

The Commonwealth of Kentucky
kynect State-Based Marketplace



Role Management in KYID
Quick Reference Guide

Quick Reference Guide: Role Management in KYID

Introduction

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

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Last Updated: March 30, 2026

Glossary of KYID User Roles

Below is a glossary of user roles assigned by Organization Administrators in KYID.

Role	Application	Description
Agency Admin	Self-Service Portal	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.
Assister	Self-Service Portal	Assister is a kynect benefits role given to Navigators (contracted kynectors) and Certified Application Counselors (non-contracted kynectors) who have successfully onboarded to KYID, taken all required trainings in MyPurpose, and passed the assessments corresponding to all required trainings in MyPurpose.
Assister Medicaid	Self-Service Portal	A role in Self-Service Portal given to kynectors, Agency Administrators, or other approved individuals in addition to the kynector or Agency Administrator roles have been granted. The Assister Medicaid role allows users to complete QHPs, APTC, CSRs, Medicaid, KCHIP, and KI-HIPP applications on behalf of a Kentucky Resident.
Assister Other Programs	Self-Service Portal	A role in Self-Service Portal given to kynectors, Agency Administrators, or other approved individuals in addition to the kynector or Agency Administrator roles. The Assister Other Programs role allows users to submit Supplemental Nutrition Assistance Program (SNAP) and Child Care Assistance Program (CCAP) applications to the Department for Community Based Services (DCBS) on behalf of a Kentucky Resident.
Assister Training	MyPurpose	Assister Training is a role in the MyPurpose Learning Management System (LMS) which allows kynectors to access and complete required trainings of the kynector program.

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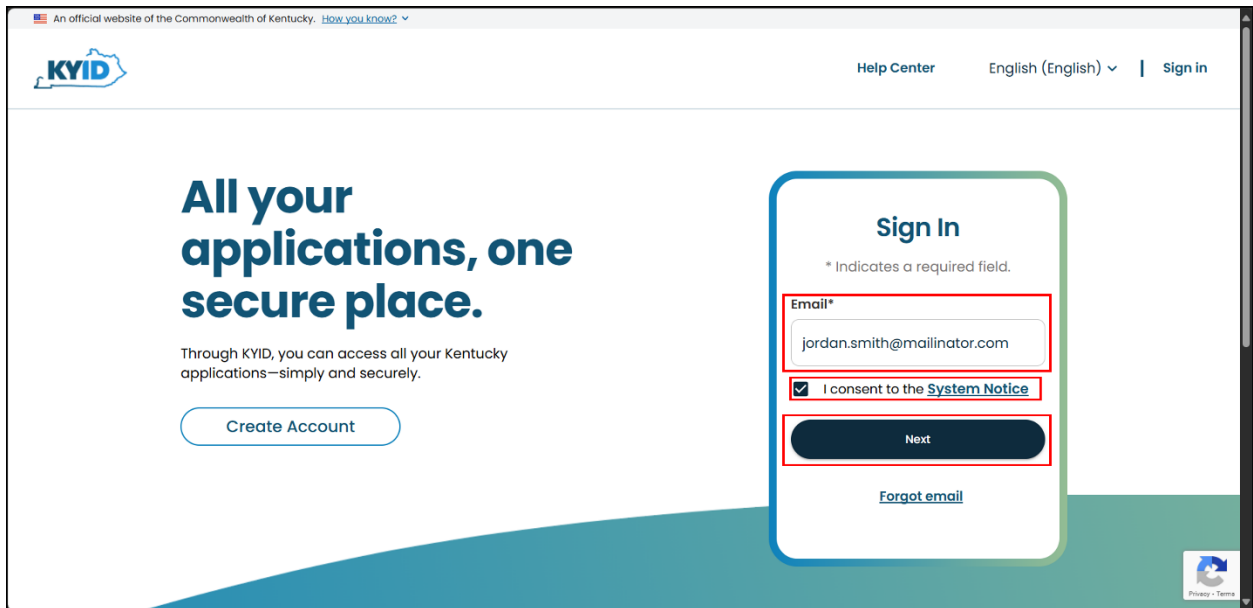
Inviting kynectors to the Assister Training Role in MyPurpose

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 KYID 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.

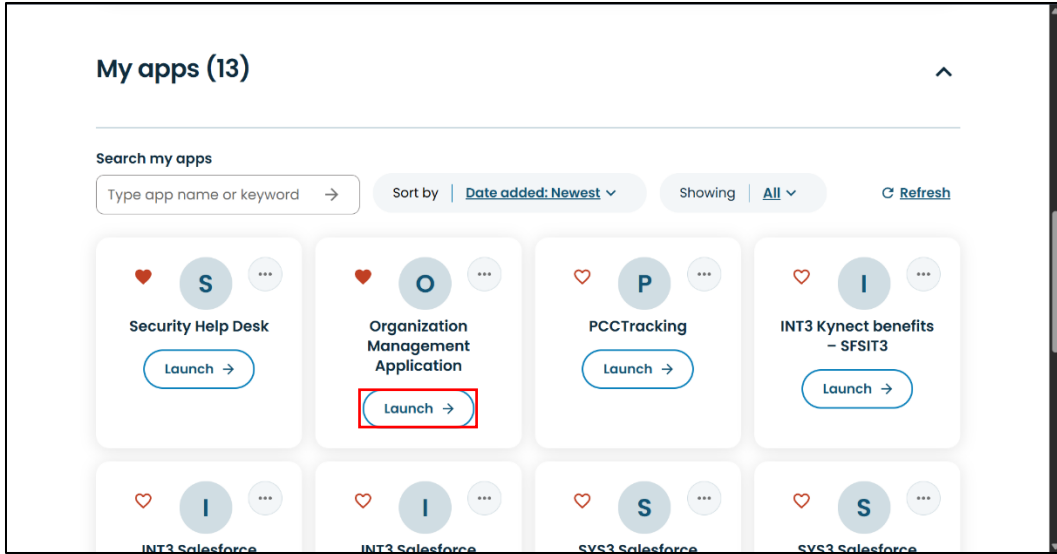
Steps for Organization Administrators to send the Assister Training Role Invitation

1. Obtain the kynector's email address that they used when creating their KYID account.
2. Navigate to the KYID home page using Google Chrome. <https://kyid.ky.gov>
3. The KYID landing page displays. Enter credentials and select **Next**.

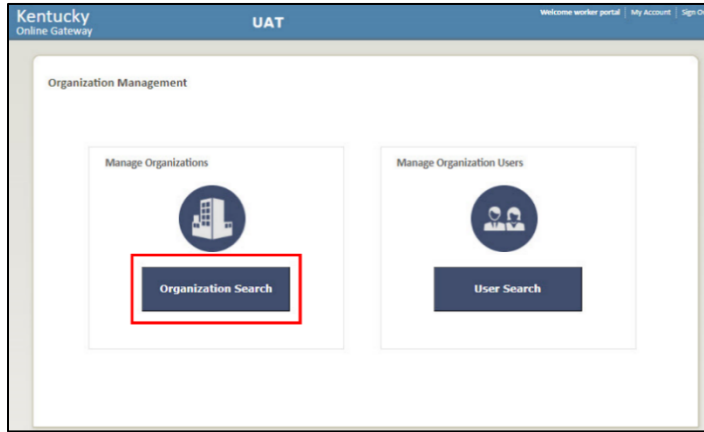


4. Enter password and complete the MFA authentication to sign in to KYID.
5. Select **Launch** on the *Organization Management* tile from the KYID **Dashboard**.

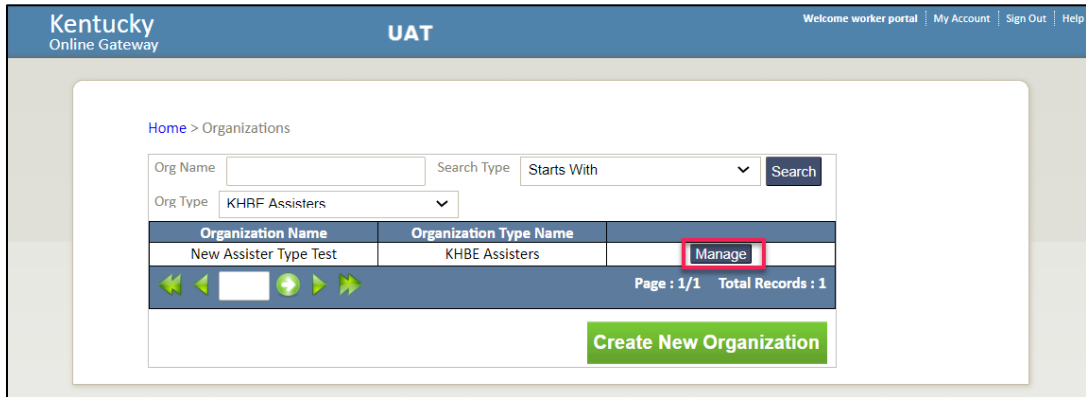
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6. Select **Organization Search**.



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



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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**. Select **Search**.

Kentucky Online Gateway UAT

Welcome worker portal | My Account | Sign Out | Help

Home > Organizations > New Assister Type Test > Organization Invites

Details | Email Domains | **Invite Users** | Pending Invitations | Manage Users

1. User to Invite

Search

Or

Please fill out the form below to invite a New User

* First Name:

* Last Name:

* Email Address:

Reset

2. Select Roles To Invite

Organization Admin Group(s)

Assister Organization Group

Organization Roles

Role Name	App Name	
Assister	Self Service Portal	Add
Assister Training	MyPURPOSE	Add

3. Selected Roles

Send Pending Invitations

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

Search Existing Users

Search Existing User By first name, last name, user name or email.

ben frank Search

	Username	Last Name	First Name	Email Address
Select	benfrank@exteruat.uatcit.uat	Frank	Benjamin	benjfrank@Keups.Net
Select	benjamin.franklin@exteruat.uatcit.uat	Franklin	Benjamin	Benjamin.Franklin@khbe.net
Select	ben.franklin@exteruat.uatcit.uat	Franklin	Ben	ben.franklin@yopmail.com
Select	ben.frank@exteruat.uatcit.uat	Franklin	Ben	benfranklin@khbe.net

OK Cancel

Please note: If the kynector also has a citizen KYID 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.

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, select **Add** next to the Assister Training role.

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Home > Organizations > New Assister Type Test > Organization Invites

Details | Email Domains | Invite Users | Pending Invitations | Manage Users

1. User to Invite

Search

Or

Please fill out the form below to invite a New User

* First Name: Ben

* Last Name: Franklin

* Email Address: ben.franklin@yopmail.com

Reset

2. Select Roles To Invite

Organization Admin Group(s)

Assister Organization Group

Organization Roles

Role Name	App Name	
Assister	Self Service Portal	Add
Assister Training	MyPURPOSE	Add

3. Selected Roles

Send Pending Invitations

12. Select **Send Pending Invitations**.

Home > Organizations > New Assister Type Test > Organization Invites

Details | Email Domains | Invite Users | Pending Invitations | Manage Users

1. User to Invite

Search

Or

Please fill out the form below to invite a New User

* First Name: Ben

* Last Name: Franklin

* Email Address: ben.franklin@yopmail.com

Reset

2. Select Roles To Invite

Organization Admin Group(s)

Assister Organization Group

Organization Roles

Role Name	App Name	
Assister	Self Service Portal	Add

3. Selected Roles

Role Name	App Name	View/Edit	Remove
Assister Training	MyPURPOSE	View/Edit	Remove

Send Pending Invitations

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

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Subject: **Invitation to Organization User - UAT** Back To Mail

To: **areverycool**

From: **KEUPS_DoNotReply_keupsuat.chfs@ky.gov**

Received: **Thu Jan 23 2020 14:44:12 GMT-0500 (Eastern Standard Time)**

Sending IP: **148.163.135.176**

Parts: [html](#)

Attachments: [\[Subscribe to receive Attachments\]](#)

Jonas Bros,

worker portal has granted you access to the following roles to participate as a user in an Organization - **2015 Go Live TEST**

Application Name: Cornerstone OnDemand
Role Name: Assister Training

Please follow the below instructions to gain access as a user for this organization. This invitation link would expire and is valid only for a one-time use.

[Click here to complete the process](#)

If you need any assistance further, please contact the Kentucky Online Gateway HelpDesk.

Kentucky Online Gateway
[Kentucky Online Gateway HelpDesk](#)

NOTE: Do not reply to this email. This email account is only used to send messages.

Privacy Notice: This email message is only for the person it was addressed to. It may contain restricted and private information. You are forbidden to use, tell, show, or send this information without permission. If you are not the person who was supposed to get this message, please destroy all copies.

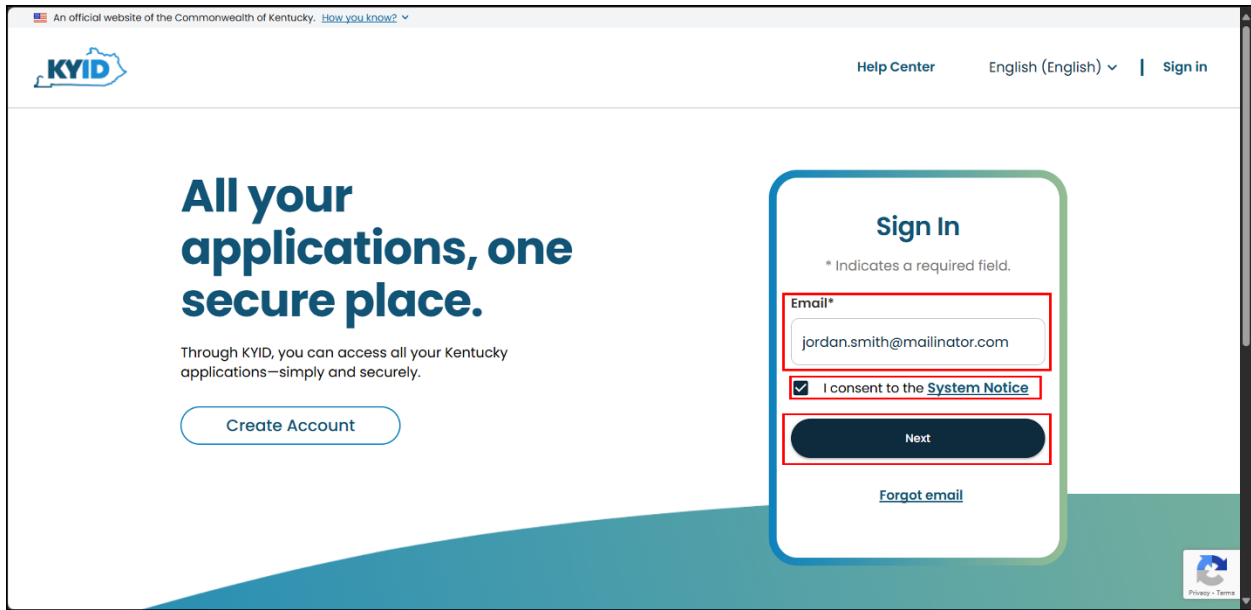
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Inviting kynectors to the appropriate role(s) in KYID

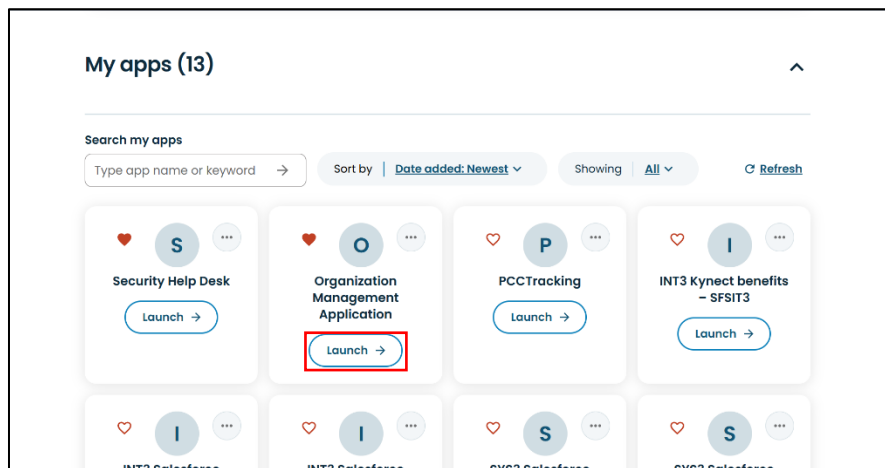
Once the kynector has completed the State-Based Marketplace (SBM) Certification/Registration Training and the other required Kentucky Health Benefit Exchange (KHBE) Trainings, the Organization Administrator then invites the kynector to the appropriate role(s) in KYID. See the steps below for how Organization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

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

1. Navigate to the KYID home page using Google Chrome. <https://kyid.ky.gov>
2. The KYID landing page displays. Enter credentials and select **Next**.

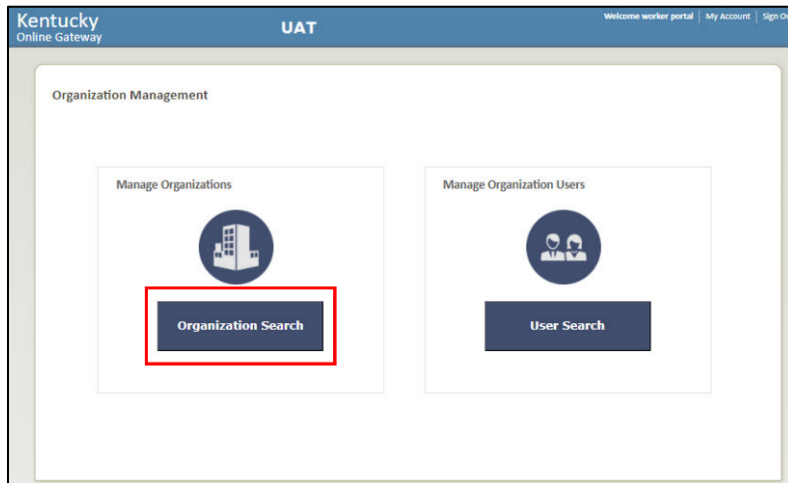


3. Select **Launch** on the *Organization Management* tile from the KYID Dashboard.

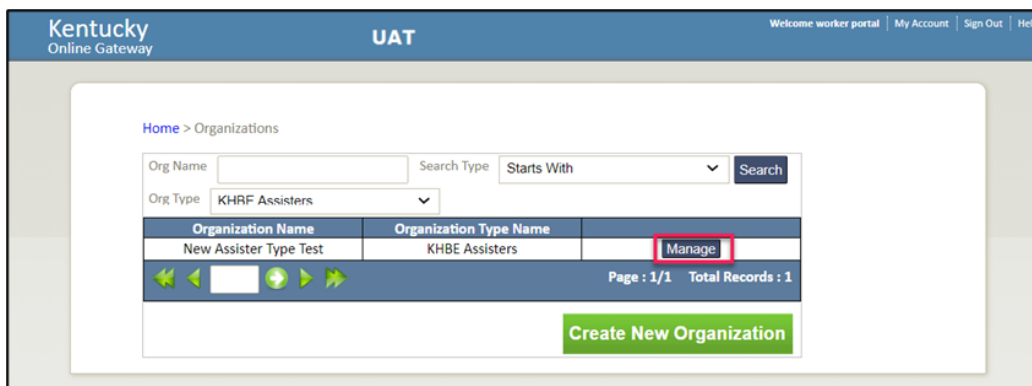


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4. Select **Organization Search**.



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



6. 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**. Select **Search**.

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Kentucky Online Gateway IDE

Welcome Worker Portal | My Account | Sign Out | Help

Home > Organizations > Assister Org1 > Organization Invites

Details | Email Domains | **Invite Users** | Pending Invitations | Manage Users | Recertification Dashboard

1. User to Invite

Search

Or

Please fill out the form below to invite a New User

* First Name:

* Last Name:

* Email Address:

Reset

2. Select Roles To Invite

Organization Admin Group(s)

Org Admin - Agency Admin Group

Organization Roles

Role Name	App Name	
Agency Admin	KHBE Self Service Portal DEV2	Add
Agency Admin	KHBE Self Service Portal DEV4	Add
Agency Admin	KHBE Self Service Portal DEV5	Add
Agency Admin	KHBE Self Service Portal DEV3	Add
Assister	KHBE Self Service Portal DEV2	Add
Assister	KHBE Self Service Portal DEV5	Add
Assister	KHBE Self Service Portal DEV3	Add
Assister	KHBE Self Service Portal DEV4	Add
Assister	Self Service Portal	Add
Assister Medicaid	KHBE Self Service Portal DEV2	Add
Assister Medicaid	KHBE Self Service Portal DEV3	Add
Assister Other Programs	KHBE Self Service Portal DEV3	Add
Assister Other Programs	KHBE Self Service Portal DEV2	Add

Please note: The Assister Other Programs and/or the Assister Medicaid security roles are add-ons which must be added **in addition to** either the Assister or Agency Admin roles to access the programs permitted by this access. Each add-on role will have its own approval process and training requirements.

7. A pop-up displays the existing KYID users that match the search criteria. **Select** next to the appropriate user. Then, select **OK**.

Quick Reference Guide: Role Management in KYID

Search Existing Users

Search Existing User By first name, last name, user name or email.

ben frank

	Username	Last Name	First Name	Email Address
Select	benfrank@exteruat.uatcit.uat	Frank	Benjamin	benjfrank@Keups.Net
Select	benjamin.franklin@exteruat.uatcit.uat	Franklin	Benjamin	Benjamin.Franklin@khbe.net
Select	ben.franklin@exteruat.uatcit.uat	Franklin	Ben	ben.franklin@yopmail.com
Select	ben.frank@exteruat.uatcit.uat	Franklin	Ben	benfranklin@khbe.net

Please note: If the kynector also has a citizen KYID 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.

8. The pop-up closes and the selected information populates in the *First Name*, *Last Name*, and *Email Address* fields.
9. Under the *Select Roles To Invite* section, select **Add** next to the Assister role.
10. Select **Add** next to the Assister role.

Kentucky Online Gateway

Welcome Justin Mullins | My Account | Sign Out | Help

Home > Organizations > Cabinet for Health and Family > Organization Invites

Details | Email Domains | **Invite Users** | Pending Invitations | Manage Users | Recertification Dashboard

1. User to Invite

Or

Please fill out the form below to invite a New User

* First Name:

* Last Name:

* Email Address:

2. Select Roles To Invite

Organization Admin Group(s)

Assister Organization Manager

Organization Roles

Role Name	App Name	
Agency Admin	Self Service Portal	<input type="button" value="Add"/>
Assister	Self Service Portal	<input type="button" value="Add"/>
Assister Training	MyPurpose	<input type="button" value="Add"/>
CHFS SP External Visitors	CHFS External SharePoint Sites	<input type="button" value="Add"/>
Qualified Entity Hospital	Self Service Portal	<input type="button" value="Add"/>

3. Selected Roles

11. Select **Send Pending Invitations**.

Quick Reference Guide: Role Management in KYID

Kentucky Online Gateway

Welcome Justin Mullins | My Account | Sign Out | Help

Home > Organizations > Cabinet for Health and Family > Organization Invites

Details | Email Domains | **Invite Users** | Pending Invitations | Manage Users | Recertification Dashboard

1. User to Invite

Search

Or

Please fill out the form below to invite a New User

* First Name:

* Last Name:

* Email Address:

Reset

2. Select Roles To Invite

Organization Admin Group(s)

Assister Organization Manager

Organization Roles

Role Name	App Name	
Agency Admin	Self Service Portal	Add
Assister	Self Service Portal	Add
Assister Training	MyPurpose	Add
CHFS SP External Visitors	CHFS External SharePoint Sites	Add
Qualified Entity Hospital	Self Service Portal	Add

3. Selected Roles

Send Pending Invitations

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 KYID role.

12. Once the Organization Administrator assigns the Assister role a KYID system-generated email is sent informing the kynector that they have been assigned the Assister role.

Lola Bennett,

worker portal has granted you access to the following roles to participate as a user in an Organization - **Demo Assister**

Application Name: Self Service Portal
Role Name: Assister

Please follow the below instructions to gain access as a user for this organization. This invitation link would expire and is valid only for a one-time use.

[Click here to complete the process](#)

If you need any assistance further, please contact the Kentucky Online Gateway HelpDesk.

Kentucky Online Gateway
[Kentucky Online Gateway HelpDesk](#)

NOTE: Do not reply to this email. This email account is only used to send messages.

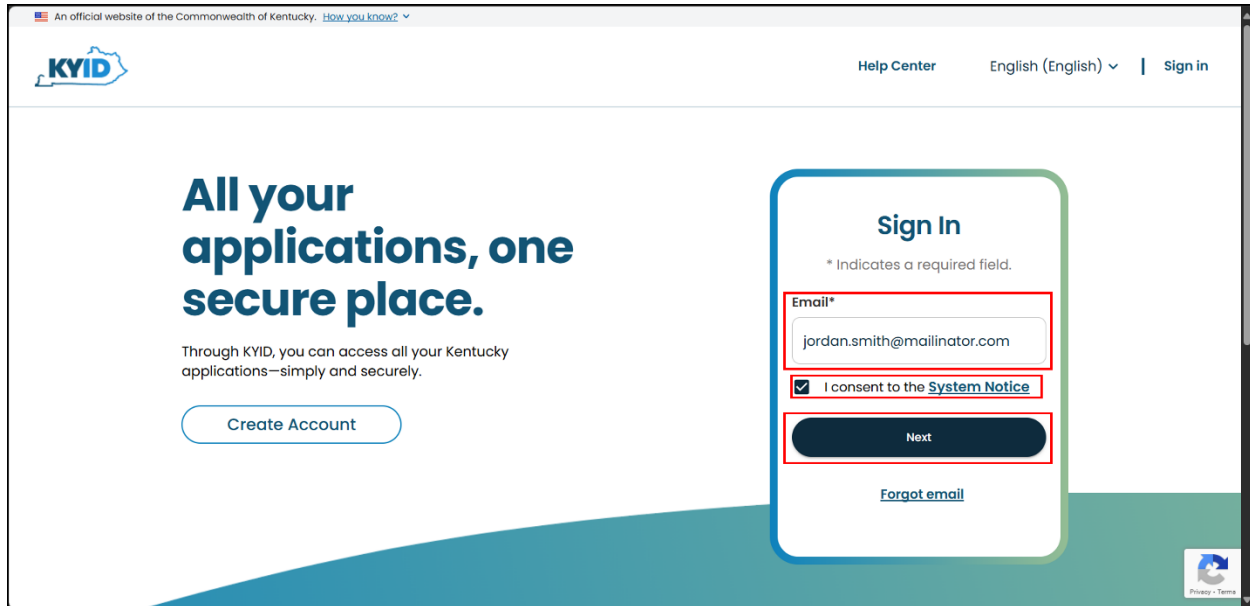
Privacy Notice: This email message is only for the person it was addressed to. It may contain restricted and private information. You are forbidden to use, tell, show, or send this information without permission. If you are not the person who was supposed to get this message, please destroy all copies.

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 KYID dashboard.

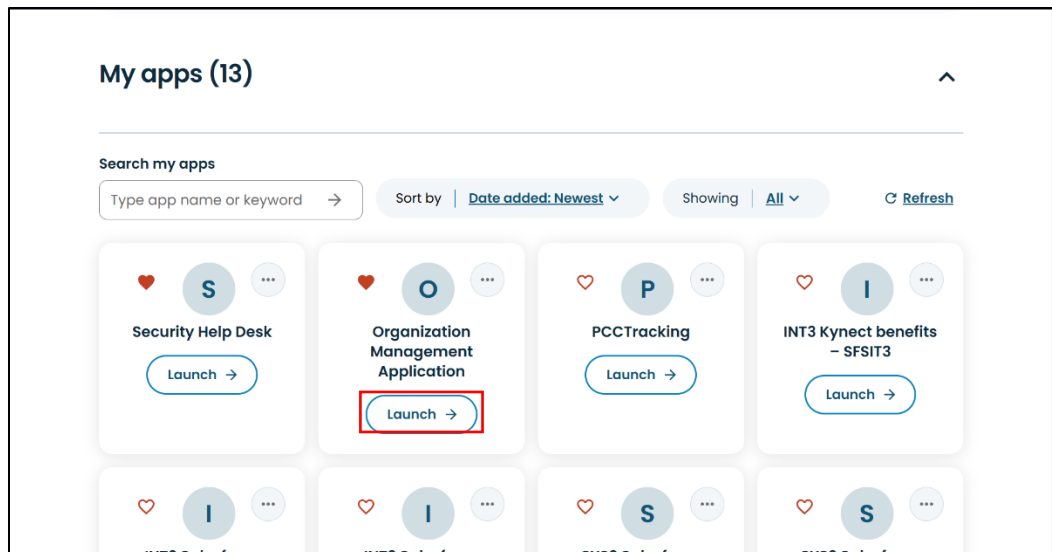
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Steps for Organization Administrators to offboard kynectors in KYID

1. Navigate to the KYID home page using Google Chrome. <https://kyid.ky.gov>
2. The KYID landing page displays.
3. Enter credentials and select **Next**.

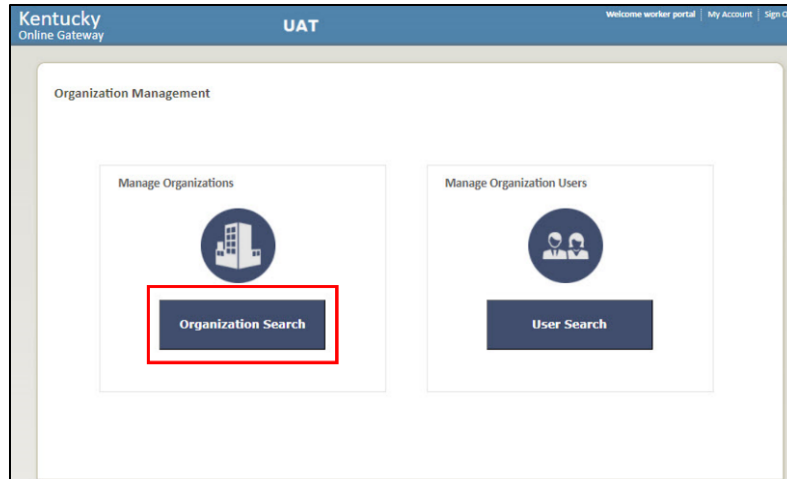


4. Select **Launch** on the *Organization Management* tile from the KYID Dashboard.



5. Select **Organization Search**.

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6. The system navigates to the Organization Management screen. Identify the desired organization name under the *Organization Name* column. Select **Manage**.

The screenshot shows the 'Organizations' list in the Kentucky Online Gateway UAT. The table has three columns: 'Organization Name', 'Organization Type Name', and 'Manage'. The 'Manage' button for the first row is highlighted with a red box.

Organization Name	Organization Type Name	Manage
ABC Health Insurer	HBE Issuers	Manage
ABCD	HBE Issuers	Manage
Anthem Health Plans of Kentuck	HBE Issuers	Manage
Anthem Health Plans of KY	HBE Issuers	Manage
Anthem Healthcare	HBE Issuers	Manage
apple	HBE Issuers	Manage
Baptist Health Plan Inc.	HBE Issuers	Manage
Bill & Carrie's Superissuer	HBE Issuers	Manage
Blue cross	HBE Issuers	Manage
Bollineni HealthCare	HBE Issuers	Manage
CHUK_ISSUER01	HBE Issuers	Manage
CR - 176 Test	HBE Issuers	Manage
David Health Alliance	HBE Issuers	Manage
HealthWorx	HBE Issuers	Manage
ISSUER PORTAL ANTHEM	HBE Issuers	Manage
ISSUER PORTAL BEST Life	HBE Issuers	Manage
ISSUER PORTAL CareSource	HBE Issuers	Manage
ISSUER PORTAL Delta Dental	HBE Issuers	Manage
ISSUER PORTAL Dental Concern	HBE Issuers	Manage
ISSUER PORTAL Dentegra	HBE Issuers	Manage

7. Navigate to the *Manage Users* tab. On this tab, the Organization Administer may remove or manage users.
- Select **Remove** to remove a user from the organization.
 - Select **Manage** to manage the relationship between the user and the organization (Group/Entity) and update a user's roles.

Quick Reference Guide: Role Management in KYID

Home > Organizations > ABCD > Organization Users

Details | Email Domains | Invite Users | Pending Invitations | **Manage Users**

Organization Users

Search Users

First Name	Last Name	Email Address	Remove User From Organization	User Details
Daniel	Beatrice	UAT_PR_UAT_167@dispostable.com	Remove	Manage
Isaiah	Brielle	UAT_PR_UAT_165@dispostable.com	Remove	Manage
Ron	John	ron.john1@keups.net	Remove	Manage
Magnus	Josephine	UAT_PR_UAT_164@dispostable.com	Remove	Manage
Rhett	Sienna	UAT_PR_UAT_166@dispostable.com	Remove	Manage

- Use the tabs at the top of the page to navigate between *Profile*, *Questions*, and *Roles*.

ABCD > Organization Users > Beatrice, Daniel

Profile | Questions | Roles

Registered Tokens

MFA Credential Id

There are no MFA records.

Profile Information

Job Classification

First Name

Middle Name

Last Name

Email Address

Language Preference

Contact

Telephone Address 1

Extension Address 2

Web Page City

State Zip

Additional Telephone

Home

Mobile

Pager

Fax

Previous

- On the *Roles* tab, select **Remove** to remove the user's assigned role.

Quick Reference Guide: Role Management in KYID

ABCD > Organization Users > User Roles

Profile Questions Roles

Assigned Roles

Role Name	Application Name	Key Value	
Org Manager	Organization Management		Remove

Previous

