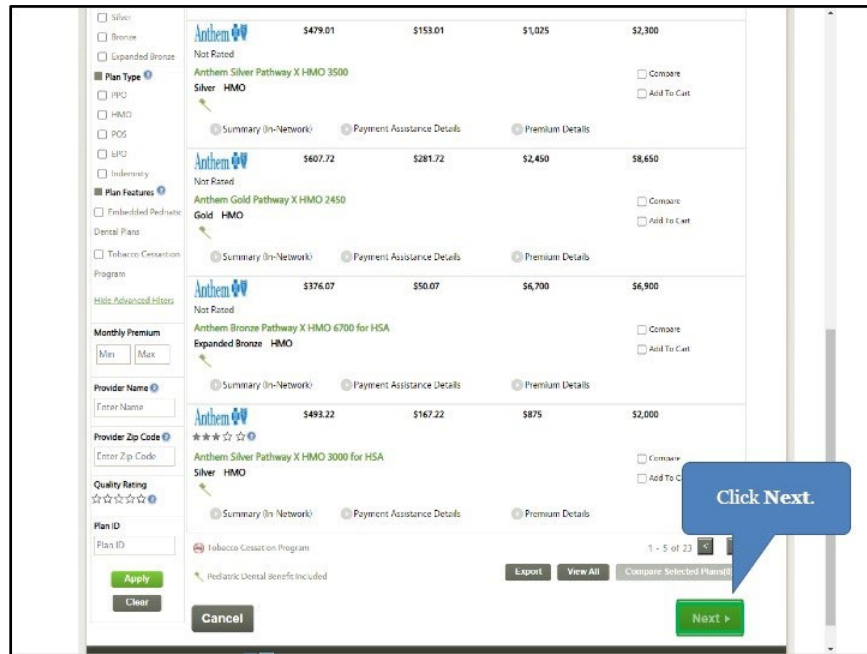
46. Click **Add to Cart** to add a Medical plan to the quote.



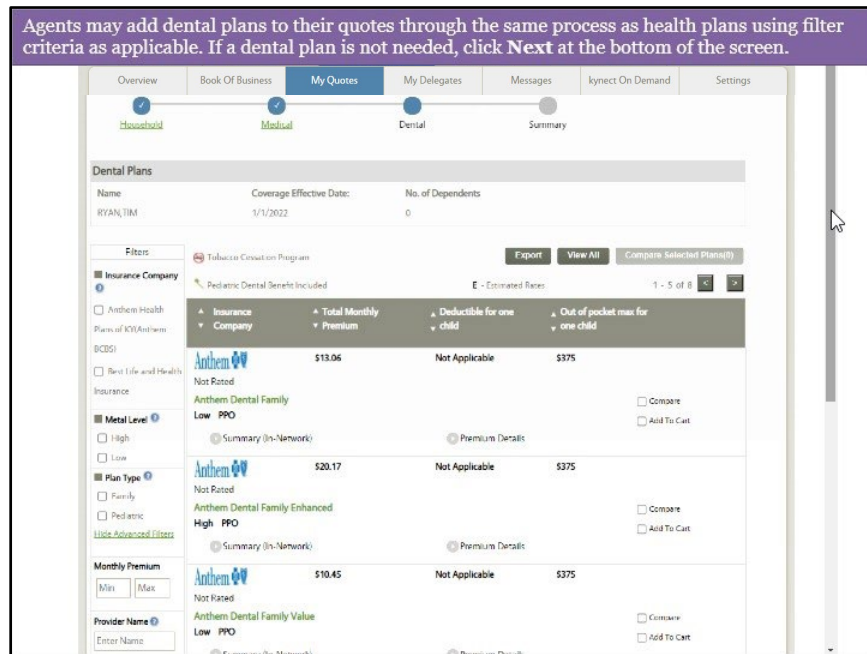
47. After adding a Medical plan to their cart, the Agent may click **Back To Plan List** to compare additional plans as applicable.



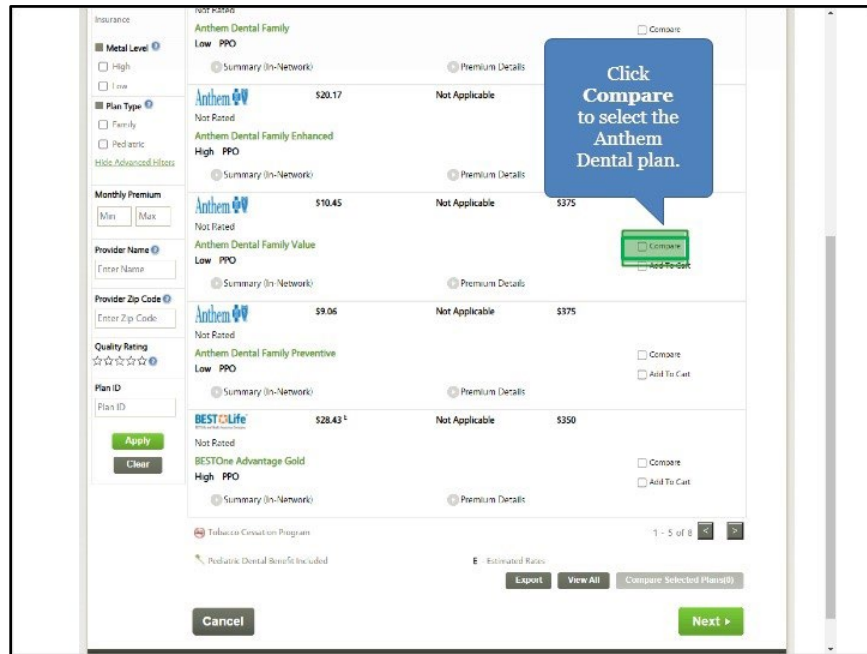
48. Click **Next** at the bottom of the screen to shop for Dental plans.



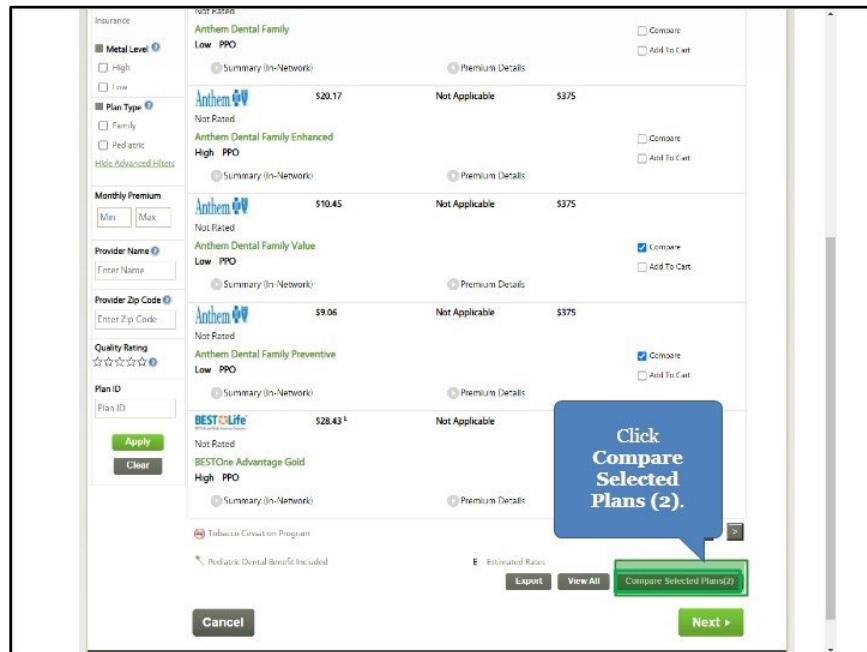
49. Agents may add a Stand-Alone Dental Plan (SADP) as applicable to the quote by following the same process outlined above for health plans.



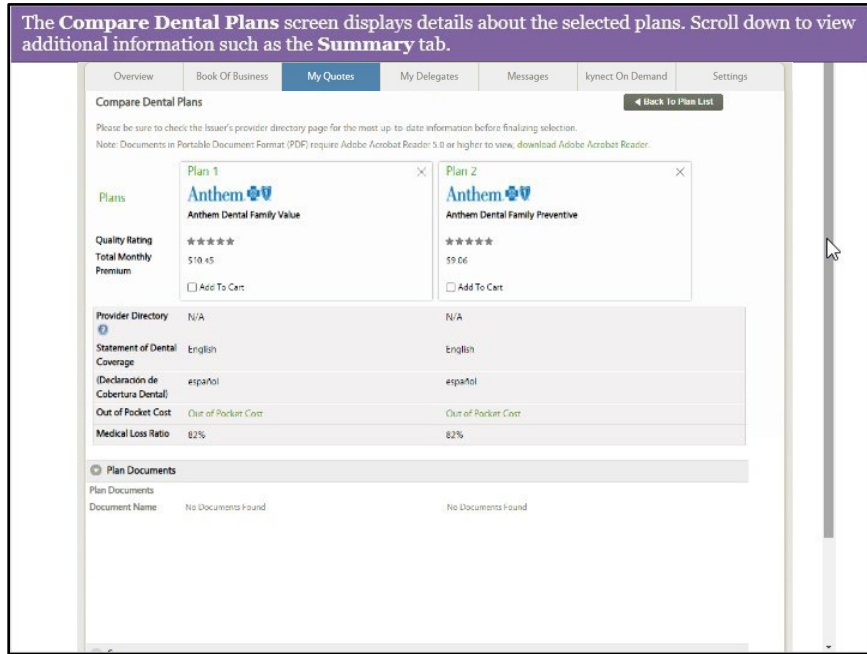
50. Click **Compare** on multiple Dental plans to compare.



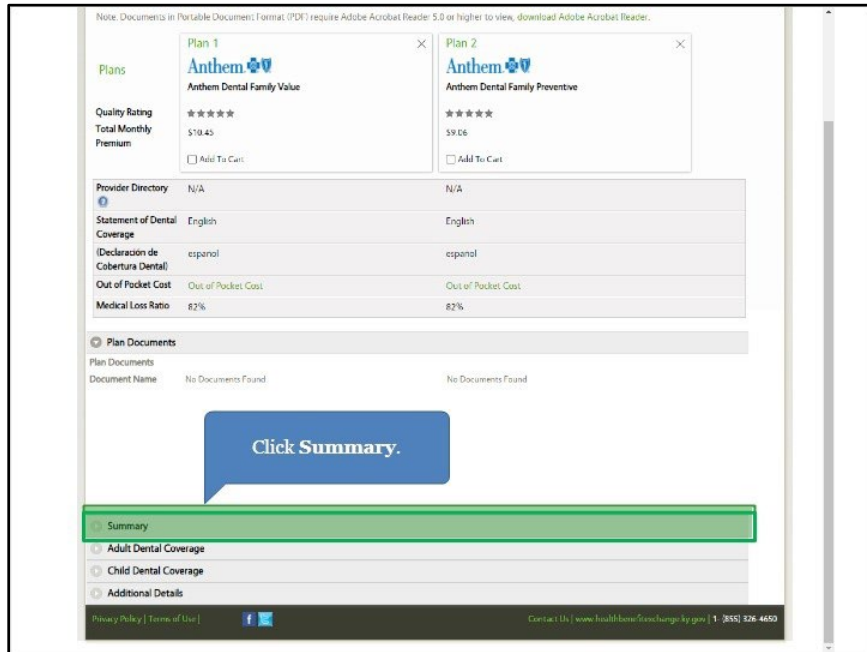
51. Click **Compare Selected Plans (2)**.



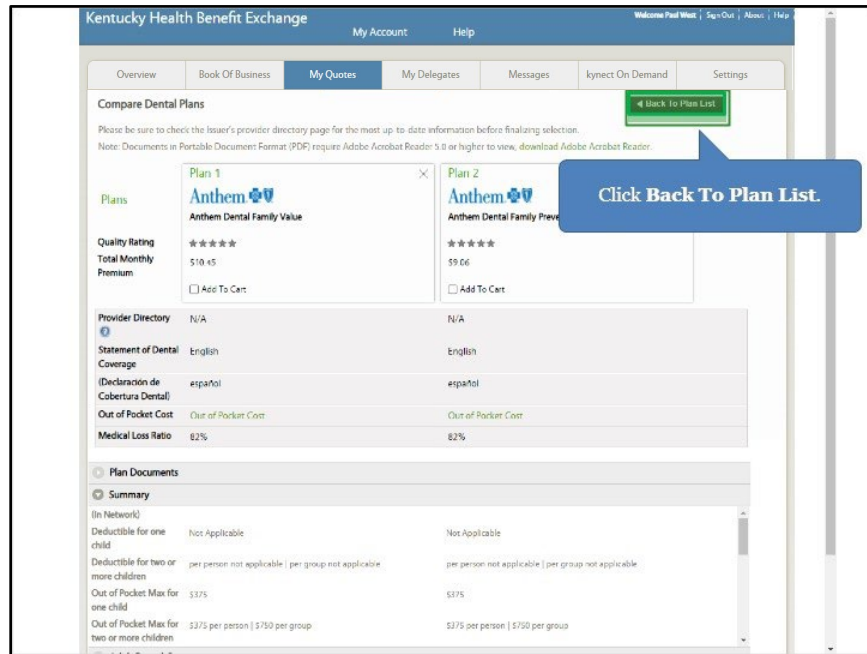
52. Review the plan information.



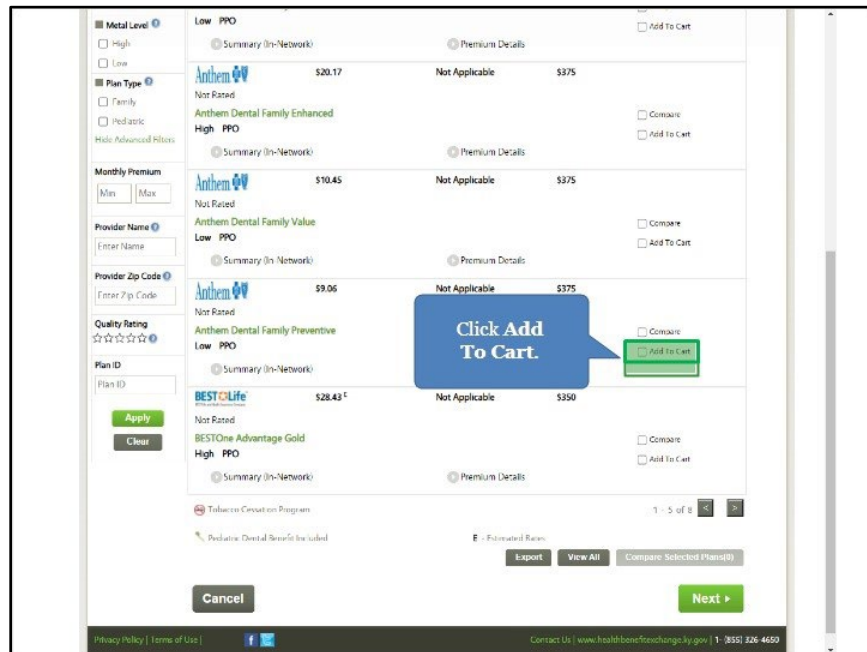
53. Click any of the **tabs** below such as **Summary** to display additional plan information.



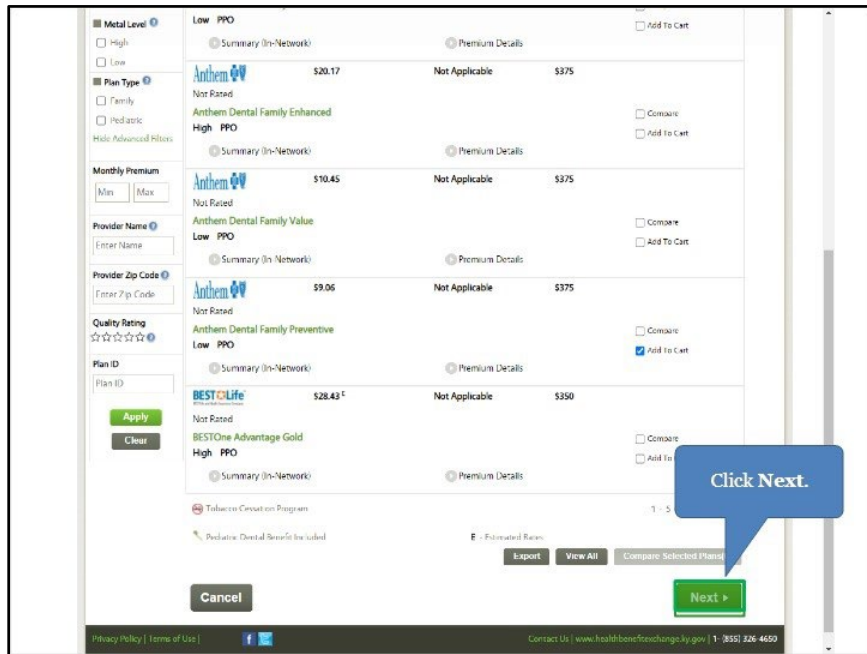
54. Click **Back To Plan List**.



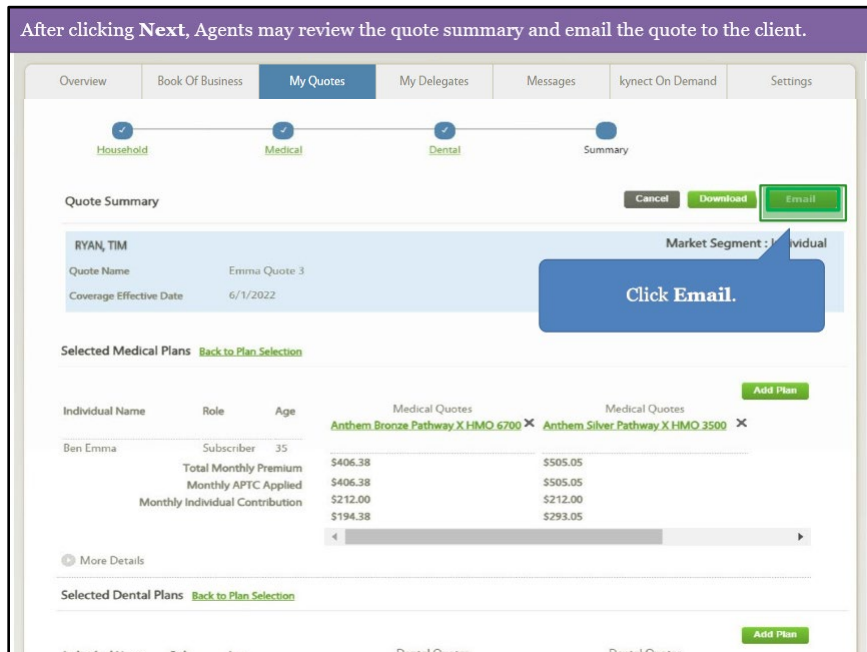
55. Click **Add To Cart** to add the desired Dental plan to the quote.



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.

Agent Portal automates a message to the client with a hyperlink so they may review the proposal. Modify the comments and recipients as needed prior to sending.

Enter the email address where you would like to send this quote

Enter the email address to receive a copy of this email (optional)

By entering your email in the field above, you agree to receive copy of the emails sent from kynect. You can opt-out at anytime.

Please edit comments, if required

I have created a health plan proposal for you. Please review the proposal and contact me with any questions. I will be happy assisting you in making the best selection for your household members' health coverage needs.

Click **Send Email** to email the quote to Tim Ryan.

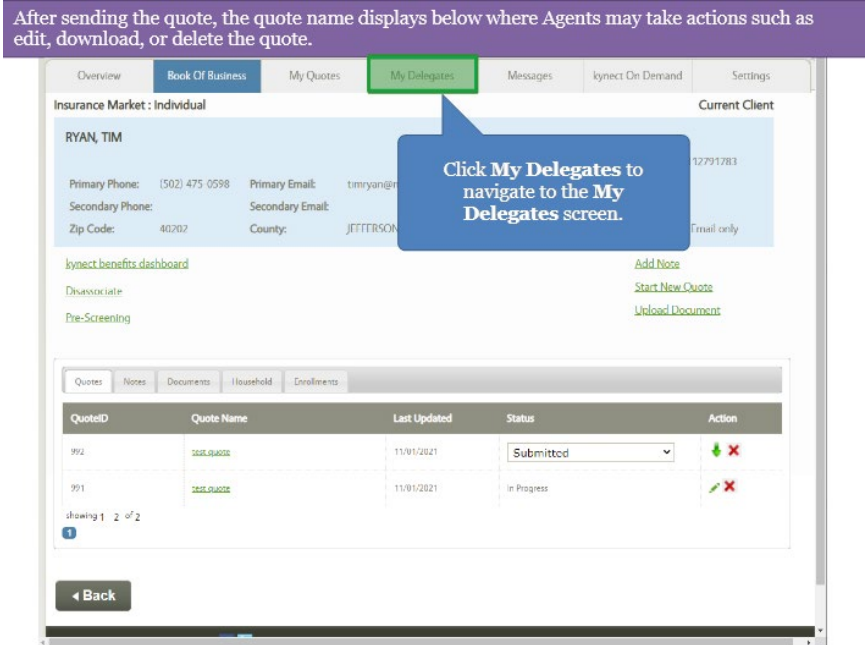
Send Email

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.

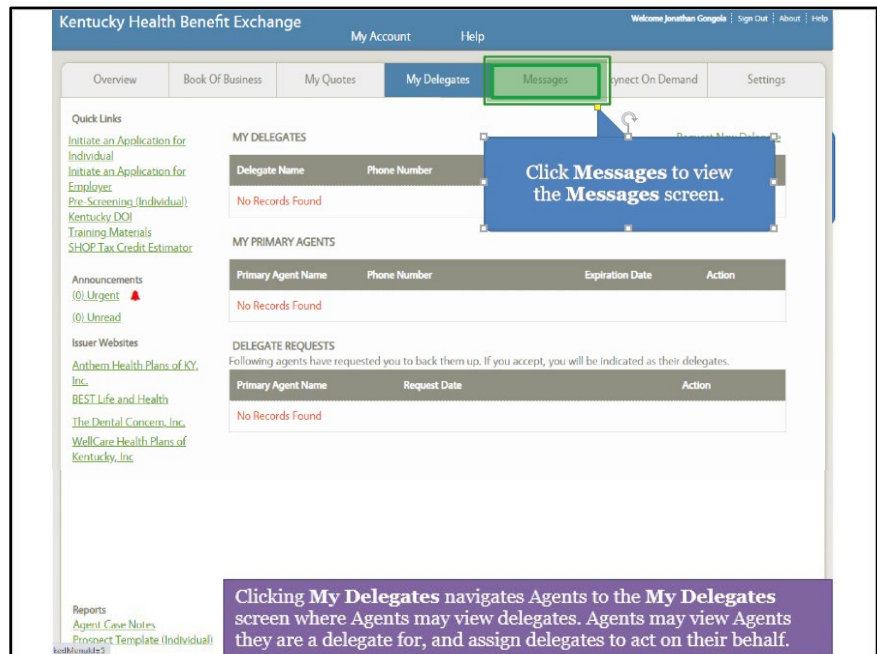
1.8 My Delegates Screen

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.



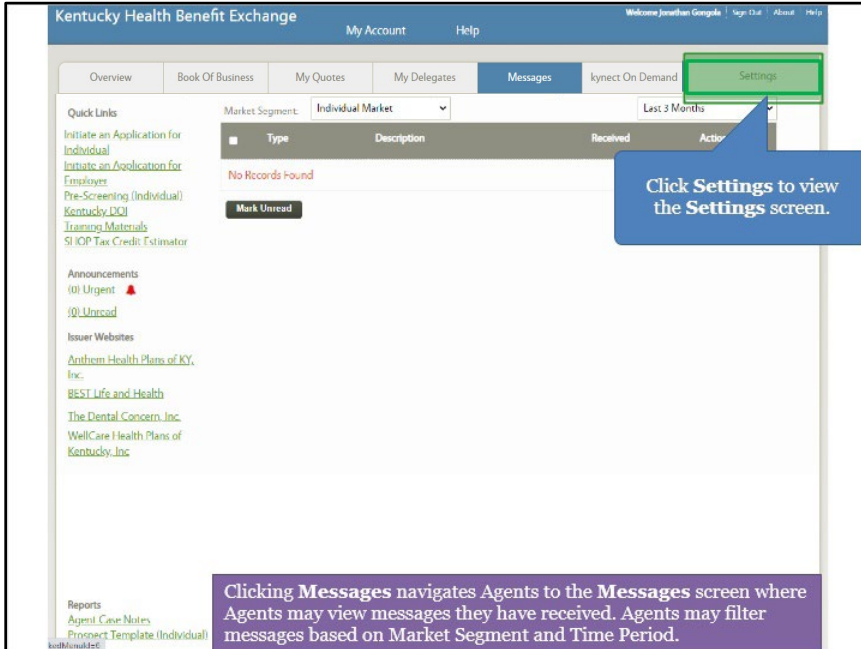
60. Click **Messages** to navigate to the **Messages** screen.



1.9 Messages Screen

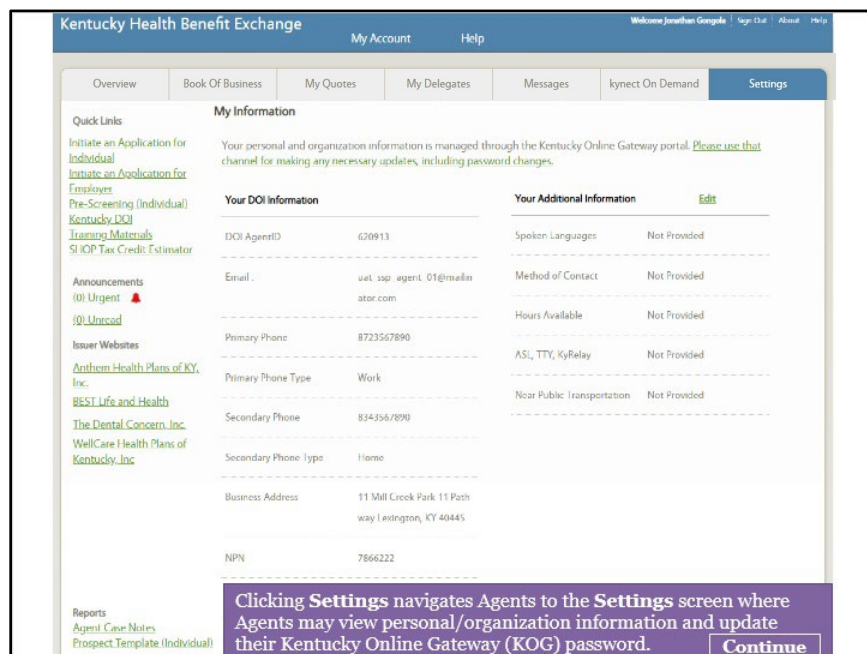
The **Messages** screen displays the Agent's recent messages they have received from kynect. Filter messages by clicking **Market Segment** and/or **Time Period**.

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



1.10 Settings Screen

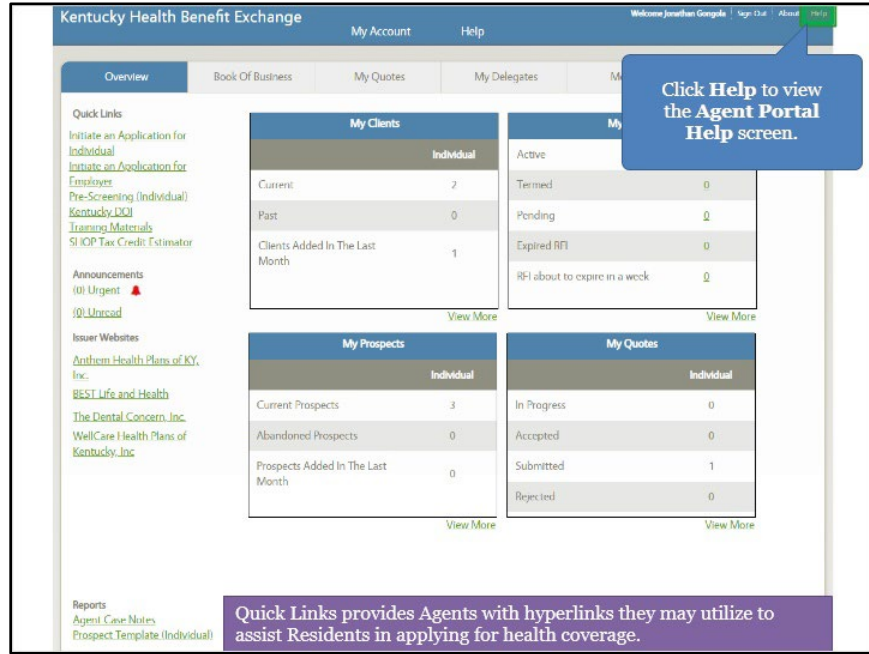
62. The **Settings** screen displays the Agent's personal and organization information. This is also where Agents update their KOG password.



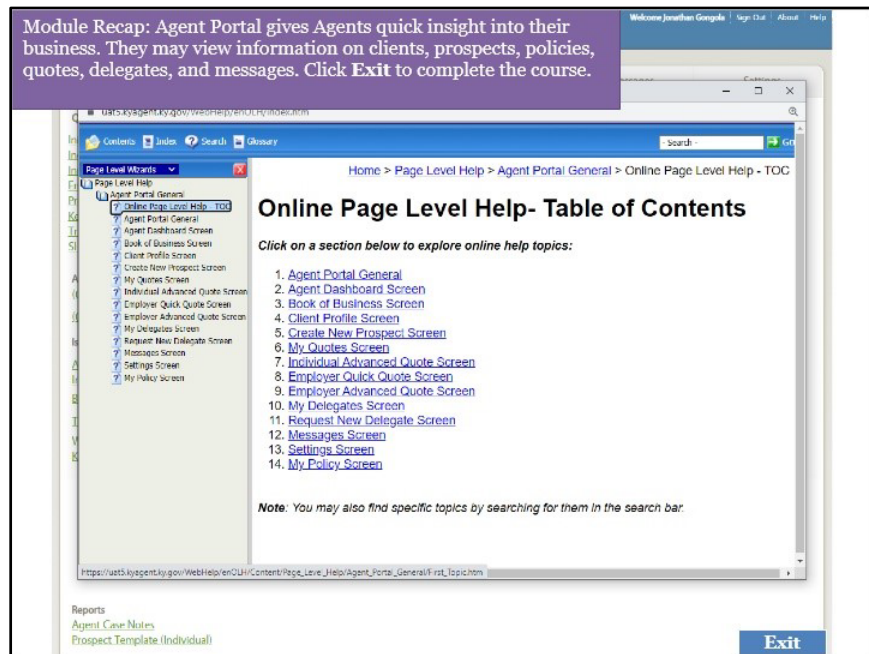
1.11 Agent Portal Help Screen

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

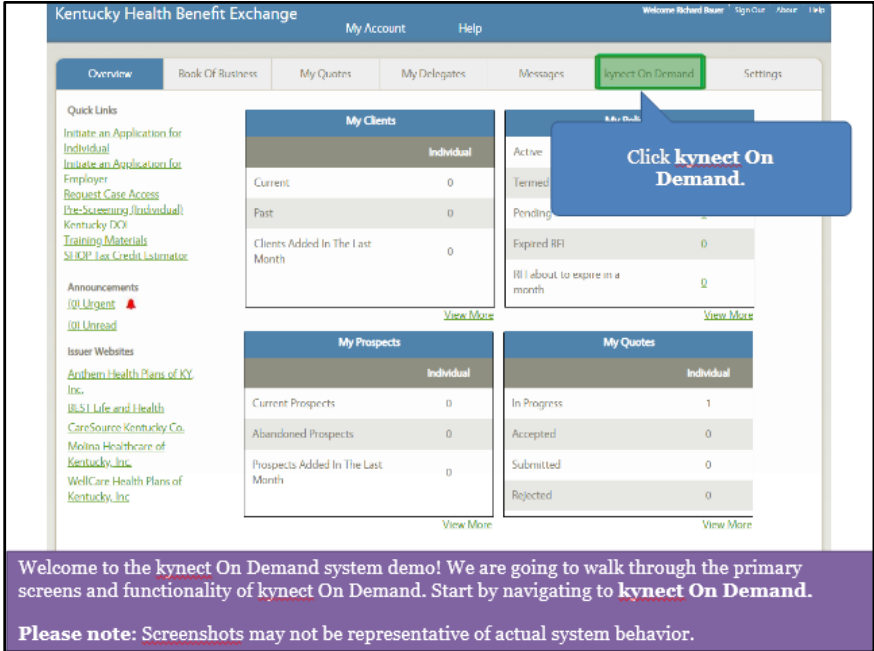
- Referral Manager
- View Metrics
- My Availability
- Preferred Contact
- De-Register

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

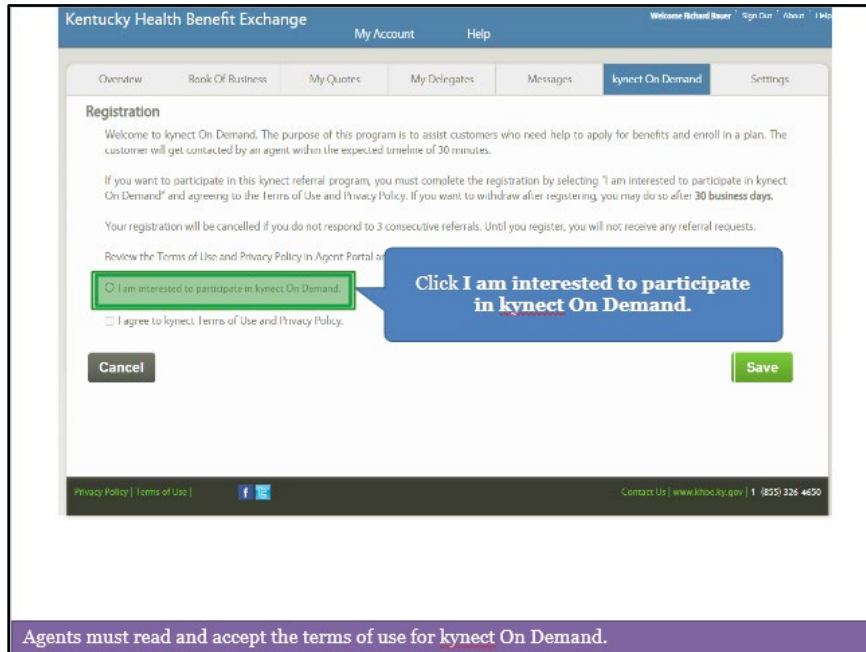
1. Click **kynect On Demand**.



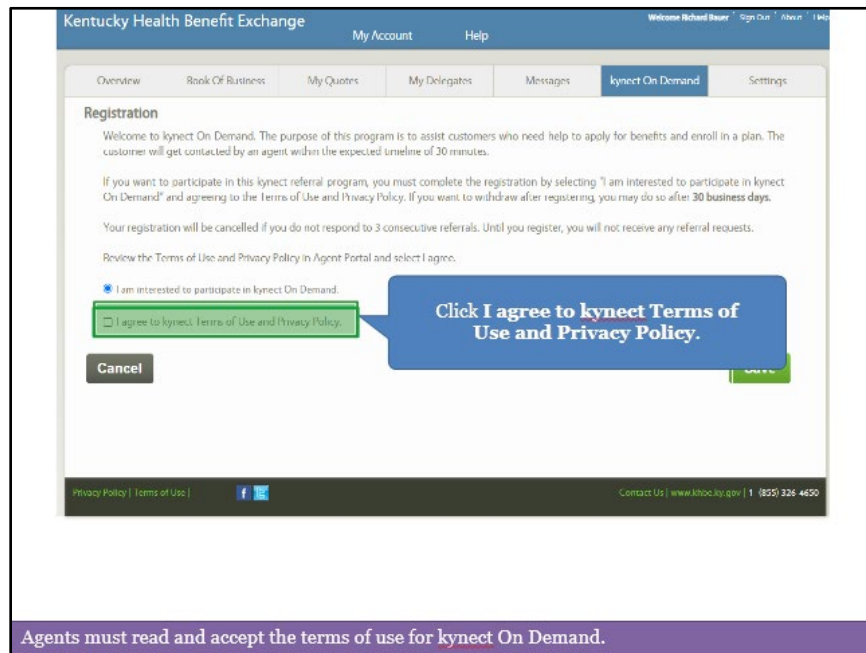
Welcome to the kynect On Demand system demo! We are going to walk through the primary screens and functionality of kynect On Demand. Start by navigating to **kynect On Demand**.

Please note: Screenshots may not be representative of actual system behavior.

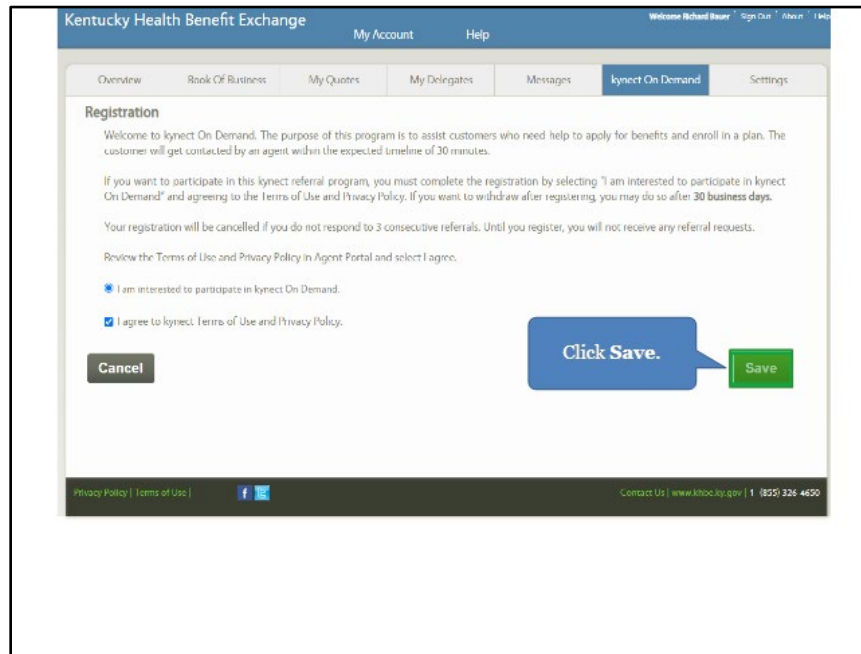
2. Agents must read and accept the terms of use for kynect On Demand. Click **I am interested to participate in kynect On Demand.**



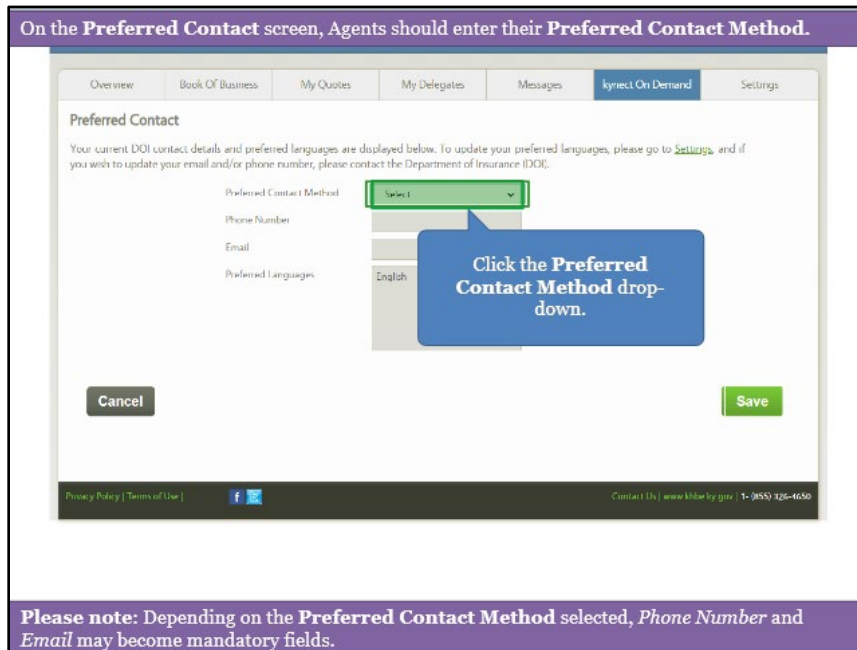
3. Click **I agree to kynect Terms of Use and Privacy Policy.**



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**.

Preferred Contact

Your current DOI contact details and preferred languages are displayed below. To update your preferred languages, please go to [Settings](#), and if you wish to update your email and/or phone number, please contact the Department of Insurance (DOI).

Preferred Contact Method: **Select**
 - Select -
 - Text only -
Email and Text
 - Email only -

Phone Number:

Email:

Preferred Languages: English

Cancel **Save**

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

7. Click **Save**.

Preferred Contact

Your current DOI contact details and preferred languages are displayed below. To update your preferred languages, please go to [Settings](#), and if you wish to update your email and/or phone number, please contact the Department of Insurance (DOI).

Preferred Contact Method: **Email and Text**

Phone Number: (555) 767-1555

Email: Richard.Sauer@dispostable.com

Preferred Languages: English

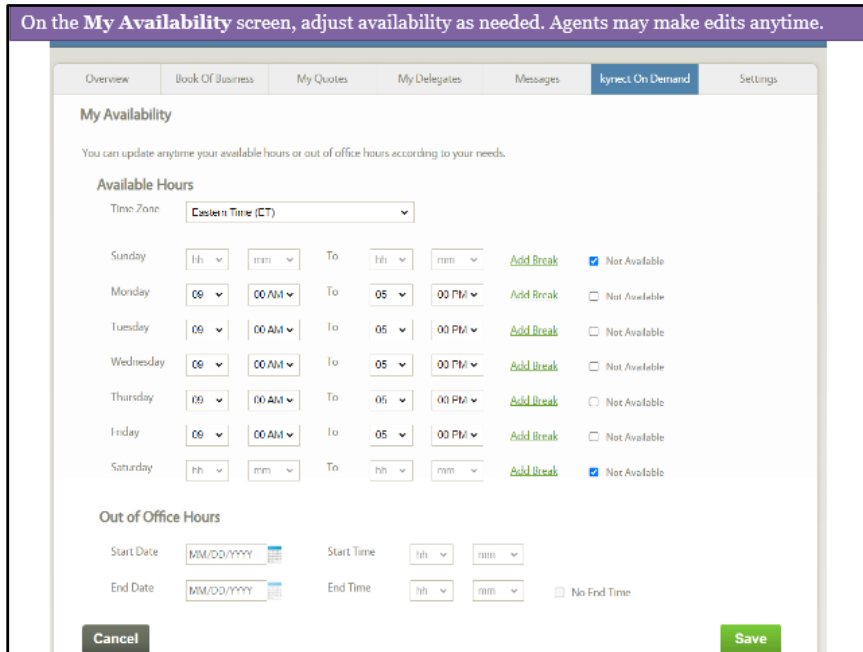
Cancel **Save**

Click Save.

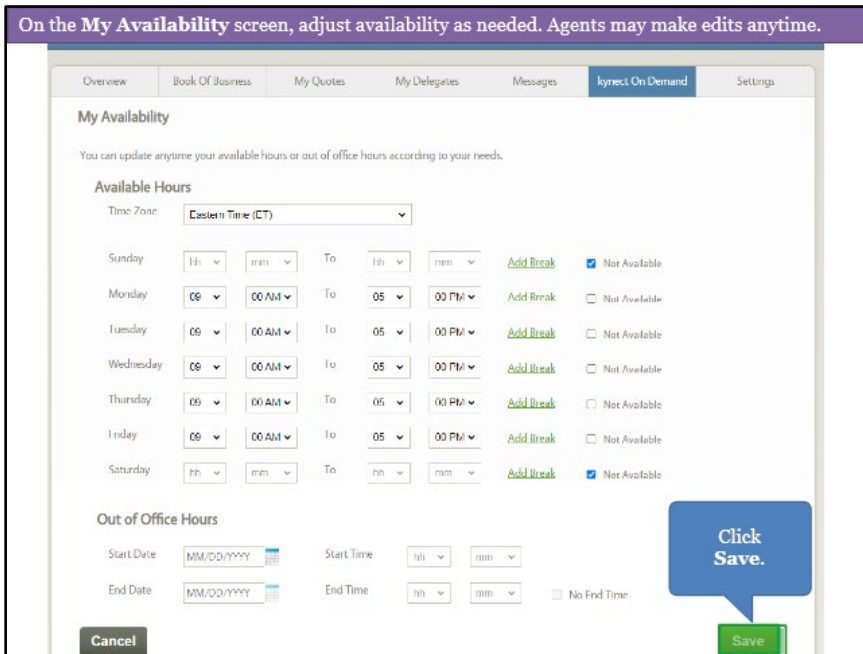
Please note: Agents should contact the Department of Insurance (DOI) to update their email and/or phone number, if applicable.

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

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

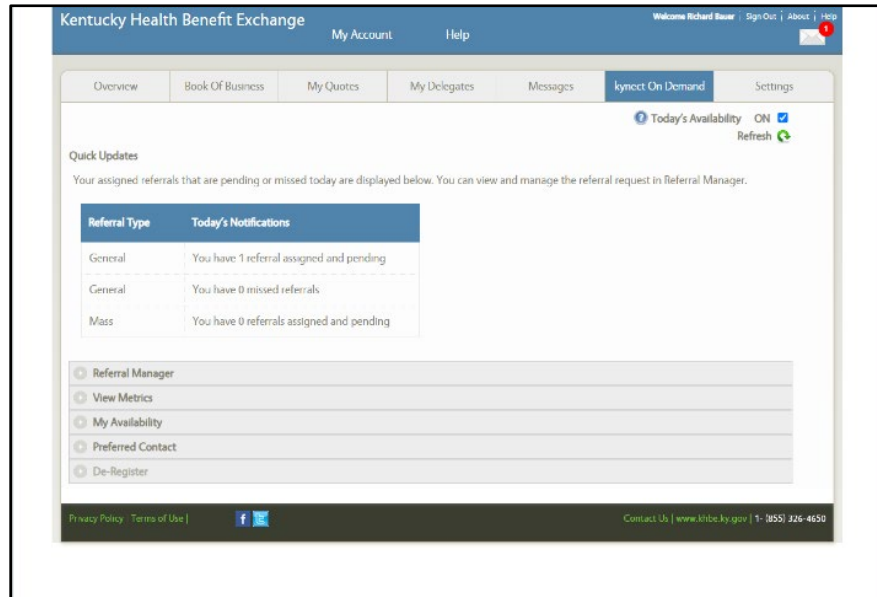


- Click **Save**.



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**.

The screenshot shows the 'Kentucky Health Benefit Exchange' dashboard. At the top, there is a navigation bar with 'My Account' and 'Help'. Below that is a secondary navigation bar with 'Overview', 'Book Of Business', 'My Quotes', 'My Delegates', 'Messages', 'kynect On Demand', and 'Settings'. The 'kynect On Demand' tab is active. Underneath, there is a 'Today's Availability' indicator set to 'ON' with a 'Refresh' button. A 'Quick Updates' section contains a table with 'Referral Type' and 'Today's Notifications'. Below this, a list of menu items includes 'Referral Manager', 'View Metrics', 'My Availability', 'Preferred Contact', and 'De-Register'. A blue callout box with the text 'Click Referral Manager.' points to the 'Referral Manager' link.

After completing the registration process, Agents are navigated to the **kynect On Demand Quick Updates** dashboard. The **Quick Updates** section displays referrals that Agents are currently assigned to.

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**.

The screenshot shows the 'Referral Manager' section of the dashboard. It features a search form with fields for 'Name', 'Referral Status' (set to 'All'), 'From Date' (MM/DD/YYYY), and 'To Date' (MM/DD/YYYY). There are 'Reset' and 'Search' buttons. A blue callout box with the text 'Click Search.' points to the 'Search' button. Below the search form, there are several expandable sections: 'Referral Type', 'Name', 'Customer Zip Code', 'Contact Details', and 'Referr'.

By selecting the *Referral Manager* section, Agents can search, view, and manage assigned referrals.

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.

The screenshot shows the 'Referral Manager' interface. At the top, there are notification boxes for 'General' and 'Mass' referrals. Below, there are search filters for Name, Referral Status (set to 'All'), From Date, and To Date. A table below shows a referral with Customer Zip Code '40475', Referral Assigned on '06/27/2023 03:19 PM', and Referral Status 'Pending'. A callout box points to a green checkmark icon in the 'Action' column, with the text 'Click the Green Check Mark icon.' Below the table, there is a 'Note' section with two points regarding referral acceptance and action timeframes.

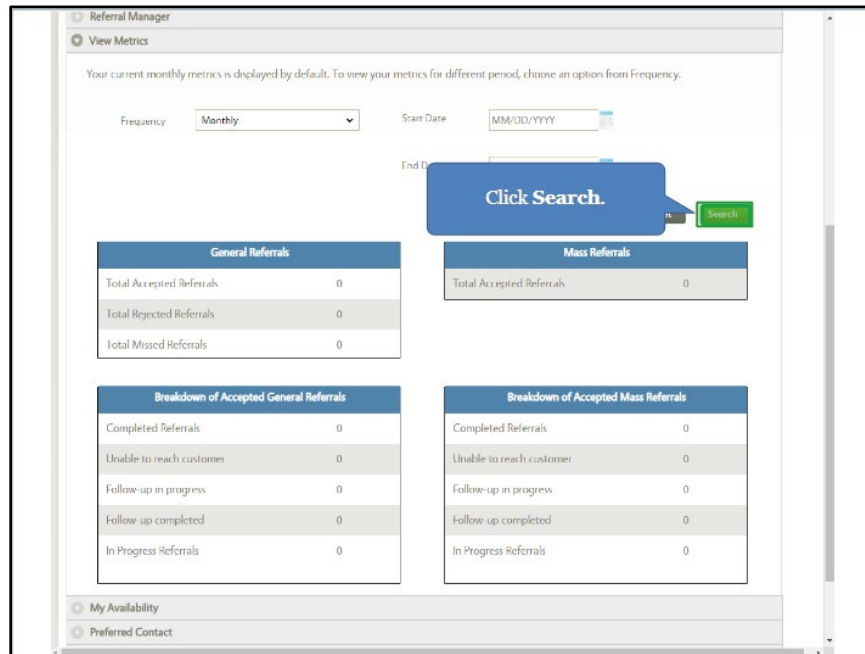
If Agents accept a referral, the referral status automatically updates from *Pending* to *In Progress*. After contacting and assisting the Resident, Agents should manually update the *Referral Status* column to *Complete*. For this example, click the **Green Check Mark** icon.

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

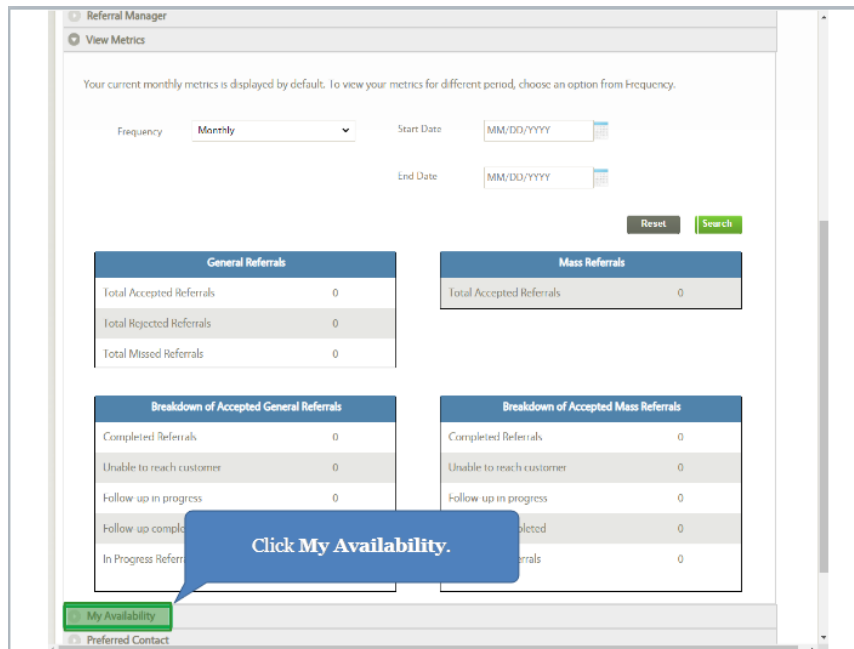
14. Click **View Metrics**.

The screenshot shows the 'Referral Manager' interface with a referral in 'In Progress' status. The table shows Customer Zip Code '40475', Contact Details 'bnelson@mailinator.com', Referral Assigned on '06/27/2023 03:19 PM', Action 'Accepted', and Referral Status 'In Progress'. A callout box points to a 'View Metrics' button at the bottom left of the interface, with the text 'Click View Metrics.' Below the table, there is a 'Note' section with two points regarding referral acceptance and action timeframes.

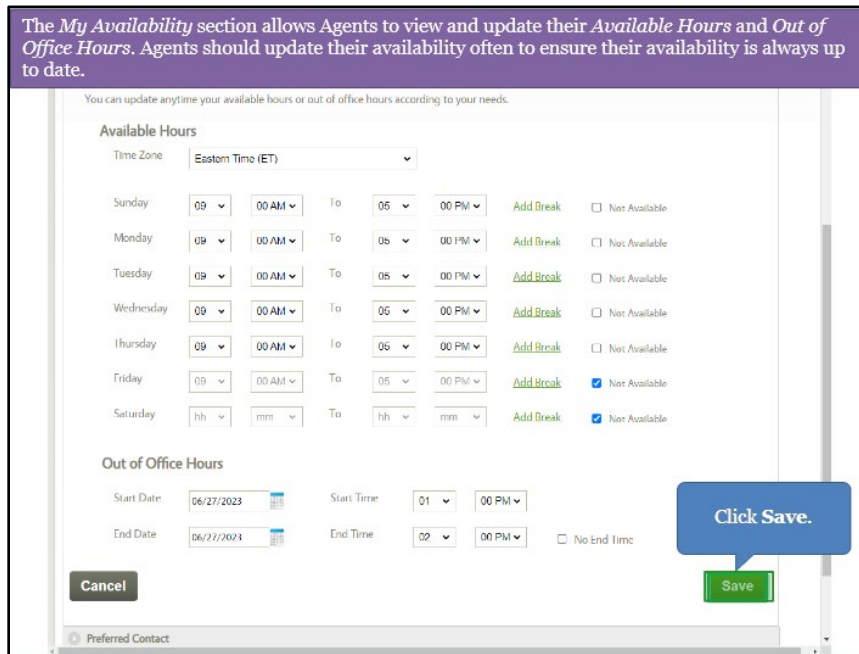
15. The *View Metrics* section displays how many referrals were completed, failed to reach the Resident, have a follow up in progress, or canceled. To filter the displayed metrics more, Agents may search by *Frequency*, *Start Date*, and *End Date*. Click **Search**.



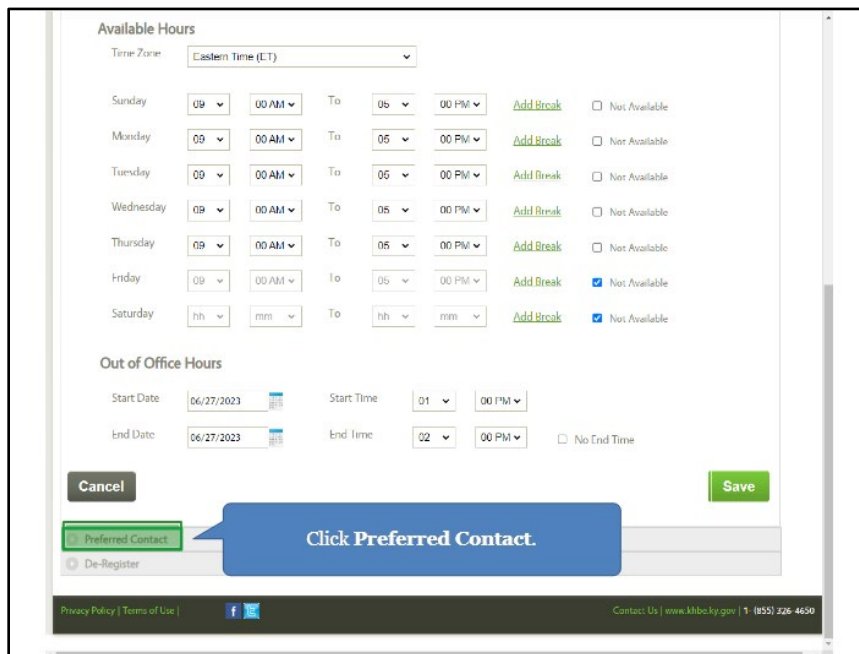
16. Click **My Availability**.



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.

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.

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**.

If an Agent no longer wishes to participate in kynect On Demand, Agents can de-register from kynect on Demand 45 days after registration.

Overview Book Of Business My Quotes My Delegates Messages **kynect On Demand** Settings

Today's Availability ON Refresh

Quick Updates

Your assigned referrals that are pending or missed today are displayed below. You can view and manage the referral request in Referral Manager.

Referral Type	Today's Notifications
General	You have 1 referral assigned and pending
General	You have 0 missed referrals
Mass	You have 0 referrals assigned and pending

Referral Manager View Metrics My Availability Preferred contact **De-Register**

If you do not want to participate in kynect on Demand, select "I am not interested to participate in kynect on Demand". Until you register you will not be able to participate in this program.

I am not interested to participate in kynect on Demand.

Click I am not interested to participate in kynect On Demand.

22. Click **Save**.

If an Agent no longer wishes to participate in kynect On Demand, Agents can de-register from kynect on Demand 45 days after registration.

Overview Book Of Business My Quotes My Delegates Messages **kynect On Demand** Settings

Today's Availability ON Refresh

Quick Updates

Your assigned referrals that are pending or missed today are displayed below. You can view and manage the referral request in Referral Manager.

Referral Type	Today's Notifications
General	You have 1 referral assigned and pending
General	You have 0 missed referrals
Mass	You have 0 referrals assigned and pending

Referral Manager View Metrics My Availability Preferred contact **De-Register**

If you do not want to participate in kynect on Demand, select "I am not interested to participate in kynect on Demand". Until you register you will not be able to participate in this program.

I am not interested to participate in kynect on Demand.

Click Save.

Cancel 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.

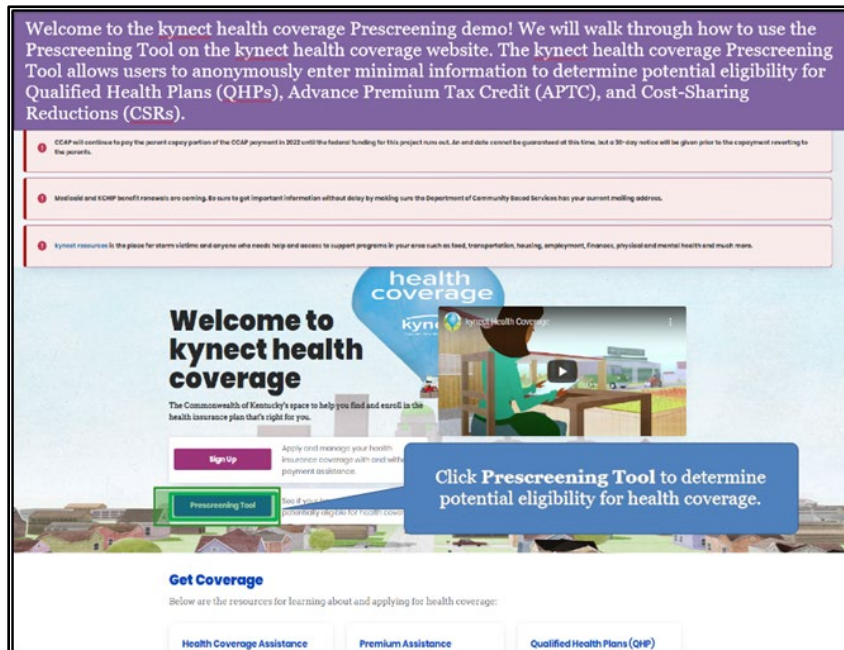
Prescreening results and how to view potential eligibility for Qualified Health Plans (QHPs), Advance Premium Tax Credit (APTC), and Cost-Sharing Reductions (CSR).

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

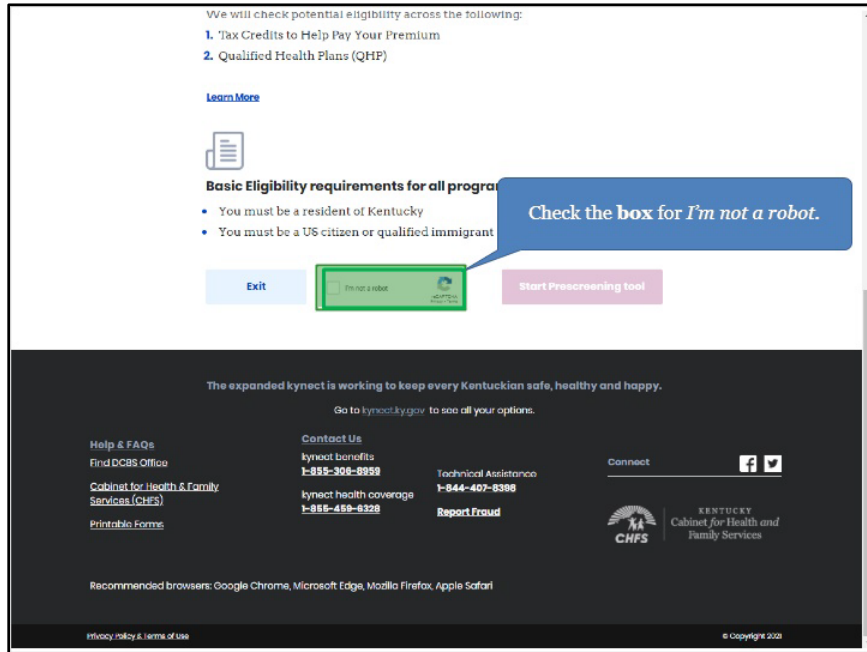
The kynect health coverage Prescreening Tool allows Residents to anonymously enter minimal information to check potential eligibility for Qualified Health Plans (QHPs), Advance Premium Tax Credit (APTC), and Cost-Sharing Reductions (CSR). The Prescreening Tool is not an application and does not guarantee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

3.1 Navigating to the kynect health coverage Prescreening Tool

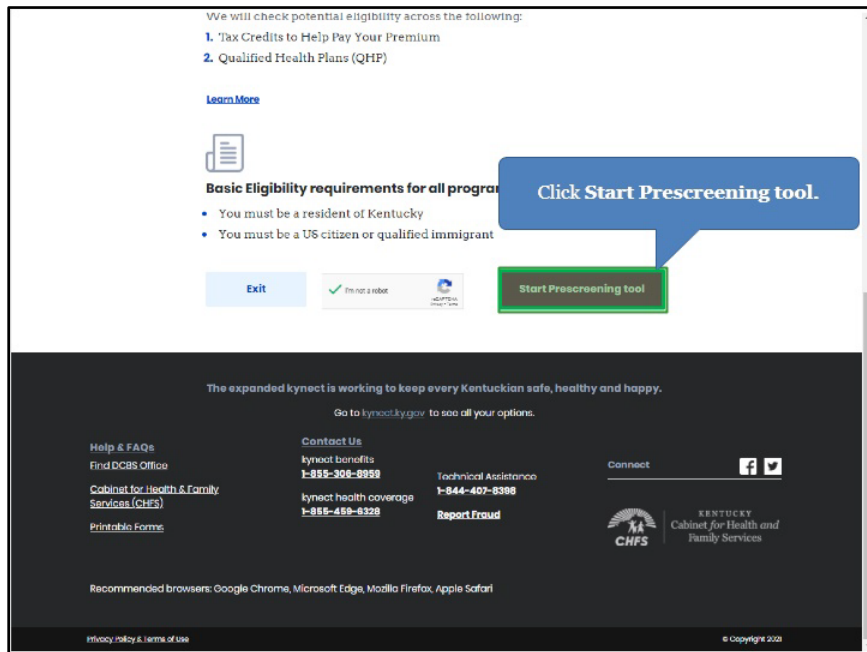
1. Navigate to the kynect health coverage [website](#).
2. Click **Prescreening Tool** to view prescreening information.



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



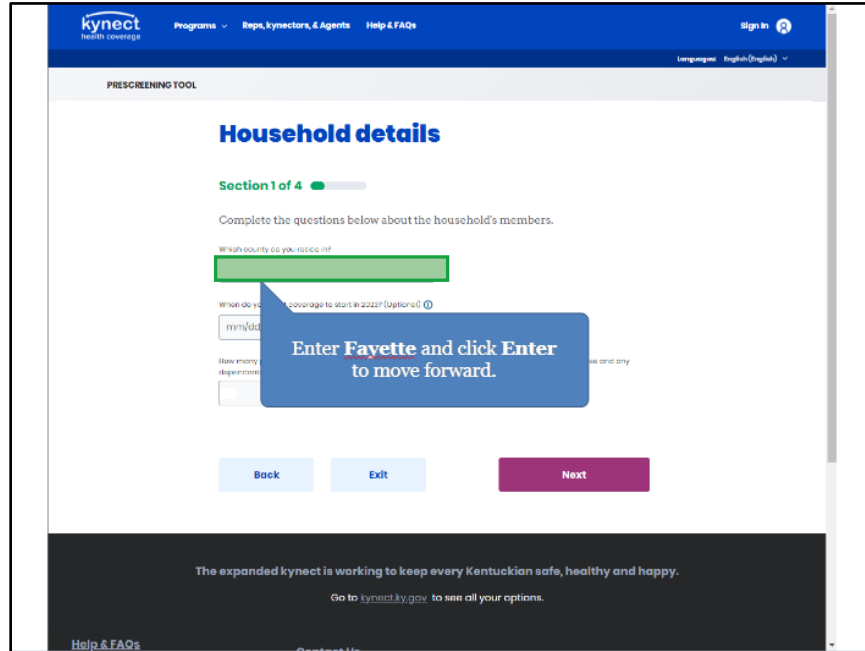
4. Click **Start Prescreening tool**.



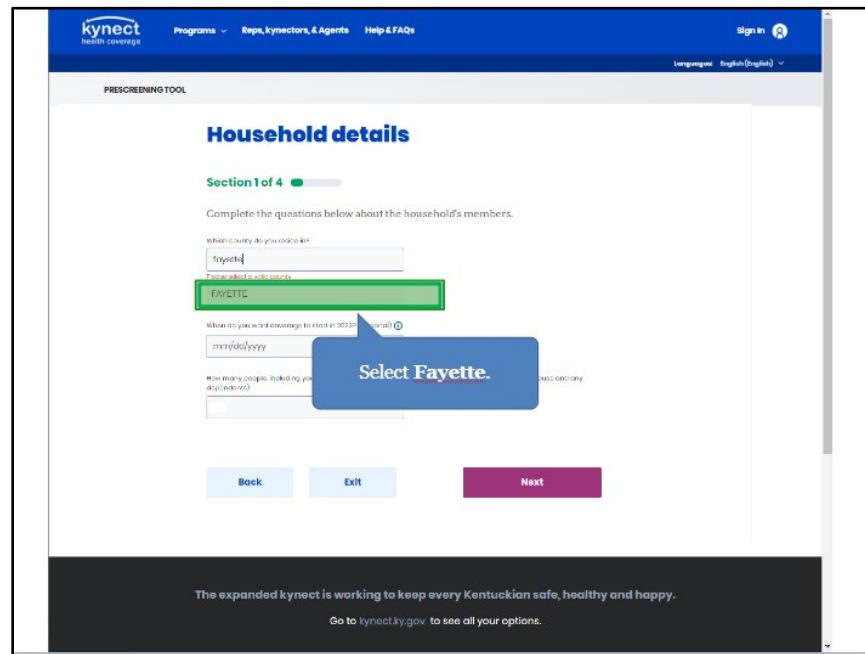
3.2 Section 1: Household Details Screen

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.

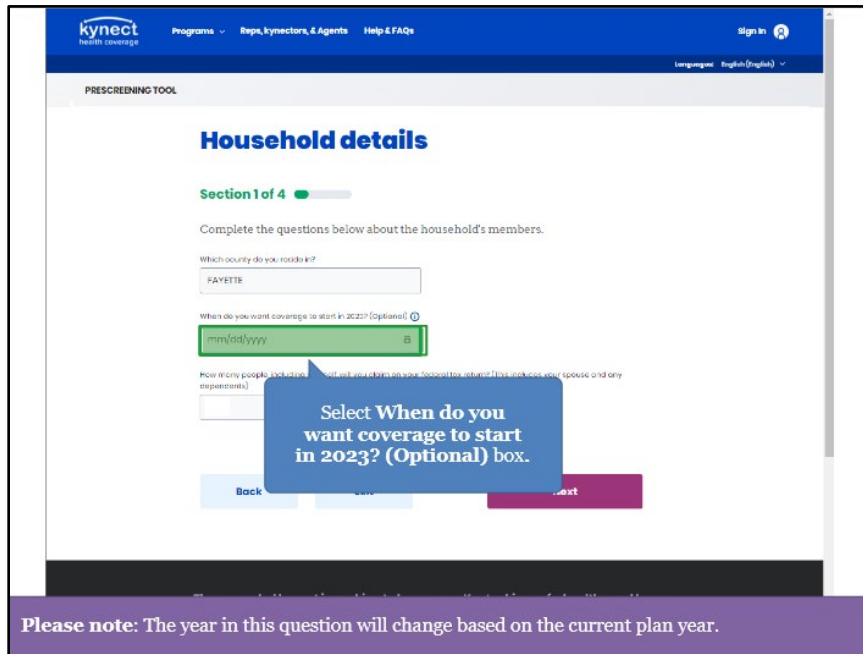
5. Enter the **County** the Resident resides in.



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

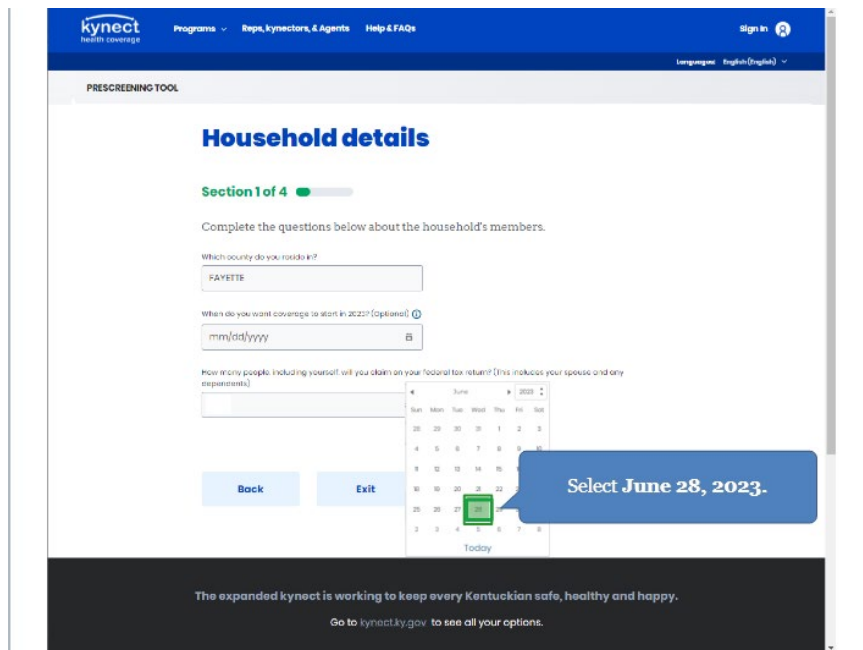


7. Select *When do you want coverage to start in 2023 (Optional)* box.

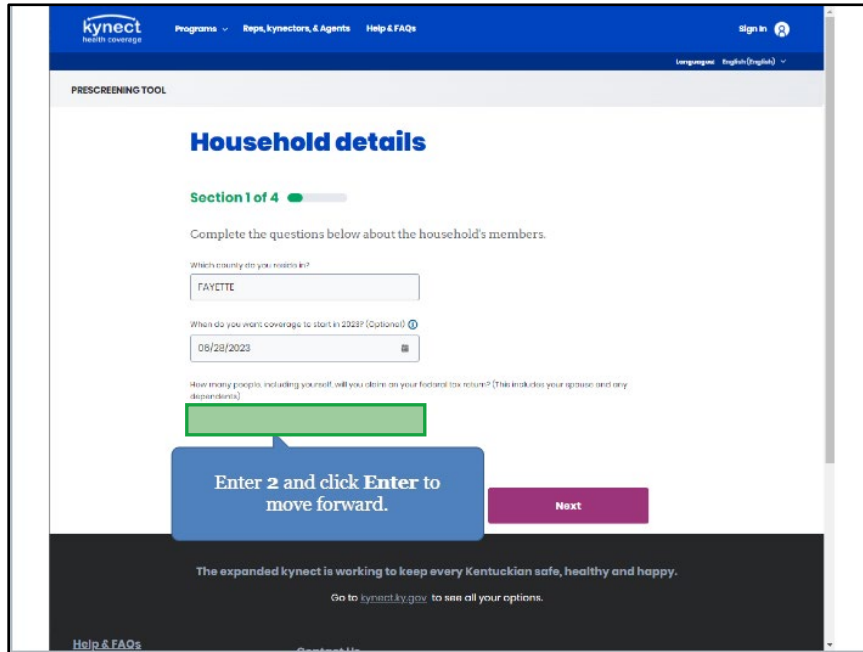


Please Note: The year in this question will change based on the current plan year.

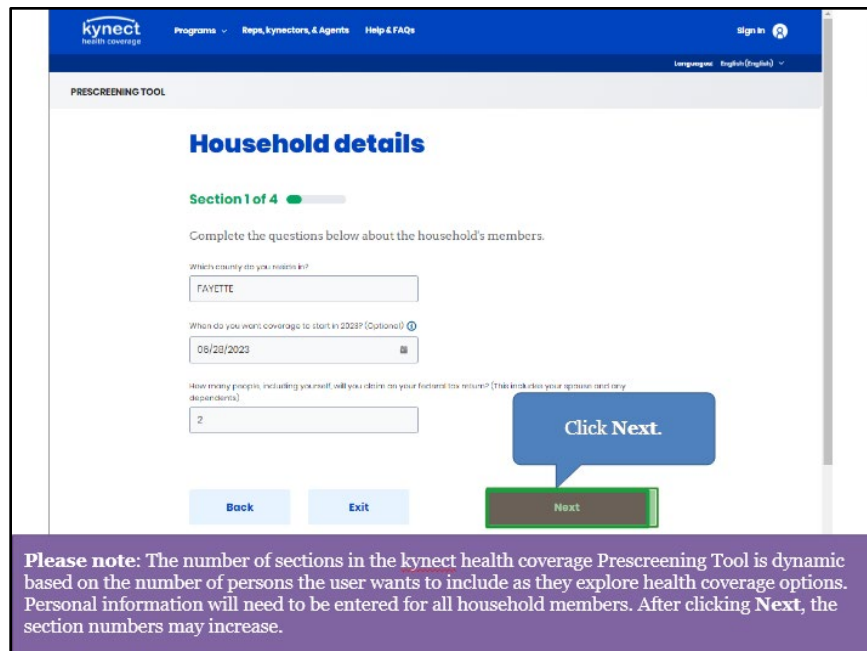
8. Select **June 28, 2023**.



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



- 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.

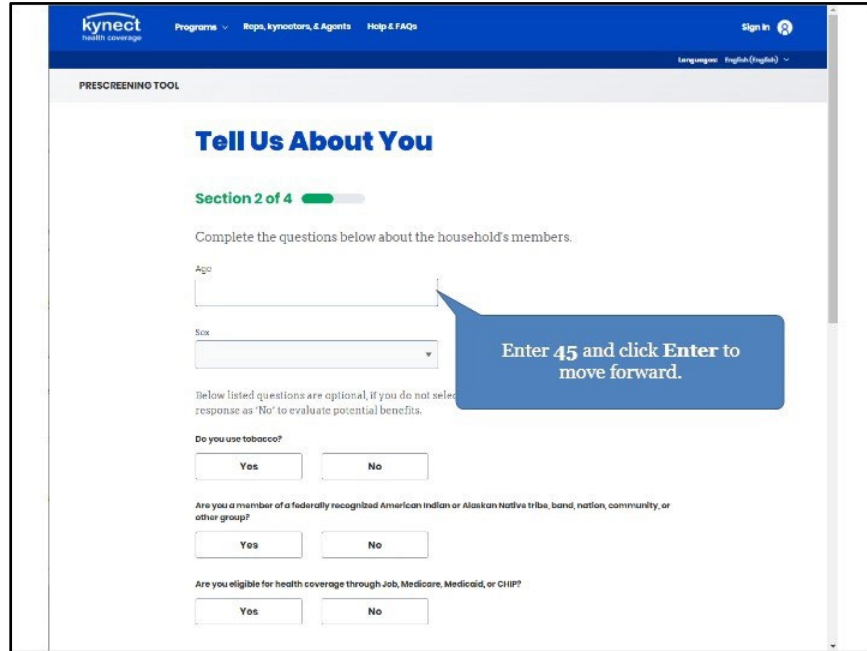


Please note: The number of sections in the kynect health coverage Prescreening Tool is dynamic based on the number of persons the user wants to include as they explore health coverage options. Personal information will need to be entered for all household members. After clicking **Next**, the section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

3.3 Section 2: Tell Us About You Screen

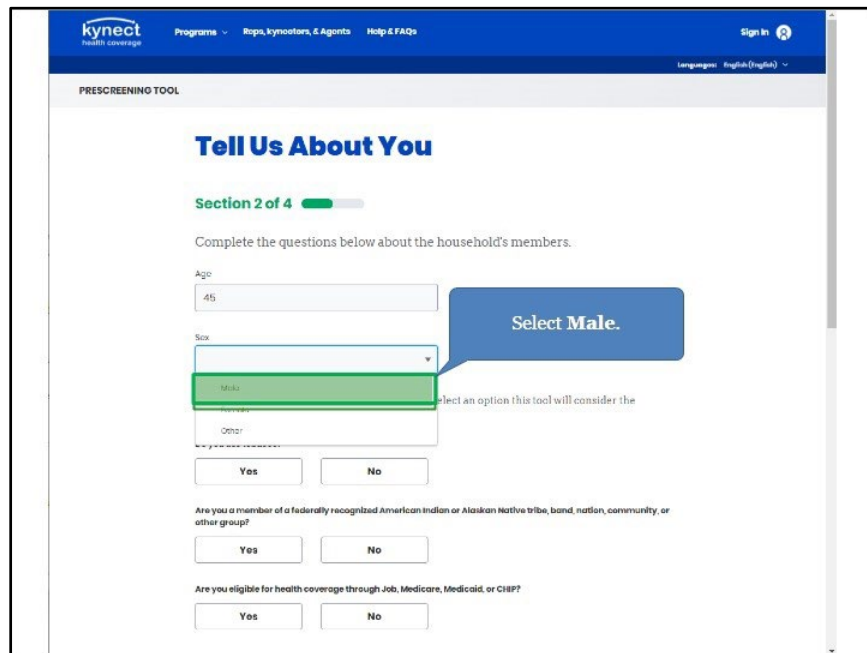
Enter **information** on the **Tell Us About You** screen. The **Tell Us About You** screen asks personal information about the Resident.

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



The screenshot shows the 'Tell Us About You' screen in the 'PRESCREENING TOOL' section. The page title is 'Tell Us About You' and it is 'Section 2 of 4'. The instruction is 'Complete the questions below about the household's members.' The 'Age' field is a text input containing '45'. A blue callout box points to the 'Age' field with the text 'Enter 45 and click Enter to move forward.' Below the 'Age' field is a 'Sex' dropdown menu. Further down are three optional questions with 'Yes' and 'No' buttons: 'Do you use tobacco?', 'Are you a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group?', and 'Are you eligible for health coverage through Job, Medicare, Medicaid, or CHIP?'.

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



The screenshot shows the 'Tell Us About You' screen with the 'Age' field filled with '45'. The 'Sex' dropdown menu is open, and 'Male' is selected and highlighted in green. A blue callout box points to the 'Sex' dropdown with the text 'Select Male.' Below the 'Sex' dropdown is an 'Other' text input field. The rest of the page content is the same as in the previous screenshot.

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

The screenshot shows the 'Tell Us About You' section of the Kynect health coverage prescreening tool. The page is titled 'PRESCREENING TOOL' and 'Tell Us About You'. It indicates 'Section 2 of 4' with a progress bar. The user is prompted to 'Complete the questions below about the household's members.' The form includes fields for 'Age' (45) and 'Sex' (Male). Below these, there are three optional questions with 'Yes' and 'No' buttons. The first question is 'Do you use tobacco?', where the 'No' button is highlighted with a green box. A blue callout bubble points to this button with the text 'Click No for Do you use tobacco?'. The second question is 'Are you a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group?' with 'Yes' and 'No' buttons. The third question is 'Are you eligible for health coverage through Job, Medicare, Medicaid, or CHIP?' with 'Yes' and 'No' buttons.

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?*

The screenshot shows the 'Tell Us About You' section of the Kynect health coverage prescreening tool. The page is titled 'PRESCREENING TOOL' and 'Tell Us About You'. It indicates 'Section 2 of 4' with a progress bar. The user is prompted to 'Complete the questions below about the household's members.' The form includes fields for 'Age' (45) and 'Sex' (Male). Below these, there are three optional questions with 'Yes' and 'No' buttons. The first question is 'Do you use tobacco?' with 'Yes' and 'No' buttons. The second question is 'Are you a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group?', where the 'No' button is highlighted with a green box. A blue callout bubble points to this button with the text 'Click No for Are you a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group?'. The third question is 'Are you eligible for health coverage through Job, Medicare, Medicaid, or CHIP?' with 'Yes' and 'No' buttons.

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.

The screenshot shows the 'Tell Us About Household Member 2' screen in the 'PRESCREENING TOOL' section. The page title is 'Tell Us About Household Member 2' and it is 'Section 3 of 4'. The instructions say 'Complete the questions below about the household's members.' There are three input fields: 'Age', 'Sex', and 'Do you use tobacco?'. The 'Age' field is currently empty. A blue callout box points to the 'Age' field with the text 'Enter 46 and click Enter to move forward.' Below the 'Age' field is the 'Sex' drop-down menu, which is also empty. There are three 'Yes/No' buttons for the tobacco question and two 'Yes/No' buttons for the federal recognition question.

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

The screenshot shows the 'Tell Us About Household Member 2' screen with the 'Age' field filled with '46'. The 'Sex' drop-down menu is now open, showing options: 'Male', 'Female', and 'Other'. The 'Female' option is highlighted in green. A blue callout box points to the 'Female' option with the text 'Select Female.' Below the 'Sex' dropdown is the 'Do you use tobacco?' question with 'Yes' and 'No' buttons. There are also two 'Yes/No' buttons for the federal recognition question and two 'Yes/No' buttons for the health coverage question.

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

The screenshot shows the 'Tell Us About Household Member 2' section of the Kynect prescreening tool. The progress bar indicates 'Section 3 of 4'. The form includes fields for 'Age' (46) and 'Sex' (Female). Below these are three optional questions: 'Do you use tobacco?', 'Are you a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group?', and 'Are you pregnant?'. The 'No' button for the tobacco question is highlighted in green, and a blue callout box points to it with the text 'Click 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?*.

The screenshot shows the same 'Tell Us About Household Member 2' section. In this instance, the 'No' button for the question 'Are you a member of a federally recognized American Indian or Alaskan Native tribe, band, nation, community, or other group?' is highlighted in green. A blue callout box points to this button with the text 'Click 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?*.

Tell Us About Household Member 2

Section 3 of 4

Complete the questions below about the household's members.

Age
46

Sex
Female

Below listed questions are optional, if you do not select an option this tool will consider the response as 'No' to evaluate potential benefits.

Do you use tobacco?
Yes No

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

Are you pregnant?
Yes **No**

Click 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?*.

Below listed questions are optional, if you do not select an option this tool will consider the response as 'No' to evaluate potential benefits.

Do you use tobacco?
Yes No

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

Are you pregnant?
Yes No

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

Want to skip these questions?
By answering this question you'll see prices based on your household. These prices, also based on your age and income, may be much lower than prices without this information. If you skip to see plans now, we'll show you prices based on a person who's 35.
[Browse plans now.](#)

Back Exit **Next**

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

Below listed questions are optional. If you do not select an option this tool will consider the response as 'No' to evaluate potential benefits.

Do you use tobacco?
 Yes No

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

Are you pregnant?
 Yes No

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

Want to skip these questions?
 By answering this question, you'll see prices based on your household. These prices, also based on your age and income, may be much lower than prices without this information. If you skip to see plans now, we'll show you prices based on a person who's 35.
[Browse plans now.](#)

Click Next.

Back Exit Next

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?*.

kynect health coverage Programs Reps, kynectors, & Agents Help & FAQs Sign In
 Language: English (English)

PRESCREENING TOOL

Tell Us About Your Household Income

Section 4 of 4

Complete the questions below about the household's members.

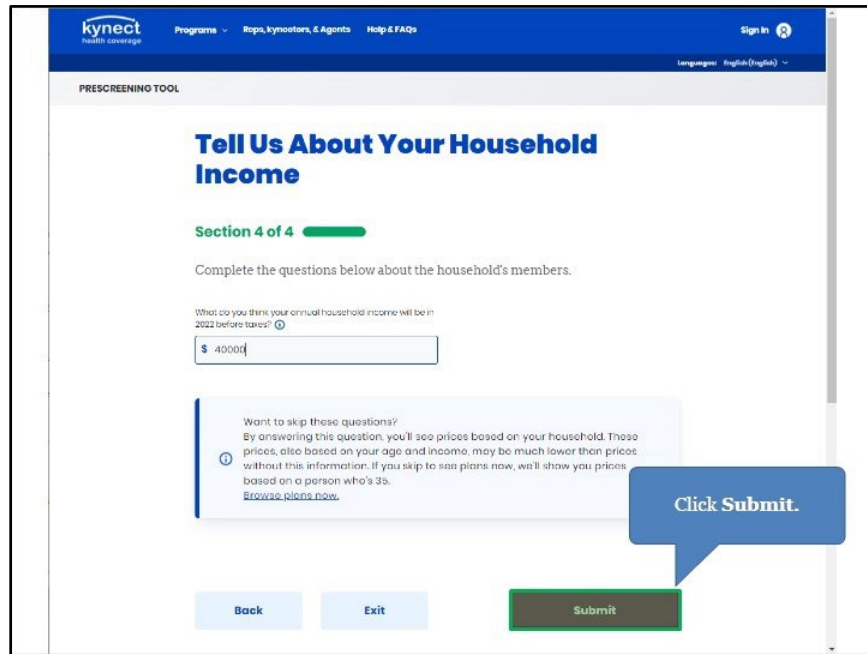
What do you think your annual household income will be in 2020?

Enter 40000 and click Enter to move forward.

Want to skip these questions?
 By answering this question, you'll see prices based on your household. These prices, also based on your age and income, may be much lower than prices without this information. If you skip to see plans now, we'll show you prices based on a person who's 35.
[Browse plans now.](#)

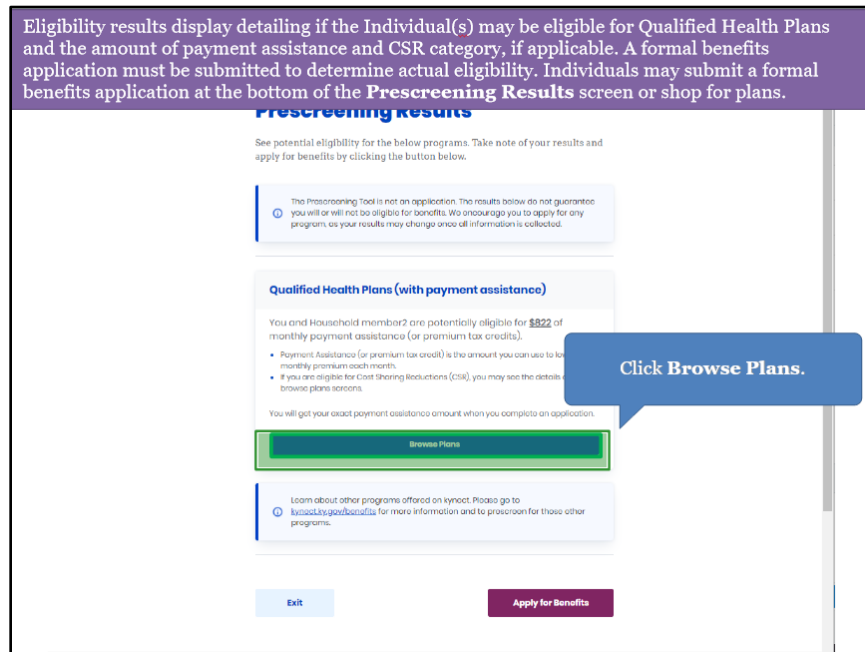
Back Exit Submit

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

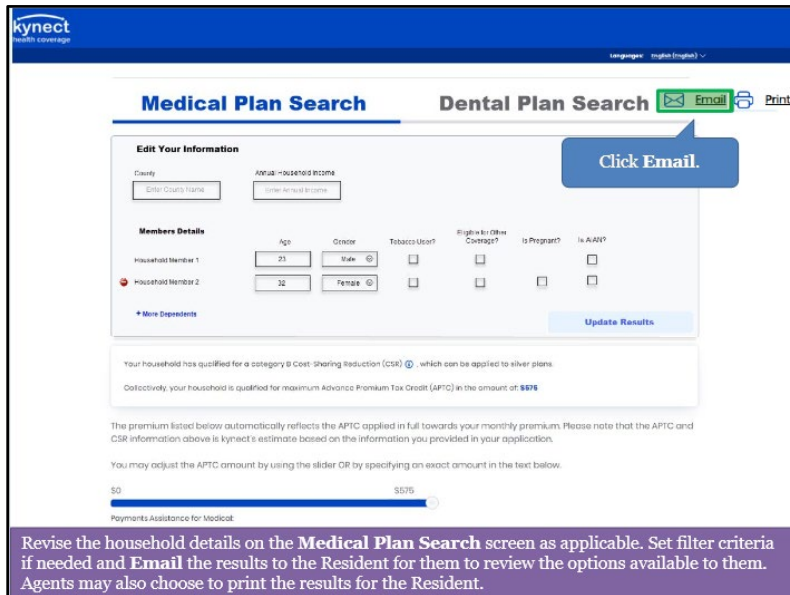


3.6 Prescreening Results Screen

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



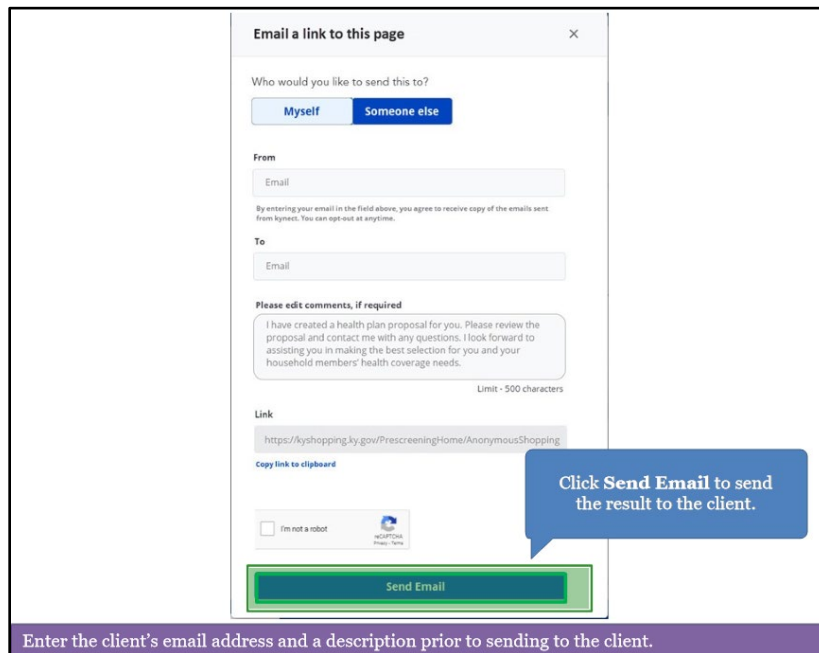
27. Click **Email**.



The screenshot shows the 'Medical Plan Search' section of the Kynect Health Coverage portal. At the top right, there are icons for 'Email' and 'Print'. A blue callout box with the text 'Click Email.' points to the 'Email' icon. Below the search filters, there is an 'Update Results' button. At the bottom of the page, a purple banner contains the following text:

Revise the household details on the **Medical Plan Search** screen as applicable. Set filter criteria if needed and **Email** the results to the Resident for them to review the options available to them. Agents may also choose to print the results for the Resident.

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



The screenshot shows a dialog box titled 'Email a link to this page'. It contains the following fields and options:

- Who would you like to send this to? (Buttons: Myself, Someone else)
- From: (Email input field)
- To: (Email input field)
- Please edit comments, if required: (Text area with a 'Limit - 500 characters' note)
- Link: (Text field containing 'https://kysshopping.ky.gov/PrescreeningHome/AnonymousShopping')
- Copy link to clipboard (checkbox)
- I'm not a robot (checkbox)
- Send Email (Green button)

A blue callout box with the text 'Click Send Email to send the result to the client.' points to the 'Send Email' button. At the bottom of the page, a purple banner contains the following text:

Enter the client's email address and a description prior to sending 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