

The Commonwealth of Kentucky



**Quick Reference Guide**  
**How to Export Reports**

Last Updated: March 1<sup>st</sup>, 2024



**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 interface. At the top, there is a navigation bar with the kynect logo, 'Dashboard', 'Programs', 'Get Local Help', 'Child Care Provider Search', and 'Help & FAQs'. A user profile section displays 'Welcome, NEWJAY' and 'Profile: kynector'. Below this, a table lists user details: Your ID (2782), Organization (NewAssistorOrg7897), Coverage Area (Allen), Public, and Program Access (Medicaid/APTC/QHP). The main content area is titled 'Cases Requiring Action' and includes a sub-section for 'Cases Requiring Action' with a table of cases. The table has columns for '#', 'Case Number', 'H&H Name', 'RFI Type', and 'Earliest RFI Due Date'. Two cases are listed: Case 1 (10030848, PATRICIA GUS, APTC income verification, 02/26/2024) and Case 2 (10030868, MELONIE JILLIAN, US Citizenship, 02/27/2024). Each case has a 'View Case Document Center' button. Below the table is an 'Export to Excel' button. At the bottom, there is a 'Search' section with various filters and input fields, including 'Programs Applicable' (Medicaid, SNAP/CCAP), 'First Name', 'Last Name', 'Case Number', 'Application Number', 'Social Security Number (9 digits)', 'Date of Birth', and 'Address Line 1'. There are also 'Reset', 'Search', and 'Export to Excel' buttons at the bottom.

Cases Requiring Action					
RFIs Expiring (2)	Renewals (0)	Pending Cases (5)	Unsubmitted Applications (1)		
#	Case Number	H&H Name	RFI Type	Earliest RFI Due Date	
1	10030848	PATRICIA GUS	APTC income verification	02/26/2024	<a href="#">View Case Document Center</a>
2	10030868	MELONIE JILLIAN	US Citizenship	02/27/2024	<a href="#">View Case Document Center</a>



## 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	601433100	020350000060190	CC	2/8/2024



**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**.

The screenshot shows a search interface with the following elements:

- Search** header
- Programs Applicable** section with two buttons: **Medicaid** (highlighted with a red box) and **SNAP/CCAP** (highlighted with a red box).
- Search fields: First Name, Last Name, Case Number, Application Number, Social Security Number (9 digits), Date of Birth (mm/dd/yyyy), and Address Line 1.
- Search by Primary Applicant
- Buttons: **Show Advanced Search**, **Reset**, **Search**, and **Export to Excel**.
- A blue question mark icon 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

First Name

Last Name

Case Number

Application Number

Social Security Number (9 digits)

Date of Birth

Address Line 1

[Show Advanced Search](#)

- 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 <input type="text"/>	Middle Initial (M.I.) <input type="text"/>
Last Name <input type="text"/>	Suffix <input type="text" value="Select"/>
Date of Birth <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Sex <input type="text" value="Select"/>
<input type="radio"/> Case Number <input type="text"/>	<input type="radio"/> Application Number <input type="text"/>
Social Security Number (9 digits) <input type="text"/>	Address Line 1 <input type="text"/>

[Show Advanced Search](#)

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

**Search**

Programs Applicable

First Name

Middle Initial (M.I.)

Last Name

Suffix  

Date of Birth  

Sex  

Case Number

Application Number

Social Security Number (9 digits)

Address Line 1

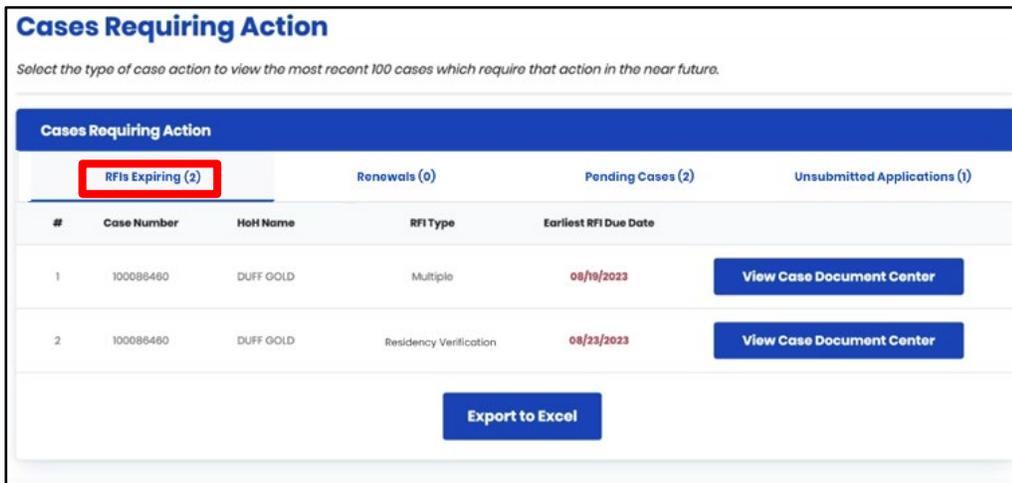
[Show Advanced Search](#)

## 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 **RFISs 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*.



**Cases Requiring Action**

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

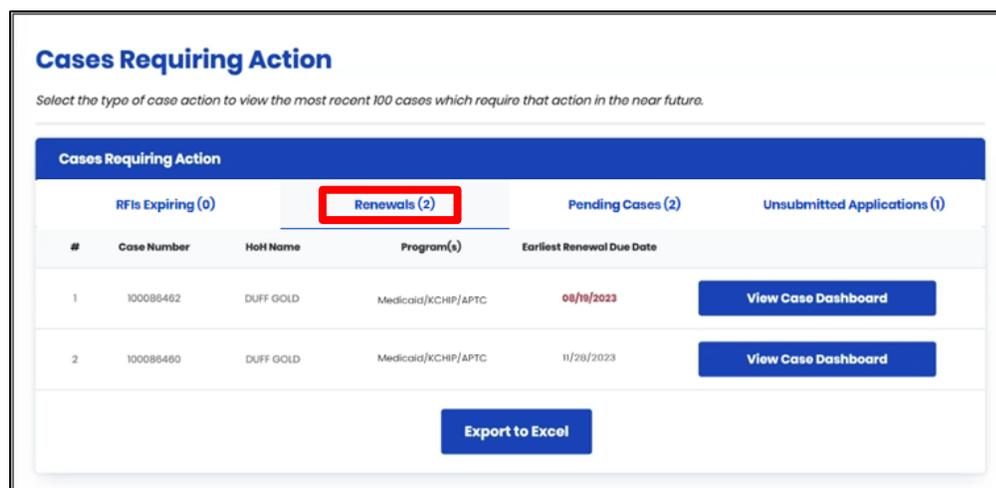
Cases Requiring Action

RFISs Expiring (2) Renewals (0) Pending Cases (2) Unsubmitted Applications (1)

#	Case Number	HoH Name	RFI Type	Earliest RFI Due Date	
1	100086460	DUFF GOLD	Multiple	08/19/2023	<a href="#">View Case Document Center</a>
2	100086460	DUFF GOLD	Residency Verification	08/23/2023	<a href="#">View Case Document Center</a>

[Export to Excel](#)

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*.



**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

RFISs Expiring (0) Renewals (2) Pending Cases (2) Unsubmitted Applications (1)

#	Case Number	HoH Name	Program(s)	Earliest Renewal Due Date	
1	100085482	DUFF GOLD	Medicaid/KCHIP/APTC	08/19/2023	<a href="#">View Case Dashboard</a>
2	100086460	DUFF GOLD	Medicaid/KCHIP/APTC	11/28/2023	<a href="#">View Case Dashboard</a>

[Export to Excel](#)

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	100394164	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](#)

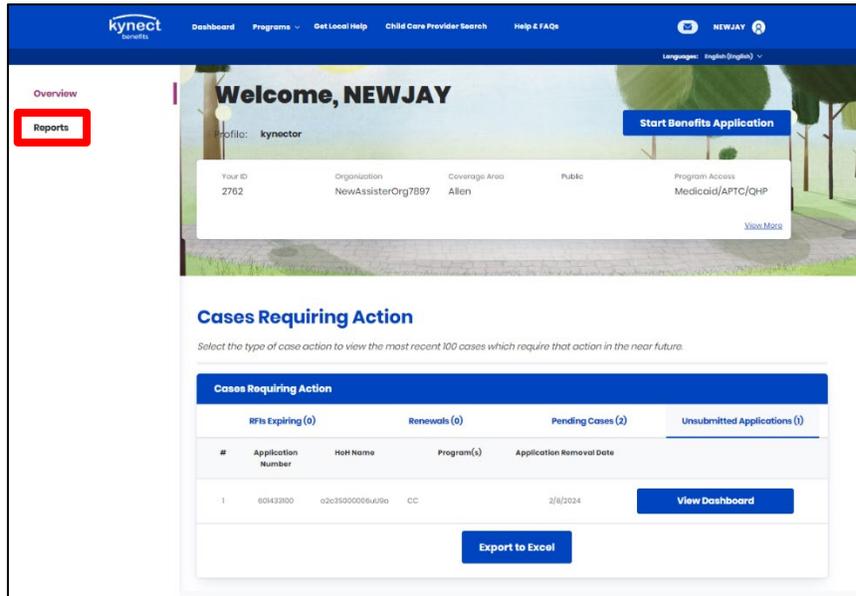


**Please note:** The selected type of case action appears in the user's downloaded files as a CSV file.



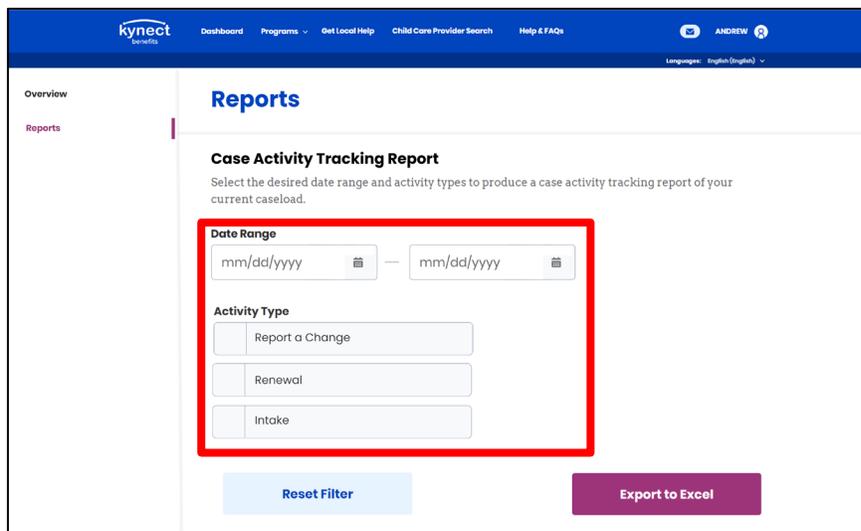
## Access Reports

To access reports, click **Reports** from the Dashboard.



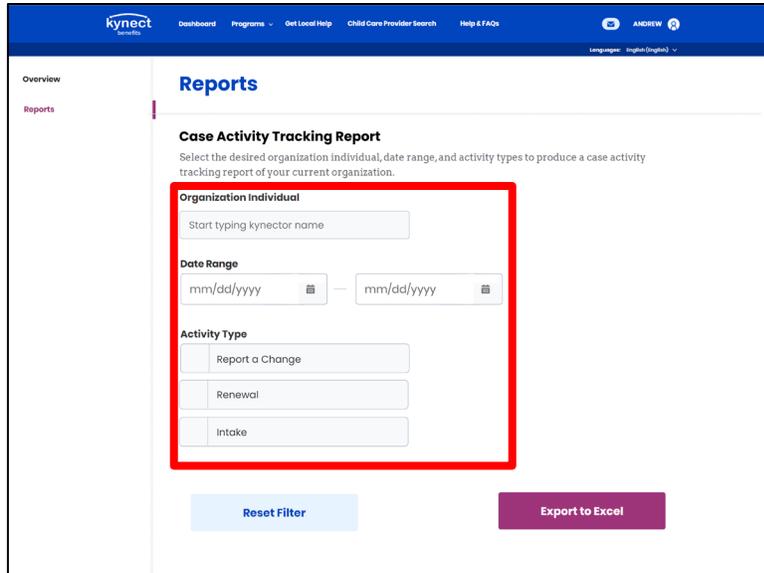
## Case Activity Tracking Report for kynectors

On the *Reports* page, kynectors see the *Case Activity Tracking Report*, where they can select the date range and activity type(s) to produce a case activity tracking report of their current caseload.



## Case Activity Tracking Report for Agency Admin Users

On the Reports page, Agency Admin users see the *Case Activity Tracking Report*, where they can enter the kynector's name, select the date range, and select the activity type(s) to produce a case activity tracking report for the kynector.



The screenshot shows the 'Reports' section of the kynect application. The main heading is 'Case Activity Tracking Report'. Below this, there is a sub-heading 'Organization Individual' with a text input field labeled 'Start typing kynector name'. Underneath is the 'Date Range' section with two date pickers in 'mm/dd/yyyy' format. The 'Activity Type' section contains three radio button options: 'Report a Change', 'Renewal', and 'Intake'. A red rectangular box highlights the 'Organization Individual' section, the 'Date Range' pickers, and the 'Activity Type' radio buttons. At the bottom of the form, there are two buttons: 'Reset Filter' (light blue) and 'Export to Excel' (purple).

## Generate a Report to Export to Excel (for kynectors)

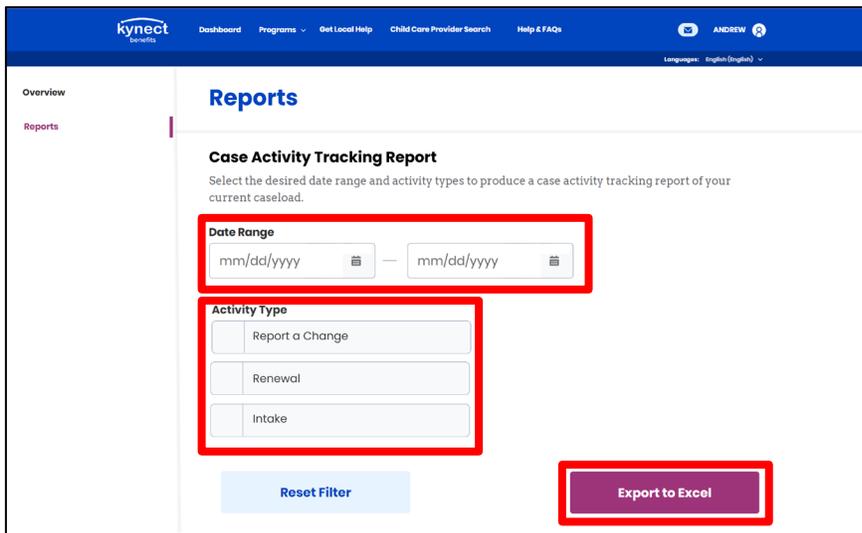
Below are the steps for kynectors to generate a report to export to Excel.

1. Under **Date Range**,
  - a. Enter the **Start Date** or click the calendar icon and select a **Start Date**.
  - b. Enter the **End Date** or click the calendar icon and select an **End Date**.



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

2. Under **Activity Type**, select one or more options: **Report a Change**, **Renewal**, or **Intake**.
3. Click **Export to Excel**.



The screenshot shows the Kynect Reports interface. The main heading is "Reports" and the sub-heading is "Case Activity Tracking Report". Below the heading, there is a description: "Select the desired date range and activity types to produce a case activity tracking report of your current caseload." The form has two main sections: "Date Range" and "Activity Type". The "Date Range" section has two input fields for "mm/dd/yyyy" with calendar icons. The "Activity Type" section has three checkboxes: "Report a Change", "Renewal", and "Intake". At the bottom of the form, there are two buttons: "Reset Filter" and "Export to Excel".



**Please note:** Click **Reset Filter** to clear the selections. The spreadsheet includes the following columns: Date, Organization, Case Number, Individual Name, and Activity Type.

## Generate a Report to Export to Excel (for Agency Admin Users)

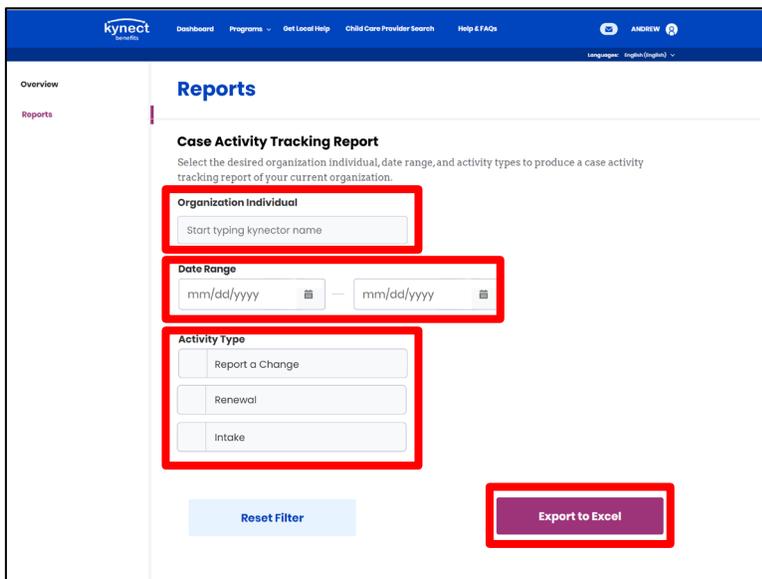
Below are the steps for Agency Admin users to generate a report to export to Excel.

1. Under **Date Range**,
  - a. Enter the **Start Date** or click the calendar icon and select a **Start Date**.
  - b. Enter the **End Date** or click the calendar icon and select an **End Date**.



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

2. Under **Activity Type**, select one or more options: **Report a Change**, **Renewal**, or **Intake**.
3. Click **Export to Excel**.



The screenshot shows the Kynect Reports interface. The main heading is "Case Activity Tracking Report". Below the heading is a sub-heading "Organization Individual" with a text input field "Start typing kynector name". Below that is the "Date Range" section with two date pickers in "mm/dd/yyyy" format. The "Activity Type" section has three radio button options: "Report a Change", "Renewal", and "Intake". At the bottom of the form are two buttons: "Reset Filter" and "Export to Excel". Red boxes highlight the "Organization Individual" field, the "Date Range" pickers, the "Activity Type" options, and the "Export to Excel" button.



**Please note:** Click **Reset Filter** to clear the selections. The spreadsheet includes the following columns: Date, Organization, Case Number, Individual Name, Activity Type, and kynector Name.