

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

Navigator training courses are limited to CAK, KIPDA, and KPCA organizations.

Navigator Roles

NAVIGATOR ORGANIZATION MANAGER

Navigator Organization Manager	
Overview	The Navigator Organization Manager role provides administrative access to the Organization Management application within kynect. Individuals in this role oversee the onboarding of new Navigators and manage the Navigator organization. This role does not perform direct kynector duties or assist clients with applications.
Required Roles	• Assister Organization Manager
Required Training	• Navigator 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 Navigator organization within the SSP, including assigning and moving cases and completing Medicaid applications on behalf of clients in kynect benefits.
Required Roles	• Agency Admin (see Important Notes) • Assister Medicaid and/or Assister Other Programs (see

Agency Administrator	
	Important Notes) • Organization Manager — Optional
Required Training	• KHBE 2027 SBM Certification for New kynectors • Navigator Organization Administrator Training • SSP for SNAP and CCAP kynectors
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 NAVIGATOR

New Navigator	
Overview	New Navigators work directly with clients to assist with applications and enrollment, with a primary focus on Medicaid. They are frontline assisters and must complete full SBM Certification before being granted active system access.
Required Roles	• Assister • Assister Medicaid • Assister Other Programs (see Important Notes)
Required Training	• KHBE 2027 SBM Certification for New kynectors • New Navigator Training • kynector After Action Reporting Tool (kAART) Training • SSP for SNAP and CCAP kynectors
Important Notes	• New Navigator Training and kAART Training are restricted to CAK, KIPDA, and KPCA organizations only.

RETURNING NAVIGATOR

Returning Navigator	
Overview	Returning Navigators 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

Returning Navigator	
	Assister Other Programs (see Important Notes)
Required Training	KHBE 2027 SBM Refresher

IMPORTANT NOTES

Onboarding Role Assignment
All new Navigators 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 – 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 Navigator Organization Manager. All other Navigator roles 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.
SNAP Training Requirement
New Navigators, Returning Navigators, and Agency Administrators are required to complete the SSP for SNAP and CCAP kynectors training in addition to their standard Navigator training requirements.