CRM JOB AID

How to find your KS Health Plan list

Step 1 In CRM go to the Policies tab. Make sure the header / view is showing "All Active Policies"	Image: Show Chart Im
Select the drop-down arrow next to the column for "Product Company" In the Filter By box make sure the first option says "Equals" In the second box scroll to the "KS Health Plan" option and hit apply	Product Type V Product Category V Product Company V Members Choi: P& Members Choi: P& BOP P& BOP P& Commercial Ur P& Workers Comp P& Apply Clear
Account	ts with ONLY KS Health Plans
If you would like to see Accounts with ONLY KS Health Plans a special view has been created and shared with your team in CRM. KFB – Health Plan – No active PC Policies **If you don't see this option reach out to your coach and it can be shared with you!	Image: Dynamics 365 Image: Dynamics 365 <tr< th=""></tr<>