

# KelseyPortal Onboarding Guide

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Last modified July 15, 2024

KelseyCare Advantage  
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# How to Access the KelseyPortal

**Step 1:** For NEW agents, you will be sent an invitation via email. Follow the instructions as shown below. If you are a returning agent, go straight to the website <https://kelseyportal.kelseycareadvantage.com>

**From:** KCABrokerSupport@KelseyCareAdvantage.com

**Subject:** You're invited to onboard with KCA



Hi \_\_\_\_\_,

You have been invited to onboard with KelseyCare Advantage for 20XX 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
3. E&O certificate
4. current AHIP certification

Additionally, you will need to read and sign the Independent Agent Agreement, review the KelseyCare Advantage 20XX 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@123

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!

**KelseyCare Advantage Broker Support Team**

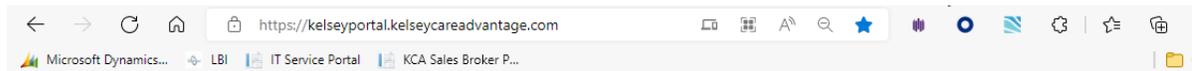
[kcabrokersupport@kelseycareadvantage.com](mailto:kcabrokersupport@kelseycareadvantage.com)

713-442-4949

[KelseyCareAdvantage.com](http://KelseyCareAdvantage.com)



**Step 2:** Click on the website link, enter your email address and temporary password



## KelseyPortal

Our easy-to-use secure site gives you the tools and access needed to manage your clients anytime.

### Features

- Check the eligibility of the client
- View your client's application status through to completion
- View your book of business
- View your commission statements
- Communicate with us through secure messaging
- Control website access for your office and more!
- View and track a prospect lead through completion

### Agent Portal

User ID

Password

Login

[Forgot Password?](#)

Want to get Contracted? [Email Us](#)

**Step 3:**

You will be prompted to change your password. Type the temporary password once again in the “Current Password” field, enter your new password in the “New Password” field, then once again in the “Confirm new password” field. Click the **[Change Password]** button to confirm

**Change your password**

Current password

New password

Confirm new password

Password must contain at least 12 characters, include uppercase, lowercase letters, numbers, and special characters.

**Change Password**

**Step 4:**

Once your new password has been accepted, you will be taken back to the main log in screen. Re-enter your email address and the new password you just created

**KelseyCare Advantage**

**KelseyPortal**  
Our easy-to-use secure site gives you the tools and access needed to manage your clients anytime.

**Agent Portal**

User ID  
your email address

Password  
.....

**Login**

Forgot Password?

Want to get Contracted? [Email Us](#)

**Features**

- Check the eligibility of the client
- View your client's application status through to completion
- View your book of business
- View your commission statements
- Communicate with us through secure messaging
- Control website access for your office and more !
- View and track a prospect lead through completion

**Step 5:**

You may be asked for additional verification. Click the **[Submit]** button to receive a text message (or email) with a code. Once you receive the text, type in your 6 digit code & click the **[Submit]** button. If you do not receive your code, contact [KCABrokerSupport@kelseycareadvantage.com](mailto:KCABrokerSupport@kelseycareadvantage.com)

**Additional Verification Required.**

Our security protocols require that you provide additional verification of your logon attempt. Please click 'Submit' below to have a unique verification code sent to your phone. Once you get the code please enter it into the screen so that your logon attempt can be verified.

Select Two-Factor Authentication Provider:

Text me a code

If you do not receive a verification code within 1 minute, please navigate back to the previous page or call our Broker hotline.

**Verify.**

Enter verification code

Code



# How to Setup Your Profile

## Step 1a:

Upon logging in, you will see a welcome screen. Click on the **[Continue to Certification]** button to move to the next step

The screenshot shows the 'Agent Portal' header with a search bar and navigation links for 'Certification' and 'My Account'. The main content area is titled 'Welcome to the KelseyCare Advantage Broker Certification'. It is divided into two columns: 'First time brokers' and 'Returning Brokers'. Both columns list steps to be followed, such as 'Confirm your DOI License Nbr and NPN Nbr', 'Verify your profile', and 'Take a test'. A prominent orange button labeled 'Continue to Certification' is highlighted with a red box at the bottom right of the page.

## Step 1b:

If you do not land on the certification screen upon logging in, simply click on the drop-down box on the top right and select Certification

The screenshot shows the 'KelseyPortal' Applications Dashboard. The top navigation bar includes 'Agent Portal', a search bar, and a dropdown menu for 'Applications'. The 'Applications' dropdown is open, showing options for 'Applications', 'Configuration', and 'Certification', with 'Certification' selected and highlighted by a red box. The dashboard features several metrics cards: 'Total App Entered' (0), 'No. of Duplicate App' (0), 'Max No. of Apps by an Agent' (44), 'No. of App entered today' (0), 'No. of App entered Last Week' (0), and 'No. of App entered Last Month' (0). There are also charts for 'Enrollment Trend - Compared to previous 2 Years' and 'Enrollment by PBP for Current Year'.

## Step 2:

Confirm that the License Number & NPN # is correct, then click the **[Next]** button

The screenshot shows a form titled 'Please enter DOI and NPN'. It contains three input fields: 'License Number' with the value '2937d612', 'NPN #' with the value '83gd6194', and 'Selling Market' with a dropdown menu set to 'Texas'. Below the NPN field is a 'Lookup NPN' link. A blue 'Next' button is highlighted with a red box at the bottom center of the form.

**Step 3:**

Fill in any missing information in the **red boxes** and make corrections as needed. If any of the grey boxes are incorrect, please contact Broker Support. 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



**Step 1 - Please enter or confirm your Profile**

First Name Peter	Middle Initial	Last Name Quill	Email your email address
DOB <input type="text"/>	NPN 83gd6194	DOI 2937d612	TAX ID <input type="text"/>
Address 1 <input type="text"/>	Address 2 <input type="text"/>	City <input type="text"/>	State TX
Zip <input type="text"/>	Phone Number <input type="text"/>	Contracted Agency your agency name	<input type="checkbox"/> I'm an Independent Agent



# How to Upload Your Profile Documents

You will be instructed to upload one of each: AHIP, E&O, DOI and Government ID

## Step 1:

- 1) Select the document type
- 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



### Step 2 - Upload Documents required by the Health Plan

Please upload the following documents. Please Note the following.

- Document Size cannot be greater than 5 MB
- Only documents of type JPG, JPEG, PNG, PDF, XLS, XLSX, DOC, DOCX and TIFF are accepted

Document Type:  (1)

Expiration Date:  (2)

Document Location:  Choose a file... (3)  (4)

Document Type	Expiry Date	Status	File Name	View	Download
---------------	-------------	--------	-----------	------	----------

## Step 2:

Repeat steps 1 through 4 until you have 4 uploaded documents showing. You will need to do this each year upon re-certification.

**\*\*\*The Expiration Date on your AHIP should be left blank\*\*\***

Click on the **[Next]** button to move to the next step.



### Step 2 - Upload Documents required by the Health Plan

Document Uploaded Successfully.

Please upload the following documents. Please Note the following.

- Document Size cannot be greater than 5 MB
- Only documents of type JPG, JPEG, PNG, PDF, XLS, XLSX, DOC, DOCX and TIFF are accepted

Document Type:

Expiration Date:

Document Location:  Choose a file...

Document Type	Expiry Date	Status	File Name	View	Download
TX ID	12/31/9999	Pending	Quill_Peter_TX ID_07202026_072820221042 .png	<a href="#">View</a>	<a href="#">Download</a>
DOI	04/05/2023	Pending	Quill_Peter_DOI_04052023_072820221042 .pdf	<a href="#">View</a>	<a href="#">Download</a>
AHIP	02/16/2023	Pending	Quill_Peter_AHIP_02162023_072820221041 .pdf	<a href="#">View</a>	<a href="#">Download</a>
E&O	01/31/2023	Pending	Quill_Peter_EO_01312023_072820221041 .pdf	<a href="#">View</a>	<a href="#">Download</a>

**Step 3:** Confirm the information displayed is correct, then click [Next].



**Step 3 - Review and sign Agent/Agency Compensation Agreement between KelseyCare Advantage**

And

<b>Agent Name:</b>	<b>Ins Lic #:</b>	<b>NPN#:</b>
Sleeper Agent	954781365	84123587
<b>Address:</b>		
11511 SHADOW CREEK PKWY		
<b>City:</b>	<b>State:</b>	<b>Zip Code:</b>
PEARLAND	TX	77854
<b>Phone:</b>	<b>Email:</b>	
( ) 3	phylischan325@yahoo.com	

Please refer to your Agency/FMO for your contract documents. Click next to continue

Previous

Next



# 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.



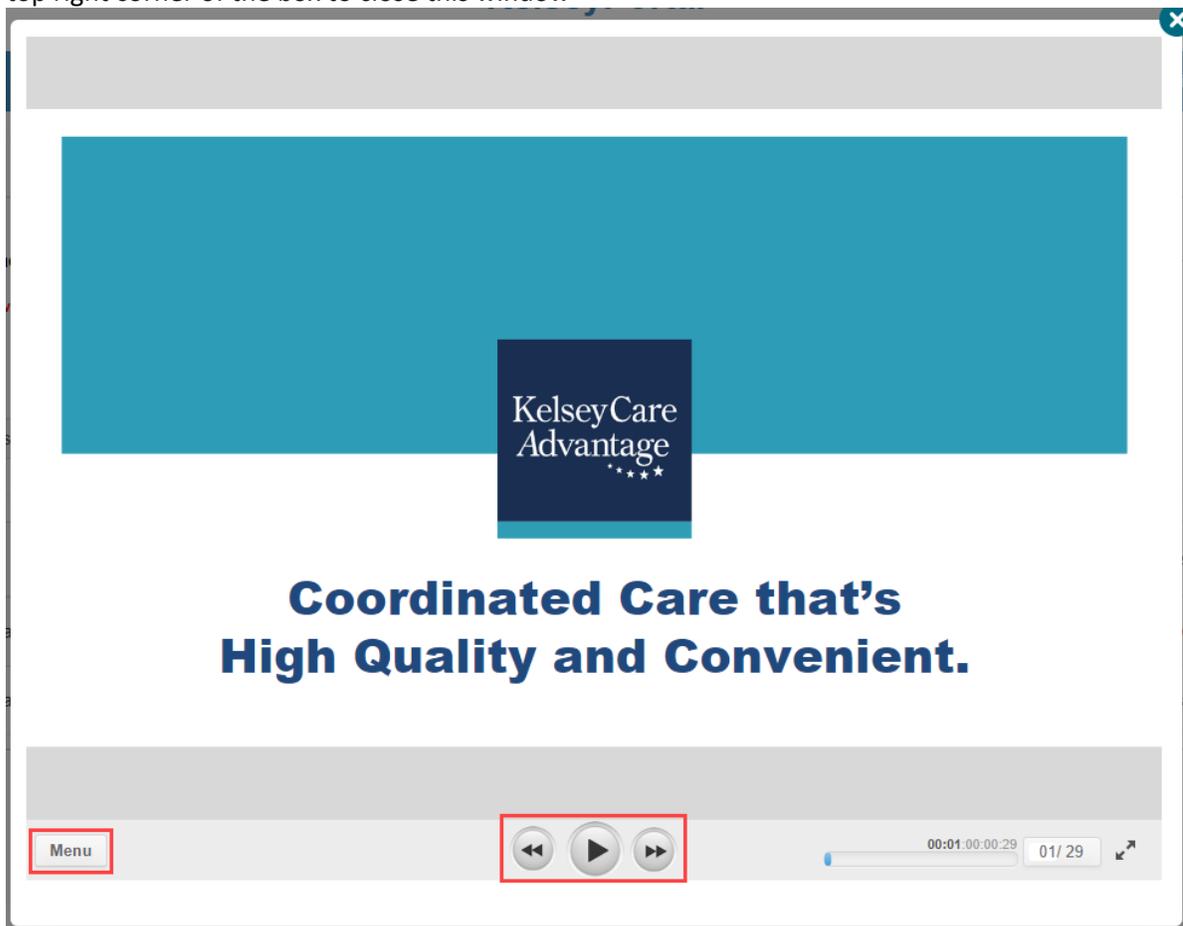
## Step 4 - Select the Training you wish to review

Passing this test will qualify you to sell All Plan Benefit Packages of KelseyCare Advantage

Year	Test Type	Plan
<input type="text"/>	<input type="text" value="Annual"/>	<input type="text" value="All Benefits of KelseyCare Advantage"/>

## Step 2:

Take your time 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



**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](#)

Care Advantage

Test In Progress

Question 1

TRUE

FALSE

Question 1 of 20

[Next](#)

• 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](#)

**Step 4b:**

When you pass the test, you will see the success message below. To finish, you can simply close the browser window, or go to the top right corner of the screen, click on “My Account” and then [Logout]



**Final Step - Your Test Results**

Congrats! You have passed the test with 95.00%. As a next step, we will review & validate the documents you have uploaded. Please note, this process can take up to 48 hours. Once this is complete, you will receive an email confirmation stating you are certified and ready to sell. If you need to contact us in the meantime, please send an email to [kcabrokersupport@kelseycareadvantage.com](mailto:kcabrokersupport@kelseycareadvantage.com).

Retake Test

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the ensuing pages, you will be directed to:

Confirm your DOI License Nbr and NPN Nbr

**Step 5:**

You will receive a confirmation email upon passing the test as well

Subject: **KCA Certification Completed**



Hi \_\_\_\_\_,

You have successfully completed your certification for **2025-All Benefits of KelseyCare Advantage!**

The broker support team will now review your AHIP, DOI, E&O and ID to approve or reject these documents. This process may take up to 48 hours.

Once all documents have been approved, you will be notified via email that you are fully certified and ready to sell for KCA!

Thank you,

**KelseyCare Advantage Broker Support Team**

[kcabrokersupport@kelseycareadvantage.com](mailto:kcabrokersupport@kelseycareadvantage.com)

713-442-4949

KelseyCareAdvantage.com





# What to Do if Your Document is Rejected

## Step 1:

If any of your documents (AHIP, DOI, E&O or ID) are not accepted, you will receive an email stating which document was rejected. You will need to re-upload the corrected document through the KelseyPortal

Subject: **Your document has been rejected**



Hi \_\_\_\_\_,

Your **AHIP** document that you provided as part of the Certification process has been rejected. Please re-upload the corrected document so we may proceed with the certification approval process.

If you have any questions, please contact us.

Thank you,

**KelseyCare Advantage Broker Support Team**

[kcabrokersupport@kelseycaadvantage.com](mailto:kcabrokersupport@kelseycaadvantage.com)

713-442-4949

KelseyCareAdvantage.com



## Step 2:

Login once again to <https://kelseyportal.kelseycaadvantage.com> and enter your username & password. Again, you may be prompted for additional verification



### KelseyPortal

Our easy-to-use secure site gives you the tools and access needed to manage your clients anytime.

#### Features

- Check the eligibility of the client
- View your client's application status through to completion
- View your book of business
- View your commission statements
- Communicate with us through secure messaging
- Control website access for your office and more !
- View and track a prospect lead through completion

#### Agent Portal

User ID

Password

**Login**

[Forgot Password?](#)

Want to get Contracted? [Email Us](#)

### Additional Verification Required.

Our security protocols require that you provide additional verification of your logon attempt. Please click 'Submit' below to have a unique verification code sent to your phone. Once you get the code please enter it into the screen so that your logon attempt can be verified.

---

Select Two-Factor Authentication Provider:

Text me a code ▾

**Submit**

If you do not receive a verification code within 1 minute, please navigate back to the previous page or call our Broker hotline.

### Verify.

Enter verification code

Code

**Submit**

**Step 3:** It will look like you need to take the certification test again, but you don't. Click on [**Continue to Certification**] to get to the next screen

**Agent Portal**    Certification ▾    My Account ▾    Search...

## Welcome to the KelseyCare Advantage Broker Certification

**First time brokers**  
In the ensuing pages, you will be directed to:

- Confirm your DOI License Nbr and NPN Nbr
- Verify your profile
- Answer some compliance questions
- View and sign a compensation agreement
- Upload certain required documents
- Review training materials
- Take a test

**Returning Brokers**  
In the ensuing pages, you will be directed to:

- Confirm your DOI License Nbr and NPN Nbr
- Verify your profile
- Review training materials
- Take a test
- Update your Profile & Provide updated documents

**Continue to Certification**

**Step 4:** Again, bypass these 2 screens by clicking the [**Next**] button

Please enter DOI and NPN

License Number: 2937d612    NPN #: 83gd6194    Selling Market: Texas

Lookup NPN

**Next**

**Step 1 - Please enter or confirm your Profile**

First Name: Peter    Middle Initial:    Last Name: Quill    Email:   

DOB: 01/01/1900    NPN: 32657412    DOI: 2937d612    TAX ID:   

Address 1: 6581 MILKY WAY    Address 2:    City: HOUSTON    State: TX

Zip: 77508    Phone Number:    Contracted Agency: Hogwarts

I'm an Independent Agent:

Previous    **Next**

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

**Step 5:**

- 1) Select the document type that was rejected
- 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



**Step 2 - Upload Documents required by the Health Plan**

Please upload the following documents. Please Note the following.

- Document Size cannot be greater than 5 MB
- Only documents of type JPG, JPEG, PNG, PDF, XLS, XLSX, DOC, DOCX and TIFF are accepted

Document Type:  (1)      Expiration Date:  (2)      Document Location:  (3)  (4)

Document Type	Expiry Date	Status	File Name	View	Download	
CERT	Non-Expiring	Accepted	Peter Quill__20220728234220_Certification.pdf	<a href="#">View</a>	<a href="#">Download</a>	
AOC	12/31/9999	Accepted	Final_Peter_32657412_2937d612_07282022104523766.pdf	<a href="#">View</a>	<a href="#">Download</a>	
TX ID	12/31/9999	Accepted	Quill_Peter_TX ID_07202026_072820221042.png	<a href="#">View</a>	<a href="#">Download</a>	
DOI	04/05/2023	Accepted	Quill_Peter_DOI_04052023_072820221042.pdf	<a href="#">View</a>	<a href="#">Download</a>	
AHIP	02/16/2023	Rejected	Quill_Peter_AHIP_02162023_072820221041.pdf	<a href="#">View</a>	<a href="#">Download</a>	
E&O	01/31/2023	Accepted	Quill_Peter_EO_01312023_072820221041.pdf	<a href="#">View</a>	<a href="#">Download</a>	



# Final Approval or Rejection

## Step 1:

When the KCA Broker Support team has reviewed your documents and test score, you will receive an email notification for your approval to sell for KCA!



Hi \_\_\_\_\_,

All documents have been reviewed and approved. Congratulations, you are now ready to sell KelseyCare Advantage plans!

Thank you,

**KelseyCare Advantage Broker Support Team**

[kcabrokersupport@kelseycareadvantage.com](mailto:kcabrokersupport@kelseycareadvantage.com)

713-442-4949

KelseyCareAdvantage.com



## Step 2:

If the KCA Broker Support team rejects your onboarding application, you will receive a different email notification.

Subject: **Your certification has been rejected**



Hi \_\_\_\_\_,

We have reviewed all the documents that you've uploaded as part of the KCA certification process. Unfortunately, at this time we are not able to approve you to sell for 2025-All Benefits KelseyCare Advantage.

Thank you,

**KelseyCare Advantage Broker Support Team**

[kcabrokersupport@kelseycareadvantage.com](mailto:kcabrokersupport@kelseycareadvantage.com)

713-442-4949

KelseyCareAdvantage.com





# 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 [kcabrokersupport@kelseycareadvantage.com](mailto:kcabrokersupport@kelseycareadvantage.com) for a password reset

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

A: Leave the field blank, it will auto populate.

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

A: Send an email to [kcabrokersupport@kelseycareadvantage.com](mailto: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: Once you have onboarded, you will see  **Book of Business** in your Applications module

**Q: Why do I keep getting logged out?**

A: The KelseyPortal is a secure site and has a timer set to log out inactive users.

**Q: I received the approval email, what's next?**

A: Your assigned Kelsey Broker Sales Manager will reach out via email with future trainings and additional materials such as:

- Kelsey Portal Applications Guide
- Election Periods Guide
- Phone Enrollment Guide
- Scope of Appt Printable Form
- Applications Printable Form