KelseyPortal Onboarding Guide

Last modified August 5, 2022

Kelsey Care Advantage

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How to Access the KelseyPortal

Step 1:

You will be sent an invitation via email. Follow the instructions as shown below

From: KCABrokerSupport@KelseycareAdvantage.com Subject: You're invited to onboard with KCA



Hi

You have been invited to onboard with KelseyCare Advantage for 2023 and register into our new KelseyPortal!

Please have the following items ready as you register on our site:

- 1. Valid government ID
- 2. Valid Texas DOI license
- E&O certificate
- 4. Current AHIP certification

Additionally, you will need to read and sign the Independent Agent Agreement, review the KelseyCare Advantage 2023 training course, and when ready, take the certification test.

You may access the portal using the following credentials: Website: https://kelseyportal.kelseycareadvantage.com/ UserID: your email address Temporary Password: RandomPassword

Upon approval of your registration, you may enroll your clients online, submit paper applications, view pending applications, and much more!

We appreciate your interest and look forward to working with you soon!

Step 2:

Click on the website link, enter your email address and temporary password

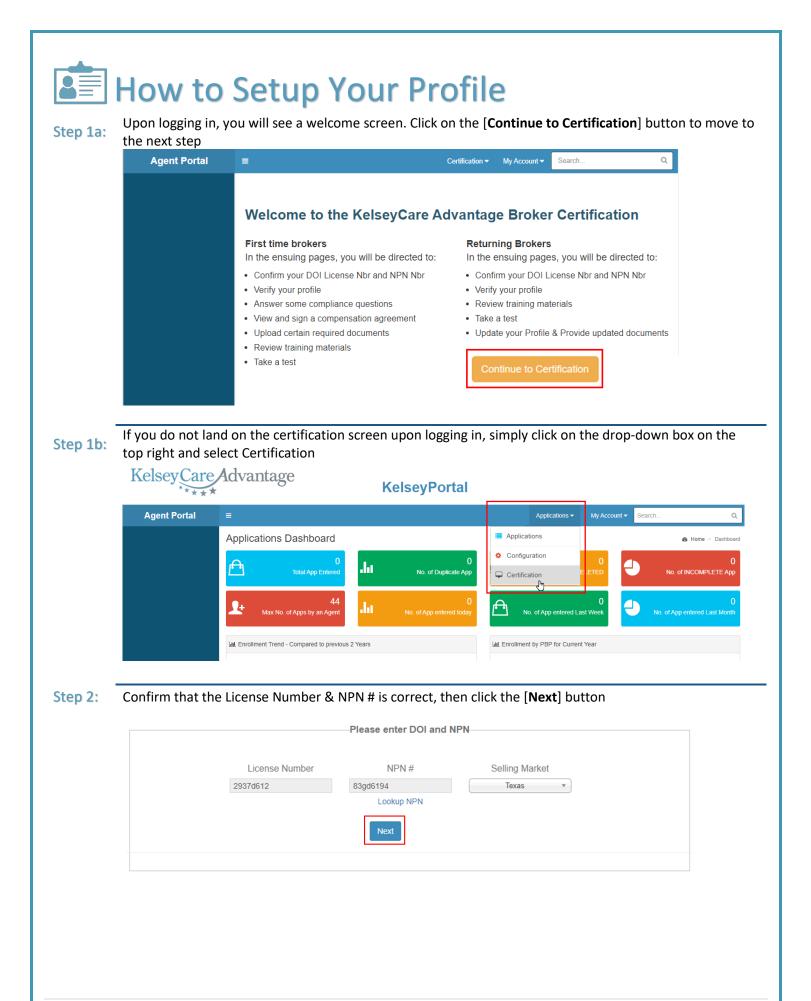


KelseyPortal	Agent Portal	
Our easy-to-use secure site gives you the tools and access	User ID	
needed to manage your clients anytime.	your email address	
	Password	
		0
Features	Login	
Check the eligibility of the client	Login	
 View your client's application status through to completion 		
View your book of business		Forgot Password?
View your commission statements		
Communicate with us through secure messaging	Want to get Contrac	ted? Email Us
 Control website access for your office and more ! 	, i i i i i i i i i i i i i i i i i i i	

· View and track a prospect lead through completion

You will be prompted to change your password. Type the temporary password once again in the "Current
 Step 3: Password" field, then create a new password and type it in the New Password field, then once again in the Confirm new password field. Click the [Change Password] button to confirm

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	Current password New password Confirm new password	Password must contain at least uppercase, lowercase letters, nu characters.			
1 4	Once your new password your email address and th ← → Ĉ බ ট https:// ▲ Microsoft Dynamics ← LBI 🔓 IT Serv	has been accepted, y he new password you kelseyportal.kelseycareadvantage.com	just created	_	in screen. Re-ente S 3 & @ D
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	KelseyPortal Our easy-to-use secure site gives yo needed to manage your clients anyt	ime.		Agent Portal User ID your email address Password	
	Features • Check the eligibility of the • View your client's applica • View your book of busine • View your commission str • Communicate with us thre • Control website access fo • View and track a prospece	client tion status through to completion ss atements bugh secure messaging or your office and more I	password —	Want to get Contracte	Torgot Password?
5:	You may be asked for add code. Once you receive th receive your code, contac	ne text, type in your 6	digit code & click	the [Submit] buttor	-
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Fill in your contact information (red boxes) and confirm that the information on this screen is correct. You
do not have to fill in the TAX ID if you don't have one. Disregard the checkbox for Independent Agent. Click the [Next] button to move to the next step

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First Name	Middle Initial	Last Name	Email
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DOB	NPN	DOI	TAX ID
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Address 1	Address 2	City	State
			TX •
Zip	Phone Number	Contracted Agency	-I'm an Independent Agent
		your agency name 🔹) —
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	4) Click	the [Uplc	bad] bu	tton to ad	d your selected	d docume	nt to the	screen b	below		
	i		-)—				
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	Please		e followii	ng document	ts. Please Note the						
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	Docum	nent Type		Expiration [Date Do	cument Loc	ation			4	
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Step 3:Answer YES/NO for the compliance history on the Independent Agent Agreement form.
Click on the button [Click here to View the Agreement]

	Step 3 - Review and sign Ag	ent/Agency Compensation Agreement between	n KelseyCare Advantage	
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<complex-block></complex-block>	with creditors, or had a direct pay	ment procedure initiated under the Securities Investors Pi	rotection Act?	
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	c. Failure to supervise in connect	ion with investment-related statutes, regulations, rules or i	industry standards of conduct?	0 •
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a defined berein (collectively, "Plun"). WHEREAS Plun is licensed as health maintenance organization or insurer in the State and has or is seeking a contract with the Centers for Medicare & Medicaid Services ("CMS") to offer Medicare Advantage ("MA") pluns in the State, and MIREAS Plun withers to contract with Agent to provide marketing and sales services in connection with Plun's MA plans directly and indirectly through Sales Agents (as hereinafted efficient). NOW, THEREFORE, in consideration of the premises and mutual promises herein stated, the parties hereby agree as follows: 1 1 1 1 1 1 1 1	Conboarding - Sales Broker Portal Conboarding - Sales Broker Fortal Contract_Contrac	x Independent_Agent_Contract_20 x eyportal.kelseycareadvantage.com/Certification	+ on/SubmitStep2	close the tab by click
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Step

Step 5:	Mark the 2 checkboxes below if you agree, sign th	oon click the [Nevt] button
Step 5.	Click here to View Agreement	
	I certify that the foregoing answers, including attachments, are TRUE and and belief.	CORRECT to the best of my knowledge
	I hereby acknowledge that I have read through the entire Compensation Ag above and I agree to all the terms and conditions therein.	greement Document attached to the link
	Agency: Hogwarts	Date: 07/28/2022
	Agent Signature	
	Teter Quill Clear Signature)
		Previous
	You will receive a confirmation email along with a	copy of the signed IAA
Step 6:		out without completing the test, you will be required to e you re-sign the IAA, you will receive a copy of the most
	Subject: Copy of IAA for your records KCA	
	Kelsey <u>Care</u> Advanta	age
	Hi,	
	Thank you for logging onto the Broker Portal to complete your onbo Attached is a copy of the Independent Agent Agreement (IAA). Plea	-
	this document for your records.	
	Thank you, KelseyCare Advantage Broker Support Team	
	kcabrokersupport@kelseycareadvantage.com 713-442-4949 KelseyCareAdvantage.com	

	How to Take the Certification Test	
Step 1:	Select the correct Year, Test Type is "Annual" and Plan is "All Benefits of KelseyCare Advantage". Click on the [View Training Content] button to open a window to review the training.	1
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	Step 4 - Select the Training you wish to review	
	Passing this test will qualify you to sell All Plan Benefit Packages of KelseyCare Advantage Year Test Type Plan Image:	
	Previous Take Test View Training Content	
Step 2:	Take your time in studying the training slides. Use the buttons at the bottom to move forward or backward. You may also click on the [Menu] button for additional notes. When you are finished, click the "x" in the top right corner of the box to close this window	5
	Kelsey <u>Care</u> Advantage	
	2023 BENEFITS	
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Step 3:Click the [Download Training Material] button to save a copy of the PDF and when ready, click the
[Start Test] button to begin. Another pop-up window will appear for you to take your test

	Step 5 - Take Test Please note the following about our certification and training program • Study the entire presentation before starting the test • All questions must be answered • A score of 85% or higher is required to pass • You have 3 attempts to pass the test
	Download Training Material Previous Start Test
	Test In Progress
	Test in Progress
	ta Question 1
	O TRUE O FALSE
	Question 1 of 20
	A score of 85% or higher is required to pass
Step 4a:	If you fail, you will see the message below:
	Final Step - Your Test Results Sorry! You have failed the test. You scored 50.00%
	Retake Test

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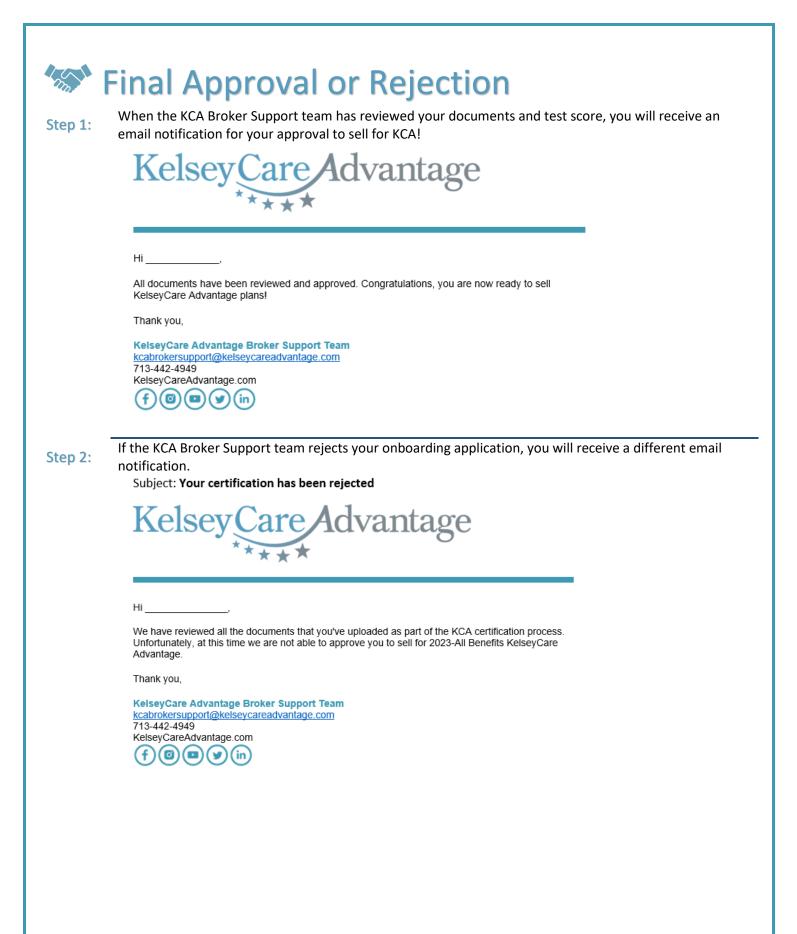
Once you make your way back to the Upload Documents screen, upload the corrected document following the same steps as before:

1) Select the document type that was rejected

Step 5:

- 2) Set the expiration date
- 3) Click on [Choose a File] to find & select the document on your computer, click [Open]
- 4) Click the [Upload] button to add your selected document to the screen below
- 5) Click the [Next] button to save and you may now exit the KelseyPortal

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Frequently Asked Questions

Q: I didn't get the email invitation to onboard, what do I do?

A: Please check your spam/junk email folder. You may also search for "You're invited to onboard with KCA". If you are still unable to locate the email invitation, contact <u>kcabrokersupport@kelseycareadvantage.com</u> for a password reset

Q: I don't know what my AHIP expiration date is, what date do I use?

A: 12/31/2022

Q: What if I fail the certification test more than 3 times?

A: Send an email to kcabrokersupport@kelseycareadvantage.com to request another attempt

Q: How do I download the training materials?

A: You must first click the [View Training Content] button which prompts a pop up window to view the training materials in a slideshow format. Once you close that pop up window, you will have another button that says [Download Training Material] where you may download the pdf

Q: How long does it take to get approved after I've passed the test?

A: Typically, it will take 2-3 business days for the Broker Support Team to review/verify your documents. As we are mass onboarding agents to the new KelseyPortal, it may be a little longer

Q: Where can I view my Book of Business?

A: That functionality is currently not available, but we plan to make this available in September/October

Q: Where do I submit my 2022 applications?

A: Continue to submit applications online - <u>https://enrollment.kelseycareadvantage.com/</u> If you have a paper application, send them to <u>Apps@kelseycareadvantage.com</u> We plan to make enrollment submission through the KelseyPortal, available in September/October

Q: Why do I keep getting logged out?

A: The KelseyPortal is a secure site. You cannot open multiple tabs or multiple windows while logged in. For security purposes, it will log you out.