The Commonwealth of Kentucky

Presumptive Eligibility Program

Presumptive Eligibility

Organization Management

Training Guide

Document Control Information

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Table of Contents

Document Control Information 2

Document Edit History 2

1. Introduction 4

2. Course Overview 4

3. Organization Management 4

3.1 What is an Organization Manager? 4

4. Organization Manager Responsibilities 5

4.1 Primary Point of Contact 5

4.2 Liaison With DMS 5

4.3 User Management 5

5. The Kentucky Online Gateway (KOG) and Security Roles 6

5.1 What is KOG? 6

5.2 KOG Security Roles? 6

6 Organization Management Tool 8

6.1 How to use the Organization Management Tool 8

6.1.1 Accessing the Tile 8

6.1.2 Organization Search vs User Search 8

6.1.2.1 Org Select 9

6.1.2.2 User Select 9

6.1.2.3 Organization Screen 10

8. Final Assessment 23

9. Helpful Resources 24

10. Conclusion 24

1. Introduction

Hello, and Welcome to our course on Presumptive Eligibility Organization Management. This training explains the roles and responsibilities of Organization Managers for the Presumptive Eligibility program.

Press the Start Button below to begin.

2. Course Overview

In this course we will be covering a number of topics, including:

- What an Organization Manager is
- The Kentucky Online Gateway (KOG) and security roles
- A system walkthrough of the Organization Management tool
- Plus, additional information about the program and available resources

Click next when you are ready to proceed.

3. Organization Management

So, what IS an Organization Manager?

Let's take a look!

3.1 What is an Organization Manager?

- An Organization Manager is an individual who has been designated by a Qualified Entity, or (Q E), to lead their organization's activities related to the Kentucky Presumptive Eligibility, or (PE), Program.
- This individual has three primary responsibilities,
    - Serves as the primary Point of Contact and subject matter expert for the Qualified Entity on all activities related to the Presumptive Eligibility program.
    - Acts as a liaison between the Qualified Entity and the Department for Medicaid Services (DMS).
    - Uses the Kentucky Online Gateway, commonly referred to as KOG, Organization Management tool to facilitate on-boarding and off-boarding of PE Determiners to the Organization.

4. Organization Manager Responsibilities

4.1 Primary Point of Contact

Let's look at the expectations related to being the primary point of contact

- Organization Managers for a Qualified Entity serve as the primary point of contact for inquiries related to the Presumptive Eligibility program, whether from their internal partners and employees, the public, or other outside entities.
    - As such, they are expected to maintain a working knowledge of the policies and procedures of the PE Program.
    - The designated Organization Manager should be familiar with the goals and intent of the program, the rules regarding its use, and be able to help answer questions related to the program.

4.2 Liaison With DMS

Now let's look at the responsibilities as the liaison between the Qualified Entity and DMS.

- The Organization Managers serves as a liaison between DMS and the Qualified Entity.
- As an Organization Manager you will be expected to assist DMS with dissemination of any policy changes, procedural updates, and other communications to the PE Determiners serving your organization.
- The Organization Manager also helps to ensure timely resolution of issues and questions by coordinating with Determiners and DMS on specific case related issues and questions.

Please Note: It is important to familiarize yourself with the tools provided for the PE Program, including information available on the PE Website such as fact sheets, quick reference guides, and escalation paths for resolution of issues.

4.3 User Management

The final responsibility we will be looking at is User Management.

- As an Organization Manager you will be granted access to the KOG Organization Management tool to manage the on-boarding and off-boarding of PE Determiners to your designated Qualified Entity.
- The Organization Management tool will help to ensure that access to the PE Program is strictly limited to only those users who have been properly trained, certified, and who are actively acting as a PE Determiner.

We will discuss the rules, expectations, and processes for managing your users throughout this training.

5. The Kentucky Online Gateway (KOG) and Security Roles

Let's take a look at what KOG is and how KOG Security Roles are used to control user access

5.1 What is KOG?

- KOG is the Single Sign-On Portal for the Commonwealth of Kentucky.
- Using KOG, an individual can quickly and easily access and switch between applications from numerous State Agencies, including the kynect system.
- The applications and access that an individual has available is dependent on the type of business the user does with the Commonwealth.
- To use KOG, every user must initially establish a KOG account which confirms and validates the user's identity.
- This validation ensures that access to state systems is secure and is only granted to those who have a legitimate business need for the access.
- Guidance materials for KOG account creation are available on the PE website.
- As an Organization Manager, it will be your job to make sure that access is being granted correctly and that when the access is no longer needed, that it is removed in a timely fashion to ensure the ongoing security of the kynect system.
- Access to PE and other state programs is controlled through the provisioning of Security Roles which help to define what level of access a user has.

Click next to learn more about Security roles.

5.2 KOG Security Roles?

- Security Roles act as a user's "keys" into the Commonwealth's systems.
- However, different Security Roles grant varying levels of access based on what the specific needs of the user are and what criteria they meet.
- This is how KOG ensures that users have only those capabilities they need to perform their duties.
- As an Organization Manager for the PE program, it is important to have a basic understanding of the three Security Roles related to Presumptive Eligibility.
    - Q.E Hospital
        - The QE Hospital Role grants access to the kynect benefits Self Service Portal.
        - Access to this role is strictly limited to only employees or sub-contractors of designated Hospitals.
        - With access to this role a determiner can submit eligibility applications for the presumptive eligibility program for all Kentuckians who may qualify.

Please Note: While DMS allows Qualified Entities to use sub-contractors in their PE Programs, it requires that the Organizations maintain primary oversight responsibilities.

- Q.E Pregnancy
  - The Q.E Pregnancy Role also grants access to the kynect benefits Self Service Portal.
  - However, unlike the Q.E Hospital access, this role can be granted to employees of the following groups:
    - Family and general practitioners, Pediatricians, and Internists,
    - Obstetricians and/or Gynecologists
    - Physician assistants, Certified nurse midwives, and advanced practice registered nurses
    - Federally Qualified Health Care Centers, Primary Care Centers, Rural Health Clinics, and Local Health Departments
  - With the Q.E Pregnancy access, the Determiner is limited to submitting applications for pregnant women only.
  - Q.E Pregnancy coverage is limited to ambulatory prenatal care services delivered in an outpatient setting.

Please Note: Q.E Hospital users are able to determine eligibility for the Pregnancy category of coverage, so they do not need to have the Q.E Pregnancy role assigned. As you will see later, there are system checks that will prevent the granting of multiple roles to a single individual.

- PE Organization Administrator
  - While the Q.E Hospital and Q.E Pregnancy roles grant access to kynect benefits Self Service Portal, the PE Organization Administrator role grants access to the KOG Organization Management Tool.
  - which type of access you are permitted to grant based on your provider type and in what setting the user will be working.
  - Additionally, with the PE Organization Administrator role you are also able to assign other users within your group to serve as PE Organization Managers.
    - It is recommended that larger Organizations have more than one Organization Manager to serve as a backup in the event of an extended absence or someone leaving the group.
    - This will provide continuity of services to your organization and ensure smooth transitions of leadership.

Please Note: PE Organization Managers MUST be a direct employee of the group. Sub-contractors are not permitted to be PE Organization Managers

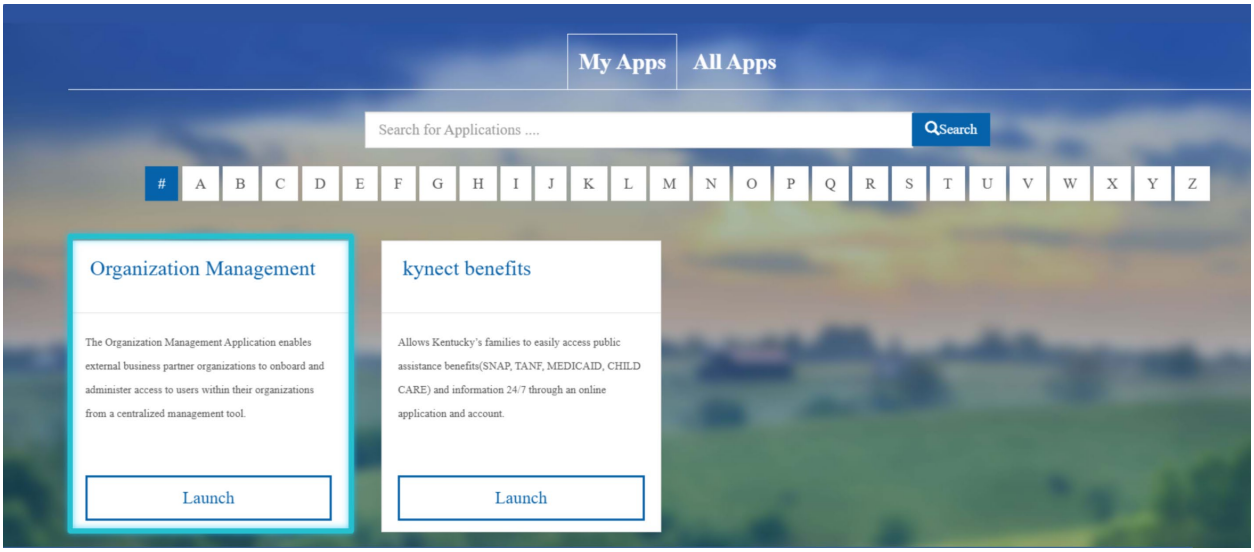
6 Organization Management Tool

- Now that we have covered the basic rules of being an Organization Manager, let's take a look at how to use the KOG Organization Management tool.

6.1 How to use the Organization Management Tool

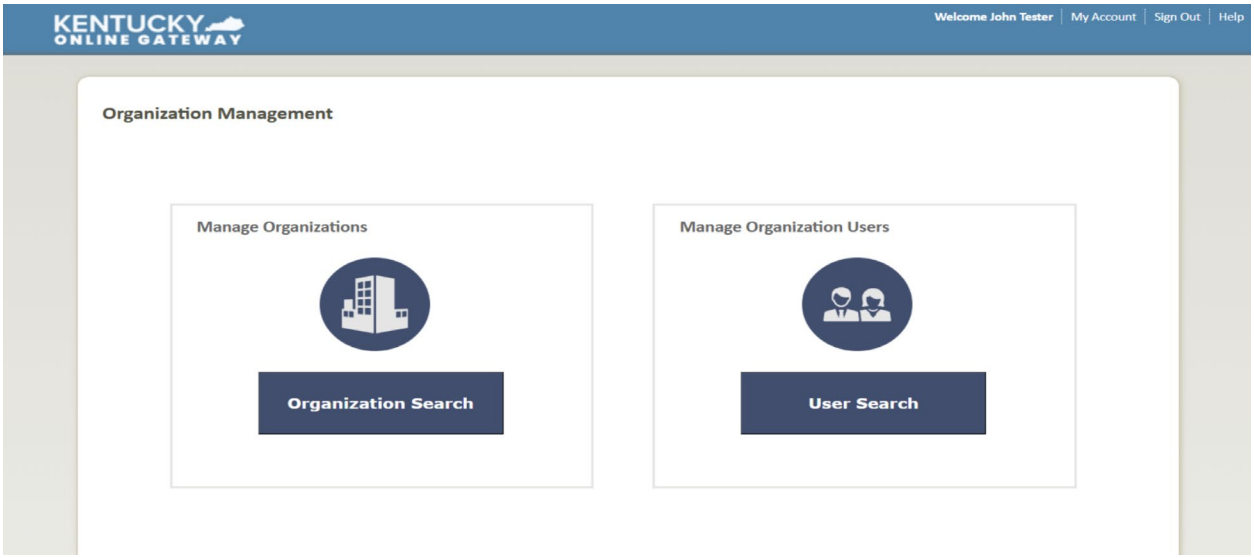
- Once a user has been granted the appropriate access to be an Organization Manager, they will access the Organization Management tool by navigating to their KOG Landing Page.

6.1.1 Accessing the Tile



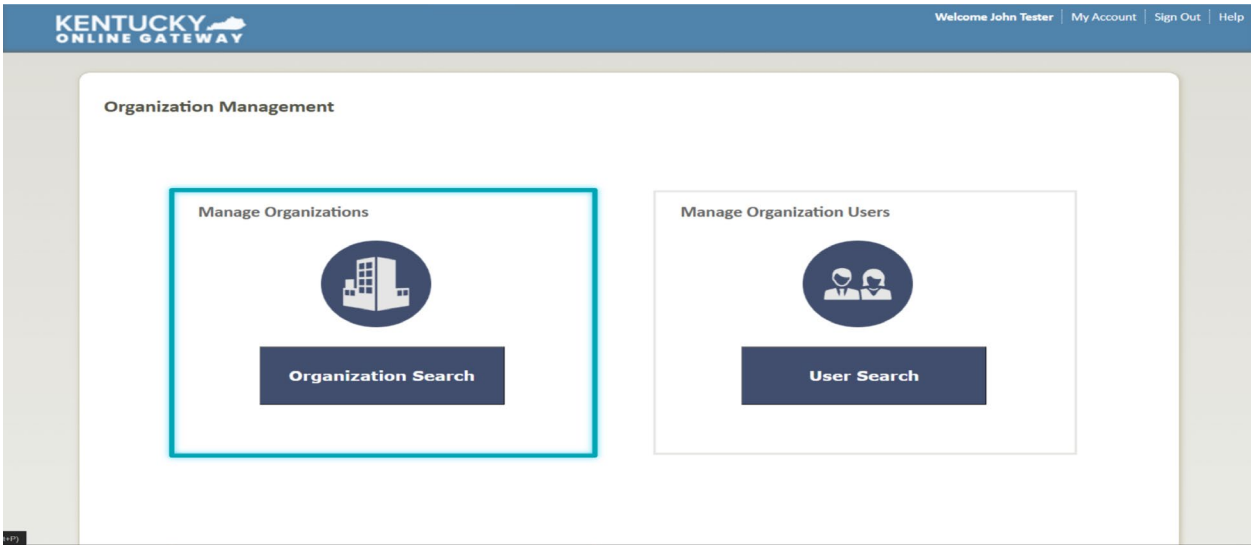
- Click Launch on the Organization Management tile to open the application.

6.1.2 Organization Search vs User Search



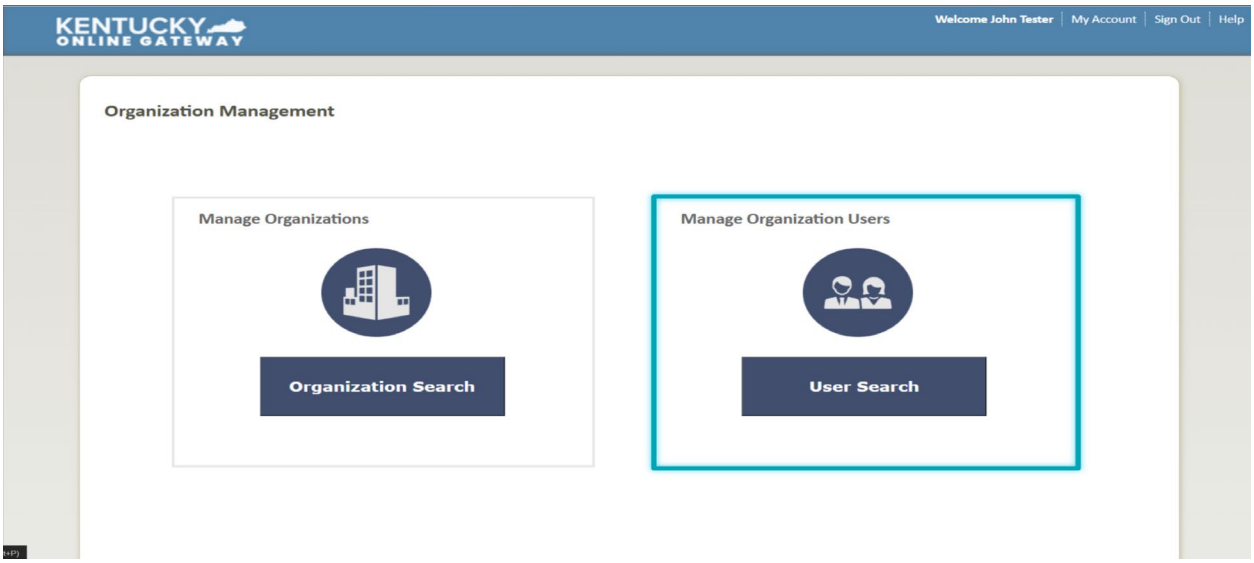
- Upon opening the tool, you are presented with two options for looking at your PE groups.

6.1.2.1 Org Select



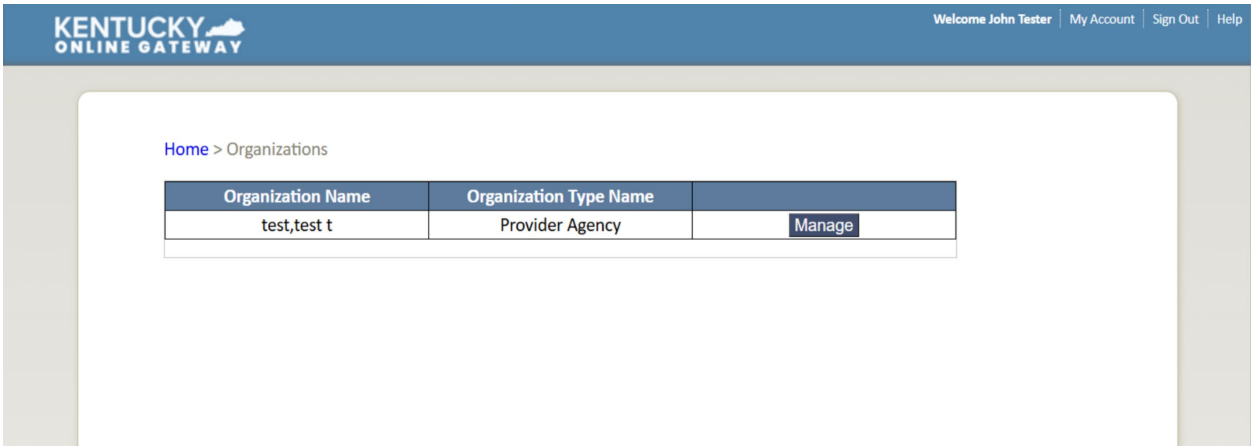
- Organization Search will show you all the Organizations to which you are assigned.

6.1.2.2 User Select



- User Search will allow you to search for a particular user within your groups.
- Click on the Organization Search to view your groups.

6.1.2.3 Organization Screen

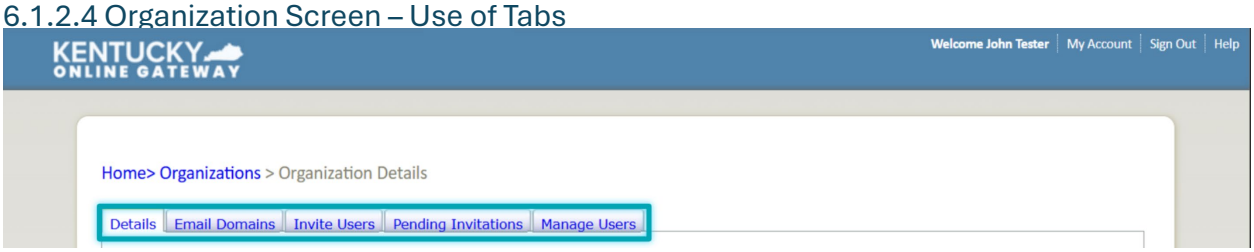


- In this instance the Organization Manager only manages one group. However, if you managed more than one group, each group you managed would appear here.

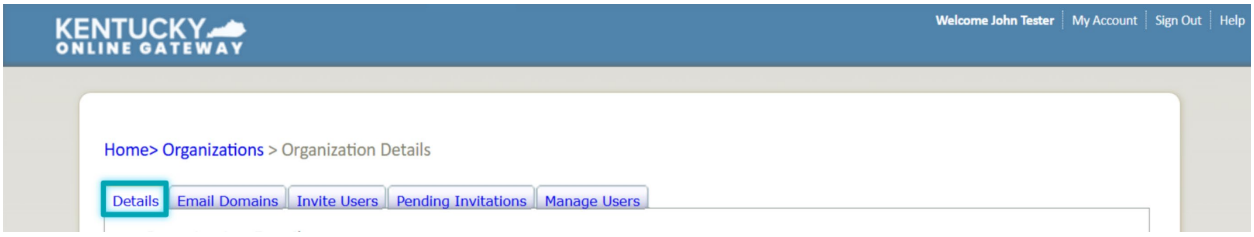
Please Note: If you manage other Organization Types such as an Assister Organization (also referred to as kynector groups), those Organizations will appear here as well. The Organization Type Name column will help you to distinguish between different group types even when they have the same name. PE Organizations will be listed as Provider Agency in this column.

Click **MANAGE** to proceed.

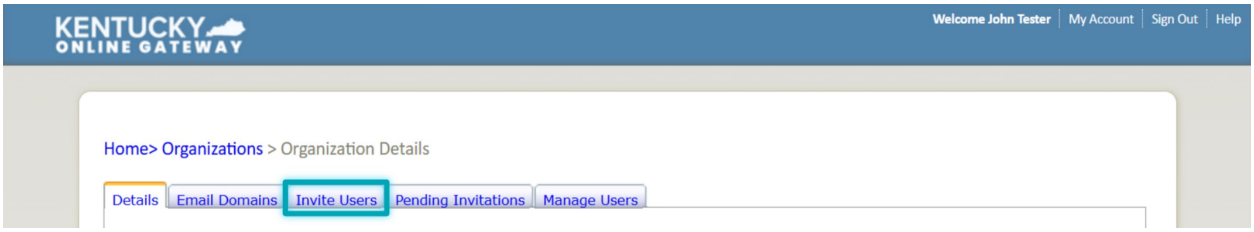
6.1.2.4 Organization Screen – Use of Tabs



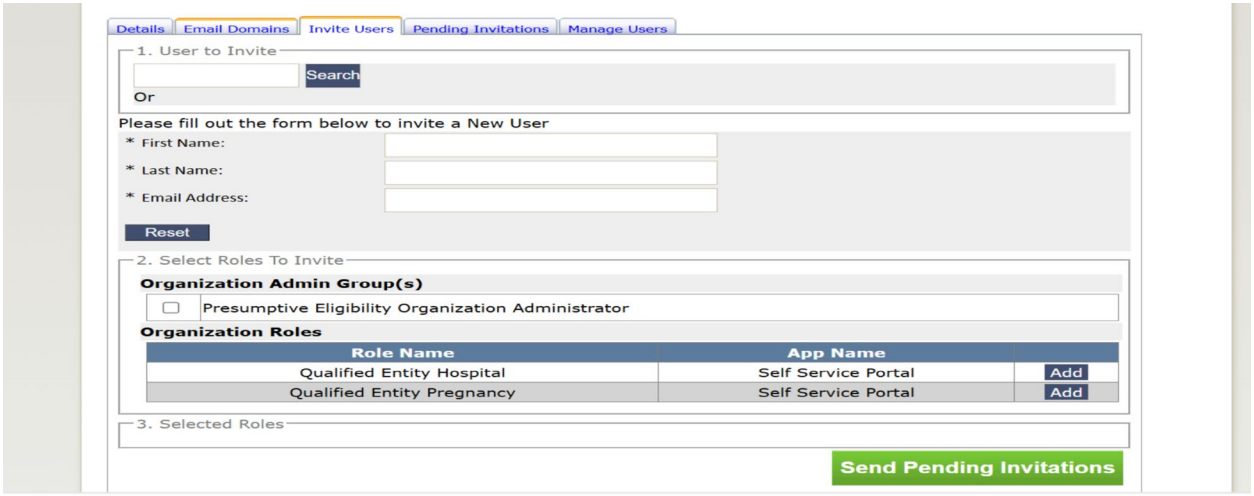
- Here you can see that you will have 5 tabs to choose from.



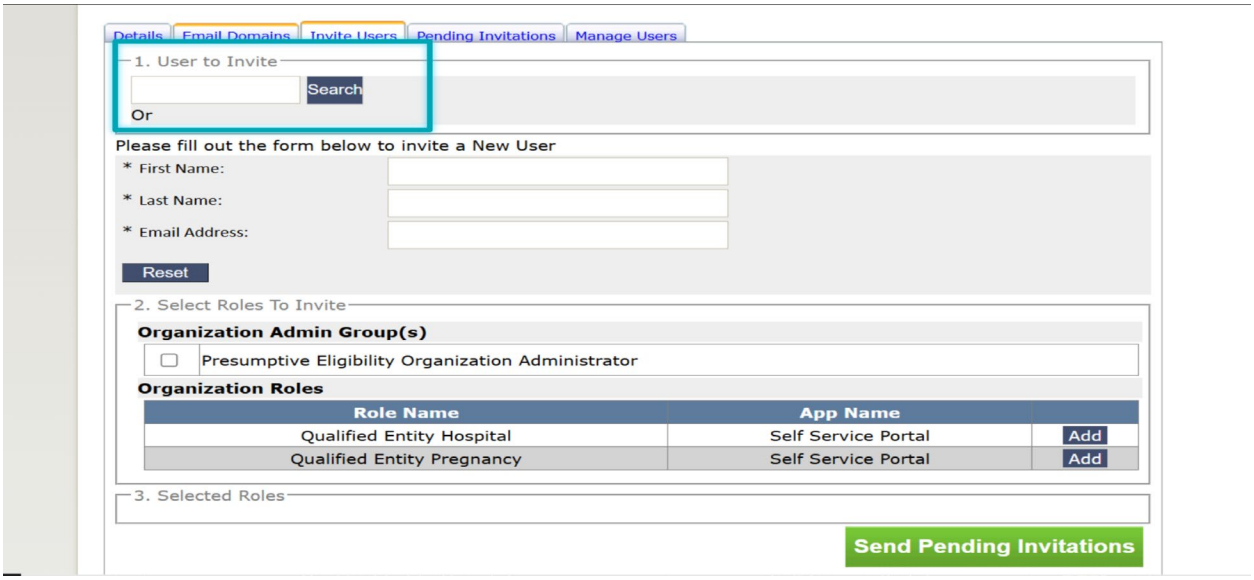
- The details tab will give your organization name, type, and ID Number
- **The email domain tab is not used**. Let's look at the invite users tab.



- Click the invite user's tab to continue.

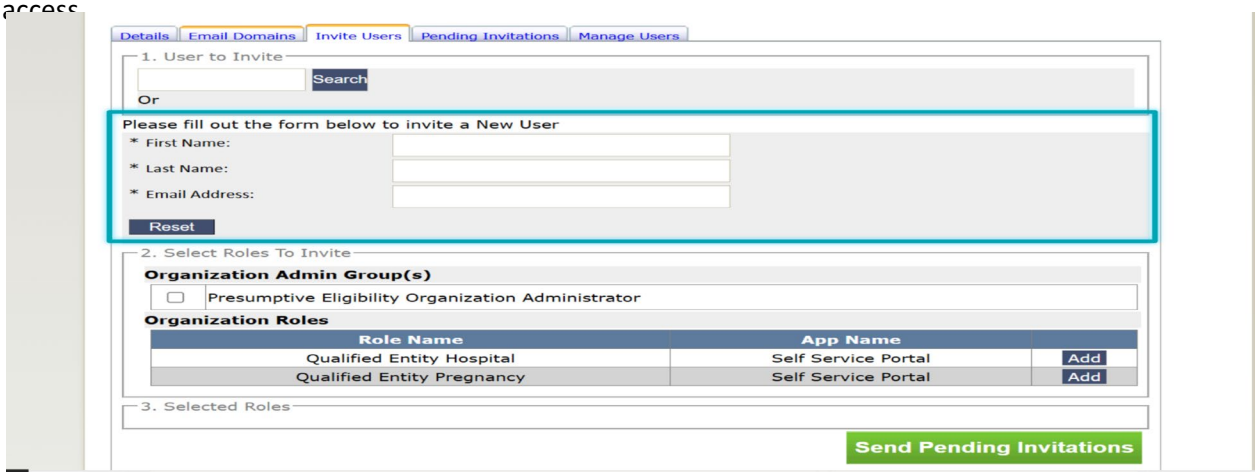


- From the invite users tab, organization managers can send an invitation to users to begin the process of adding them to the Organization.

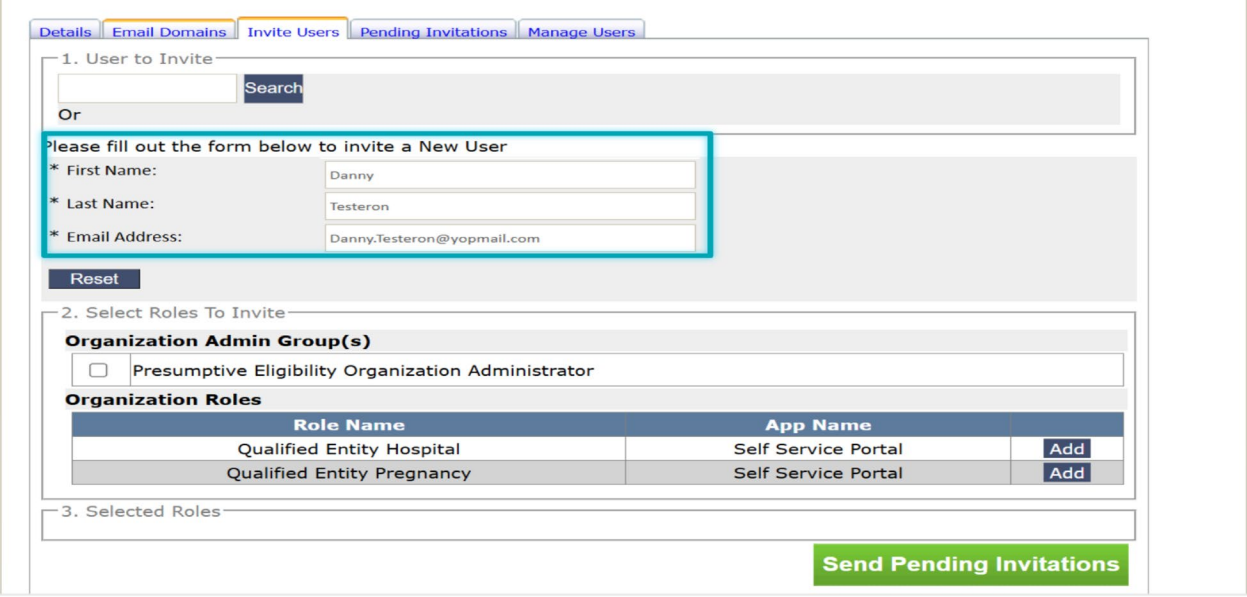


- The first method is to search for the user. If the user has an existing KOG account, they should appear in the search results.

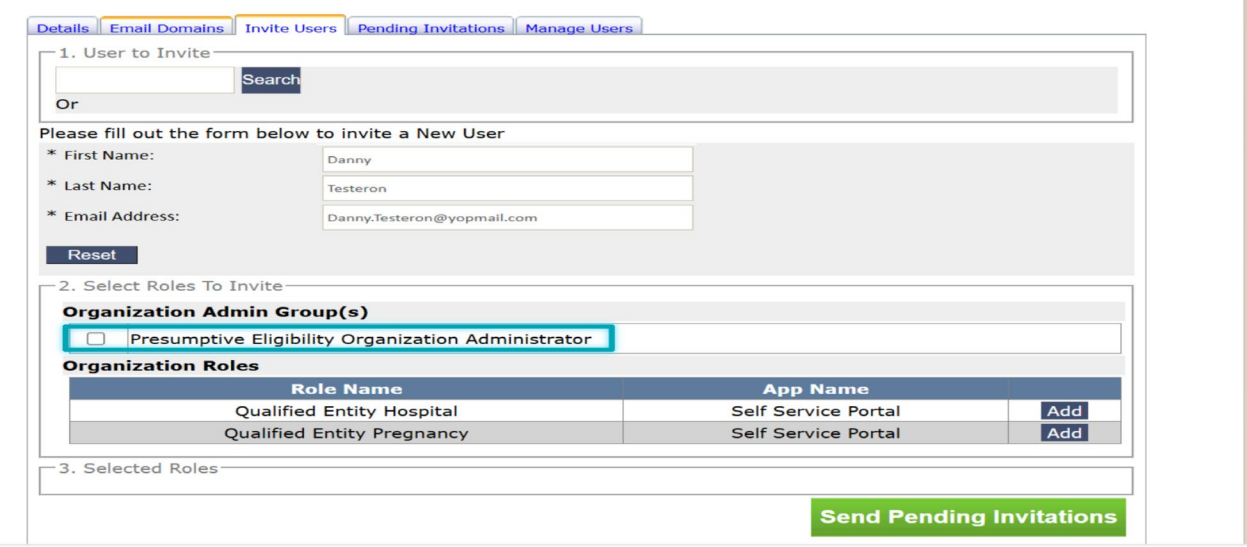
Please note: Organization Managers should confer with the user to ensure that the existing KOG account is appropriate to use for their PE access. Users should not be invited to PE access using a KOG account that was previously used for personal reasons, such as applying for benefits through kynect. Separate KOG accounts should be maintained to separate business from personal levels of access.



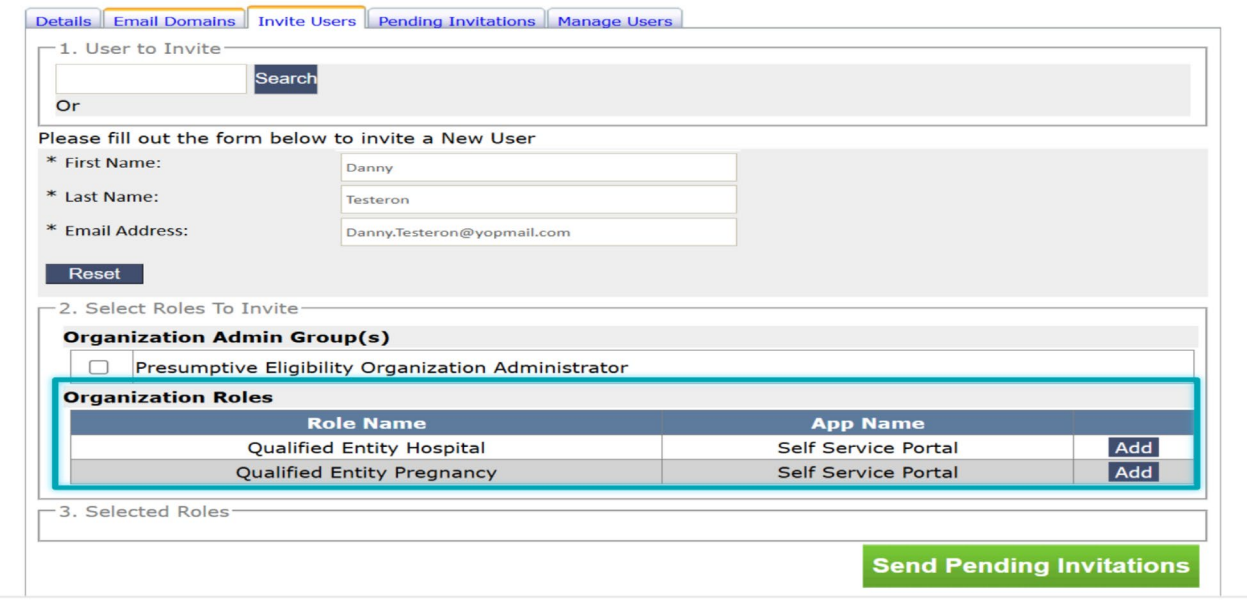
- The second method for inviting a user is to fill out the highlighted form to invite the user. This method will work whether the user has an existing KOG account associated to the email address entered or not. For those who do not have a KOG account, the invitation process will guide them through the KOG account creation process as part of accepting the invitation.
- Click the first name form field to add a new username.



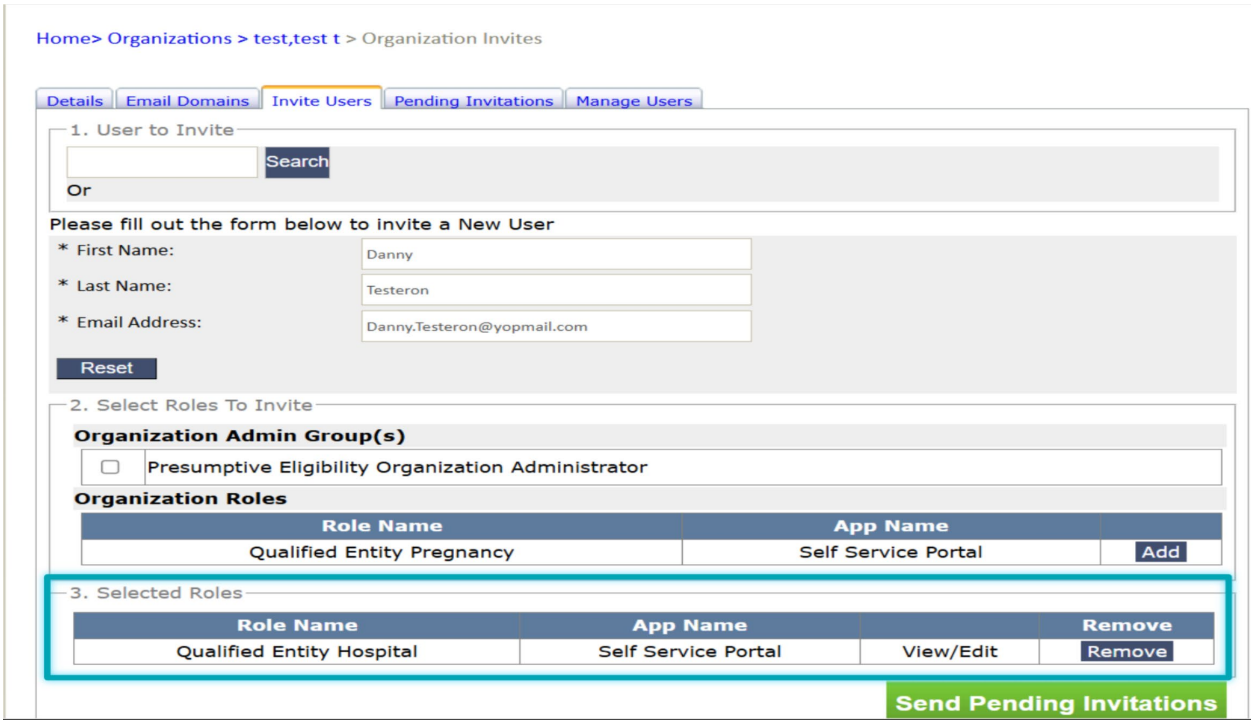
- Now that we have identified the user, we are wanting to send an invite to, it is time to determine what type of access the user needs to be granted.
- As previously discussed, there are three roles that are available related to the PE Program.



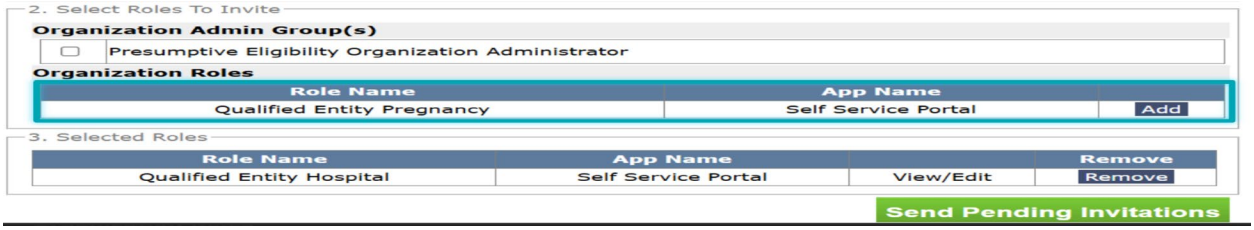
- The first we will look at is the PE Organization Administrator role. While it is recommended for groups to have more than one Organization Manager, this access should not be granted to every user. Typically, two Organization Managers is sufficient for most groups. You can select this access by clicking the checkbox next to the role name.
    - However, we are not inviting this user to be an organization manager.



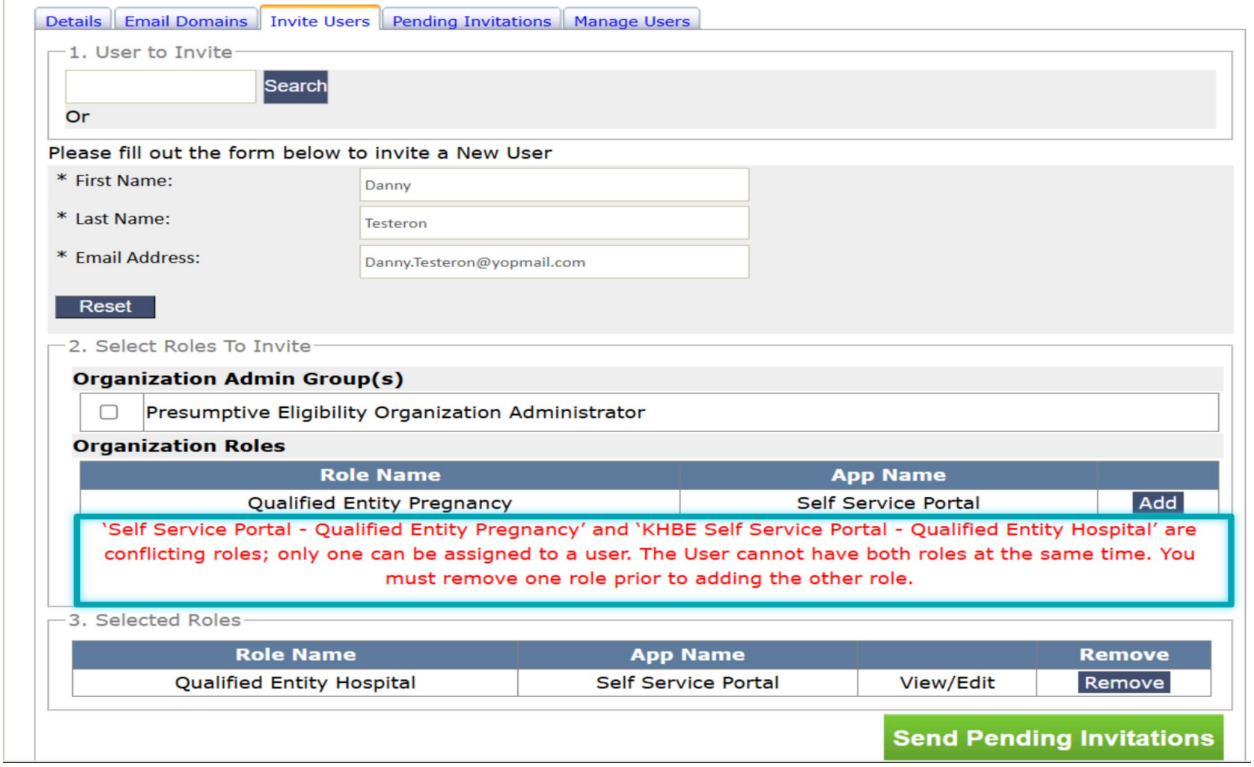
- Our user is an employee of a designated hospital, so we are going to invite him to the Q.E Hospital level of access.
- Select the add button next to the QE Hospital role.



- As you can see, the Q.E Hospital role has now been moved to the Selected Roles section of the page. Let's take a look at what happens if we try to add the Pregnancy role for the user as well.



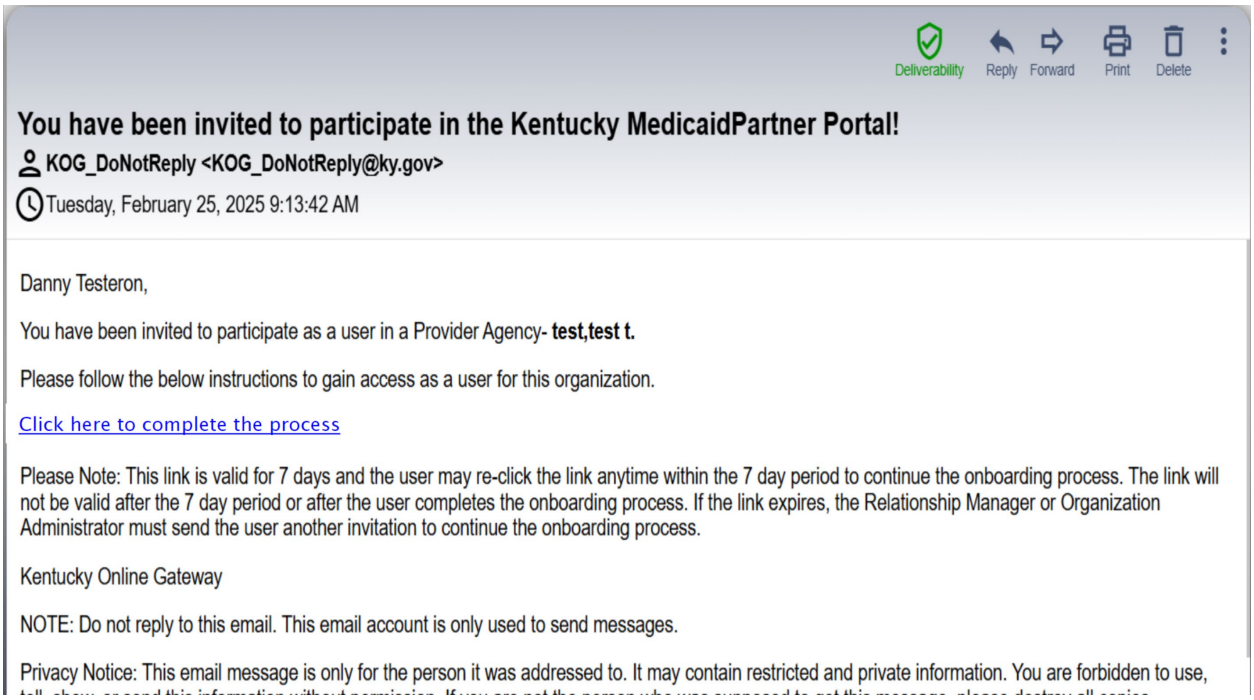
- Click the add button next to the Pregnancy role to proceed.



- On attempting to add the Q.E Pregnancy role to the user we have received an error message from the KOG system. This error occurs because the two QE roles are mutually exclusive, meaning they cannot be provisioned to the same user simultaneously.

Please Note: The mutual exclusivity between the QE roles is not limited to just one Organization. If the user has already been granted access to one QE role by another organization, they will not be able to be granted access to the other. In the event that you need to grant access that is mutually exclusive please reach out to the PE Program Inbox and DMS will provide guidance.

- In this instance, our user has not been provisioned with any roles and only needs the access to QE hospital. Click Send Pending Invitations to finalize the invite.



Deliverability Reply Forward Print Delete

You have been invited to participate in the Kentucky MedicaidPartner Portal!

KOG_DoNotReply <KOG_DoNotReply@ky.gov>

Tuesday, February 25, 2025 9:13:42 AM

Danny Testeron,

You have been invited to participate as a user in a Provider Agency- **test,test t.**

Please follow the below instructions to gain access as a user for this organization.

Click here to complete the process

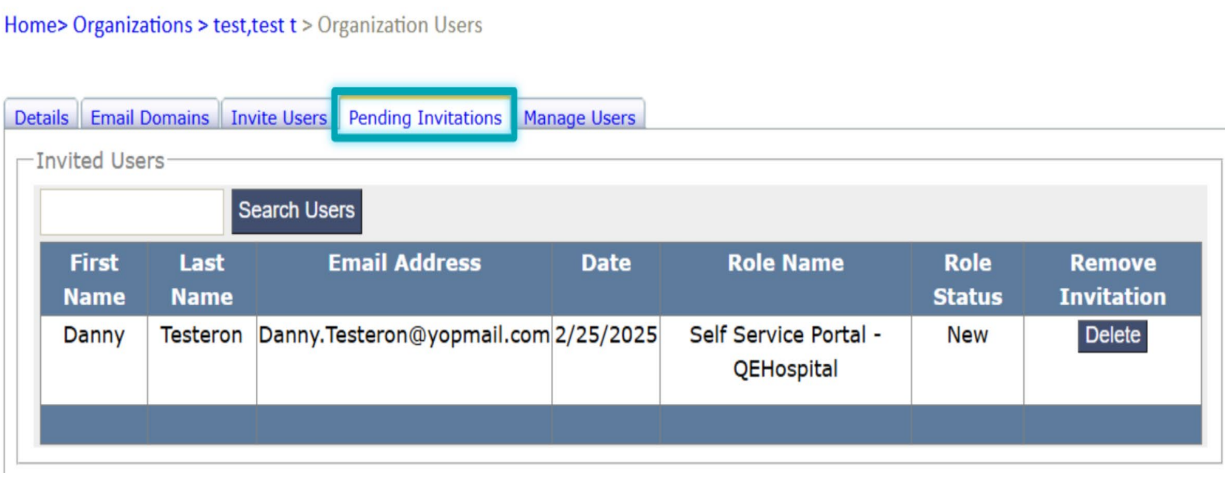
Please Note: This link is valid for 7 days and the user may re-click the link anytime within the 7 day period to continue the onboarding process. The link will not be valid after the 7 day period or after the user completes the onboarding process. If the link expires, the Relationship Manager or Organization Administrator must send the user another invitation to continue the onboarding process.

Kentucky Online Gateway

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,

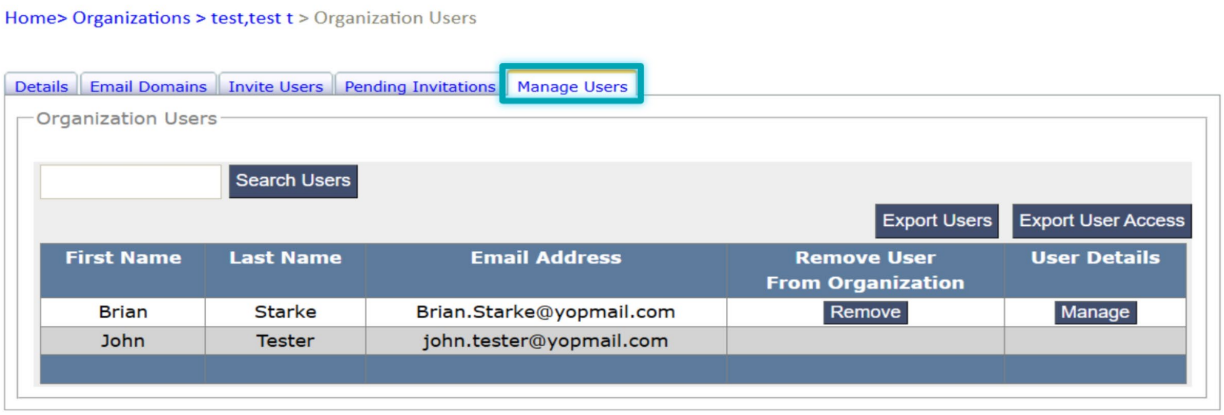
- KOG will generate an email to the user when the invitation has been submitted, it will come from the email address KOGDoNotReply@ky.gov and will look similar to this one.
- It is not uncommon for this email to get caught in Spam or Junk email filters, so it is always best to confirm that the user received the email.
- The user has 7 days to click the link in the email to continue their onboarding process. If the user does not complete this step within 7 days, the Organization Manager will need to send another invitation.
- Click the link to proceed



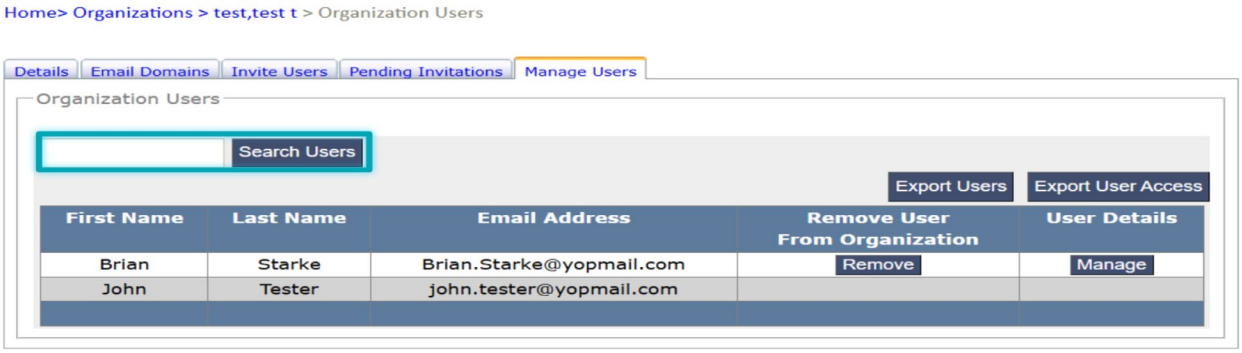
- Let's take a look at the Pending Invitations tab. From this tab you can see all invitations that have not yet been completed.
- For each pending invitation the following information can be seen,
    - The name and email address of the user invited
    - The date the invitation was sent
    - The name of the role or roles they were invited to and the status of the invite.

Please Note: The Role Status will change as actions take place. On initial invite, the status will show as “New” and will remain in this status until the invited user clicks the link in the email from the previous slide. When they complete the initial process, the Status will be updated from “New” to “Started”. Please check this screen to confirm that the invited user has taken action and confer with them to ensure they begin the process before their time expires. It is also important to note that all access requests for Q.E roles now require a final review and sign-off from DMS.

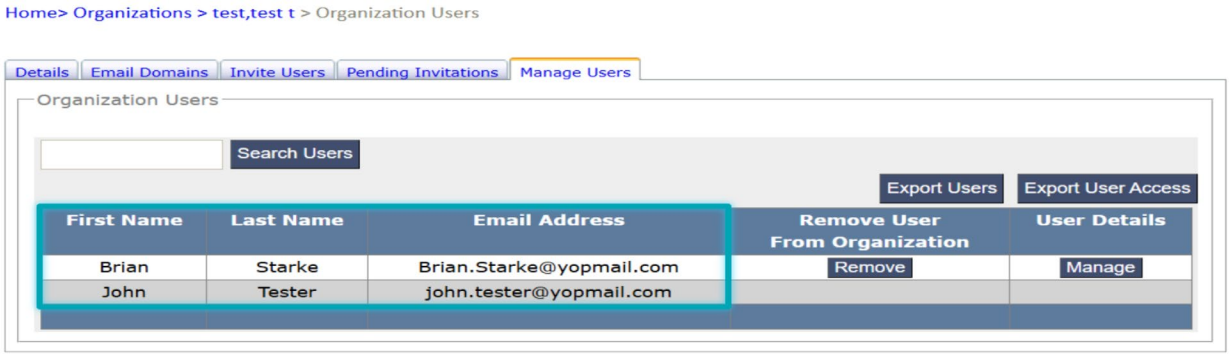
- If you need to delete a user’s invitation for any reason, you can do that by clicking the delete button under remove invitation.
- click the Manage Users tab to proceed



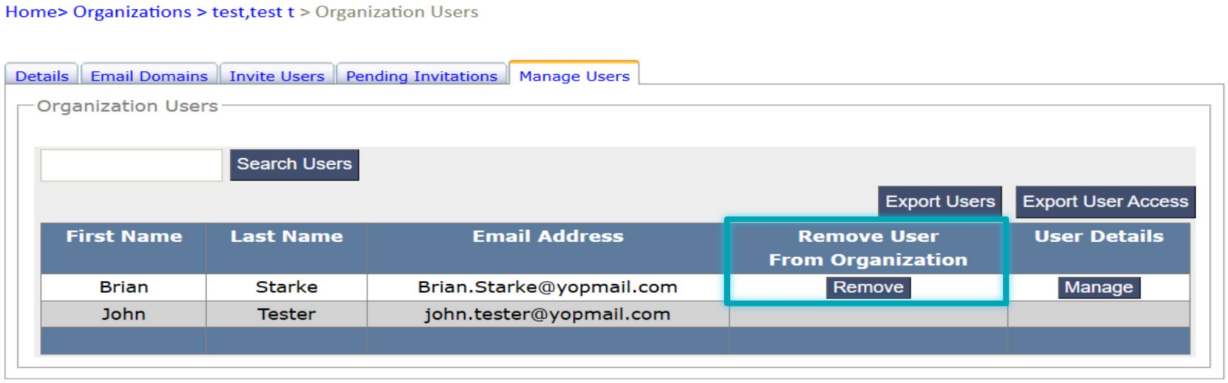
- Let's take a look at the Manage Users tab. From this tab you can see all the users in your organization.



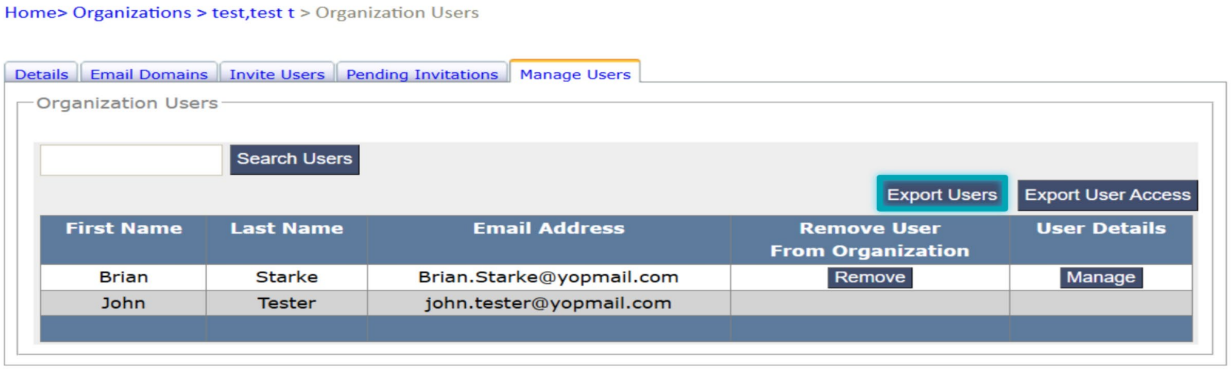
- You can use the search function to locate a specific user.



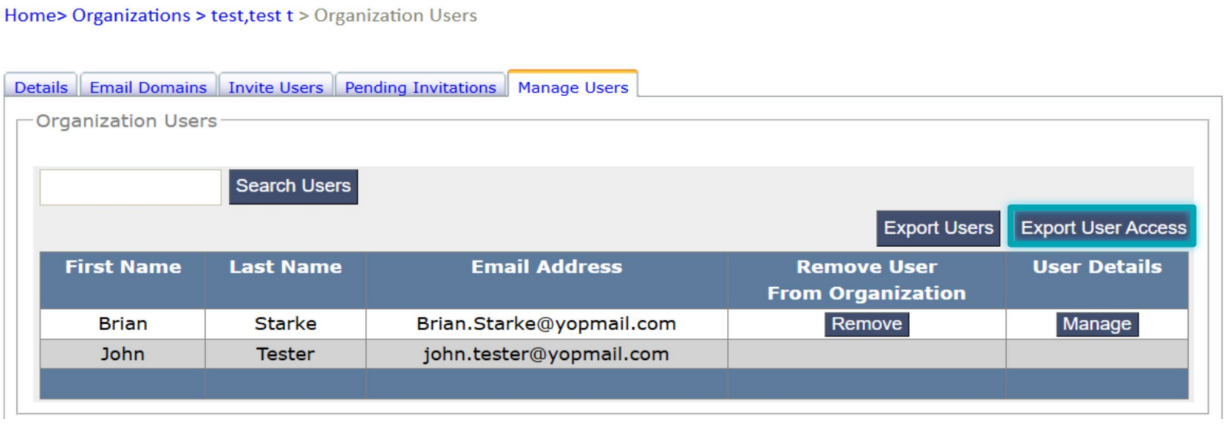
- In the first three columns you will find the user's first and last names and the email address associated with their account.



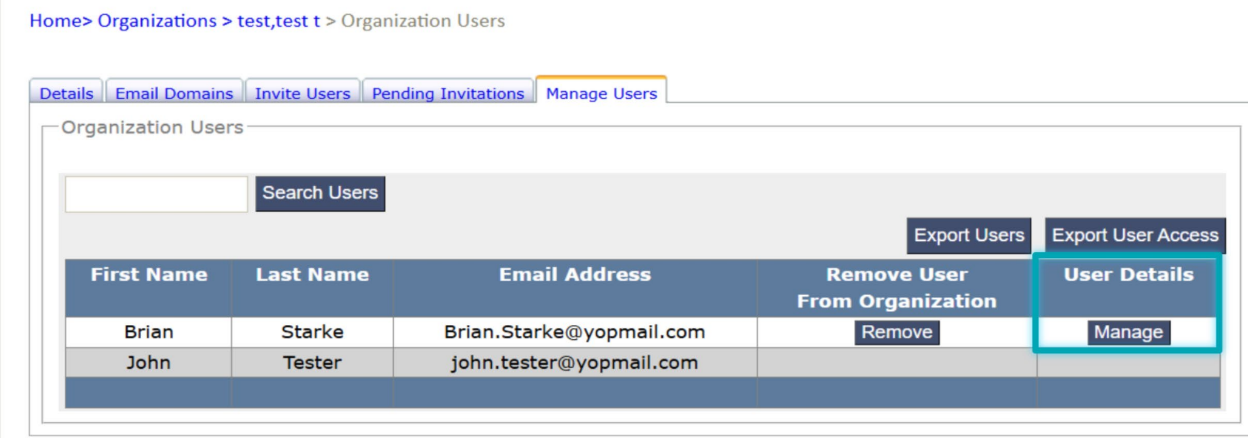
- You can remove users from your organization by clicking the remove button.



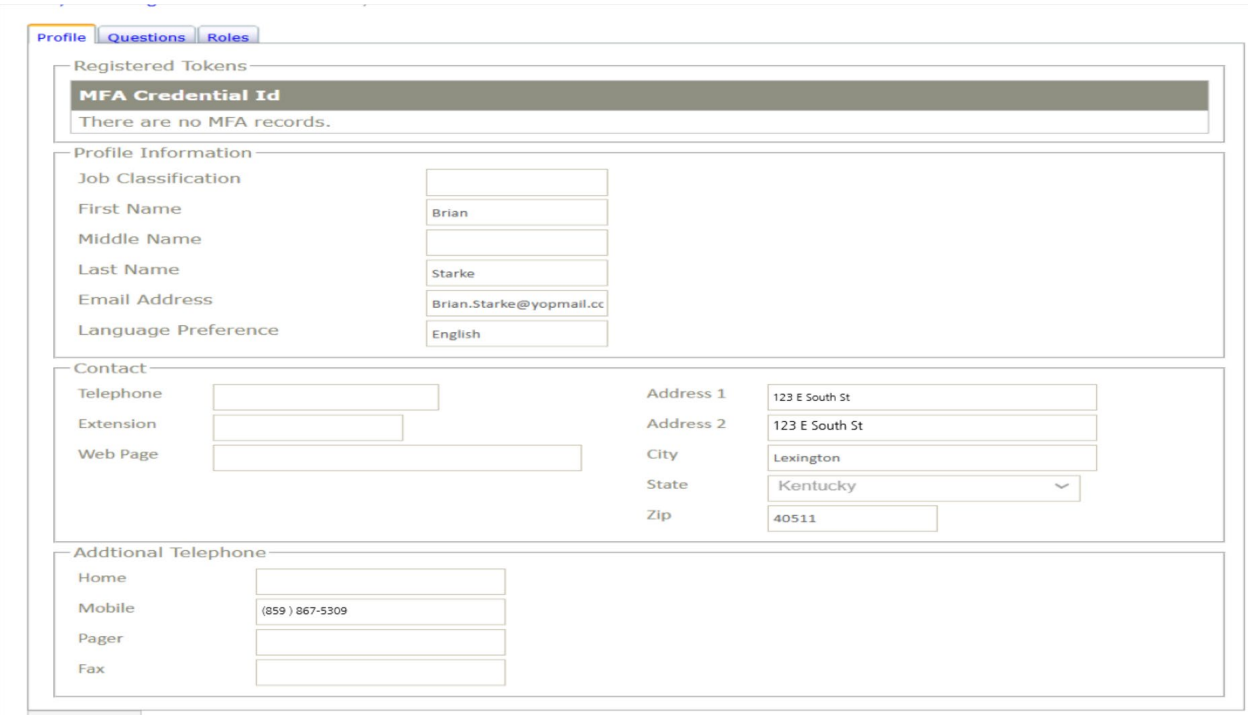
- The export users' function will allow you to download a spreadsheet that contains a list of all of the organization's users.



- Export user access will generate a similar list, but it will also include the users assigned access in the spreadsheet.

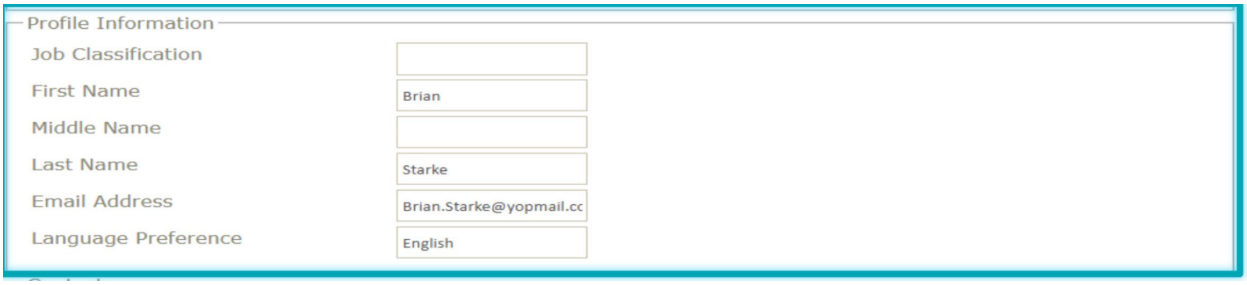


- Lastly in the User Details column you will see a Manage button. Clicking this button will allow you to manage the details of the specific user.
- Click “Manage” to proceed.



- When managing a user's account, there are three tabs you can visit. The first is the Profile Tab.

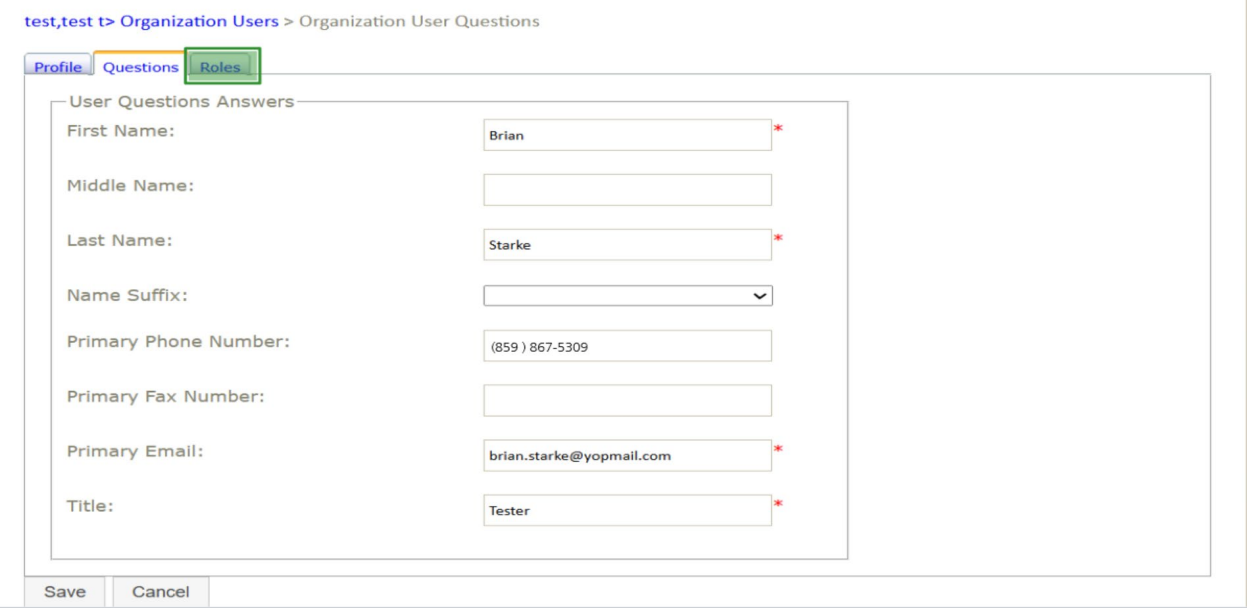
- In the first section, if the user is using Multi-Factor Authentication, information related to it will be displayed here.



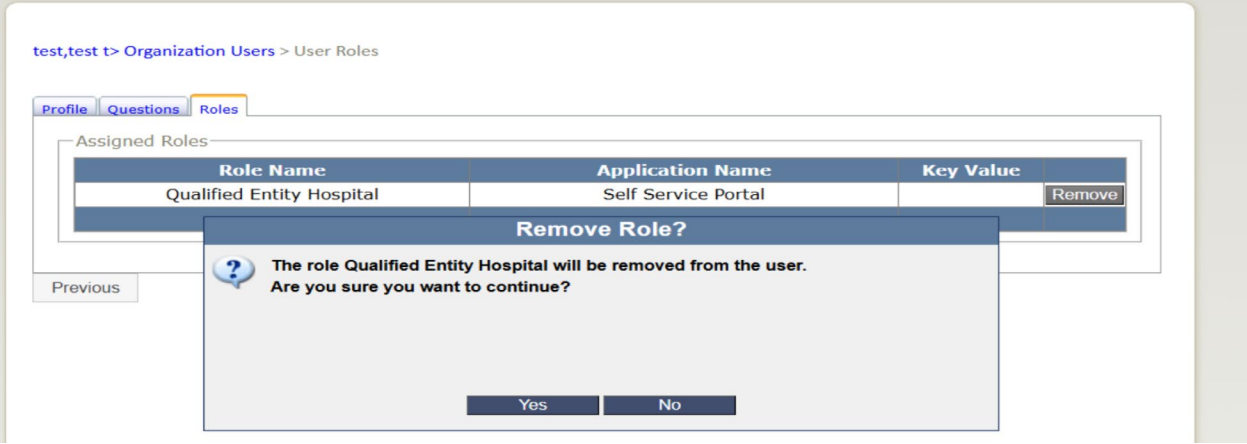
- In the second section you can update a user's name, email address, and language preference.

- The third section allows you to update the user's contact information, such as telephone number and address.

- The fourth and final section allows you to add additional telephone numbers associated with the user.
- Click on the Questions Tab to proceed



- The questions screen is very similar to the Profile screen in that it allows you to update the basic information of the user.
- It is a best practice to update both screens when making changes to a user's information.
- Click the roles tab when you are ready to proceed.



- The final tab in the Manage Users screen will show you all of the roles that are assigned to each user. From this screen you can remove individual roles without removing the user entirely. However, if all roles are removed then the user will automatically be removed from your organization.
- As you can see, we are removing the only role for this user.
- Click the yes button to remove the role and remove the user from your group.

8. Final Assessment

At the end of this training, users must complete a **final assessment** with a passing score of **80% or higher** to be certified as a **PE Organization Manager**.

Assessment Questions

1. Which of the following is NOT a responsibility of the PE Organization Manager?
   A. Serving as the Primary Point of Contact for their Organization
   B. Acting as a liaison between the PE Organization and D.M.S
   C. Establishing Presumptive Eligibility Policy
   D. Establishing Presumptive Eligibility Policy

2. Helpful information for the PE Program such as fact sheets, quick reference guides, and escalation paths can be found here.
   A. On Facebook
   B. In the kynect Self Service Portal
   C. Under your desk
   D. On the PE Website

Determine if the following statement is true or false.

3. PE Organization Managers do not need to be familiar with the policies and procedures of the program to effectively manage their groups. (**True or False**)

4. Which of the following statements about the use of sub-contractors in PE Organizations is correct?
   A. PE Organizations are not permitted to use sub-contractors in their PE Programs
   B. PE Organizations may only use sub-contractors to manage their PE Programs
   C. PE Organizations are not required to oversee the activities of sub-contractors
   D. Sub-contractors can be PE Determiners but are not allowed to be Organization Managers

Determine if the following statement is true or false.

5. PE Organization Managers will need to grant access to the Q.E Pregnancy role to users who only have Q.E Hospital access so they can submit applications for pregnant women. (**True or False**)

6. When on boarding a user who has an existing KOG account why is it important to confer with the user before sending an invitation??
   A. Because the user may have used the existing account for personal business.
   B. To ensure that they are maintaining a separate account for their business needs
   C. To prevent issues in the on-boarding of the user
   D. All of the above

Determine if the following statement is true or false.

7. The mutual exclusivity of the QE Hospital and QE Pregnancy roles extends to other organizations that have granted the user access. (**True or False**)

8. When reviewing the Pending Invitation screen a status of “New” will change to “Started” when what happens?
   A. The invited user selects the link in their invitation email and completes the initial steps
   B. The invitation has expired
   C. The email was caught by a Junk or Spam filter
   D. The invited user is off sick

Determine if the following statement is true or false.

9. The Department for Medicaid Services reviews and has final approval of all access requests for Q.E roles. (**True or False**)
10. Removing all of a user’s active roles in the Manage Users tab will remove the user from your organization. **(True or False)**

9. Helpful Resources

Organization Managers can access additional **PE resources**, including:

- The **PE Website** for fact sheets and job aids.
- The **KOG Helpdesk** for account assistance.
- The **PE Program Inbox** for escalations and policy questions.

10. Conclusion

This guide provides **Organization Managers** with the tools and knowledge needed to oversee PE Determiners, manage access, and comply with state policies.

For further details, please consult the official **Kentucky Health Benefit Exchange (KHBE) documentation**.