
Certified Application Counselor (CAC) Roles and Required Trainings

Kentucky Health Benefit Exchange (KHBE) | Division of Health Plan Operations

Overview

This document defines the roles, responsibilities, and required training courses for Certified Application Counselors (CACs) and CAC Organization Managers within the Kentucky Health Benefit Exchange (KHBE) program. All roles are managed through the kynect system, and access levels are determined by the assigned system roles.

During initial onboarding, all new CACs and Organization Managers must be assigned the **kynector Training role only**. Once the required training has been completed, additional roles are granted based on each individual's access needs and responsibilities.

Certified Application Counselor (CAC) Roles

CAC Organization Manager

CAC Organization Manager	
Overview	The CAC Organization Manager role provides administrative access to the Organization Management application within kynect. Individuals in this role oversee the onboarding of new CACs and manage the CAC organization. This role does not perform direct kynector duties or assist clients with applications.
Required Roles	Assister Organization Manager
Required Training	- CAC Organization Administrator Training - KHBE Annual Privacy and Security Review

Agency Administrator

Agency Administrator	
Overview	The Agency Administrator role provides access to the kynect benefits Self Service Portal (SSP). Individuals in this role manage the CAC organization within the SSP, including assigning and moving cases and completing Medicaid applications on behalf of clients in kynect benefits.
Required Roles	• Agency Admin (<i>see Important Notes</i>) • Assister Medicaid and/or Assister Other Programs (<i>see Important Notes</i>) • Organization Manager — Optional
Required Training	• KHBE 2027 SBM Certification for New kynectors • CAC Organization Administrator Training • KHBE Annual Privacy and Security Review
Important Notes	• Agency Administrators must not be assigned the Assister role simultaneously. Doing so will generate an “incompatibility of roles” error in the system.

New Certified Application Counselor (CAC)

Newly Onboarding Certified Application Counselor (CAC)	
Overview	New CACs work directly with clients to assist with applications and enrollment, with a primary focus on Medicaid. They must complete full SBM Certification and CAC-specific training before being granted active system access.
Required Roles	• Assister • Assister Medicaid • Assister Other Programs (<i>see Important Notes</i>)
Required Training	• KHBE 2027 SBM Certification for New kynectors • New Certified Application Counselor (CAC) Training

Returning Certified Application Counselor (CAC)

Returning Certified Application Counselor (CAC)	
Overview	Returning CACs have previously completed SBM Certification and are required to complete the annual SBM Refresher in lieu of the full certification course. The Refresher course includes Privacy and Security training as an embedded component.
Required Roles	• Assister • Assister Medicaid • Assister Other Programs (<i>see Important Notes</i>)
Required Training	• KHBE 2027 SBM Refresher

Important Notes

Onboarding Role Assignment
All new CACs and Organization Managers must be assigned only the kynector Training role at the start of the onboarding process. Additional roles are assigned only after all required training has been successfully completed.
Agency Administrator and Organization Manager Role Requirements
Every organization must have at least one user assigned to the Agency Administrator role. An organization may not operate with an Organization Manager role only. The Agency Administrator role is required regardless of the size of the organization. If an organization has only one person in a management capacity, that individual must hold both the Agency Administrator role and the Organization Manager role. Each role carries distinct system access and responsibilities — the Agency Administrator role provides manager-level access to cases and caseloads within kynect benefits, while the Organization Manager role manages user profiles and role assignments within KYID. Both functions must be covered within every organization at all times.

Agency Administrator – Role Incompatibility

Agency Administrators must not be assigned the **Assister** role simultaneously. Assigning both roles will generate an “incompatibility of roles” error and will prevent proper access. These roles are mutually exclusive.

Assister – Other Programs Role

The **Assister – Other Programs** role is managed by the **SNAP kynector Program** under the Family Support Cabinet. This role is not assigned or managed through KHBE. For all SNAP-related inquiries, contact: famsupportkynectors@ky.gov.

Privacy and Security Training

The **KHBE Annual Privacy and Security Review** is only required as a standalone course for the CAC Organization Manager and Agency Administrator. New and Returning CACs receive Privacy and Security training as an embedded component of the **KHBE 2027 SBM Certification** or the **KHBE 2027 SBM Refresher** and do not need to complete it separately.