

The Commonwealth of Kentucky



**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*.

The screenshot shows the Kynect Dashboard for a user named NEWJAY. The 'Reports' tab is highlighted in the left sidebar. The main content area displays 'Cases Requiring Action' with a table of cases and an 'Export to Excel' button. Below this is a 'Search' section with various filters and search criteria.

**Dashboard Header:** kynect benefits, Dashboard, Programs, Get Local Help, Child Care Provider Search, Help & FAQs, NEWJAY, Languages: English (English)

**Left Sidebar:** Overview, Reports (highlighted)

**Welcome, NEWJAY**  
Profile: kynector  
Start Benefits Application

**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 (5)	Unsubmitted Applications (1)
#	Case Number	HOH Name	RFI Type	Earliest RFI Due Date	
1	100391848	PATRICIA GUS	APTC Income verification	02/26/2024	<a href="#">View Case Document Center</a>
2	100393068	MELONIE JILLIAN	US Citizenship	02/27/2024	<a href="#">View Case Document Center</a>

[Export to Excel](#)

**Search**  
Programs Applicable: Medicaid, SHAP/CCAP  
First Name:   
Last Name:   
☐ Case Number:   
☐ Application Number:   
Social Security Number (9 digits):   
Date of Birth: mm/dd/yyyy   
Address Line 1:   
☐ Search by Primary Applicant  
[Show Advanced Search](#) [Reset](#) [Search](#) [Export to Excel](#)



## 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.

**Cases Requiring Action**

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

#	Application Number	Holt Name	Program(s)	Application Removal Date
1	60143300	62635000006499a	CC	2/8/2024

[View Dashboard](#)

[Export to Excel](#)



**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**.

A screenshot of a web application's search interface. The title "Search" is at the top left. Below it, the "Programs Applicable" section contains two buttons: "Medicaid" (highlighted with a red rectangle) and "SNAP/CCAP". The form includes several input fields: "First Name", "Last Name", "Case Number" (with a radio button), "Application Number" (with a radio button), "Social Security Number (9 digits)", "Date of Birth" (with a date picker icon), and "Address Line 1". There is also a checkbox labeled "Search by Primary Applicant". At the bottom, there are four buttons: "Show Advanced Search", "Reset", "Search", and "Export to Excel". A blue circular help icon with a question mark is located in the bottom right corner.



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**.

**Search**

Programs Applicable

**Medicaid** **SNAP/CCAP**

First Name


Last Name

☐ Case Number

☐ Application Number

Social Security Number (9 digits)

Date of Birth

mm/dd/yyyy 

Address Line 1

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



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.

**Search**

Programs Applicable

First Name

Middle Initial (M.I.)

Last Name

Suffix

Select

Date of Birth

mm/dd/yyyy

Sex

Select

☐ Case Number

☐ Application Number

Social Security Number (9 digits)

Address Line 1

[Show Advanced Search](#)



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

**Search**

Programs Applicable

Medicaid

SNAP/CCAP

First Name

Middle Initial (M.I.)

Last Name

Suffix

Select

Date of Birth

mm/dd/yyyy

Sex

Select

☐ Case Number

☐ Application Number

Social Security Number (9 digits)

Address Line 1

[Show Advanced Search](#)

Reset

Search

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 **RFIs 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*.

The screenshot shows the 'Cases Requiring Action' dashboard. At the top, there's a blue header with the title 'Cases Requiring Action' and a subtitle 'Select the type of case action to view the most recent 100 cases which require that action in the near future.' Below the header, 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 the following columns: '#', 'Case Number', 'HoH Name', 'RFI Type', 'Earliest RFI Due Date', and a button 'View Case Document Center'. There are two rows of data. The first row has Case Number 100086480, HoH Name DUFF GOLD, RFI Type Multiple, and Earliest RFI Due Date 08/19/2023. The second row has Case Number 100086480, HoH Name DUFF GOLD, RFI Type Residency Verification, and Earliest RFI Due Date 08/23/2023. At the bottom of the table is a blue button labeled 'Export to Excel'.

#	Case Number	HoH Name	RFI Type	Earliest RFI Due Date	
1	100086480	DUFF GOLD	Multiple	08/19/2023	<a href="#">View Case Document Center</a>
2	100086480	DUFF GOLD	Residency Verification	08/23/2023	<a href="#">View Case Document Center</a>

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*.

The screenshot shows the 'Cases Requiring Action' dashboard with the 'Renewals (2)' tab selected and highlighted with a red box. The table below has columns: '#', 'Case Number', 'HoH Name', 'Program(s)', 'Earliest Renewal Due Date', and a button 'View Case Dashboard'. There are two rows of data. The first row has Case Number 100086482, HoH Name DUFF GOLD, Program(s) Medicaid/KCHIP/APTC, and Earliest Renewal Due Date 08/19/2023. The second row has Case Number 100086480, HoH Name DUFF GOLD, Program(s) Medicaid/KCHIP/APTC, and Earliest Renewal Due Date 11/28/2023. At the bottom of the table is a blue button labeled 'Export to Excel'.

#	Case Number	HoH Name	Program(s)	Earliest Renewal Due Date	
1	100086482	DUFF GOLD	Medicaid/KCHIP/APTC	08/19/2023	<a href="#">View Case Dashboard</a>
2	100086480	DUFF GOLD	Medicaid/KCHIP/APTC	11/28/2023	<a href="#">View Case Dashboard</a>

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*.

### 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	100394184	GERRY BRADFORD	Pending Plan Selection	<a href="#">View Benefits Page</a>
2	100394198	TITUS MATA	Pending Plan Selection	<a href="#">View Benefits Page</a>

[Export to Excel](#)

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.

### 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	a2c35000006uU9a	CC	2/8/2024	<a href="#">View Dashboard</a>

[Export to Excel](#)



**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. On the **Reports** screen, users can select either **Case Activity Tracking Report** or **FPL Percentage Report** as shown in the below sub-sections.

**Overview**

**Reports**

**Welcome, NEWJAY**

Profile: kynector

Start Benefits Application

Your ID: 2762

Organization: NewAssisterOrg7897

Coverage Area: Allen

Public

Program Access: Medicaid/APTC/QHP

[View More](#)

**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	801423100	a2c35000006uJ9a	CC	2/8/2024

[View Dashboard](#)

[Export to Excel](#)



## Case Activity Tracking Report for kynectors

Below are the steps for kynectors to generate and export a Case Activity Tracking Report to Excel.

1. Select **Case Activity Tracking Report** from the drop-down.
2. Enter the **Start Date** and **End Date** in the **Date Range** field.
  - a. The date can be typed out manually, or the calendar icon can be used to select the date.



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

3. Select the **Activity Type**.
4. Click **Export to Excel** or click **Reset Filter** to clear the selections.



**Please note:** The spreadsheet includes the following columns: Date, Organization, Case Number, Individual Name, and Activity Type.

The screenshot shows the 'Reports' section of the Kynect interface. A red box highlights the configuration area for the 'Case Activity Tracking Report'. Inside the box, there is a dropdown menu set to 'Case Activity Tracking Report'. Below this, the 'Date Range' section has two input fields for 'mm/dd/yyyy' with calendar icons. The 'Activity Type' section has three radio buttons: 'Report a Change', 'Renewal', and 'Intake'. Below the red box, there are two buttons: 'Reset Filter' and 'Export to Excel'.



## Case Activity Tracking Report for Agency Admin Users

Below are the steps for Agency Admin users to generate and export a Case Activity Tracking Report to Excel.

1. Select **Case Activity Tracking Report** from the drop-down.
2. Enter the kynector's name for whom the report is being generated for in the **Organization Individual** field.
3. Enter the **Start Date** and **End Date** in the **Date Range** field.
  - a. The date can be typed out manually, or the calendar icon can be used to select the date.



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

4. Select the **Activity Type**.
5. Click **Export to Excel** or click **Reset Filter** to clear the selections.



**Please note:** The spreadsheet includes the following columns: Date, Organization, Case Number, Individual Name, and Activity Type.

The screenshot shows the 'Reports' section of the Kynect system. A red box highlights the 'Case Activity Tracking Report' form. The form includes a dropdown menu for 'Choose a report type from the drop down to view its details.' with 'Case Activity Tracking Report' selected. Below this, the 'Case Activity Tracking Report' section contains instructions: 'Select the desired organization individual, date range, and activity types to produce a case activity tracking report of your current organization.' The form has three main sections: 'Organization Individual' with a text input field 'Start typing kynector name', 'Date Range' with two date input fields (mm/dd/yyyy) and calendar icons, and 'Activity Type' with three radio button options: 'Report a Change', 'Renewal', and 'Intake'. At the bottom of the form, there are two buttons: 'Reset Filter' and 'Export to Excel'.



## FPL Percentage Report for kynectors

Below are the steps for kynectors to generate and export an FPL Percentage Report to Excel.

1. Select **FPL Percentage Report** from the drop-down.
  - a. Once selected the following description of the report displays: *“This report summarizes the Federal Poverty Level (FPL) percentages for cases managed by you or a kynector within your agency.”*
2. Click **Export to Excel**.
  - a. Once clicked the following message displays: *“Your report is being generated. You can leave this page and come back later to download it.”*
  - b. Once the report is generated, it will be available to download.

A screenshot of a web application interface. On the left is a sidebar with three items: "Overview", "kynect On Demand", and "Reports" (which is highlighted with a purple bar). The main content area is titled "Reports" in blue. It contains a text prompt "Choose a report type from the drop down to view its details." followed by a dropdown menu that currently shows "FPL Percentage Report". Below this, the title "FPL Percentage Report" is displayed in bold, followed by a description: "This report summarizes the Federal Poverty Level(FPL) percentages for cases managed by you or a kynector within your agency." At the bottom right of the main content area is a purple button labeled "Export to Excel". A red rectangular box highlights the dropdown menu and the report description text.

**Please note:** The spreadsheet includes the following columns: Organization, Case Number, Individual, FPL Percentage, and FPL Year.



## FPL Percentage Report for Agency Admin Users

Below are the steps for Agency Admin users to generate and export an FPL Percentage Report to Excel.

1. Select **FPL Percentage Report** from the drop-down.
2. Enter the kynector's name for whom the report is being generated for in the **Organization Individual** field.
3. Click **Export to Excel**.
  - a. Once clicked the following message displays: *"Your report is being generated. You can leave this page and come back later to download it."*
  - b. Once the report is generated, it will be available to download.

The screenshot shows the Kynect web interface. On the left is a sidebar with 'Overview', 'Agency Management', and 'Reports' (highlighted in pink). The main area is titled 'Reports' and contains a form. At the top of the form is a dropdown menu with the text 'Choose a report type from the drop down to view its details.' and 'FPL Percentage Report' selected. Below this is the section 'FPL Percentage Report' with a description: 'This report summarizes the Federal Poverty Level(FPL) percentages for cases managed by you or a kynector within your agency.' Underneath is the 'Organization Individual' label and an empty text input field. At the bottom right of the form is a purple button labeled 'Export to Excel'.



**Please note:** The spreadsheet includes the following columns: Organization, Case Number, Individual, FPL Percentage, and FPL Year.