The Commonwealth of Kentucky

kynect

Quick Reference Guide
How to Export Reports

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This Quick Reference Guide is designed to help kynectors and Agency Admin users export reports from kynect benefits.

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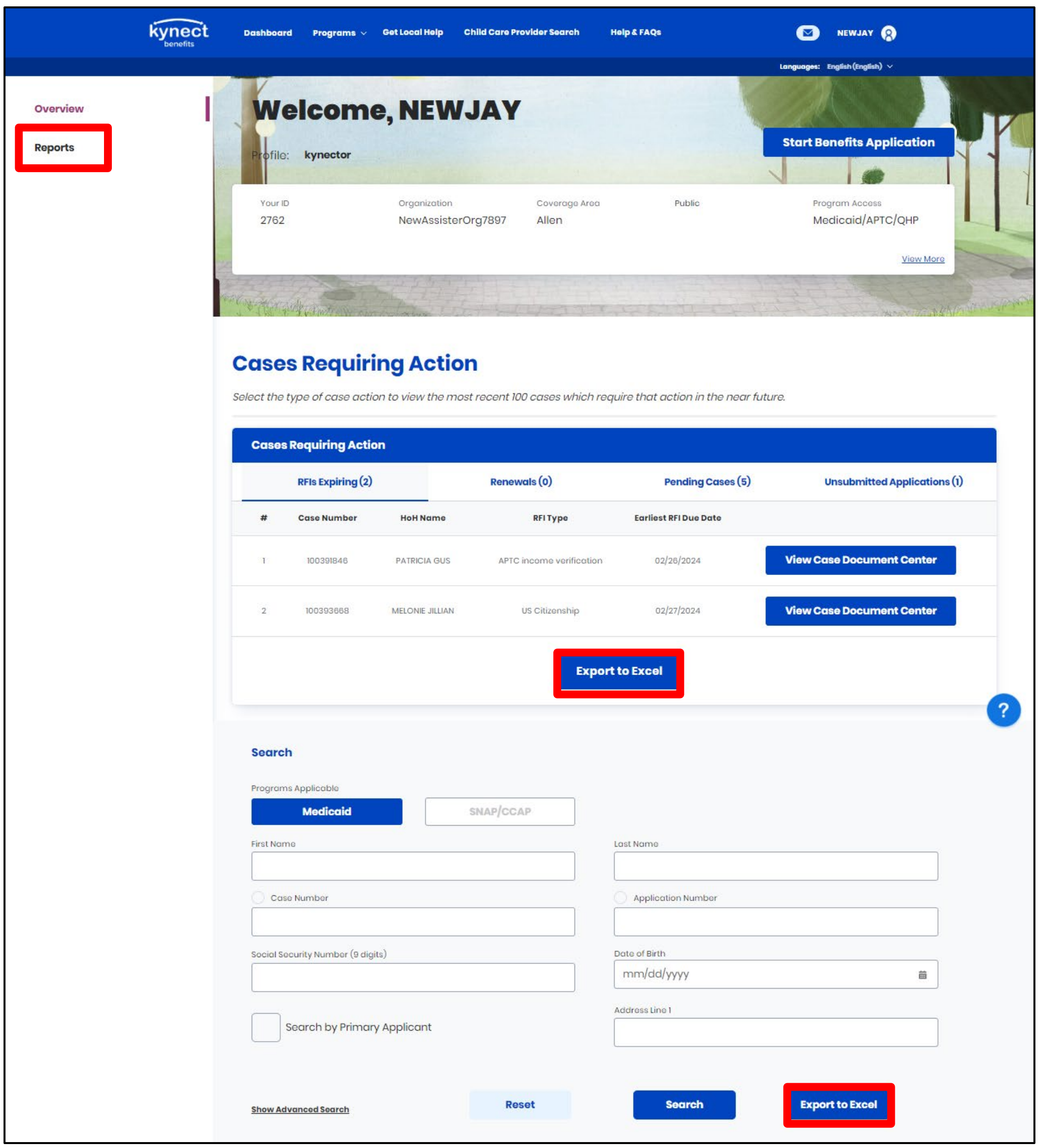
Export Reports Overview

The Export Report functionality in kynect benefits allows kynectors and Agency Admin users the ability to export cases into Excel. There are three methods to Export to Excel:

- *Cases Requiring Action* from their Dashboard
- General Case Search Results
- *Case Activity Tracking Report* from the *Reports* tab on their Dashboard

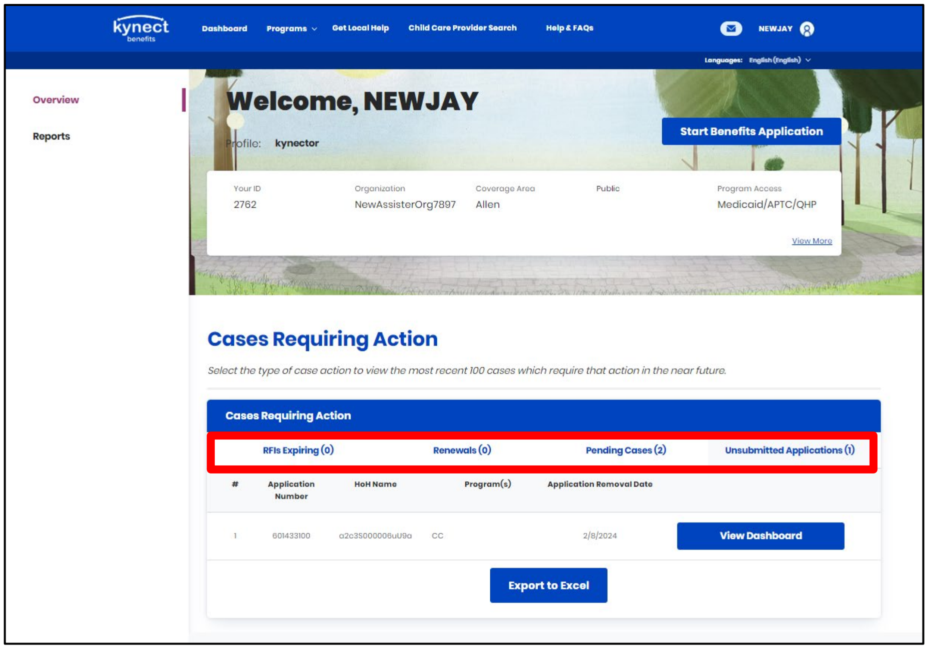
Dashboard

From their Dashboard, kynectors and Agency Admin users see *Cases Requiring Action* and the Case Search option below *Cases Requiring Action*. From the Dashboard, kynectors and Agency Admin users can also access *Reports*.



Cases Requiring Action

On their Dashboard, kynectors and Agency Admin users can export *Cases Requiring Action* that are associated to them to Excel. Users can export cases to Excel based on these four categories: RFIs Expiring, Renewals, Pending Cases, or Unsubmitted Applications. The total number of cases is noted after the category name in parentheses.

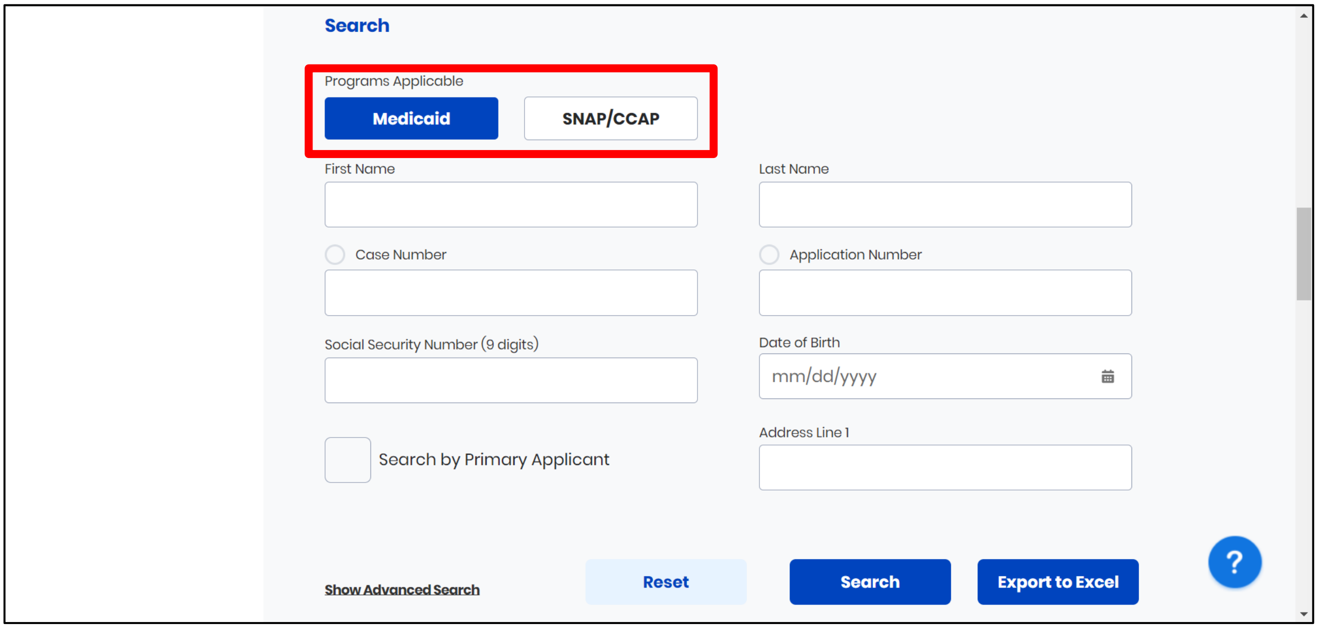


Please note: Only the top 100 cases requiring action display in the table. If a kynector or Agency Admin user has more than five records, the X and Y buttons allow the user the view the next or previous five.

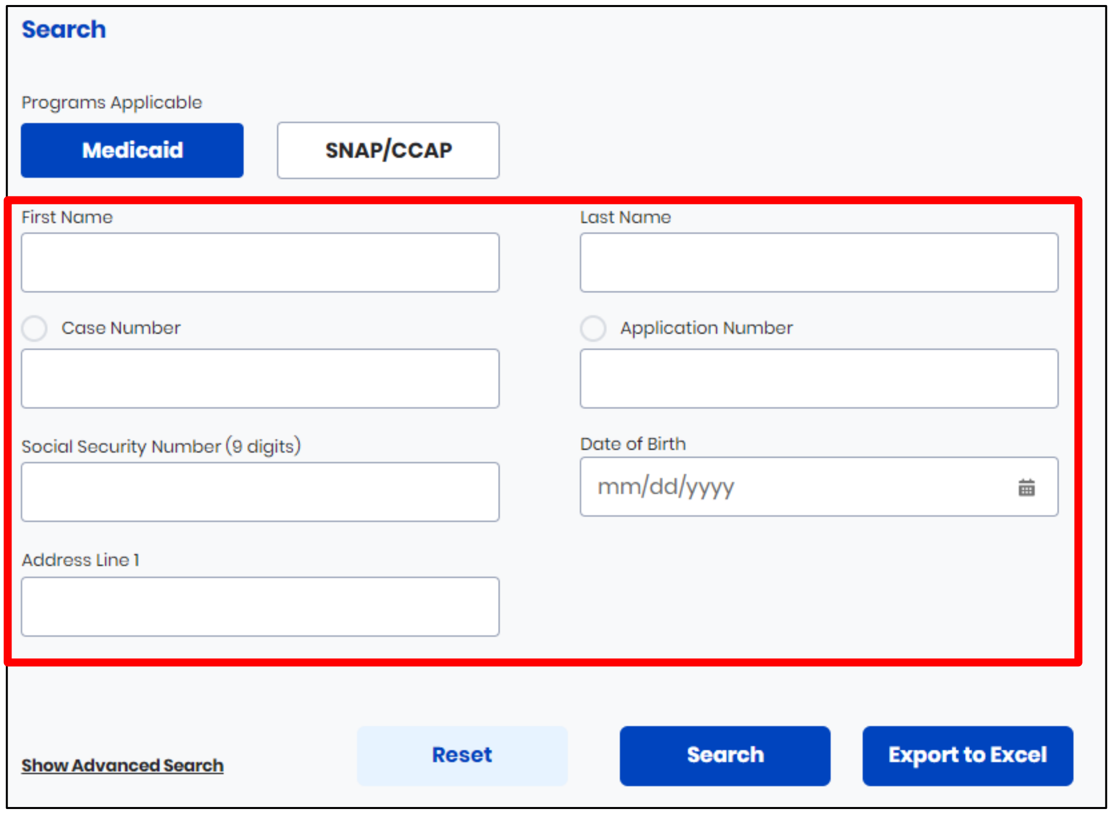
Export to Excel from Search below Cases Requiring Action

kynectors and Agency Admin users can also export search results to Excel. Below are the steps to Export to Excel.

1. Under Programs Applicable, select **Medicaid** or **SNAP/CCAP**.



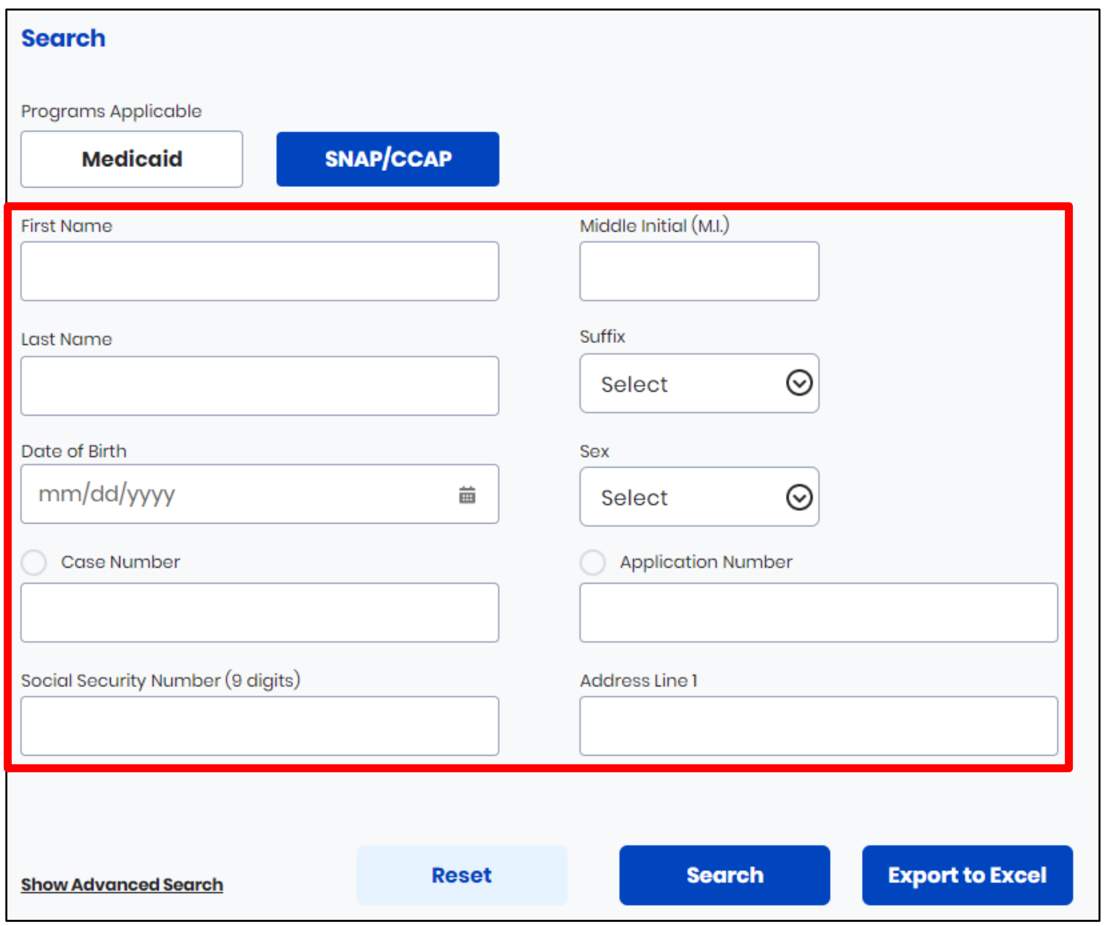
2. If desired, enter additional information applicable for the search:
    a. For Medicaid:
        i. Enter **First Name**.
        ii. Enter **Last Name**.
        iii. Select **Case Number** or **Application Number** radio button.
        iv. Enter **Case Number** or **Application Number**.
        v. Enter **Social Security Number**.
        vi. Enter **Date of Birth** or click the calendar icon and select the **Date of Birth**.
        vii. Select **Search by Primary Applicant** (Agency Admin users only).
        viii. Enter **Address Line 1**.



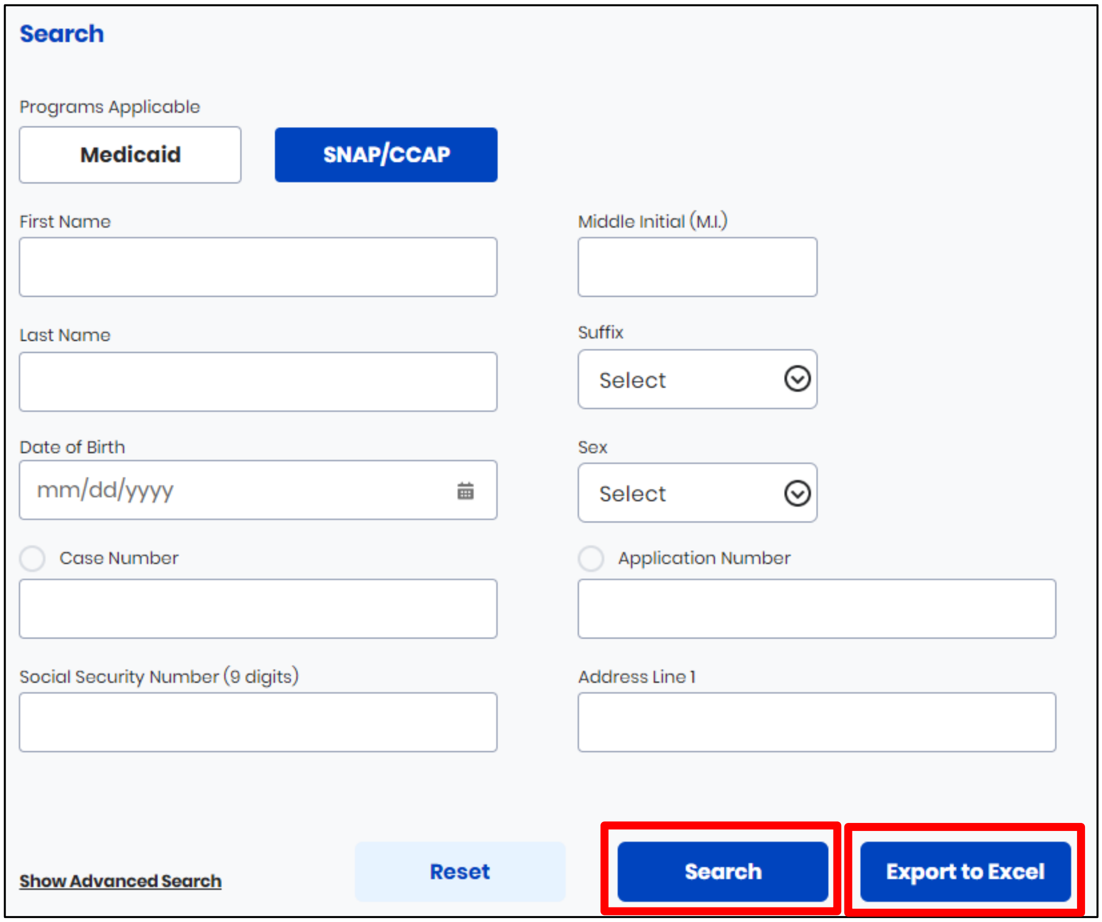
b. For SNAP/CCAP:

i. Enter **First Name**.
ii. Enter **Middle Initial (M.I.)**.
iii. Enter **Last Name**.
iv. Select **Suffix**.
v. Enter **Date of Birth** or click the calendar icon and select the **Date of Birth**.
vi. Select **Sex**.
vii. Select **Case Number** or **Application Number** radio button.
viii. Enter **Case Number** or **Application Number**.
ix. Enter **Social Security Number**.
x. Enter **Address Line 1**.

Please note: In order to use the search function, user must enter the First Name, Last Name, Date of Birth, and one of the following fields: Case Number, Application Number, or Social Security Number.



3. Click **Search**.
4. Click **Export to Excel**.

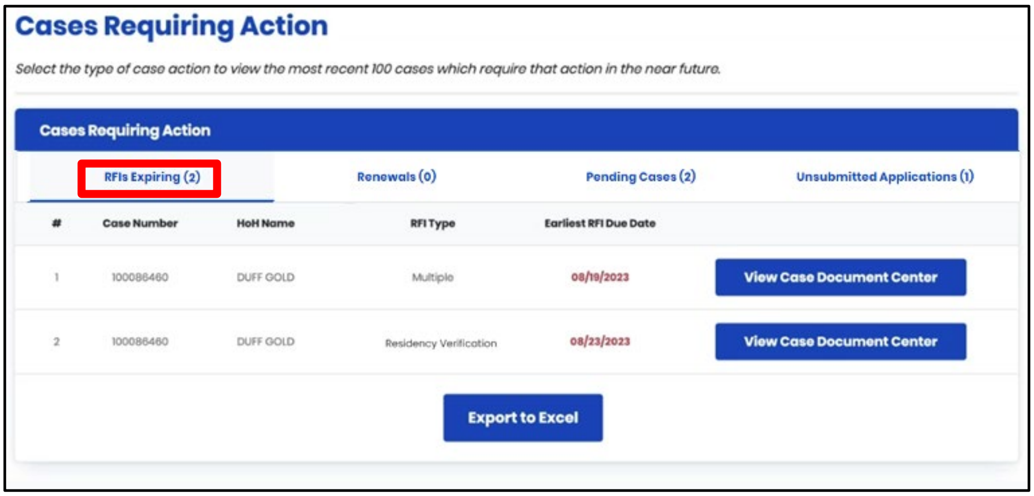


Export to Excel from Dashboard

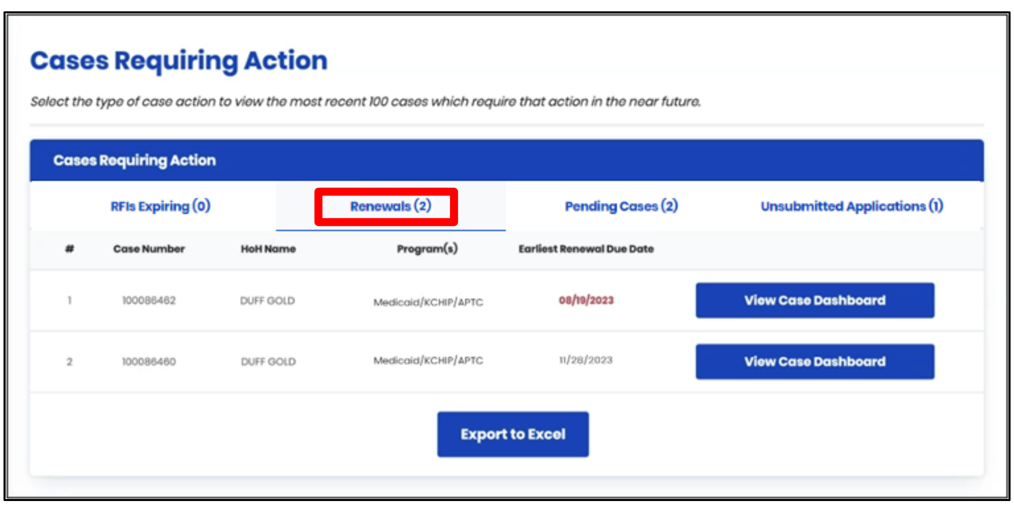
kynectors and Agency Admin users can easily export *Cases Requiring Action* to Excel as a CSV file type.

Below are the steps to **Export to Excel**.

1. Scroll down to the *Cases Requiring Action* section of the kynector or Agency Admin dashboard.
2. Click the **RFISs Expiring** tab at the top of the header column. The kynector or Agency Admin users see the *Case Number*, the *HoH Name*, the *RFI Type*, and the *Earliest RFI Due Date*.

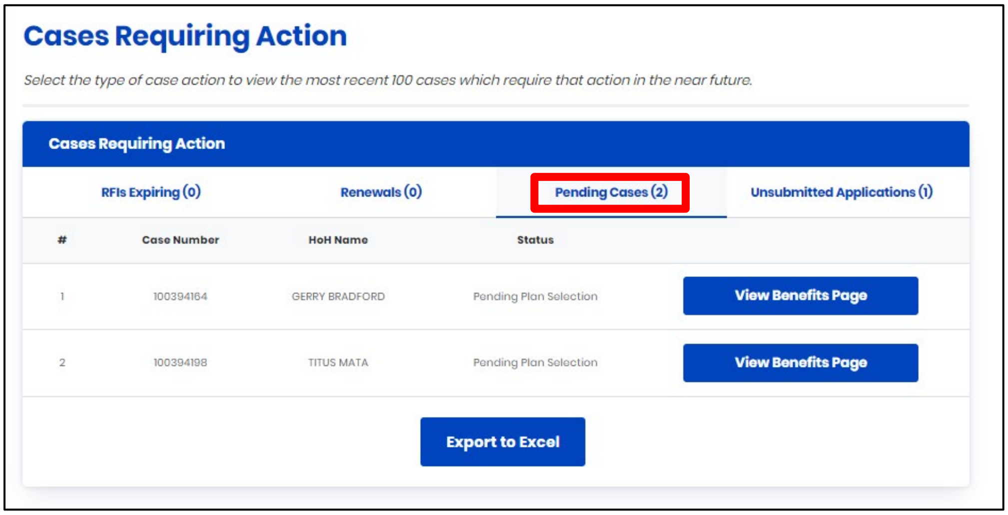


3. Click the **Renewals** tab at the top of the header column to view details for SNAP and Medicaid and QHP cases which are eligible for renewal within the next 30 days and for which the renewal has not yet been initiated. The kynector or Agency Admin users see the *Case Number*, *HoH Name*, *Program(s)*, and *Earliest Renewal Due Date*.

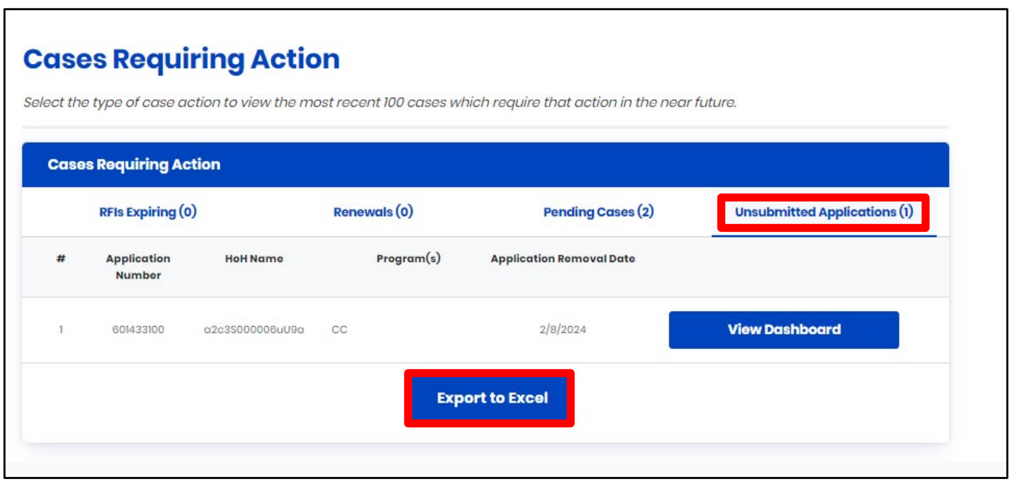


4. Select the **Pending Cases** tab at the top of the header column to view details for cases

that have moved into a Pending Verification, Pending Review, Pending Plan Selection, or Pending Interview status within the last 30 days. The kynector or Agency Admin users see the *Case Number*, *HoH Name*, and *Status*.



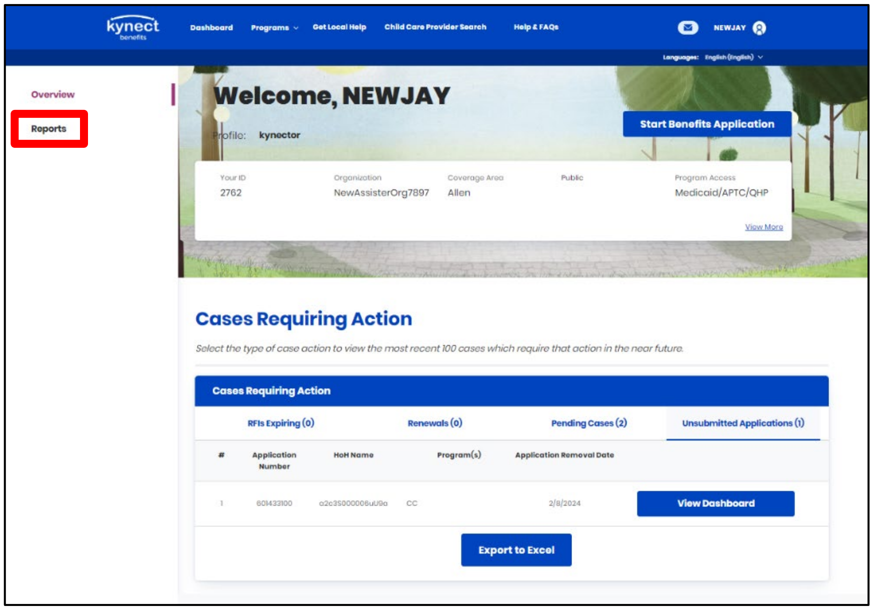
5. Select the **Unsubmitted Applications** tab at the top of the header column to view unsubmitted applications associated to them. The kynector or Agency Admin users see the *Application Number*, *HoH Name*, *Program(s)*, and *Application Withdraw Date*.
6. Click the **Export to Excel** button to export the first 100 results on the tab.



Please note: The selected type of case action appears in the user's downloaded files as a CSV file.

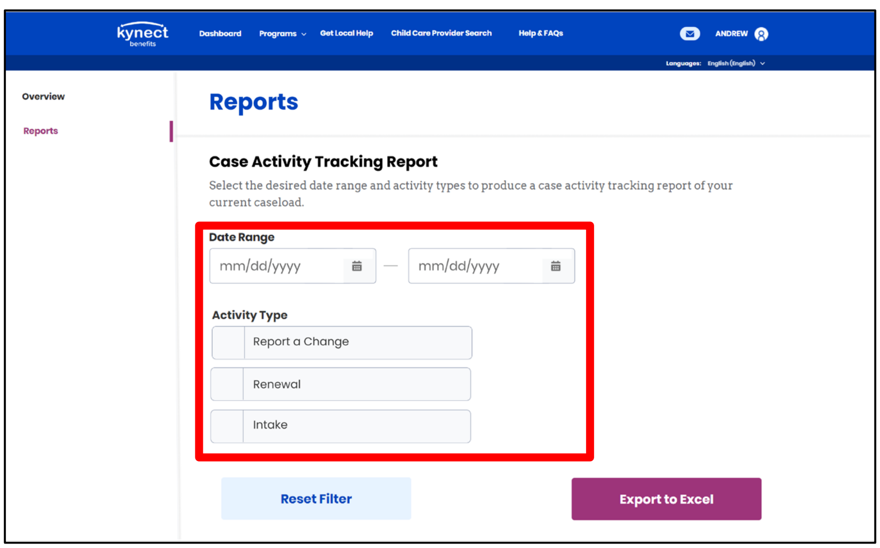
Access Reports

To access reports, click **Reports** from the Dashboard.



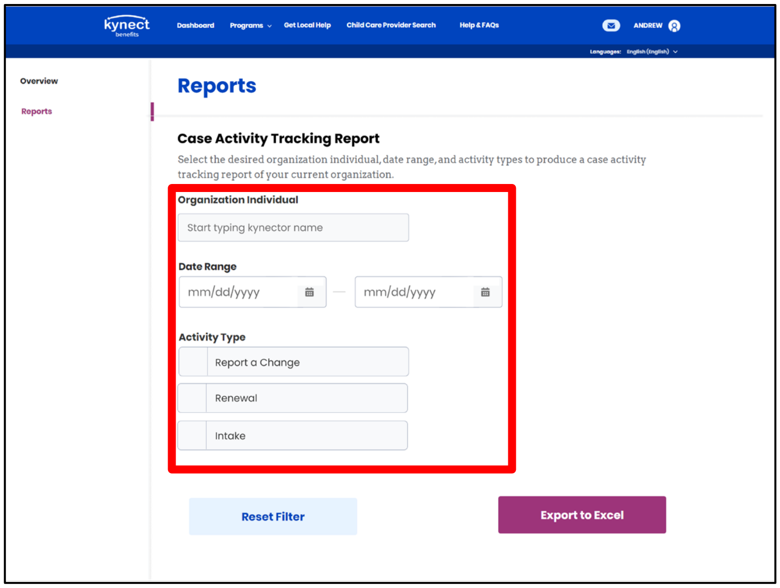
Case Activity Tracking Report for kynectors

On the *Reports* page, kynectors see the *Case Activity Tracking Report*, where they can select the date range and activity type(s) to produce a case activity tracking report of their current caseload.



Case Activity Tracking Report for Agency Admin Users

On the Reports page, Agency Admin users see the *Case Activity Tracking Report*, where they can enter the kynector's name, select the date range, and select the activity type(s) to produce a case activity tracking report for the kynector.



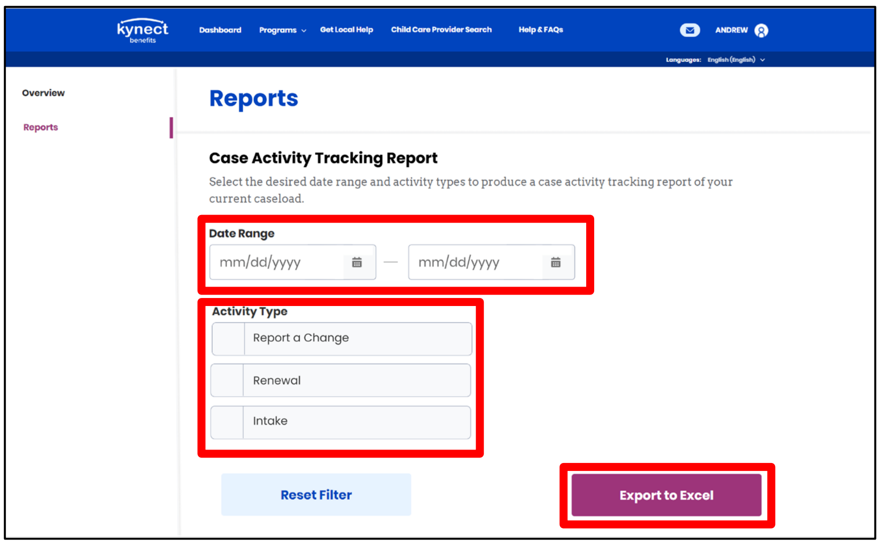
Generate a Report to Export to Excel (for kynectors)

Below are the steps for kynectors to generate a report to export to Excel.

1. Under **Date Range**,
    a. Enter the **Start Date** or click the calendar icon and select a **Start Date**.
    b. Enter the **End Date** or click the calendar icon and select an **End Date**.

Please note: The report can only pull data from 60 days back to the current date.

2. Under **Activity Type**, select one or more options: **Report a Change**, **Renewal**, or **Intake**.
3. Click **Export to Excel**.



Please note: Click **Reset Filter** to clear the selections. The spreadsheet includes the following columns: Date, Organization, Case Number, Individual Name, and Activity Type.

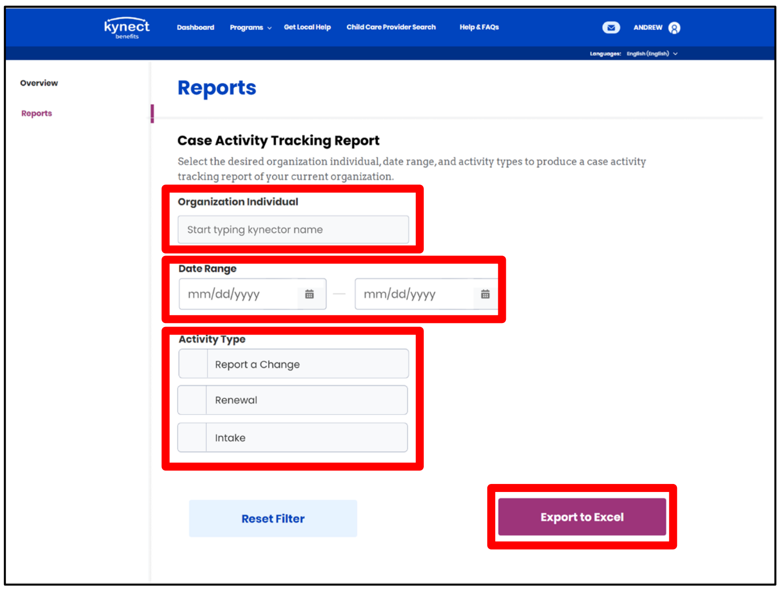
Generate a Report to Export to Excel (for Agency Admin Users)

Below are the steps for Agency Admin users to generate a report to export to Excel.

1. Under **Date Range**,
    a. Enter the **Start Date** or click the calendar icon and select a **Start Date**.
    b. Enter the **End Date** or click the calendar icon and select an **End Date**.

Please note: The report can only pull data from 60 days back to the current date.

2. Under **Activity Type**, select one or more options: **Report a Change**, **Renewal**, or **Intake**.
3. Click **Export to Excel**.



Please note: Click **Reset Filter** to clear the selections. The spreadsheet includes the following columns: Date, Organization, Case Number, Individual Name, Activity Type, and kynector Name.