The Commonwealth of Kentucky

kynect State-Based Marketplace

Certified Application Counselor (CAC) Organization Administrator Training

July 8, 2026

Document Control Information

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Introduction

This training explains the responsibilities and duties that Organization Administrators must perform, including supervising kynectors in their organizations, managing KYID access, overseeing kynector outreach efforts and enrollment events, and escalating issues as needed.

Note: KHBE recommends all individual training modules be completed in one sitting. Not completing the modules could result in the user's progress not being saved.

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1. Organization Administrator Responsibilities

1.1 Who is an Organization Administrator?

Organization Administrators act as the primary liaison between their contracted organization and KHBE, and as the main point of contact for KHBE regarding contractual requirements.

1.2 Organization Administrator Responsibilities

The role of the Organization Administrator has responsibilities beyond that of a kynector. Organization Administrator responsibilities include the following:

1.2.1 Administrative Duties

Administrative duties refer to tasks and activities:

- Onboarding kynectors
- Monitoring kynectors' training status
- Adding/removing kynectors from KYID
- Reassigning associated cases
- Language/messaging on materials

1.2.2 Recruitment

Recruitment efforts aim to have a diverse employee base that is reflective of the communities served, based on (but not limited to) the following:

- Race
- Ethnicity
- Sexual orientation
- National origin
- Disability
- Age

1.2.3 Quarterly Metrics Reporting Guidelines

The following data elements are included in the Metrics Report:

- Reporting period Quarter
- Date report submitted to KHBE
- Organization Name
- Organization Administrator
- Entity name
- County
- Medicaid/QHPs or KCHIP

1.2.4 Certified Application Counselors (CAC) Quarterly Reports

Each quarter, CACs record their activities into the CAC Reporting Template. Every quarter CACs submit these reports to the KHBE general mailbox at KHBE.Program@ky.gov. KHBE staff review these reports to evaluate the overall performance and effectiveness of the CACs' activities. Each organization must turn in the report by the 15th of the month following the end of the quarter (e.g., Q1 reports would be due April 15; Q2 reports would be due July 15; Q3 reports would be due October 15; and Q4 reports would be due January 15).

In the report, there are five main criteria recorded.

Please note: CACs are to use the Metrics Reporting Guidance document which will assist with the Quarterly Metrics Report.

Section 1: Coverage Model

- Number of Applications that were started but not submitted
- Applications completed (Medicaid eligible)
- Type of other Applications completed
- Type of other enrollments
- Applications completed (QHP eligible)
- Enrollments completed for QHP
- Applications in-progress (outstanding as of last day of reporting period)
- Medicaid recertifications (this number is included in the month that the renewal was confirmed, NOT the renewal effective date month)
- QHP renewals (this number is included in the month that the renewal was confirmed, NOT the renewal effective date month)

Section 2: Focus

- Number of enrollment related contacts
- Number of hours spent on enrollment assistance
- Number of referrals sent and type of referral
- Number of referrals received

Section 3: Education, Outreach, and Enrollment

- Number of appointments with Individuals
- Number of direct (phone or in-person) contacts with Individuals
- Number of follow-up calls made to consumers

Section 4: Operations (complete only once per county)

- Number of reported privacy and security incidents

Section 5: Talent Management (complete only once per county)

- Number of CACs trained and certified

1.3 Exporting Reports

Organization Administrators can also export reports from the Self Service Portal for their Organization. Please refer to the How to Export Reports Quick Reference Guide for detailed instructions.

2. KYID

2.1 What is KYID?

KYID allows Residents and kynectors to easily access multiple state-based systems using a single sign-on. This prevents users from having to manage multiple sets of usernames and passwords across multiple applications.

2.2 KYID Roles

Organization Administrators are able to assign and change user roles within KYID. The user roles that Organization Administrators are able to assign, and change are listed below.

2.2.1 KYID Glossary Roles

See below a list of roles that can be assigned by an Organization Administrator 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 COLT, and passed the assessments corresponding to all required trainings in COLT.
Assister Other Programs	Self-Service Portal	Assister Other Programs is a role in Self-Service Portal given to kynectors, Agency Admins, or other approved individuals after the kynector or Agency Admin role has been granted. The Assister Other Programs role allows users to complete the

Role	Application	Description
		Supplemental Nutrition Assistance Program (SNAP) and Child Care Assistance Program (CCAP) application on behalf of a Kentucky Resident.
Assister Training	COLT	Assister Training is a role in COLT given to Navigators (contracted kynectors) and Certified Application Counselors (non-contracted kynectors) who have onboarded to KYID and still need to take the required training in COLT.
Qualified Entity Hospital	Self-Service Portal	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. Please note: kynectors should NOT access the BCCTP application.

2.2.2 KHBE Administrator Roles

KHBE has two different Administrator roles in KYID:

1. Agency Administrator role
2. Organization Manager role

Some Organization Administrators may have additional levels of system access to assist with Presumptive Eligibility (PE) and other applications.

Agency Administrator Role and Organization Manager Role

2.2.3 Agency Administrator Role

The Agency Administrator role is a kynect 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 kynect role allows the user to monitor and adjust caseloads and kynector assignments and evaluate the program at an organizational level.

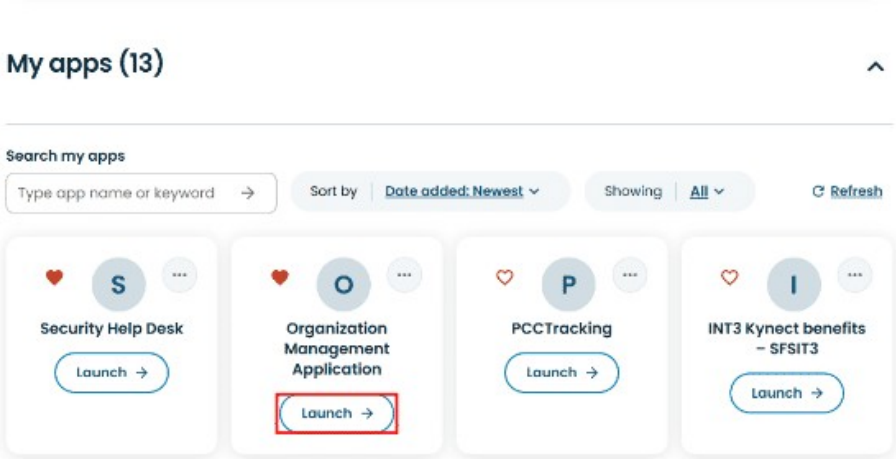
2.2.4 Organization Manager Role

Organization Manager role is a role within the KYID system which permits the Managers to add, remove, and update user profiles and assigned roles.

This KYID role should be limited to a few users within the Organization who know and understand the responsibilities of this access.

Maintaining user accounts is a critical part of ensuring that an organization is in compliance, that search results found in the kynect system are accurate, and that organizations maintain their users in a manner that prevents security incidents.

2.3 Organization Management Tile



Organization Management Application Tile on KYID

Once signed into KYID, Organization Administrators have access to the Organization Management tile to manage their assigned organization within KYID.

2.4 Duties within KYID

Organization Management is the primary tool that grants Organization Administrators access to the KYID system. Some duties include the following:

1. Ensuring the accuracy of all organization and organization user data to include contact information, counties serviced, and public vs private settings. These impact the online search results and case association dropdowns in Worker Portal.
2. Managing role assignments for all organization users
3. Completing annual recertification processes
4. Assisting organization users with troubleshooting access and onboarding issues

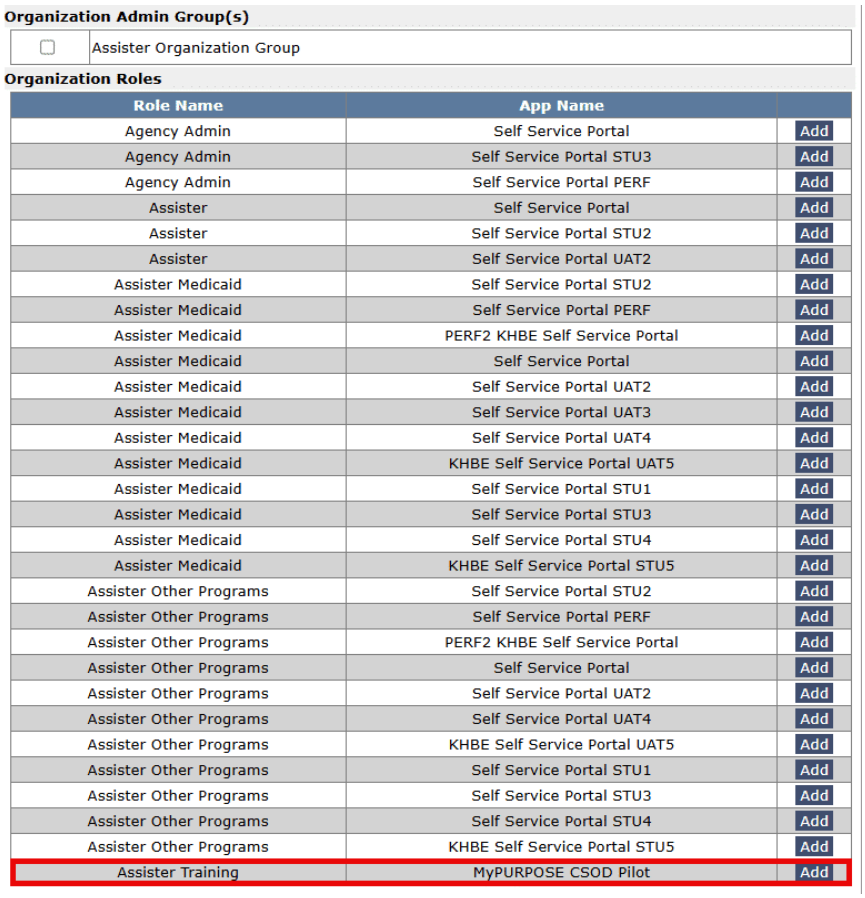
5. Assisting organization users with updating KYID accounts when information changes (e.g., names, email addresses, contact information)

2.5 Inviting kynectors to their Roles in KYID

Inviting kynectors to the Assister Training role must be completed through the Organization Management tile. Once a kynector has been invited, they can access their training in the Commonwealth Offerings for Learning & Training (COLT). Once the kynector receives their invitation, they complete all required KHBE training in COLT LMS.

2.5.1 Assigning the Training Role

Inviting kynectors to the Assister Training role must be completed through the Organization Management tile. Once a kynector has been invited, they can access their training in the Commonwealth Offerings for Learning & Training (COLT). Once the kynector receives their invitation, they complete all required KHBE training in COLT LMS.



Organization Admin Group(s)

☐	Assister Organization Group

Organization Roles

Role Name	App Name	
Agency Admin	Self Service Portal	Add
Agency Admin	Self Service Portal STU3	Add
Agency Admin	Self Service Portal PERF	Add
Assister	Self Service Portal	Add
Assister	Self Service Portal STU2	Add
Assister	Self Service Portal UAT2	Add
Assister Medicaid	Self Service Portal STU2	Add
Assister Medicaid	Self Service Portal PERF	Add
Assister Medicaid	PERF2 KHBE Self Service Portal	Add
Assister Medicaid	Self Service Portal	Add
Assister Medicaid	Self Service Portal UAT2	Add
Assister Medicaid	Self Service Portal UAT3	Add
Assister Medicaid	Self Service Portal UAT4	Add
Assister Medicaid	KHBE Self Service Portal UAT5	Add
Assister Medicaid	Self Service Portal STU1	Add
Assister Medicaid	Self Service Portal STU3	Add
Assister Medicaid	Self Service Portal STU4	Add
Assister Medicaid	KHBE Self Service Portal STU5	Add
Assister Other Programs	Self Service Portal STU2	Add
Assister Other Programs	Self Service Portal PERF	Add
Assister Other Programs	PERF2 KHBE Self Service Portal	Add
Assister Other Programs	Self Service Portal	Add
Assister Other Programs	Self Service Portal UAT2	Add
Assister Other Programs	Self Service Portal UAT4	Add
Assister Other Programs	KHBE Self Service Portal UAT5	Add
Assister Other Programs	Self Service Portal STU1	Add
Assister Other Programs	Self Service Portal STU3	Add
Assister Other Programs	Self Service Portal STU4	Add
Assister Other Programs	KHBE Self Service Portal STU5	Add
Assister Training	MyPURPOSE CSOD Pilot	Add

2.5.2 Assigning the kynector Role

Invite the kynector to the Assister role in KYID once all required trainings have been completed.

Organization Admin Group(s)

☐	Assister Organization Group

Organization Roles

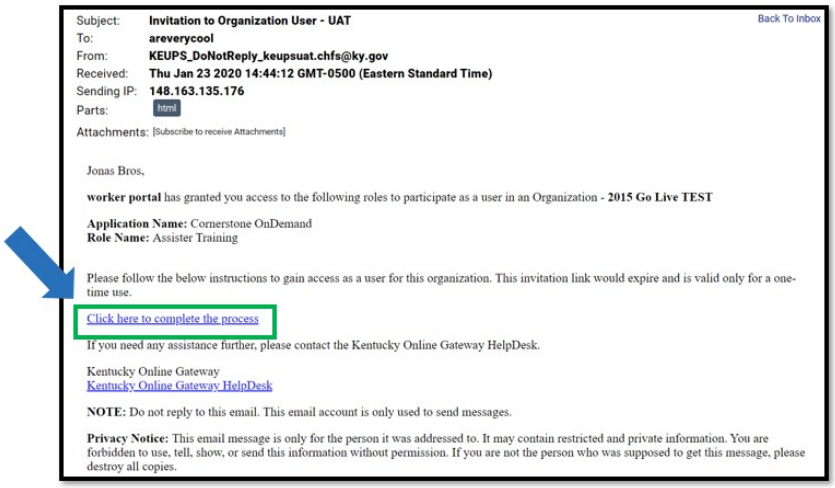
Role Name	App Name	
Agency Admin	Self Service Portal	Add
Agency Admin	Self Service Portal STU3	Add
Agency Admin	Self Service Portal PERF	Add
Assister	Self Service Portal	Add
Assister	Self Service Portal STU2	Add
Assister	Self Service Portal UAT2	Add
Assister Medicaid	Self Service Portal STU2	Add
Assister Medicaid	Self Service Portal PERF	Add
Assister Medicaid	PERF2 KHBE Self Service Portal	Add
Assister Medicaid	Self Service Portal	Add
Assister Medicaid	Self Service Portal UAT2	Add
Assister Medicaid	Self Service Portal UAT3	Add
Assister Medicaid	Self Service Portal UAT4	Add
Assister Medicaid	KHBE Self Service Portal UAT5	Add
Assister Medicaid	Self Service Portal STU1	Add
Assister Medicaid	Self Service Portal STU3	Add
Assister Medicaid	Self Service Portal STU4	Add
Assister Medicaid	KHBE Self Service Portal STU5	Add
Assister Other Programs	Self Service Portal STU2	Add
Assister Other Programs	Self Service Portal PERF	Add
Assister Other Programs	PERF2 KHBE Self Service Portal	Add
Assister Other Programs	Self Service Portal	Add
Assister Other Programs	Self Service Portal UAT2	Add
Assister Other Programs	Self Service Portal UAT4	Add
Assister Other Programs	KHBE Self Service Portal UAT5	Add
Assister Other Programs	Self Service Portal STU1	Add
Assister Other Programs	Self Service Portal STU3	Add
Assister Other Programs	Self Service Portal STU4	Add
Assister Other Programs	KHBE Self Service Portal STU5	Add
Assister Training	MyPURPOSE CSOD Pilot	Add

Assigning the Assister Role in KYID

2.5.3 kynector Invitation Responsibilities

kynector invitation responsibilities include:

- An approval email is sent to KHBE to approve the kynector role.
- KHBE verifies the kynector has completed their KHBE trainings and approves the kynector for their role.
- Organization Administrators are responsible for ensuring kynectors have been verified by KHBE and completed all of their required trainings.



Subject: **Invitation to Organization User - UAT** Back To Inbox
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.

Sample kynector Invitation Email

2.6 KYID Usage Requirements

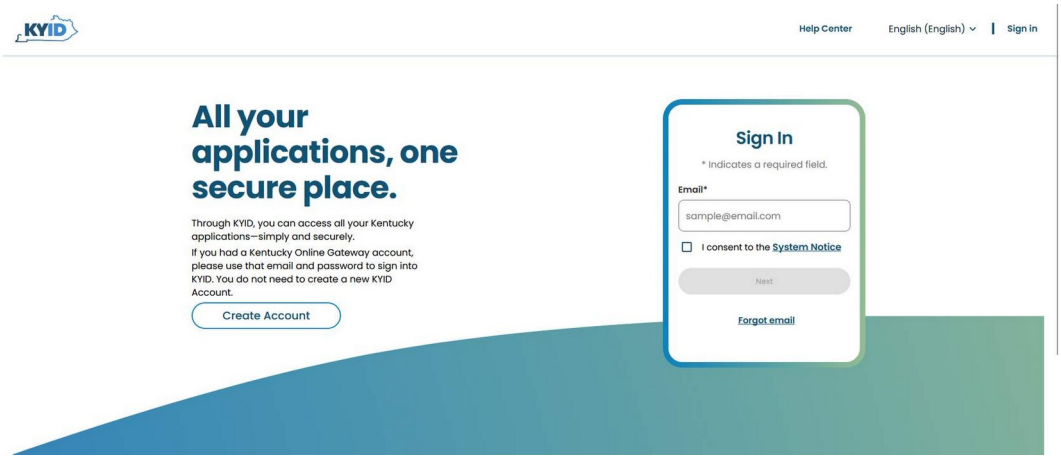
Prolonged kynector inactivity in KYID results in the deactivation and removal of the kynector's KYID account. KYID account information is used to populate the kynector search field that is available for Residents' use when they search for kynectors in kynect. Therefore, it is critical for kynectors to maintain active involvement and keep their information up-to-date in KYID.

- **Ninety (90) Day Login Requirement:** All kynectors must log into KYID at least once every 90 days or their account is deactivated and their role in the system is removed.
- **Leave of Absence Requirement:** All kynectors must notify KHBE in advance if planning to be on leave for more than eight (8) weeks so KHBE may place that user's access in a suspended status. kynectors should email KHBE.Program@ky.gov to provide this notification.
- **KYID Account Integrity:** kynectors should never create new KYID accounts if their email or name changes. Instead, kynectors should update their existing KYID account to reflect any new information.

2.7 Organization Administrator Navigation

The Organization Management tool contains the following screens that Organization Administrators use to manage their organization and users:

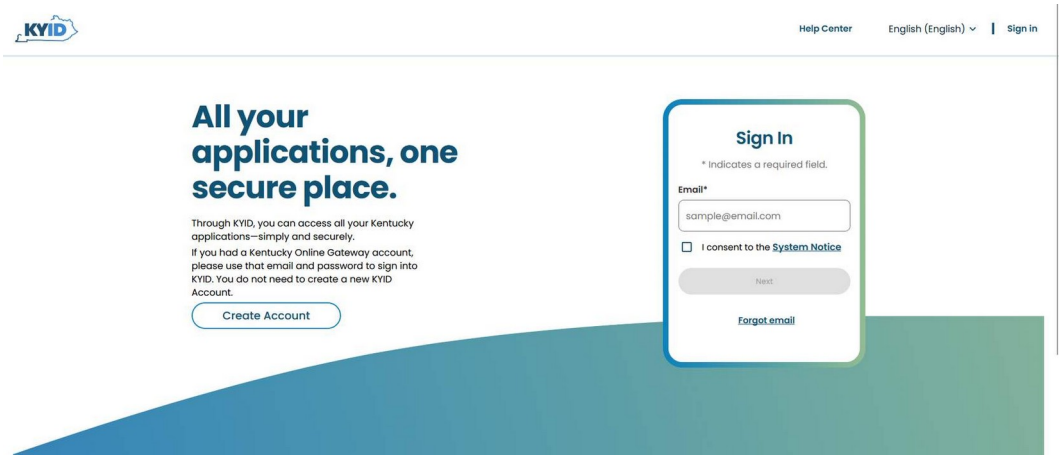
2.7.1 Organization Details



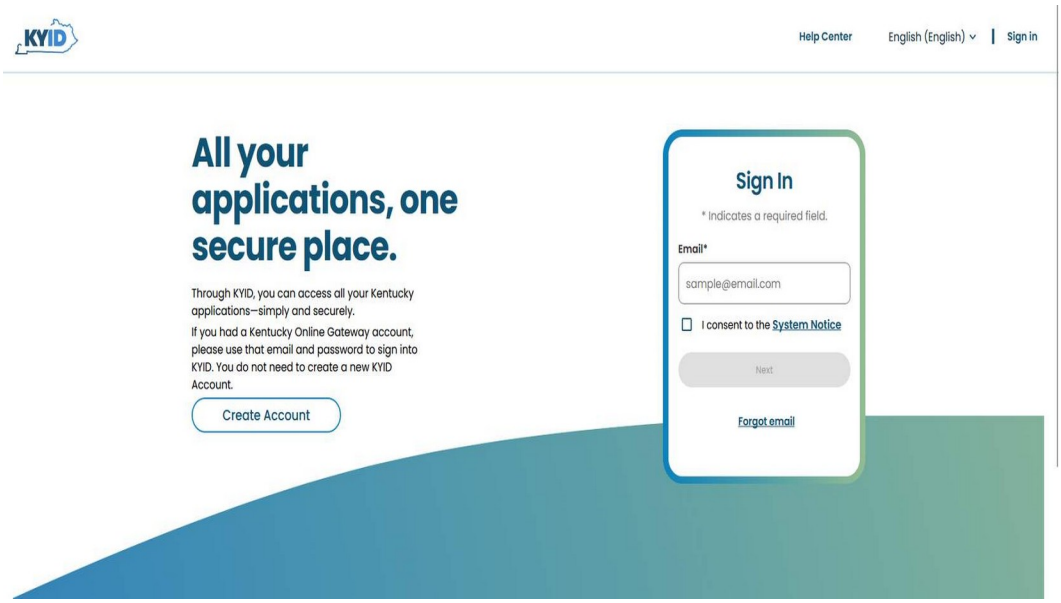
Organization Details Screen

On the Details screen, Organization Administrators are responsible for keeping all organization information updated including email addresses, physical addresses, phone numbers, primary contacts, etc. Individual kynector information must be updated by the specific kynector through their KYID account.

2.7.2 Manage Users



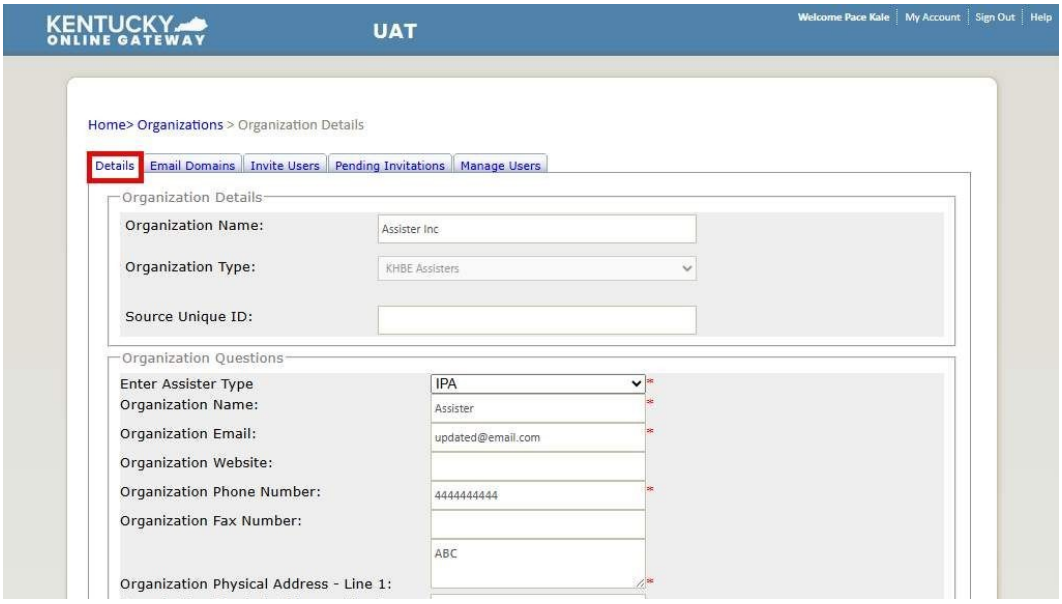
Manage Users Screen



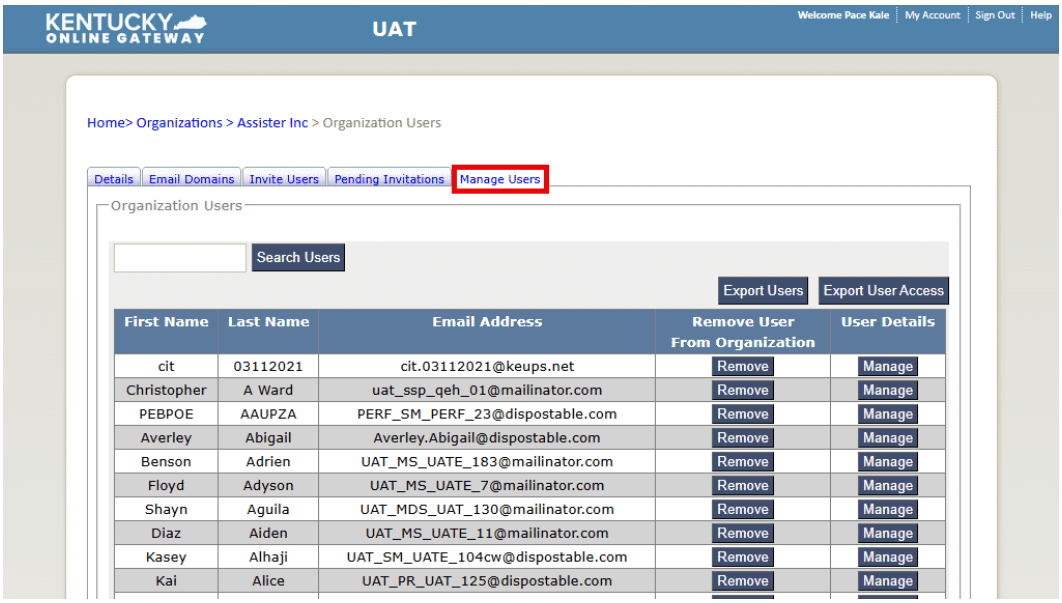
Manage Users – Organization Users List

The Manage Users screen allows Organization Administrators to manage Individuals and their digital access within their organization, including the option to add and remove roles.

2.7.3 Profile



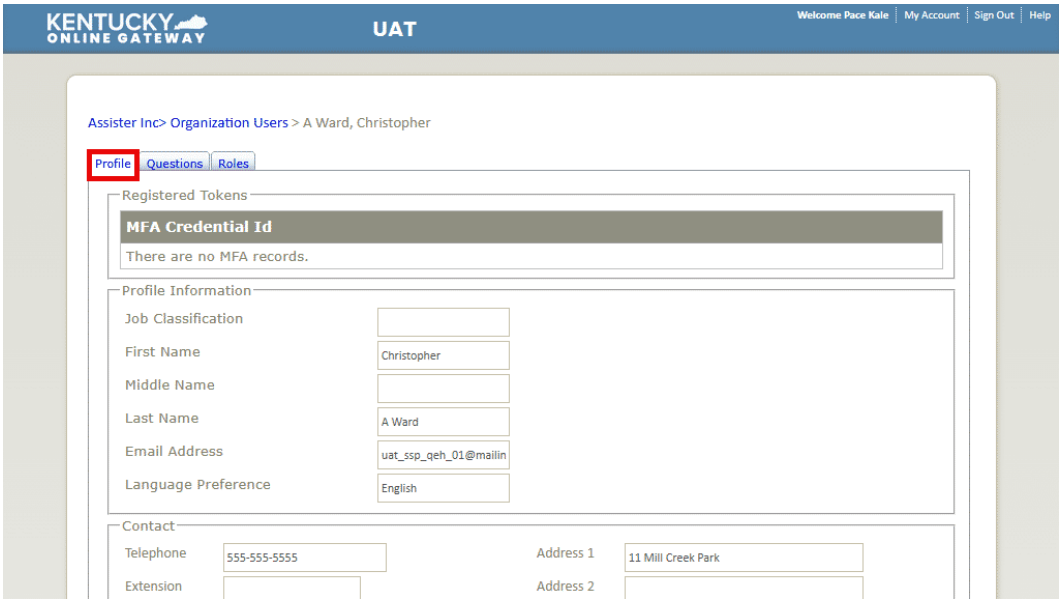
Profile Tab – Click Manage Next to User



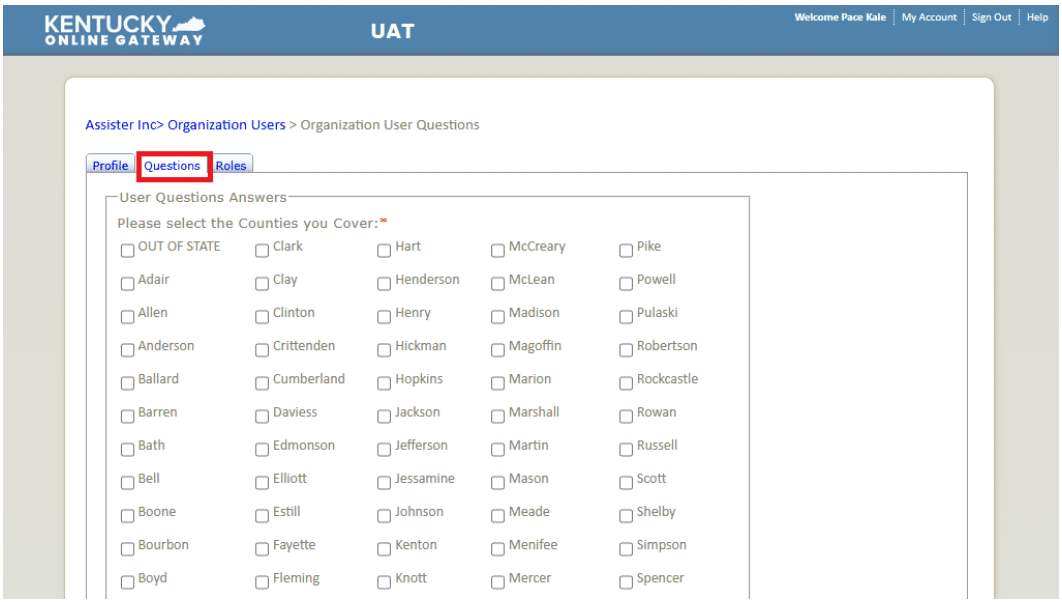
Profile Screen – User Information

After clicking Manage next to the desired user, the Profile screen displays the selected Individual's information. Information displayed on this screen must be edited by the kynector, but Organization Administrators should confirm the information is accurate and work with the kynector to make updates as necessary using the appropriate steps. For example, using the edit feature within KYID rather than creating a new KYID account when names and/or email addresses change.

2.7.4 Questions



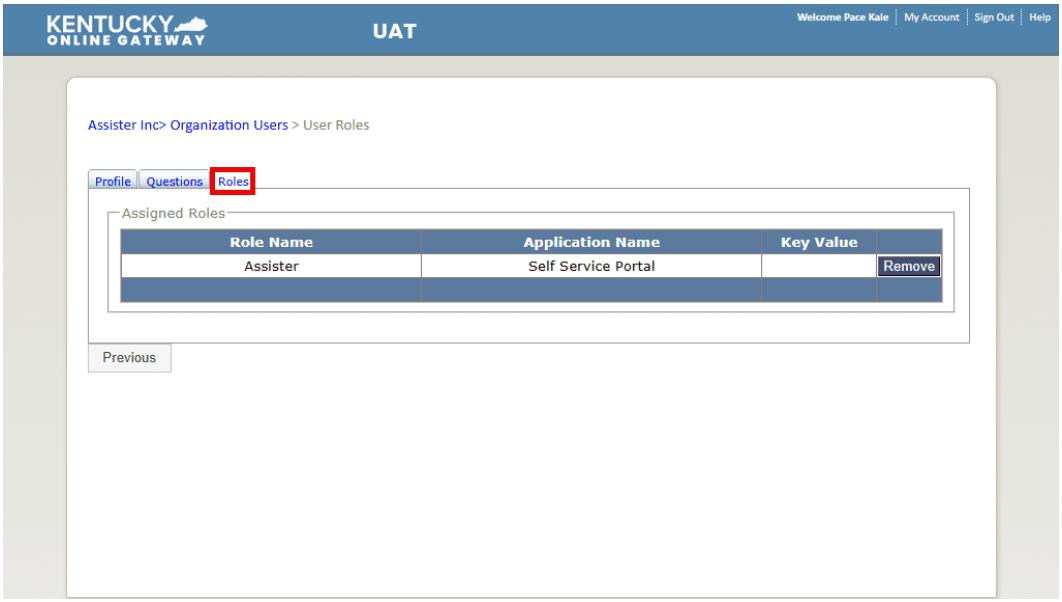
Questions Tab



Questions Screen – Counties Served

The Questions screen can be edited by Organization Administrators or kynectors, but Organization Administrators should confirm the accuracy of counties served, public/private settings, contact information, etc.

2.7.5 Roles

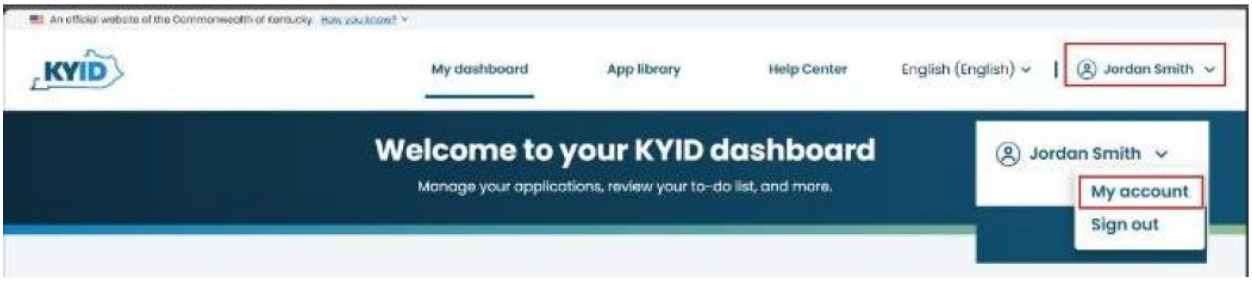


The Roles screen allows Organization Administrators to change a kynector's role assignment(s). When changing role assignments, the role MUST be removed first. After removing the applicable role(s), the kynector may be invited to new role(s) from the Invite Users screen.

2.8 Updating KYID Email Addresses

kynectors can easily update their KYID email address by signing into KYID at kyid.ky.gov and utilizing the following steps:

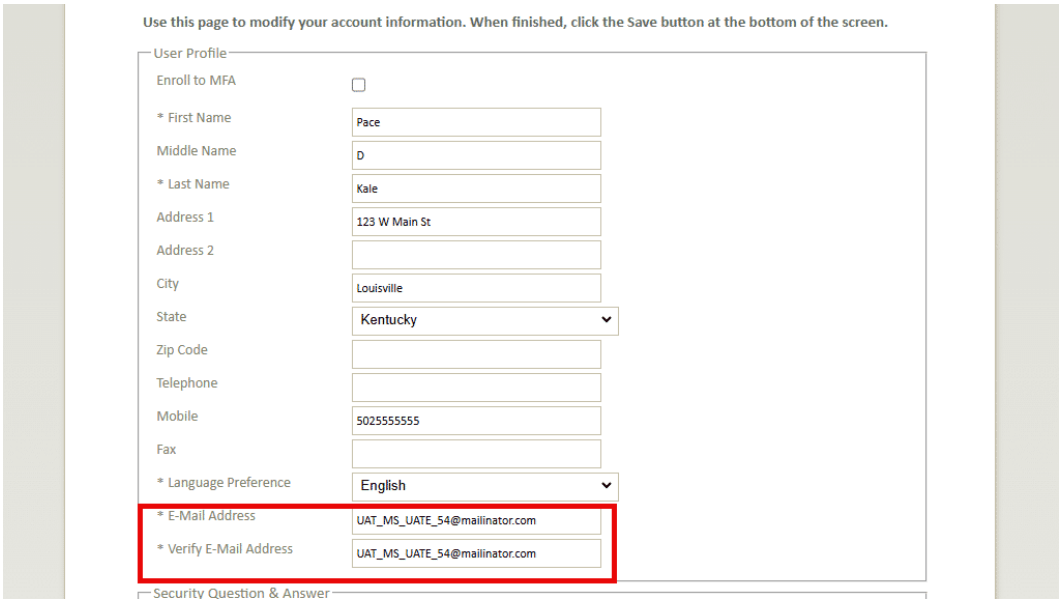
Step 1 – Access My Account



Step 1 – KYID Dashboard, My Account Button

After signing into KYID, click the My Account button located on the upper-right hand side of the screen.

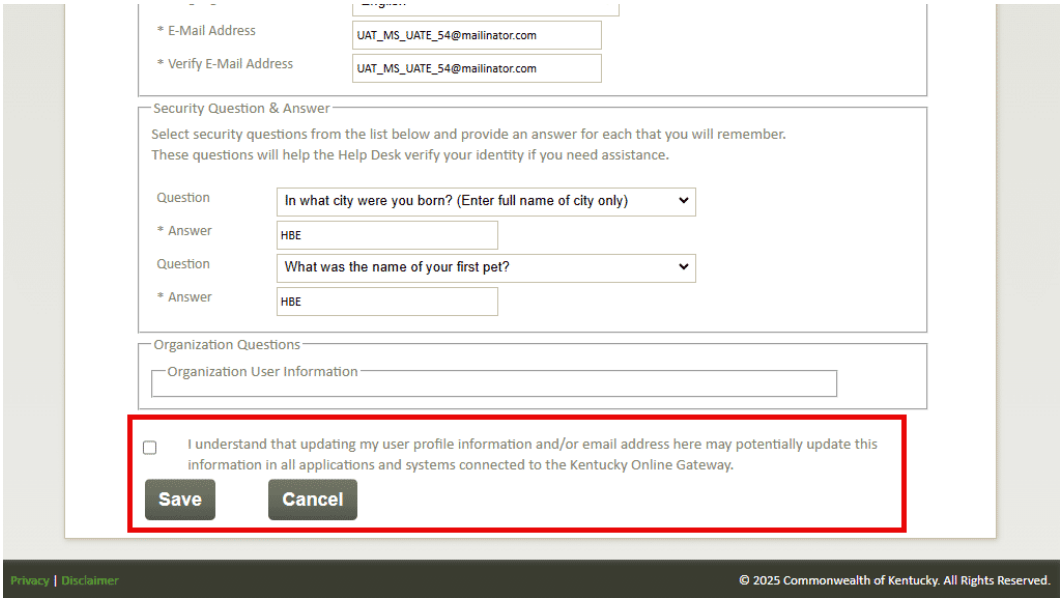
Step 2 – Update Account Details



Update the Email Address and other relevant account details such as Address or Phone Numbers on the My Info screen as needed.

Step 3 – Save Changes

Check the Attestation Box which states I understand that updating my user profile information and/or email address here may potentially update this information in applications and systems connected to KYID and click Save.



Step 4 – Confirmation

Check your inbox for an email address change notification. Open the email and click on the Link provided within to verify the change.

3. COLT: KHBE's Learning Management System

3.1 Commonwealth Offerings for Learning & Training (COLT)

COLT LMS provides a consistent training experience and maintains an online training record for all kynectors.

3.1.1 LMS Purpose

The goal of an LMS is to provide a consistent training curriculum and to maintain an online training record for all kynectors.

3.1.2 LMS Objectives

- Increase kynector access to trainings
- Improve kynector knowledge and skills
- Streamline the kynector training process
- Track and easily manage kynector training completions

3.2 Required Trainings

Organization Administrators and kynectors are required to complete all mandatory trainings on COLT. Once Administrators confirm completions of all trainings, they may submit a request to add the Assister and Assister-Medicaid roles to the kynector. KHBE will grant final approval which will permit the user to begin assisting Residents with applying for health coverage.

3.2.1 Required Trainings for kynectors

- State-Based Marketplace (SBM) Certification Training
- New kynector Training
- Other Trainings as assigned
- Must complete annual kynector refresher training

3.2.2 Required Trainings for Organization Administrators

- State-Based Marketplace (SBM) Certification Training
- New kynector Training
- Organization Administrator Training
- Other Trainings as assigned
- Must complete annual kynector refresher training

3.3 Training Assessment Requirements

All required trainings must be completed before Organization Administrators and kynectors have access to kynect.

Organization Administrators and kynectors are required to score at least 80% on all assessments within three attempts in order to successfully complete the training.

Organization Administrators must contact the KHBE Program Inbox at KHBE.Program@ky.gov for any kynector who has been unsuccessful after their second (2nd) attempt in taking the assessment.

Organization Administrators should confirm with kynectors that they have completed all required training prior to submitting a request for user access.

3.4 Required Training Tracking for Organization Administrators

Organization Administrators are not able to view a kynector's complete courses. However, the KHBE team can confirm the completion of all training for kynectors. Therefore, Organization Administrators need to remind kynectors of timely completion and reporting of all their required trainings.

Listed below are some reminders Organization Administrators should be aware of:

- Organization Administrators must remind kynectors to track their completed courses and completion certificates through their transcript on COLT LMS. KHBE is able to provide this information to Organization Administrators upon request.

- Organization Administrators should receive confirmation from kynectors confirming that they have completed required trainings and passed the assessments.
- Failure to comply with training requirements may result in the loss of system access for one (1) year from the date of removal for non-compliance.

3.5 COLT Resources

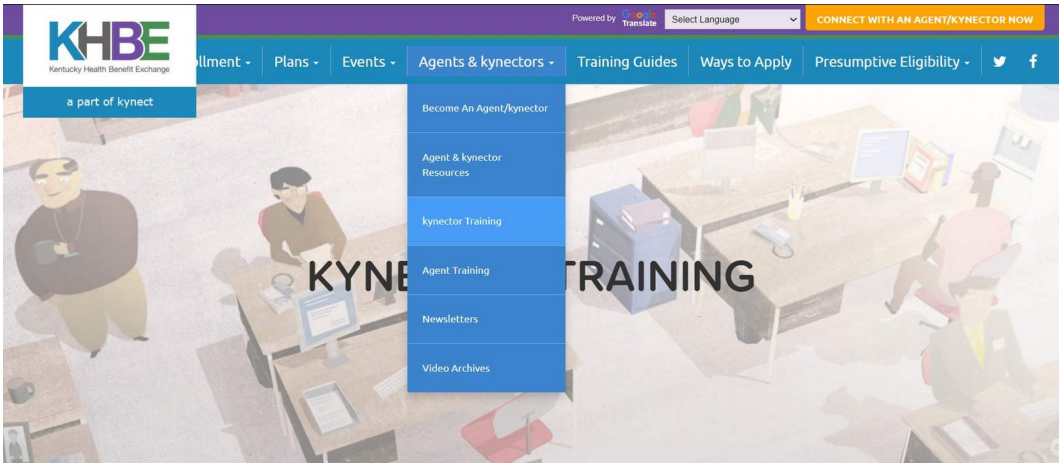
Resources have been identified for kynectors based on the communication strategy for kynectors. COLT resources are available on KHBE.ky.gov.

KHBE Logo

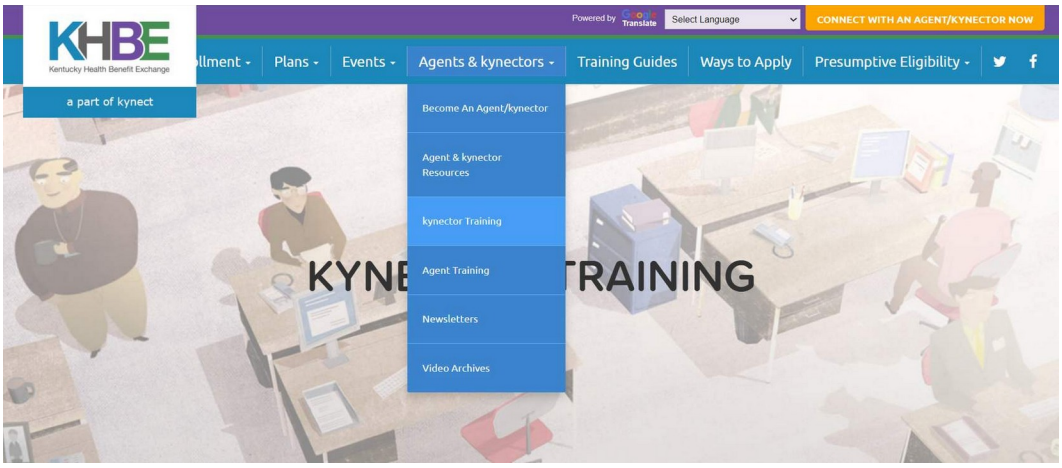
The KHBE Website contains detailed instructions on how to onboard to KYID and access the required trainings. Many additional information guides can also be located on the KHBE website.

3.6 Accessing KHBE Resources

Resources are available to Organization Administrators and kynectors on KHBE.ky.gov in the Agents & kynectors tab. See below instructions on how to access resources on the KHBE website.



KHBE Website – Agents & kynectors Tab



KHBE Website – kynector Training Materials Tab

3.6.1 kynector Training Materials Tab

1. Access KHBE.ky.gov.
2. Select the Agents & kynectors tab.
3. From the drop-down, select kynector Training.

4. Assessment Questions

Answer all questions below. A score of 80% or better is required to pass. You have three (3) attempts to pass the assessment. If you are unsuccessful after your second attempt, contact KHBE.Program@ky.gov to allow for any further attempts.

1. What is the primary role of an Organization Administrator in relation to KHBE?

a. Directly enrolling Kentucky Residents in health coverage programs
b. Acting as the primary liaison between their contracted organization and KHBE
c. Approving all kynector training assessments on behalf of KHBE
d. Managing the kynect Self-Service Portal for all users statewide

2. Which of the following is NOT an administrative duty of Organization Administrators?

a. Onboarding kynectors
b. Monitoring kynectors' training status
c. Organizing regional health fairs
d. Adding/removing kynectors from KYID

3. By what date must CAC Quarterly Reports be submitted to KHBE for the first quarter (Q1)?

a. March 31
b. April 15
c. April 30
d. January 15

4. How many main criteria sections are included in the CAC Quarterly Report?

a. Three
b. Four
c. Five
d. Seven

5. Which of the following reports must Organization Administrators submit to KHBE?

a. Monthly Event Request Template
b. Quarterly Metrics report
c. Eligibility report
d. LIHEAP report

6. Which of the following activity types can Organization Administrators export from the Reports screen?

a. Report a Change
b. Renewal
c. Intake
d. All of the above

7. What is the primary benefit of KYID for kynectors and Residents?

a. It provides a dedicated portal for submitting CAC Quarterly Reports
b. It allows users to access multiple state-based systems using a single sign-on
c. It automatically assigns kynectors to Residents in their county
d. It tracks enrollment events and outreach activities for each organization

8. What does the Organization Manager role within KYID permit users to do?

a. Approve kynector roles on behalf of KHBE
b. Complete Presumptive Eligibility applications for Residents
c. Add, remove, and update user profiles and assigned roles
d. Export Quarterly Metrics Reports for their organization

9. Organization Administrators can invite kynectors and edit organization details by utilizing which of the following applications within KYID?

a. Organization Management
b. Self-Service Portal
c. kynector Training
d. Agent Training

10. True or False: A kynector who does not log into KYID for more than 90 days will have their account deactivated and their system role removed.

a. True
b. False

11. If a kynector plans to be on leave for more than eight (8) weeks, what must they do?

a. Create a new KYID account before returning from leave
b. Notify KHBE in advance by emailing KHBE.Program@ky.gov
c. Contact their Organization Administrator to deactivate their account
d. Submit a leave request through the Self-Service Portal

12. The My Info screen on KYID can be used to edit all of the following criteria EXCEPT:

a. Email Address
b. Phone Number
c. Address
d. Password

13. What minimum score must Organization Administrators and kynectors achieve on each COLT assessment to successfully complete the training?

a. 70%
b. 75%
c. 80%
d. 90%

14. True or False: Some trainings for kynectors and Organization Administrators require annual recertification.

a. True
b. False

15. kynector training materials are hosted on the KHBE website under which tab?

a. kynector Training
b. Ways to Apply
c. Enrollment
d. Plans