The Commonwealth of Kentucky
kynect State-Based Marketplace

kynect
health coverage
Together for a better Kentucky

Open Enrollment Issue Tracker
and Editing Screenshots
Quick Reference Guide
Introduction

The Open Enrollment Issue Tracker and Editing Screenshots QRG is intended to provide instructions on how to complete an Issue Tracker submission for Open Enrollment Plan Year 2022. This document will also demonstrate how to capture proper screenshots through the Snipping Tool application and the keyboard shortcut to ensure the image does not contain Personally Identifiable Information (PII).

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Last Updated: December 10, 2021
1 What is the Open Enrollment Plan Year 2022 Issue Tracker?

The Open Enrollment Plan Year 2022 Issue Tracker collects various types of system issues to assist in quicker escalation to KHBE. Types of issues that may be entered in the tracker include MCO/Issuer website issues, KOG issues, kynect issues, helpdesk issues, system suggestions or enhancements, and other issues. However, this does not replace contacting the appropriate helpdesk with issues and getting a ticket number.

Please reference the below resources to contact the appropriate helpdesk:

- **Professional Services Line:** (855) 326-4650
- **Marketplace Call Center:** (800) 318-2596 (For 2021 Marketplace Coverage only)

<table>
<thead>
<tr>
<th>Self-Service Portal (SSP) Issues</th>
<th>Check These Materials First</th>
<th>I still have questions, who do I contact?</th>
</tr>
</thead>
</table>
| SSP Issues are typically technical access issues | - kynect training materials on the DMS website: kynect benefits, Cabinet for Health and Family Services  
- Release Notes  
- kynect training materials at KHBE.ky.gov | - Call the Professional Services Line: 1-855-326-4650  
- For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBEPrograms@ky.gov.  
- KHBE will review and escalate further as appropriate.  
- When emailing KHBE, kynectors and Agents should include ticket number from PSL, case number, description of issue, and screenshot of issue. No PHI can be included in the email. |

<table>
<thead>
<tr>
<th>Department for Medicaid Services (DMS) Issues</th>
<th>Check These Materials First</th>
<th>I still have questions, who do I contact?</th>
</tr>
</thead>
</table>
| DMS Issues are typically related to eligibility requirements for Residents | - CHFS Policy Manuals on the DCBS website, training manuals on MyPurpose  
- Training materials in MyPurpose LMS | - For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBEPrograms@ky.gov.  
- KHBE will review and escalate further as appropriate. |

<table>
<thead>
<tr>
<th>Dire Need Issues</th>
<th>Check These Materials First</th>
<th>I still have questions, who do I contact?</th>
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</thead>
</table>
| Dire Need issues are those requiring attention within a 24-hour period | - Newsletter page on the KHBE website | - Email kynectors@ky.gov for Dire Need issues.  
- kynectors should use the subject line “Dire Need” and indicate whether the Dire Need is for a Medicaid, Qualified Health Plan (QHP), or another case.  
- KHBE determines appropriate response agency for escalation. |

<table>
<thead>
<tr>
<th>KOG Helpdesk</th>
<th>Check These Materials First</th>
<th>I still have questions, who do I contact?</th>
</tr>
</thead>
</table>
| Contact for KOG account related issues | - Agents Welcome Packet  
- New kynector Welcome Packet  
- kynect benefits KOG Quick Reference Guide  
- Training materials in MyPurpose LMS | - These unresolved issues should be emailed to KOGHelpdesk@ky.gov.  
- When emailing the KOG helpdesk, agents and kynectors should include a brief description and screenshot of the issue. No Personally Identifiable Information (PHI) can be included in the email. |

<table>
<thead>
<tr>
<th>All Other Issues</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Always reach out to the appropriate helpdesk. If the issue remains unresolved after reaching out to the helpdesk, it should then be escalated to <a href="mailto:KHBEPrograms@ky.gov">KHBEPrograms@ky.gov</a>.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1.1 How to Access the Open Enrollment Issue Tracker

The Open Enrollment Issue Tracker can be accessed through the link provided, [here](#). The link can also be found in the Open Enrollment Webinar deck and will be included each week in the Insight Newsletter pdf. The link should only be accessed through these channels and should NOT be shared. The Issue Tracker is intended for use by kynectors, Agents, and Site Support Staff during Open Enrollment Plan Year 2022.
2 How to Complete an Issue Tracker Submission

Follow the steps below to complete an Issue Tracker submission.

1. Select if the Staff Reporting classifies as a kynector, Agent, or Site Support Staff.

   *Which of the following do you classify as?
   - [ ] kynector
   - [ ] Agent
   - [ ] Site Support Staff

2. Enter the Staff Reporting’s First and Last Name and Email Address, then select the radio button that identifies the Organization.

   *Staff Reporting: First Name
   - Nikki

   *Staff Reporting: Last Name
   - Flash

   *Staff Reporting: Email Address
   - Nikki.Flash@mailinator.com

   *Staff Reporting: Organization
   - [ ] Community Action Kentucky (CAK)
   - [ ] Kentuckiana Regional Planning & Development Agency (KIPDA)
   - [ ] Kentucky Primary Care Association (KPCA)
   - [ ] Kentucky Health Benefit Exchange (KHBE)
   - [ ] Kentucky Equal Justice Center
   - [ ] Family Health Centers
   - [ ] Kentucky Voices for Health (KVH)
   - [ ] Insurance Agency/Organization
   - [ ] Other

   Please note: Agents should select Insurance Agency/Organization and enter their Agency/Organization in the open field that displays. In all other cases, if the Organization is not listed select Other and enter the Organization in the open field that displays.
3. Enter the **Date of the Issue** and click **Next**.

![Date of issue: 10/11/2021](image)

4. Select the **radio button** that identifies the system affected.

![Which system does the issue affect?](image)

**Please note:** The **Agent Dashboard** option will only display if the user selects **Agent** to the question “Which of the following do you classify as?”

**Please note:** The selection made to the question “Which system does the issue affect?” will automatically trigger new information fields. Please complete the new required fields.

5. Select **which program you were applying for** (if applicable).

![Which program were you applying for?](image)
6. Enter the **Case Number or Application ID**. If the case number or application ID is not provided, the issue cannot be triaged. If it is an issue that occurs before a case number or application ID is received, please put "N/A".

*Case Number or Application ID*
Please note: If the case number or application ID is not provided, the issue cannot be triaged. If it is an issue that occurs before a case number or application ID is received, please put "N/A".

112747584

7. Select if **this issue has been reported to the Professional Services Line or appropriate helpdesk**.

*Did you report this issue to your Professional Services Line or appropriate helpdesk?*
- **Yes**
- **No**
- **I'm not sure**

Please note: Completing an Issue Tracker submission **does not** replace contacting the appropriate helpdesk with issues and getting a ticket number. If you are not provided with a ticket number, please ask for one. Please reference the [Escalation Process Chart](#) for more information.

8. If **Yes** is selected, the tracker will trigger the question, “If sent to your Professional Services Line, do you have a ticket number?”

   a. Enter the **ticket number** in the field that displays if there is a ticket number for the issue.

*If sent to your Professional Services Line, do you have a ticket number?*
- **Yes. If you have the ticket number enter here:**
   - 123456789
- **No**
- **I don't have ticket number/not sure of ticket number**
b. Select the reason a ticket number was not provided if there is no ticket number for the issue.

![Reason for no ticket number]

9. Select the primary category of the issue.

![Primary category options]

- Application Intake
- Issue with Enrollment Manager (unable to browse for plans, not redirecting me to correct website)
- Case Association
- Error Message Received
- Slowness/Performance Issue
- Document Upload
- Incorrect Next Steps
- Feature Not Enabled (greyed out)
- Correspondence/Notices
- Dashboard (Message Center, To Do’s, etc.)
- Report a Change
- Training Materials (QRG, Online Help, etc.)
- Grammar or language issue
- General eligibility issue
- MA eligibility issue
- QHP eligibility issue
- Payment Assistance eligibility issue
- Agent Dashboard
- Other
Please note: The Agent Dashboard option will only display if the user selects Agent to the question “Which of the following do you classify as?”

10. Select the browser the issue was occurring in and the type of device the issue is occurring on.

11. Select around what time (EST) the issue occurred.
12. Provide a detailed **description of the issue**.

*Describe the issue*

Receiving an error when requesting access to a client’s case

**Please note:** When describing the issue, it is important to provide as much detail as necessary such as the screen that the issue is occurring on. Please make sure **no** Personally Identifiable Information (PII) is included in the response.

13. Select **if the issue was able to be resolved** and provide any additional comments/enhancements suggestions.

*Were you or the Resident able to resolve the issue?*
- [ ] Yes, by switching to another browser
- [ ] Yes, by refreshing screen
- [ ] Yes, by clearing the cache
- [ ] Yes, Other
- [x] No

Additional comments/Enhancement Suggestions:

14. Select **Yes** or **No** to “Do you have a screenshot of the issue?”

*Do you have a screenshot of the issue?*
- [ ] Yes
- [ ] No

**Please note:** Screenshots can only be added to the Issue Tracker for MCO, kynect, and helpdesk issues that were not resolved. The option to attach an image only displays if one of these issue types is selected on the Issue Tracker.
Please note: Any Personally Identifiable Information (PII) must be removed before submitting a screenshot of the issue. Please refer to Section 3 for detailed instructions on how capture a proper screenshot.

Please note: Refer to Section 4 for instructions on how to upload multiple screenshots to the Issue Tracker using PowerPoint.

15. Read the instructions for examples of PII and click Select Image.

REMOVE ANY PERSONALLY IDENTIFIABLE INFORMATION (PII) BEFORE SUBMITTING:
Examples of PII include:

- First and Last Name (except if it is an issue with help desk and you listed the representative’s name)
- Social Security number
- Driver’s license number
- Bank account number
- Passport number
- Email address

*Please upload a screenshot below. jpg, jpeg, png and .tiff, are all accepted

REMOVE ANY PERSONALLY IDENTIFIABLE INFORMATION (PII) BEFORE UPLOADING

Select Image  No image selected.
16. Select the image, then click **Open** to upload the screenshot to the tracker.
17. The screenshot title now displays in the tracker.
18. To complete an Issue Tracker submission, kynectors and Agents must attest that they have completed the below trainings. Trainings may be accessed through KHBE’s Learning Management System, MyPurpose. If one or both have not been completed, please do so before completing the Issue Tracker submission.

   a. kynectors must click the **check box** to confirm they have completed the Privacy & Security Training and Open Enrollment Webinar.

   ![Check box for Privacy & Security Training and Open Enrollment Webinar]

   *In order to complete an Issue Tracker submission, you must attest that you have completed the Privacy and Security Module within the SBM Registration/Certification Training and Open Enrollment Webinar. Both may be accessed through KHBE’s Learning Management System, MyPurpose. Please check the boxes below to indicate that you have completed both trainings, and to complete your Issue Tracker submission.*

   ✔️ *I confirm that I have completed the Privacy & Security Training and Open Enrollment Webinar.

   b. Agents must click the **check box** to confirm they have completed the Privacy & Security Training and watched the Issue Tracker Demonstration on LMS or during Agent Office Hours.

   ![Check box for Privacy & Security Training and Issue Tracker Demonstration]

   *In order to complete an Issue Tracker submission, you must attest that you have completed the Privacy and Security Module within the SBM Registration/Certification Training and watched the Issue Tracker Demonstration featured in the Agent Office Hours. Both may be accessed through KHBE’s Learning Management System, MyPurpose. Please check the boxes below to indicate that you have completed both trainings, and to complete your Issue Tracker submission.*

   ✔️ *I confirm that I have completed the Privacy & Security Training and watched the Issue Tracker Demonstration on LMS or during Agent Office Hours.

19. Click the **check box** to confirm that no PII is included in this Issue Tracker submission.

   ![Check box for PII confirmation]

   *I confirm that no PII is included in this Issue Tracker submission.*
20. Provide an e-signature confirming no PII is included in this Issue Tracker submission and all information is accurate, then click **Next**.

![Signature Input Field](Image)

*Please provide an e-signature confirming no PII is included in this Issue Tracker submission and all information is accurate.

Nikki Flash

**Next**

21. The Issue Tracker submission is complete! Someone will follow up once a resolution is received.

![Issue Tracker Submission Confirmation](Image)

**Thank you for reporting your issue!**

To report another issue, click **here**
3 Capturing Screenshots and Removing Personally Identifiable Information (PII)

It is important to add a screenshot to an Issue Tracker submission, when applicable, to help KHBE and the functional team triage the issue and provide a resolution as quickly as possible. When uploading these screenshots, all users must ensure that Personally Identifiable Information (PII) is removed from the image.

Examples of PII include:

- First and last name
- Date and place of birth
- Telephone number
- Address
- Mother’s maiden name
- Social Security number
- Driver’s license number
- Email address
- Biometric records or identifiers
- Medical, educational, financial, and/or employment information

The following sections demonstrate how to capture a proper screenshot in the Snipping Tool application or with the keyboard shortcut and how to remove PII that may be in the image.
3.1 How to Capture a Screenshot and Remove PII with Snipping Tool

Follow the steps below to capture a screenshot and remove PII using the Snipping Tool application.

1. Navigate to the screen where the issue is occurring.
2. Enter **Snipping Tool** in the search bar on the bottom left corner of your home screen, then select **Snipping Tool** from the results.

3. The Snipping Tool application will open, click **Mode** to select the type of snip.
4. From the **Mode** tab, select the type of snip from the following options:
   
   a. **Free-form Snip**: Draw a free-form shape around an object.
   
   b. **Rectangular Snip**: Drag the cursor around an object to form a rectangle.
   
   c. **Window Snip**: Select a window, such as a dialog box that you want to capture.
   
   d. **Full-screen Snip**: Capture the entire screen.

![Snipping Tool](image)

5. Once the preferred type of snip is selected, click **New** to capture your screenshot.

![Snipping Tool](image)
6. Once the screenshot is captured, the image will display in the Snipping Tool application.

7. After reviewing that the image contains the information needed, check for Personally Identifiable Information (PII) that must be removed.

8. If there is PII identified, click the Pen Icon. This is what will be used to cover any PII.

9. Click Customize… to edit the type of pen.
10. By clicking **Customize…**, there are options to edit the color, thickness, and tip of the pen. It is recommended to use **Black** for Color, **Thick point pen** for Thickness, and **Chisel tip pen** for Tip. Click **OK** to continue.

![Custom Pen](image)

11. Hold the cursor down and drag it over the text that needs to be covered. Do this until all PII is covered, but do not cover non-PII when possible.
12. Navigate to the file button in the top left corner and select Save As.

13. Make sure the image is a .jpg, .jpeg, .png or .tiff and then save the image to an appropriate folder. Click Save once you are ready to save the screenshot.

Please note: The document file name can be updated to be more relevant, but there is no formal naming convention that is required. Please ensure there is no PII included within the file name.

14. The screenshot is now saved to the folder and is ready to be uploaded to the Issue Tracker.
3.2 How to Capture a Screenshot and Remove PII with Keyboard Shortcut

If the Snipping Tool application is unavailable, follow the below steps to take a screenshot using the Print Screen keyboard shortcut.

1. Navigate to the screen where the issue is occurring.

2. Depending on the device, click the **Windows Logo Key + PrtScn button** as a shortcut for the print screen. If the device does not have the PrtScn button, you may use **Fn + Windows logo key + Space Bar** to take a screenshot.

3. To locate the screenshots, open **File Explorer** from the taskbar. On the side navigation pane, select the **Pictures** folder, and select **Screenshots**.
4. In the Screenshots folder, select the image you want to use.

5. After reviewing that the image contains the information needed, proceed to check for Personally Identifiable Information (PII) that must be removed.

6. With the PII identified, click the **Pencil and Paint Brush Icon** then click **Draw** to edit the screenshot. This is what will be used to cover any PII.
7. Navigate to the top center of the image and click the **Pen icon** to edit the Color and Size of the pen. It is recommended to use **Black** for the color and move the scale to the **far right** for the largest size.
8. Hold the cursor down and drag it over the text that needs to be covered. Do this until all PII is covered, but do not cover non-PII when possible.

9. Navigate to the top center of the image and click the Save Icon. The edited screenshot will automatically save in the Screenshots folder. Make sure the image is a .jpg, .jpeg, .png or .tiff file.
10. The new image that the PII has been removed from will display in the Screenshots folder.

Please note: The document file name can be updated to be more relevant, but there is no formal naming convention that is required. Please ensure there is no PII included within the file name.

11. The screenshot is now saved to the folder and is ready to be uploaded to the Issue Tracker.
4 How to Upload Multiple Screenshots to the Issue Tracker Using PowerPoint

Uploading more than one screenshot to the Issue Tracker may be necessary for certain issues to be triaged properly. If your issue requires the need for more than one screenshot, please follow the steps below to upload the screenshots to PowerPoint and save the slide as a .jpg, .jpeg, .png or .tiff file.

1. Open the PowerPoint application and start a new presentation.

![PowerPoint interface](image1)

2. Navigate to the **Insert** tab in the top navigation pane and click the **Pictures** icon.

![Insert Pictures](image2)

3. Click **This Device** from the **Pictures** icon drop-down to select the screenshots you have captured, removed any PII from, and saved to your device.

![Selecting This Device](image3)
4. Select the screenshots you would like to upload to the Issue Tracker by holding down **Ctrl** and clicking the images. Click **Insert** to upload.

5. The images selected are now uploaded to the presentation. Adjust the size of the images by dragging the corners and move as needed. Make sure the images are placed on the same slide.

**Please note:** The screenshots must be placed on one slide in the presentation to save properly and be uploaded to the Issue Tracker.
6. Navigate to the top left corner and select **File** to save the presentation as a .jpg, .jpeg, .png or .tiff file.

7. From the File tab, select **Save As**. From this screen, select .jpg, .jpeg, .png or .tiff file type from the drop-down.

**Please note**: The document file name can be updated to be more relevant, but there is no formal naming convention that is required. Please ensure there is no PII included within the file name.

8. Make sure the image is a .jpg, .jpeg, .png or .tiff and then save the image to an appropriate folder. Click **Save** once you are ready to save the screenshots.
9. A pop-up will display asking “Which slides do you want to export?” Click **Just This One**.

![Microsoft PowerPoint](image)

**Please note:** If screenshots are added on separate slides, even if you choose to export All Slides, each slide will be saved as an individual image. All screenshots needed for the Issue Tracker submission **must** be placed on the same slide and exported as Just This One.

10. The image containing multiple screenshots is now saved to the folder and is ready to be uploaded to the Issue Tracker.