Role Management in the Kentucky Online Gateway (KOG) Quick Reference Guide
Introduction

This document is intended to provide reference information related to Organization Administrator roles and responsibilities within KOG, including assigning Individuals the Assister Training Role for them to complete their required trainings.

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**Glossary of KOG User Roles**

Below is a glossary of user roles assigned by Organization Administers in KOG.

<table>
<thead>
<tr>
<th>Role</th>
<th>Application</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Admin</td>
<td>Self-Service Portal</td>
<td>Agency Administrator is a kynect benefits role that grants the user a manager's level of access. This role should be given to a few users within the organization who know and understand the role capabilities/responsibilities and who need the ability to see all the cases associated with the organization. This allows the user to monitor and adjust caseloads and kynector assignments and evaluate the program at an organizational level.</td>
</tr>
<tr>
<td>Assister</td>
<td>Self-Service Portal</td>
<td>Assister is a kynect benefits role given to Navigators (contracted kynectors) and Certified Application Counselors (non-contracted kynectors) who have successfully onboarded to KOG, taken all required trainings in MyPurpose, and passed the assessments corresponding to all required trainings in MyPurpose.</td>
</tr>
<tr>
<td>Assister Training</td>
<td>MyPurpose</td>
<td>Assister Training is a role in MyPurpose given to Navigators (contracted kynectors) and Certified Application Counselors (non-contracted kynectors) who have onboarded to KOG and still need to take the required trainings in MyPurpose.</td>
</tr>
<tr>
<td>CHFS SP External Visitors</td>
<td>CHFS External SharePoint Sites</td>
<td>CHFS SP External Visitor is a role that grants a user access to the CHFS external SharePoint sites.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Please note:</strong> The CHFS SP External Visitors role is currently no longer active. This role should not be assigned.</td>
</tr>
<tr>
<td>Qualified Entity Hospital</td>
<td>Self-Service Portal</td>
<td>Qualified Entity (QE) Hospital is a kynect benefits role. The QE Hospital role allows users to complete the Presumptive Eligibility (PE) or the Breast and Cervical Cancer Treatment Program (BCCTP) application on behalf of a Kentucky Resident. If the Resident is approved, they are granted time-limited Medicaid benefits.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Please note:</strong> kynectors should NOT access the BCCTP application.</td>
</tr>
</tbody>
</table>
Inviting kynectors to the Assister Training Role in MyPurpose
Inviting Navigators (contracted kynectors) and Certified Application Counselors (CACs), also known as non-contracted kynectors, to the Assister Training Role must be completed by an Organization Administrator. Organization Administrators complete the invitation process through the Organization Management tile from the KOG dashboard.

Once the kynector has been invited to the Assister Training Role, they can access MyPurpose Learning Management System (LMS). Organization Administrators should follow the steps below to invite a kynector to the Assister Training Role.

Steps for Organization Administrators to send the Assister Training Role Invitation
1. Obtain the kynector’s email address that they used when creating their KOG account.
3. The KOG landing page displays. Click Sign In.
4. Enter credentials and click Sign In.
5. Click **Launch** on the *Organization Management* tile from the KOG Dashboard.

![Organization Management](image1.png)

6. Select **Organization Search**.

![Organization Search](image2.png)

7. The Organization Administrator sees a table with the organization(s) they manage. To send an invitation to the kynector, click the **Manage** button next to the correct organization.

![Organization Table](image3.png)
8. Select the **Invite Users** tab and search for the kynector’s name in the “User to Invite” search field or enter the kynector’s **First Name**, **Last Name**, or **Email Address**. Click **Search**.

9. A pop-up displays the existing KOG users that match the search criteria. Click **Select** next to the appropriate user. Then, click **OK**.

10. The pop-up closes and the selected information populates in the **First Name**, **Last Name**, and **Email Address** fields.

11. Under the **Select Roles To Invite** section, click **Add** next to the Assister Training role.

**Please note**: If the kynector also has a citizen KOG account, it may display in the search results. **DO NOT** assign the Assister Training role to the kynector’s citizen account. The Assister Training role must be assigned to the dedicated work email provided by the kynector.
12. Click **Send Pending Invitations**.

13. An email will be received from KOG with a link to complete assignment of the Assister Training role. The kynector will be able to log in to KOG and access the Assister Training tile which will navigate them to My Purpose.
Inviting kynectors to the appropriate role(s) in KOG

Once the kynector has completed the State-Based Marketplace (SBM) Certification/Registration Training and the other required Kentucky Health Benefit Exchange (KHBE) Trainings, the Organization Administrator then invites the kynector to the appropriate role(s) in KOG. See the steps below for how Organization Administrator should invite kynectors to the Assister KOG role.

Steps for Organization Administrators to Invite kynectors to the Assister Role in KOG

2. The KOG landing page displays. Click Sign In located at the bottom of the screen.
3. Enter credentials and click Sign In.
4. Click **Launch** on the *Organization Management* tile from the KOG Dashboard.

5. Select **Organization Search**.

6. The Organization Administrator sees a table with the organization(s) that they manage. To send an invitation to the kynector, click the **Manage** button next to the correct organization.
7. Select the **Invite Users** tab and search for the kynector’s name in the “User to Invite” search field or enter the kynector’s **First Name**, **Last Name**, or **Email Address**. Click **Search**.

8. A pop-up displays the existing KOG users that match the search criteria. Click **Select** next to the appropriate user. Then, click **OK**.

Please note: The CHFS SP External Visitors role is currently no longer active. This role should not be assigned.
9. The pop-up closes and the selected information populates in the First Name, Last Name, and Email Address fields.

10. Under the Select Roles To Invite section, click Add next to the Assister role.

11. Click Add next to the Assister role.

**Please note:** If the kynector also has a citizen KOG account, it may display in the search results. DO NOT assign the Assister role to the kynector’s citizen account. The Assister role must be assigned to the dedicated work email provided by the kynector.

12. Click Send Pending Invitations.
13. Once the Organization Administrator assigns the Assister role a KOG system-generated email is sent informing the kynector that they have been assigned the Assister role.

Please note: An approval email is sent to KHBE to approve the assignment of the kynector role. KHBE has a 48-hour window to approve the kynector's KOG role.

Please note: Once the Organization Administrator sends the Assister Role invitation, an approval email is sent to KHBE to approve the assignment of the Assister Role. KHBE verifies that the kynector has completed their KHBE trainings. Once KHBE verifies training completion, they will approve the kynector for the Assister Role resulting in access to the Self-Service Portal (SSP) on the kynector's KOG dashboard.
Steps for Organization Administrators to offboard kynectors in KOG


2. The KOG landing page displays. Click **Sign In** located at the bottom of the screen.

3. Enter credentials and click **Sign In**.

4. Click **Launch** on the **Organization Management** tile from the KOG Dashboard.
5. Select **Organization Search**.

6. The system navigates to the Organization Management screen. Identify the desired organization name under the **Organization Name** column. Click **Manage**.
7. Navigate to the **Manage Users** tab. On this tab, the Organization Administer may remove or manage users.

- Click **Remove** to remove a user from the organization.
- Click **Manage** to manage the relationship between the user and the organization (Group_Entity) and update a user’s roles.

- Use the tabs at the top of the page to navigate between **Profile**, **Questions**, and **Roles**.
On the *Roles* tab, click **Remove** to remove the user’s assigned role.