The Commonwealth of Kentucky kynect State-Based Marketplace



Document Upload Quick Reference Guide for Agents

Introduction

This document is intended to provide step by step instructions for Agents to upload Client documents to Agent Portal and kynect benefits.

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1 Document Upload Overview

The Document Upload process provides Agents with simple and guided instructions for uploading documents that may be requested to verify information during the enrollment process. During the enrollment process, many cases may have a Request for Information (RFI) to complete the application. RFIs verify a Client's information so correct eligibility may be returned and to ensure proper benefits are being applied. There are two different ways that an Agent may upload documents for their Clients and Prospects. Those methods are through Agent Portal and in kynect benefits.

1.1 Tips for Document Upload

- 1. Make sure the image is clear and it captures all information on the document when taking a picture for a mobile upload.
- 2. Files must not be password protected.
- 3. Image Files must not exceed 6MB and document files must not exceed 4MB. The accepted document file types include: *.PDF, *.TIF, *.TIFF and the accepted image file types include *.JPEG, *.JPG, and *.PNG. Other file types are not accepted. In case the file exceeds the limit, the following options can be considered:
 - a. Use the "crop" tool to remove any remaining background or empty space around the image. This will reduce the size of the image.
 - b. Use a smaller image format. Different image formats have varying file sizes; PNG files are typically the largest and JPG files are the smallest.
 - c. To keep the size of PDF files as small as possible for faster uploading and to keep within the required size limit: After saving the completed PDF, click on File > Save As Other > Reduced Size PDF.
 - d. While scanning a paper document, choose the scanner setting of black and white (not gray scale or color) and set the resolution to 300 dpi.
- 4. View required documents under "Documents Needed" in the Document Center before beginning the Document Wizard.

2 Uploading a Document in Agent Portal

Agents may upload documents for clients and prospects on Agent Portal. Agents upload documents providing proof of information needed to apply for benefits such as income information, tax records, Social Security Number, citizenship information, etc.

Below are the steps to complete the Document Upload process in Agent Portal:

- 1. Navigate to the **Book of Business** screen in Agent Portal.
- 2. Select **Current Client** or **Current Prospect** drop-down.
- 3. Click Search.
- 4. Select a **Client** or **Prospect Name.**
- 5. Click Manage Document.

Overview Book Of Business My Quotes My Delegates Messages kynet. On Demand Settings surance Market : Individual Current Client UQFV, XSZL PIKOV Case #: 113016325 Primary Phone: (B13) 456-7890 Primary Email: Optimg5 Cript.com Preferred Spoken Language: English Secondary Phone: (123) 456-7890 Secondary Email: Optimg5 Cript.com Preferred Written Language: English Zip Code: 1405 County: ROBERTSON Preferred Communication: Paper	ntucky Health Be	nefit Exchange	My Account	Help		Welcome Antonia Balley	Sign Out About
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- 6. Click **Browse** to open the File Folder.
- 7. Enter **Comments** detailing the information that is included in the selected document(s).
- 8. Click Upload.

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Ove	rview	Book Of Business	My Quotes	My Delegates	Messages	Settings
surance	Manage De	ocuments				× ect
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3 Uploading a Document in kynect benefits

Agents can begin the Document Upload process from the Resident Dashboard in kynect benefits. A benefits application must be signed and submitted before kynect benefits allows users to submit documents as forms of proof.

It is very important that all required documents and RFI's are submitted through the Document Wizard. The steps below are the quickest way to have documents reviewed and approved:

1. Click **Documents** on the side menu of the Resident Dashboard to be taken to the **Document Center**.

Overview	A CONTRACTOR		and and	
Case Summary	W <mark>elcome, JA</mark> COB CC	DRN		Balantia
Benefits	My Information	Add Other Benefits	Apply for other benefits or assistance provided by kynect for which your household may be eligible.	
Health Plans			Update your household information to	
Documents		Report a Change	kynect based on the changes.	
Hearings	Onen Enzellment for Kentucky Medicaid for 2023 will	take place from Oct. 15 - Dec. 2, 2022. While new beneficiaries c	an enroll in	
Appointments		ance for beneficiaries who are already receiving Medicaid to s		

2. View the required documents under the **Documents Needed** tab.

Ready to upload docume	nts we requested?	
Upload the requested docume	nts for your household step-by	/-step.
Upload Document(s)	l	
Uploaded files may not appear	instantly.	
Do you want to view your pre	viously provided Reasonable	• Explanation?
Click on Reasonable Explanati	on button to view.	
Reasonable Explanatio	n	
Documents	Needed (1)	Documents Uploaded (5)
_		
JACOB CORN		
APTC income verification File needed - action required	Due Date: 12/1 0/2024	

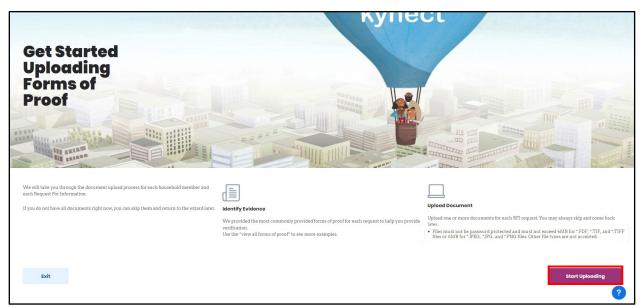
Please note: Documents remain under the Documents Needed tab as pending until they are accepted.

Please note: Individuals can click the **Reasonable Explanation** button to view their reported Reasonable Explanation for their APTC Income verification based on the coverage year. **This reasonable explanation cannot be used for Medicaid or other programs.**

3. Click **Upload Document(s)** to being uploading documents for open requests.



4. Click **Start Uploading** after reviewing the information on the **Get Started Uploading Forms of Proof** screen.



- 5. Select **Yes** or **No** for *Do you have proof* question on the **Proof** screen.
- 6. Click Next.
 - If **Yes** for the proof question, then the **Document Upload** screen displays.
 - If **No** was selected for the *Do you have proof* question, then the **Proof** screen for the next document requested displays.

Proof		
l of 2 Requests JACOB CORN's APTC incom	e verification	
View accepted forms of pro	oof	
Do you have proof of J	ACOB CORN's APTC income verification	?
Yes	Νο	
Exit		Next
Please note: Clic documents.	k View accepted forms of proof t	to view a list of all accepted
Please note: If an displays the follow	n Individual has an open APTC Incon ing verbiage:	ne Verification, the Proof screen
	ur APTC income proof by selecting t oading an acceptable forms of prooj	
The Individual is t	nen prompted to select Yes or No to	the following question:
<i>c</i> 1	f or the reasonable explanation to ve ME SUFFIX>'s APTC income?"	erify <first middle<="" name="" th=""></first>
Explanation . If F to proceed to the R Reasonable Explantic is selected, the Ind	the Individual selects either Upload Reasonable Explanation is selecte Reasonable Explanation screen will nation from the drop-down and click ividual will click Next and proceed to roof forms and click Save .	d, the Individual will click Next here they will select the Save . If Upload Form of Proof

Please note: If the Individual is verifying their approved or pending APTC Income with a Reasonable Explanation during Open Enrollment the **Reasonable Explanation** screen view will ask to provide a Reasonable Explanation for both years, the current year, or the next year, depending on when the Individual receives APTC benefits. The Individual will then click **Save** and be navigated back to the **Document Center** screen.

7. Select the type of document being uploaded in the *Form of proof* drop-down menu.

Please note: A hyperlink to download a template appears if there is a template document to help satisfy the need of the request.

8. Click the **Document** icon to search the device's files and select the document to upload from the computer or mobile device.

Uplocd JACOB CORN'S APTC income verification: JACOB CORN	
Files must not be password protected and must not exceed 4MB for *.JPEG, *.JPG, and *.PNG files. Other file types are not accepted.	for *.PDF, *.TIF, and *.TIFF files or 6MB
You do not need to upload the same document more than once. document as proof of something else please use the 'Skip' button same document again.	
Form of proof	
+ Please upload a file within the allowable size. File size should be no more than 6 Mt	3.
If you'd like to add another form of proof, please attach it here	
Add new form of proof	
Please ensure that all forms of proof have been added above befo	re you proceed
Skip	Upload & Continue

- 9. Click **Add new form of proof** to add an additional document if there is more than one document for this proof.
- 10. Click **Upload & Continue** to return to the **Proof** screen for the next request.

Upload	
JACOB CORN'S APTC income verification: JACOB CORN	
Files must not be password protected and must not exceed 4MB for *.PDF, *.TIF, and *.TIFF files or 6MB for *.JPEG, *.JPG, and *.PNG files. Other file types are not accepted.	
You do not need to upload the same document more than once. If you have already uploaded this document as proof of something else please use the 'Skip' button below instead of uploading the same document again.	
🕑 Pay Stubs	
Pay Stubs.pdf	圃
Please upload a file within the allowable size. File size should be no more than 6 MB.	
If you'd like to add another form of proof, please attach it here	
n you a nice to add another form of proof, please attach it here	
Add new form of proof	
Please ensure that all forms of proof have been added above before you proceed	
Skip Upload & Continue	

11. The **Document Wizard** will walk the user through the steps to upload a document for each request. After all documents have been submitted, the **Submitted Documents** screen displays.

12. Click **Back to the Document Center** once the required document(s) are uploaded.

Submitted Documents	• •
We have received the documents below and are in the process of reviewing. If a request for verification was not submitted or if we are unable to use as a form of proof, please be sure to return to the Document Center and upload the appropriate documents. You can review each request status individually on the Document Center. If you believe you	
uploaded the incorrect document, you may manually upload the correct document or contact DCBS.	
JACOB CORN's APTC income verification	
Pay Stubs.pdf	
Bo	ack to Document Center

The **Submitted Documents** tab will change from "Not Received" to "Received, under reviewno action required" under the **Documents Needed** tab once they are uploaded correctly.

Ready to upload docum	nents we reques	ted?		
Upload the requested docu	ments for your hou	sehold step-by-ste	p.	
Upload Document(s) Uploaded files may not app				
Documer	nts Needed (2)		Docum	ents Uploaded (13)
JACOB CORN				

Please note: Once submitted, the document(s) reflect the date it was submitted, due date, and provides a hyperlink so the document may be reviewed.

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