

The Commonwealth of Kentucky



kynector/Authorized Representative Dashboard Quick Reference Guide





This Quick Reference Guide is designed to help kynectors and Authorized Representatives complete the necessary steps to navigate their dashboard.

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Please Note: Residents who still need help after referencing this Quick Reference Guide can call **(855) 459-6328** for additional assistance.



kynector/Authorized Representative Dashboard Overview

The kynector/Authorized Representative Dashboard helps kynectors and Authorized Representatives search and find the cases for their associated Residents. From the dashboard, kynectors and Agency Administration can also see the cases in their caseload that require urgent action. kynectors and Authorized Representatives must have an active KYID account to access their dashboard.

kynector/Authorized Representative Dashboard Details

The top half of the kynector/Authorized Representative dashboard includes the details below.

- ID Number
- Organization
- Coverage Area
- Public or Private Status
- Number of associated Resident cases
- Program Access

The menu on the side includes **Reports**, where kynectors and Authorized Administration users can access reports to Export to Excel. The two reports available for selection from the **Reports** screen are the **FPL Percentage Report** and the **Case Activity Tracking Report**.

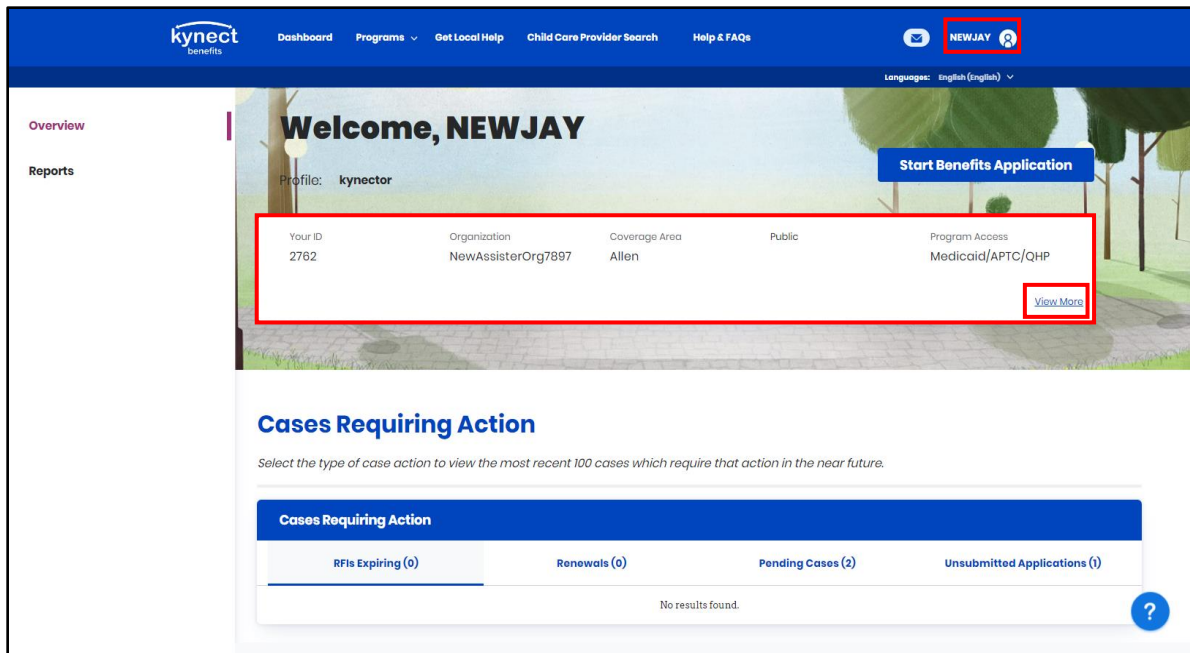


Please Note: For more information and guidance for exporting reports, please refer to the **How to Export Reports Quick Reference Guide**.



Please Note: The **Case Summary** link appears on the left side for active cases that currently or previously had Medicaid (MA) or Qualified Health Plan (QHP) present, where the individual is the Head of Household. If the case is not active, or the individual is not the Head of Household, the link is not available.

1. Select **View More** to reveal **Contact Information** and **Organization Information**.
2. To update **Contact Information** or **Organization Information**, select your **name** in the upper right-hand corner to access the **My Information** screen.



Please Note: The screenshot above displays the kynectors/Authorized Representative ID number. kynectors use the kynector ID when they call the Professional Services Line.

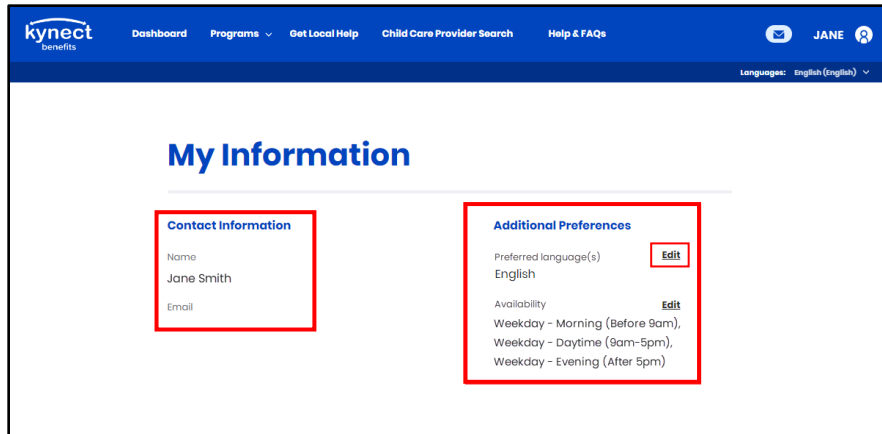


Please Note: kynectors will also have Agency Management and kynect On Demand options listed along the left side.

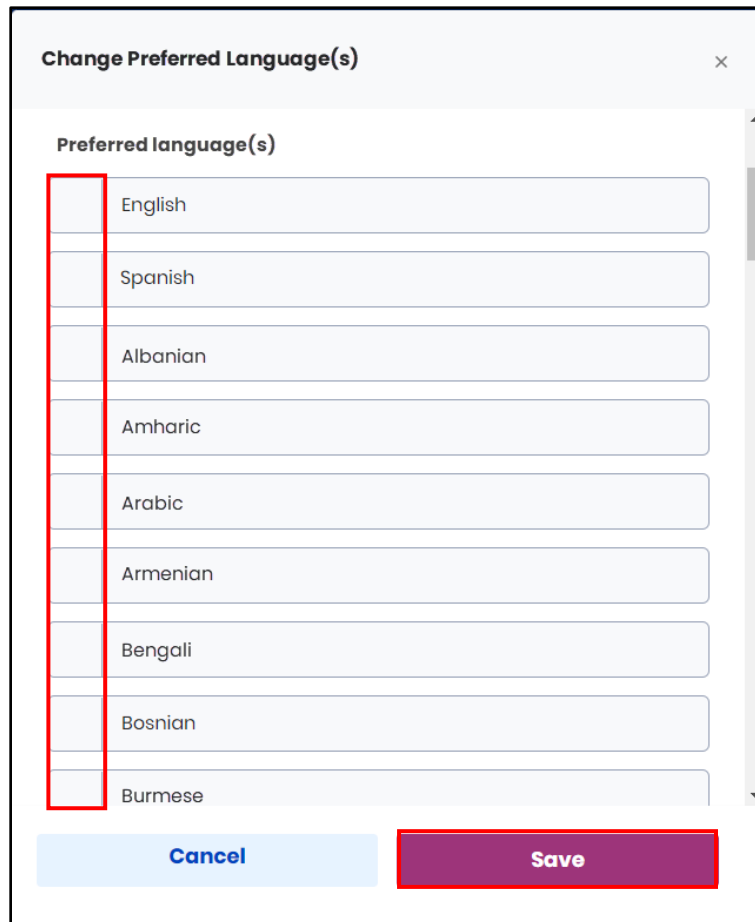


Please Note: Select **View Less** to hide the information.

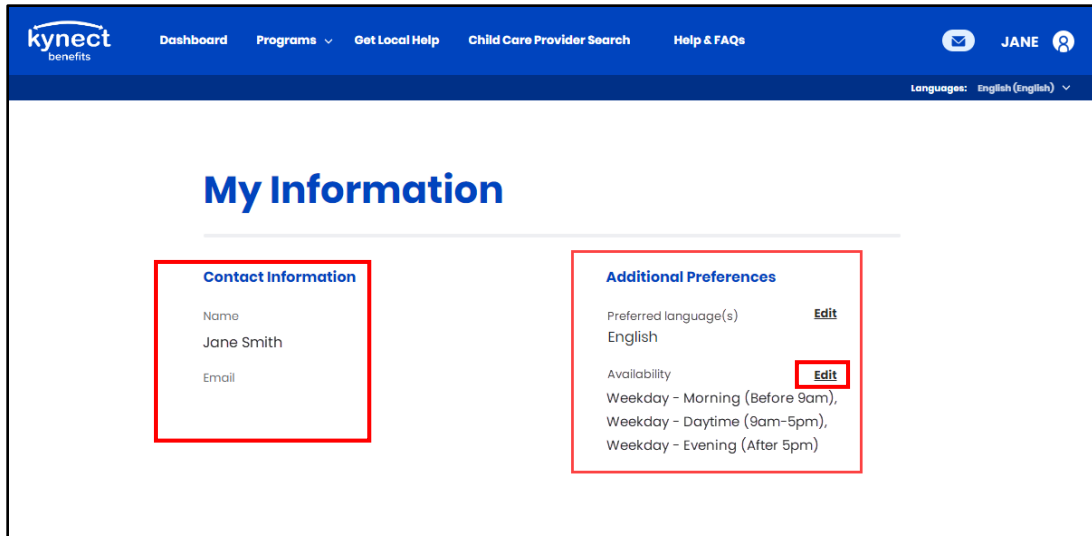
3. The **My Information** screen displays Contact Information and Additional Preferences.
4. The **Contact Information** tile displays the Agent's name and Email (if provided).
5. The **Additional Preferences** tile displays the Agent's Preferred language(s) and Availability.
6. If applicable, select the **Edit** hyperlink next to **Preferred language(s)**.



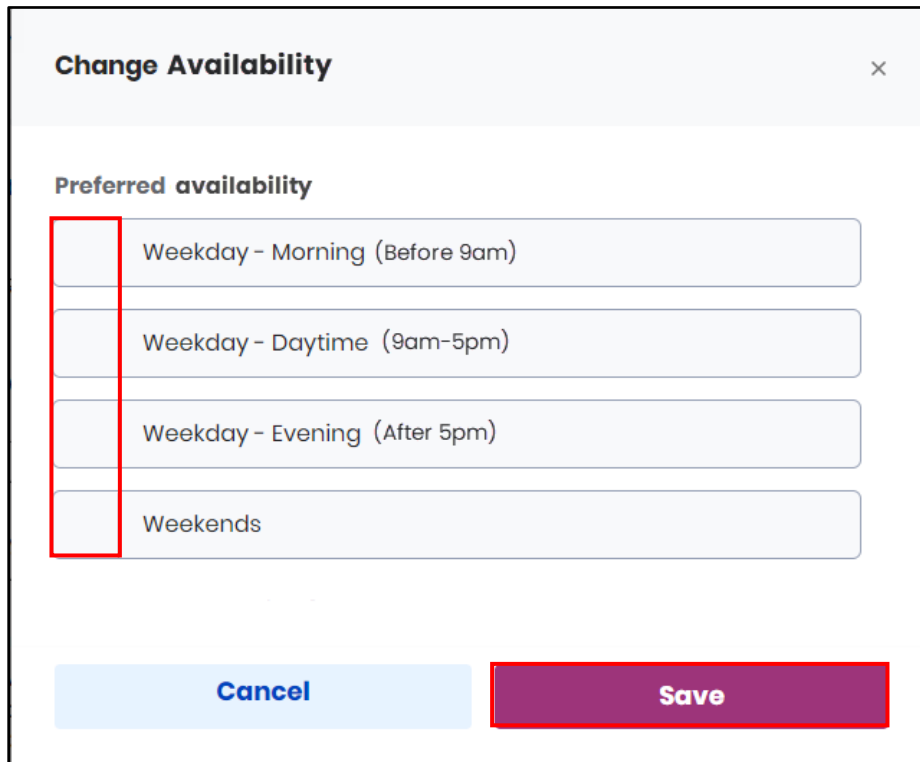
7. On the **Change Preferred Language(s)** pop-up, select all the languages that apply.
8. Select **Save**.



9. If applicable, on the **My Information** screen, select the **Edit** hyperlink next to **Availability**.

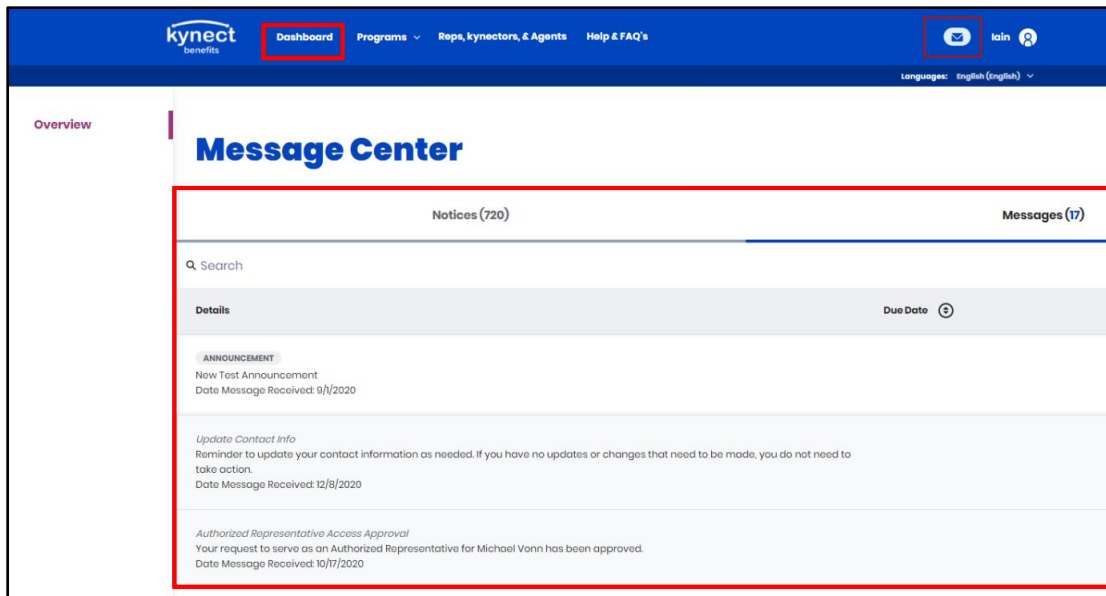


10. On the **Change Availability** pop-up, select all applicable date/time options.
11. Select **Save**.



View Message Center

1. Select the **Message Center** icon to view Announcements, Messages, and Notifications for the cases for Residents. Accessibility to Notifications and To-Do's depend on the role and associated programs. Select **Dashboard** on the top menu to return to the kynector/Authorized Representative dashboard.



Please Note: If the Individual is Head of Household (HOH), the Message Center displays notices regarding cases in which they are HOH, provided the case is currently active or made inactive/closed within the previous 90 days. For non-citizen user roles like Authorized Representatives, Agents, and kynectors, only notices for cases where a relevant association exists are displayed. If the Individual is not HOH, notices display for cases where they are active and associated only to the Individual. If the Individual is out of household, then notices are not displayed for that Individual. Notices generated for out of household Individuals do display for the HOH.

Filter Message Center Notices

The Message Center Notices table is sorted by the most recent Date Generated to the oldest Date Generated. The table displays 10 records per page– Residents can use the pagination at the bottom of the table and select a new page number or Next to see more Notices. Residents can filter *Notices* by *Notice Type*, *Name*, *Case/Application Number*, *Action Due by Date*, and *Date Generated*.



Please Note: The Message Center Notices tab displays the 100 most recent notices by default. To view more, Residents can select the “here” hyperlink.

Below are the steps to select and apply filters on the Notices table, if desired.

1. Select **Notices** to view **Notices**.



2. Select **Filter** to view **Filter** options. Select from the following Filter options to narrow down the results.

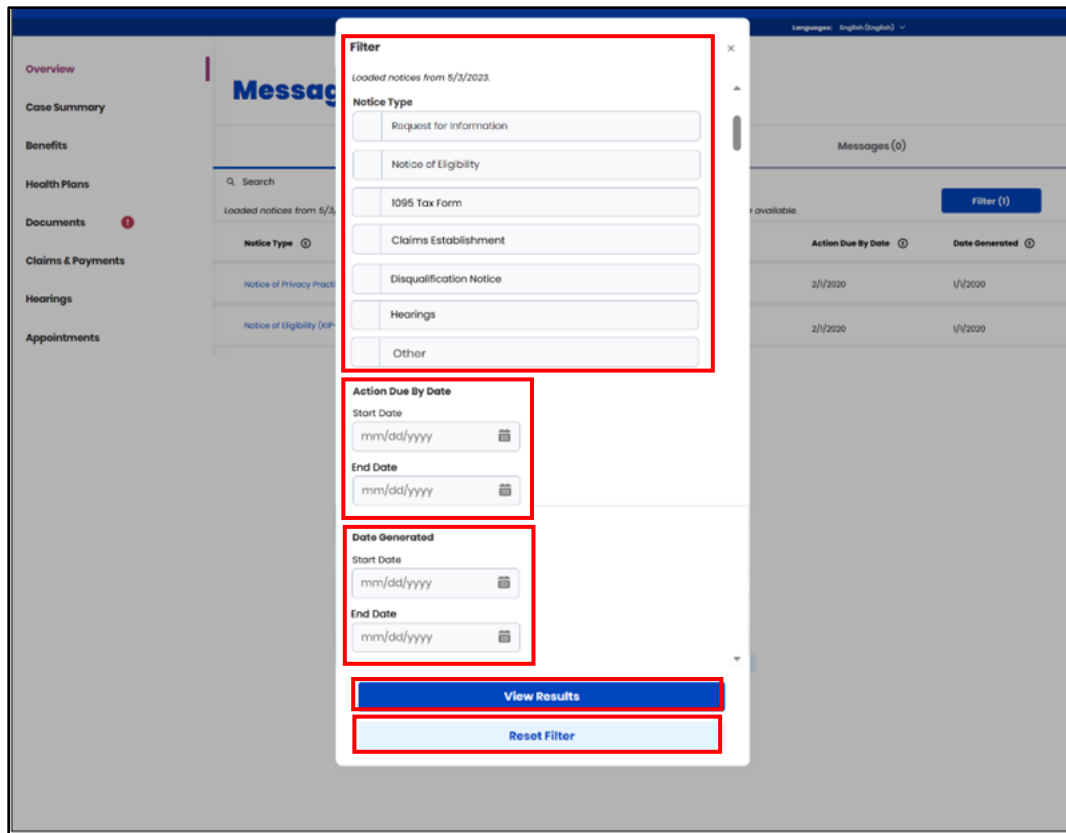


- a. Under **Notice Type**, select one or more options: **Request for Information, Notice of Eligibility, 1095 Tax Form, Claims Establishment, Disqualification Notice, Hearings, or Other.**



Please Note: The following Hearing types will be filtered if the user selects hearings: Recommended Order, Final Order, Notice of Hearings. The Other notice type filters all other types of notices that do not fall under the above categories in the current record set.

- b. Under **Action Due By Date**,
 - i. Enter the **Start Date** or select the calendar icon and select a **Start Date**.
 - ii. Enter the **End Date** or select the calendar icon and select an **End Date**.
- c. Under **Date Generated**,
 - i. Enter the **Start Date** or select the calendar icon and select a **Start Date**.
 - ii. Enter the **End Date** or select the calendar icon and select an **End Date**.



Please Note: Select **View Results** to view the Notices associated with the selected filters. Select **Reset Filter** to remove all selected filters.

View Cases Requiring Action (for kynectors)

kynectors and Agency Administration users can easily view their most recent 100 cases that require action in the near future from the *Cases Requiring Action* section of their dashboard.

1. Scroll down to the *Cases Requiring Action* section of the kynector or Agency Administration dashboard.
2. The kynector or Agency Administration users can view the total number of cases in their caseload per each urgent action tab at the top of the header columns of the table.
3. Select the **Export to Excel** button to export the first 100 results on each tab to a CSV file type.



The screenshot shows the kynect benefits dashboard. At the top, there is a navigation bar with 'Dashboard', 'Programs', 'Get Local Help', 'Child Care Provider Search', and 'Help & FAQs'. The user is logged in as 'NEWJAY'. The main content area features a 'Welcome, NEWJAY' message and a 'Start Benefits Application' button. Below this is a profile card for 'kynector' with details: Your ID (2762), Organization (NewAssisterOrg7897), Coverage Area (Allen), Public, and Program Access (Medicaid/APTC/QHP). The 'Cases Requiring Action' section is highlighted with a red border. It includes a sub-header 'Cases Requiring Action' and a description: 'Select the type of case action to view the most recent 100 cases which require that action in the near future.' There are four tabs: 'RFIs Expiring (2)', 'Renewals (0)', 'Pending Cases (2)', and 'Unsubmitted Applications (1)'. The 'RFIs Expiring (2)' tab is selected and highlighted with a red box. Below the tabs is a table with columns: '#', 'Case Number', 'HoH Name', 'RFI Type', and 'Earliest RFI Due Date'. Two rows of data are shown, both for Case Number 100088480 and HoH Name DUFF GOLD. The first row has RFI Type 'Multiple' and Earliest RFI Due Date '08/18/2023'. The second row has RFI Type 'Residency Verification' and Earliest RFI Due Date '08/23/2023'. Each row has a 'View Case Document Center' button. Below the table is an 'Export to Excel' button, also highlighted with a red box. At the bottom of the dashboard, there is a 'Search' field.

#	Case Number	HoH Name	RFI Type	Earliest RFI Due Date
1	100088480	DUFF GOLD	Multiple	08/18/2023
2	100088480	DUFF GOLD	Residency Verification	08/23/2023

4. Select the **RFIs Expiring** tab to view details for cases with urgent actions that will occur in the near future (within 30 days).
 - a. The kynector or Agency Administration users see the *Case Number*, *HoH Name*, *RFI Type*, and *Earliest RFI Due Date* on this tab.
 - b. Cases are ordered by Earliest open RFI Due Date, earliest to latest.
 - c. Select the **View Case Document Center** button to navigate to the given case's Document Center.



Cases Requiring Action

Select the type of case action to view the most recent 100 cases which require that action in the near future.

Cases Requiring Action					
RFIs Expiring (2)		Renewals (0)	Pending Cases (2)	Unsubmitted Applications (1)	
#	Case Number	HoH Name	RFI Type	Earliest RFI Due Date	
1	100086480	DUFF GOLD	Multiple	08/18/2023	View Case Document Center
2	100086480	DUFF GOLD	Residency Verification	08/23/2023	View Case Document Center

[Export to Excel](#)

5. Select the **Renewals** tab to view details for SNAP and Medicaid and QHP cases which are eligible for renewal within the next 30 days and for which a renewal has not yet been initiated.
 - a. The kynector or Agency Administration users see the *Case Number*, *HoH Name*, *Program(s)*, and *Earliest Renewal Due Date* on this tab.
 - b. Cases are ordered by Earliest Renewal Due Date, earliest to latest.
 - c. Select the **View Case Dashboard** button to navigate to the given case's dashboard.

Cases Requiring Action

Select the type of case action to view the most recent 100 cases which require that action in the near future.

Cases Requiring Action					
RFIs Expiring (0)		Renewals (2)	Pending Cases (2)	Unsubmitted Applications (1)	
#	Case Number	HoH Name	Program(s)	Earliest Renewal Due Date	
1	100086482	DUFF GOLD	Medicaid/KCHIP/APTC	08/18/2023	View Case Dashboard
2	100086480	DUFF GOLD	Medicaid/KCHIP/APTC	11/28/2023	View Case Dashboard

[Export to Excel](#)

6. Select the **Pending Cases** tab 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.
 - a. If a case falls into more than one of the following statuses, only the first status (in order of precedence) would be displayed: Pending Interview, Pending Verification, Pending Plan Selection, Pending Review.



- b. The kynector or Agency Administration users see the *Case Number*, *HoH Name*, and *Status* on this tab.
- c. Cases are ordered by the date they were moved into the pending status, with the oldest date showing first.
- d. Select the **View Benefits Page** button to navigate to the given case's Benefits page.

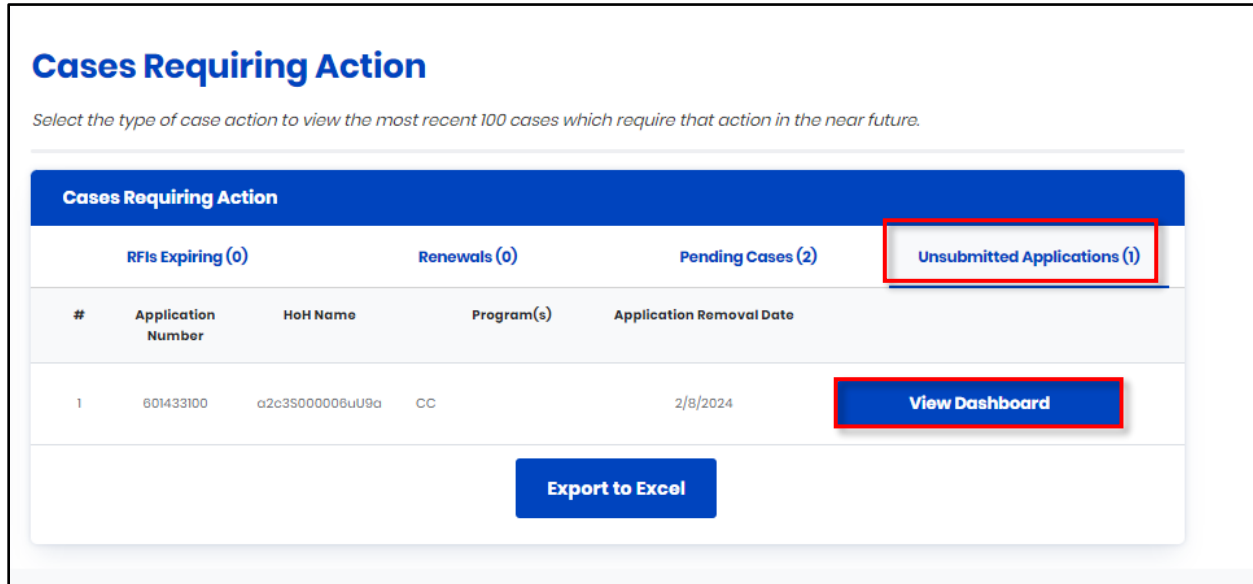
Cases Requiring Action

Select the type of case action to view the most recent 100 cases which require that action in the near future.

Cases Requiring Action				
RFIs Expiring (0)	Renewals (0)	Pending Cases (2)	Unsubmitted Applications (1)	
#	Case Number	HoH Name	Status	
1	100394164	GERRY BRADFORD	Pending Plan Selection	View Benefits Page
2	100394188	TITUS MATA	Pending Plan Selection	View Benefits Page

[Export to Excel](#)

7. Select the **Unsubmitted Applications** tab to view unsubmitted applications associated to the kynector or Agency Administration user.
 - a. The kynector or Agency Administration users see the *Case Number, HoH Name, Program(s), and Application Withdraw Date* on this tab.
 - b. Cases are ordered by the earliest Application Removal Date, with the earliest date showing first.
 - c. Select the **View Dashboard** button to navigate to the given case's Dashboard.



Cases Requiring Action

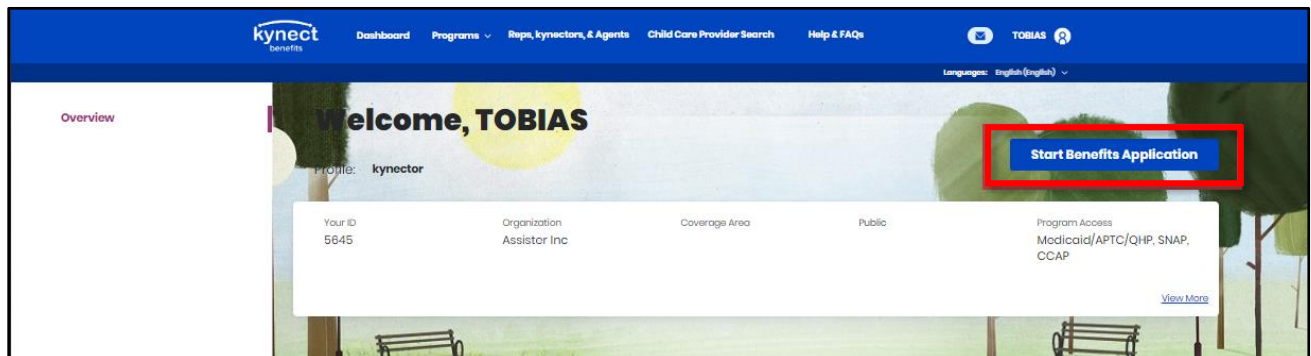
Select the type of case action to view the most recent 100 cases which require that action in the near future.

Cases Requiring Action					
RFIs Expiring (0)	Renewals (0)	Pending Cases (2)	Unsubmitted Applications (1)		
#	Application Number	HoH Name	Program(s)	Application Removal Date	
1	601433100	a2c35000008uU9a	CC	2/8/2024	View Dashboard

Export to Excel

Start Benefits Application

1. Select **Start Benefits Application** to begin the process of completing a benefits application on behalf of a Resident.



Dashboard Programs Reps, kynectors, & Agents Child Care Provider Search Help & FAQs

Language: English (English)

Welcome, TOBIAS

Profile: kynector

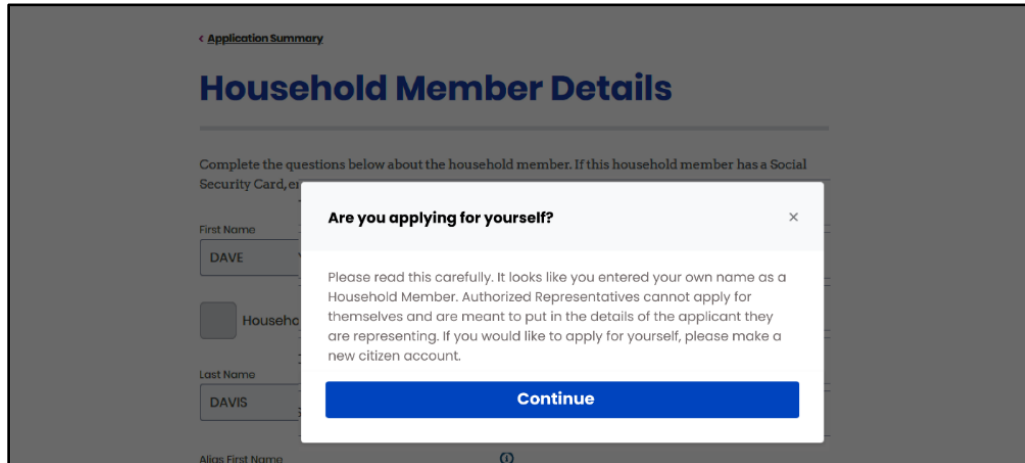
Your ID 5645	Organization Assistor Inc	Coverage Area	Public	Program Access Medicaid/APTC/QHP, SNAP, CCAP
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[View More](#)

Start Benefits Application



Please Note: The following screen appears if an Authorized Representative tries to complete a benefits application for themselves:



Please Note: If another user is currently completing an application for the Individual, then the following message displays: “You cannot access this Application since another user is currently editing this application.” If the user already in the application is inactive for 10 minutes or longer, then they are kicked out of the system.



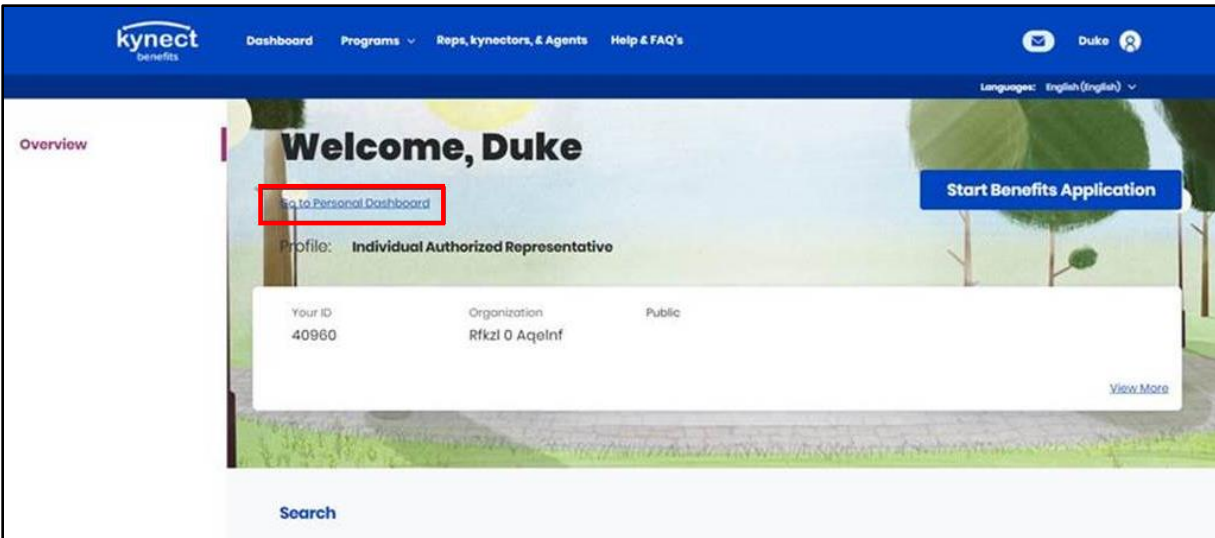
Please Note: If a kynector is associated with more than one organization, they will receive the following screen after selecting **Start Benefits Application**.

A screenshot of a web application dialog box titled "Select kynector Organization". The dialog has a close button (X) in the top right corner. Below the title, there is a prompt: "Select the organization you would like to create the application on behalf of". There are two radio button options: "Westchester Hospital" and "Eastchester Clinic". At the bottom of the dialog, there are two buttons: a blue "Continue" button and a light blue "Cancel" button.

Please Note: If a partial match occurs when the Individual information entered matches with an existing Individual on kynect, a notification is sent to the Message Center in Agent Portal for agents, and the Message Center in kynect for kynectors, with the following message displayed: “The application you have submitted for <Name> with <ApplicationID> has resulted in a Partial Match and requires additional verification from our end. Our team has begun investigating the Partial Match Task and is working to find a solution. We'll keep you updated on the outcome of the Partial Match Task within 2-3 business days. We appreciate your patience while we wait, and we advise against submitting multiple applications. If you have any inquiries regarding this, please contact the professional services line at 1-855-326-4650.”

Navigating to the Personal Dashboard

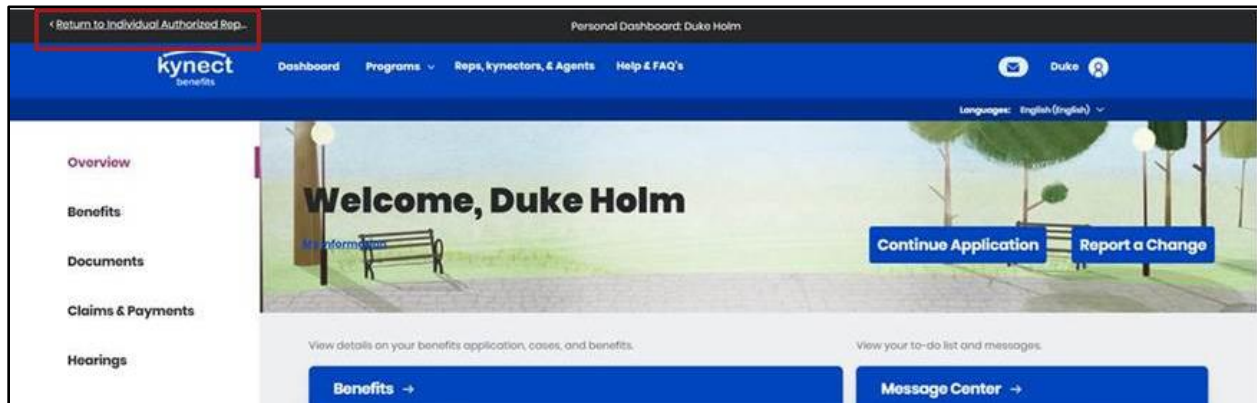
1. Select **Go to Personal Dashboard** to navigate to the other dashboards. If the user has a Resident role, they are taken to the Personal dashboard where they apply for benefits or manage benefits information.



Please Note: If the user has additional roles, this option may read differently. An example would be “Go to the Authorized Representative Dashboard.”



2. Select **Return to kynector Dashboard** or **Return to Individual Authorized Representative Dashboard** to return to the kynector or Authorized Representative Dashboard.



Viewing Associated Resident Dashboard and Adding Case Notes

After a Resident has added the kynector or Authorized Representative to their kynect benefits account, the Resident's case will appear under Clients. The *Client Details* section includes the following details:

- Resident Details (Name, Gender, Age, or Case Number)
- Case Status
- Submitted Date
- Last Updated



Search

Programs Applicable

Medicaid SNAP/CCAP

First Name

Last Name

Case Number

Application Number

Social Security Number (9 digits)

Date of Birth

Address Line 1

Search by Primary Applicant

[Show Advanced Search](#) [Reset](#) [Search](#) [Export to Excel](#)

31 Clients Found

Client Details	Case Status	Submitted Date	Last Updated
BFIUWHRU IWUEFHIF F Age 30 Case #113211115	Approved	10/20/2023	10/23/2023
AEFHOUH WEFUHIU M Age 47 Case #113211121	Approved	10/20/2023	10/23/2023
MAXINE SMITH F Age 29 Case #113200946	Approved	09/08/2023	10/20/2023
IKKE LOAS M Age 33 Case #113214515	Approved	10/17/2023	10/19/2023



Please Note: The **Search by Primary Applicant** checkbox allows Individuals to filter the search results by primary applicant only.



Please Note: If a Resident has multiple cases, the most recent one appears under last updated. Select **Export to Excel** to export a list of Resident cases and details. The export includes a list of Requests for Information for the Residents. kynectors can only export after searching.


Searching for Resident Cases

The Search tool is useful for kynectors and Authorized Representatives who have multiple clients. The Search tool also allows kynectors to distinguish between searches for Medicaid clients and SNAP/CCAP clients if they have multiple roles. The Search tool only returns results for associated Residents. The Search tool allows



users to search by First Name, Last Name, Case Number, Application Number, Social Security Number, Date of Birth, and Address.

1. First, kynectors with multiple roles should toggle between “Medicaid” and “SNAP/CCAP” depending on the type of search.


 **Please Note:** The Search tool’s toggle between Medicaid and SNAP/CCAP is only available for kynectors. The program toggle feature does not appear on the Search tool for Authorized Representatives.

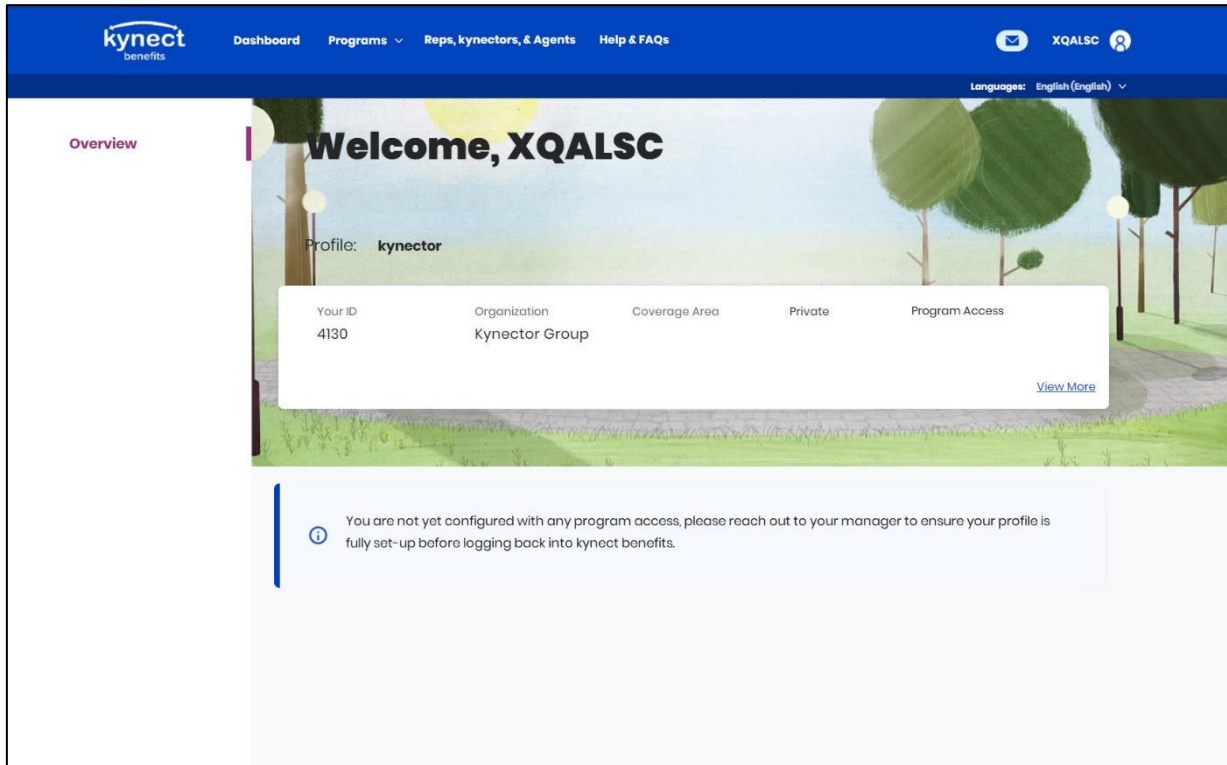
2. kynectors and Authorized Representatives can select **Search** to get a full list of Resident cases to which they are associated.

The screenshot shows a search interface with the following elements:

- Search** (Section Header)
- Programs Applicable:** Two buttons, **Medicaid** (selected) and **SNAP/CCAP**.
- Search Fields:**
 - First Name (text input)
 - Last Name (text input)
 - Case Number (radio button, text input)
 - Application Number (radio button, text input)
 - Social Security Number (9 digits) (text input)
 - Date of Birth (text input with mask mm/dd/yyyy and calendar icon)
 - Address Line 1 (text input)
- Search by Primary Applicant
- [Show Advanced Search](#)
- [Reset](#)
- Search** (button, highlighted with a red box)
- [Export to Excel](#)

3. Search by First Name, Last Name, Case Number, Application Number, Social Security Number, Date of Birth, and Address for all cases. Kynectors search for SNAP/CCAP clients, the “M.I.”, “Suffix”, and “Sex” fields also appear.
4. Used the advanced search to search with additional fields if necessary.

 **Please Note:** If a kynector or Authorized Representative does not have a Medicaid or Other Program Assister role, the below message appears in lieu of the Search tool.



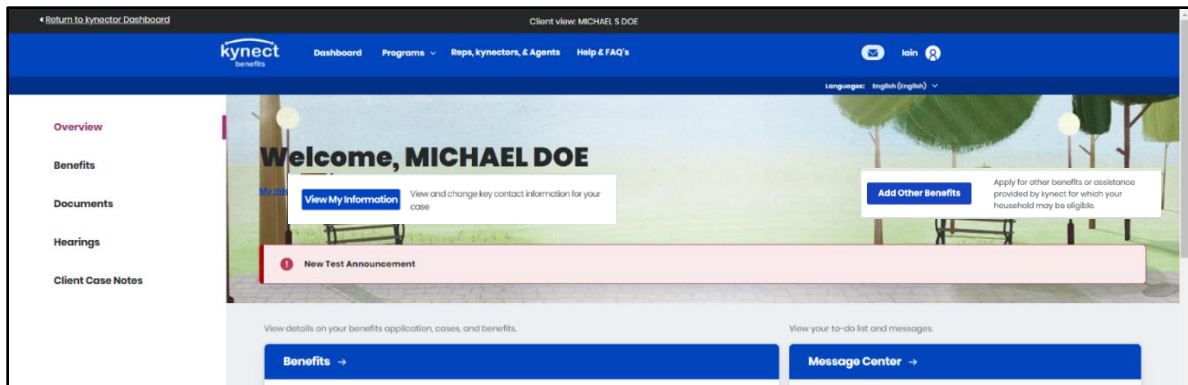
Steps to Accessing a Client's Resident Dashboard

1. Select on a Client's Name to be taken to the client's Resident Dashboard.

The screenshot shows a search results table with the following controls at the top: "Show Advanced Search", "Reset", "Search", and "Export to Excel". The table indicates "3 Clients Found" and has columns for "Client Details", "Case Status", "Submitted Date", and "Last Updated". The first row, for "MICHAEL DOE", is highlighted with a red box.

Client Details	Case Status	Submitted Date	Last Updated
MICHAEL DOE M Age 25 Case #:112254198	Approved	12/20/2020	12/20/2020
MICHAEL DOE M Age 26 Case #:112254199	Approved	12/20/2020	10/13/2020
MICHAEL DOE M Age 25 Case #:112254185	Approved	10/08/2020	10/08/2020

2. View the Resident Dashboard in "Client View".



3. From the Client View, kynectors and Authorized Representatives may complete the processes below on behalf of the Resident while in Client View:
 - View active Benefit Programs
 - Start a Benefits Application by selecting **Add Other Benefits**
 - Report a change in Resident information by selecting **Report a Change**
 - View Resident To-Do's, Notifications, and Announcements in the Message Center
 - Request a Medicaid Card
 - Use the Prescreening Tool



Please Note: The actions that are available is dependent on the benefit programs and the permissions granted by the Resident.

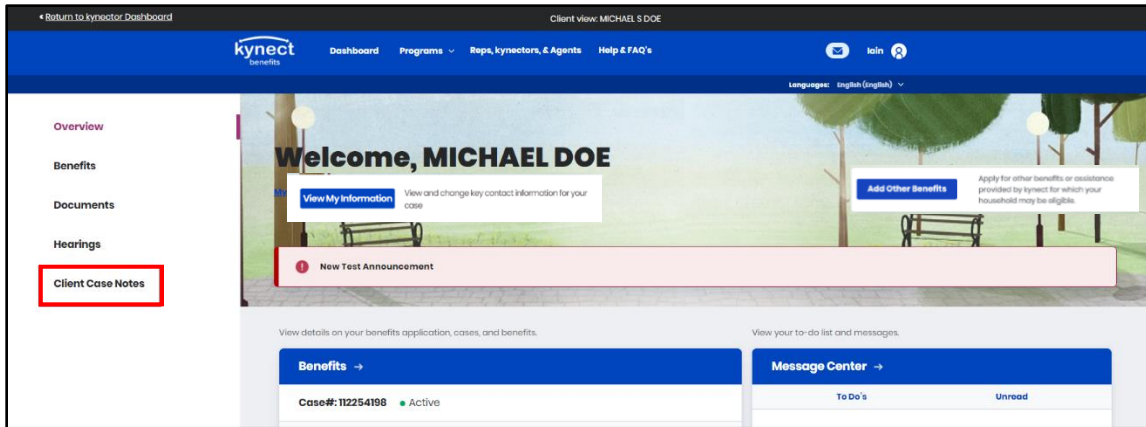


Please Note: If a Resident is a dependent, a banner displays at the top of the Resident Dashboard which indicates that the Resident is not the Head of Household and tells the kynector or Authorized Representative who is.

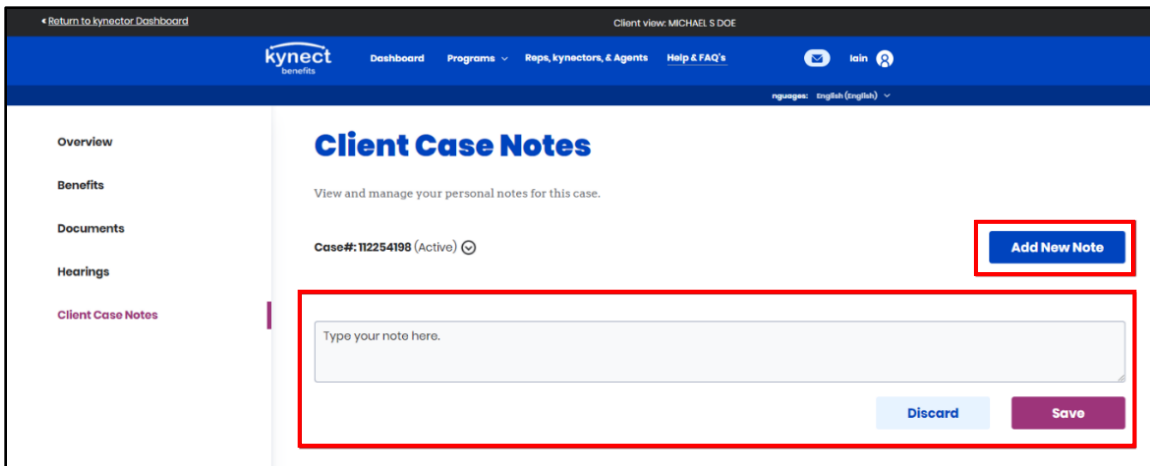
Below are the steps for kynectors and Agency Administrators to add Client Case Notes.

Steps to Add Client Case Notes

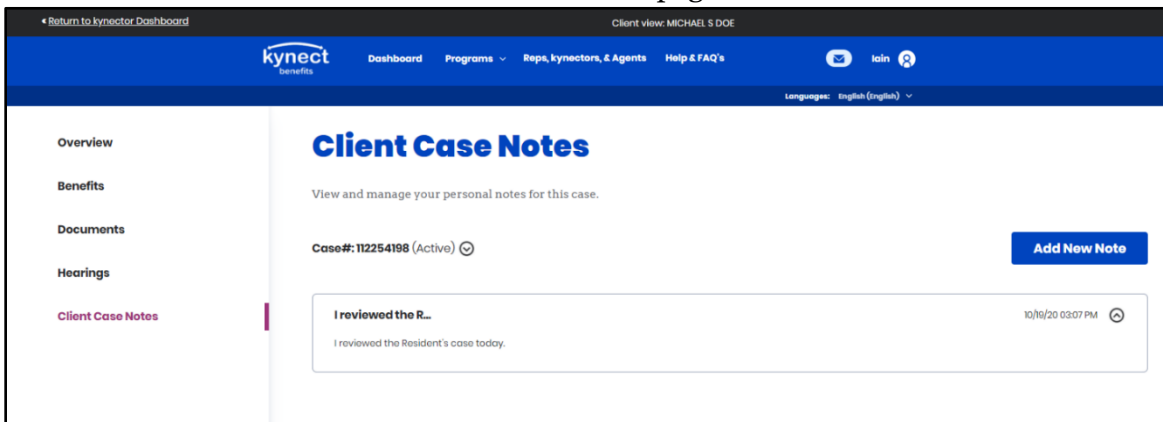
1. Select **Client Case Notes** on the side menu on a computer or the menu icon on a mobile device.



2. Select **Add New Note**.
3. Type the Case note in the note field.
4. Select **Save**.



5. View the Case Note in the **Client Case Notes** page.





Please Note: Accessibility to see Case Notes depends on the user's role and the associated benefit programs. DCBS staff will not be able to view the notes entered through kynect benefits.

6. Select **Return to kynector Dashboard** in the top left corner of the page to return to the kynector Dashboard.
7. Select **Yes, Exit** to confirm the exit back to the kynector dashboard.