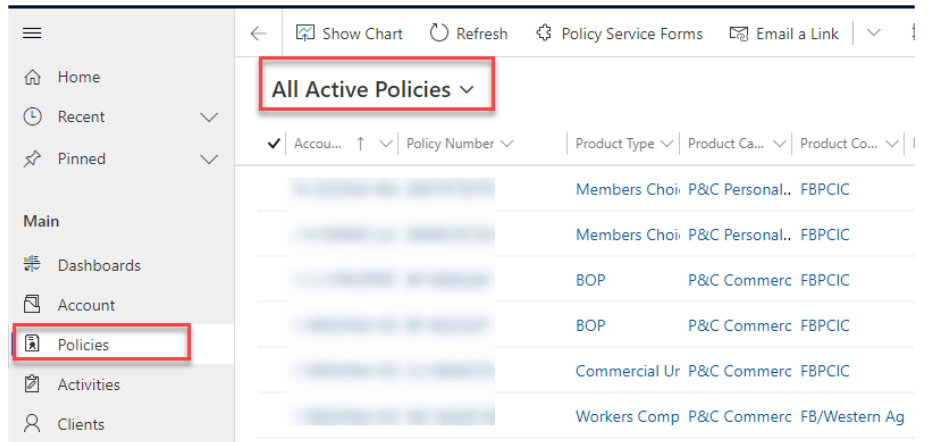


Step 1

In CRM go to the **Policies** tab. Make sure the header / view is showing "All Active Policies"

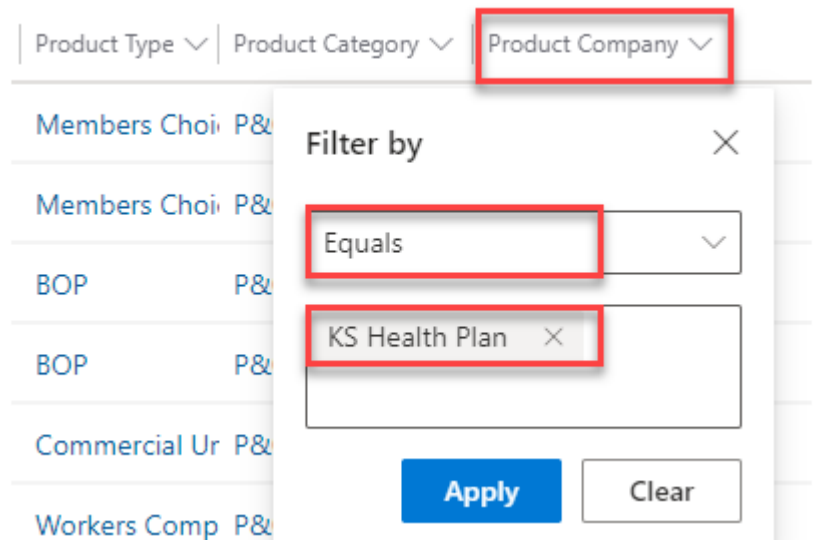


Step 2

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



Accounts 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!

