

The Commonwealth of Kentucky
kynect State-Based Marketplace



**Navigator Organization Administrator
Training (CAK, KIPDA, KPCA Only)**

July 9, 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.

Please 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.

Assessment: Throughout this training, there are knowledge check questions that review the material covered in each module. At the end of the course, there is a graded assessment. The score required to pass is 80% or better. Organization Administrators have three (3) attempts to pass the assessment. Any Organization Administrator who has been unsuccessful in their 2nd attempt must contact the KHBE Program Inbox at KHBE.Program@ky.gov to allow for any further attempts.

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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 Reporting

Reporting provides a continued data-driven feedback on outreach and enrollment goals using the KHBE provided templates/reports. Organization Administrators are responsible for collecting and distributing reports. These include:

Event Reporting Data:

- Monthly Event Request Templates
- Monthly Event Photos

Financial Reporting Data:

- Purchase requests
- Property control ledger
- Timesheets

Other Reporting:

- kynector After Action Reporting Tool (kAART)
- Self-Service Portal (SSP) Activity
- Education and Outreach
- Administrative Duties
- Monthly Consumer Satisfaction Survey Results

1.3 Metrics Reporting Guidelines

The following data elements are included in the Metrics Report:

- Reporting period Month
- Date report submitted to KHBE
- Organization Name
- Organization Administrator
- Entity name
- Region
- County

The Metrics Report documents kynectors' and Organization Administrators' updates in facilitating enrollment and conducting outreach activities. The Metrics Report consists of the following sections:

Section 1: Talent Management (complete only once per county)

- Number of kynectors trained and certified
- Average consumer satisfaction rating

Section 2: Cost Effectiveness

- Total funds used on enrollment activities for the reporting month
- Total funds used on enrollment activities year to date (YTD)
- Total funds used on outreach activities
- Total funds used on outreach activities year to date (YTD)

1.4 Exporting Reports

You can also export reports from the Self Service Portal for your Organization. Please refer to the How to Export Reports Quick Reference Guide located on the KHBE Website.

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 Supplemental Nutrition Assistance Program (SNAP) and Child Care Assistance

Role	Application	Description
		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 trainings 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:

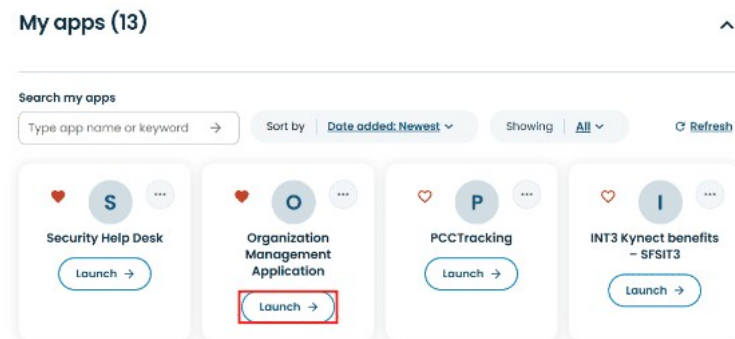
The Agency Administrator role is a kynect role that grants the user a manager's level of access. This role should be given to a few users within the organization who know and understand the role capabilities/responsibilities and who need the ability to see all the cases associated with the organization. This kynect role allows the user to monitor and adjust caseloads and kynector assignments and evaluate the program at an organizational level.

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

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



Organization Management Application Tile on 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 includes: contact information, counties serviced, and public vs private settings. These impact the online search results and case association drop-downs 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

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 trainings in the Commonwealth Offerings for Learning & Training (COLT). Once the kynector receives their invitation, they complete all required KHBE trainings 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

Assigning the Assister Training role in KYID

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

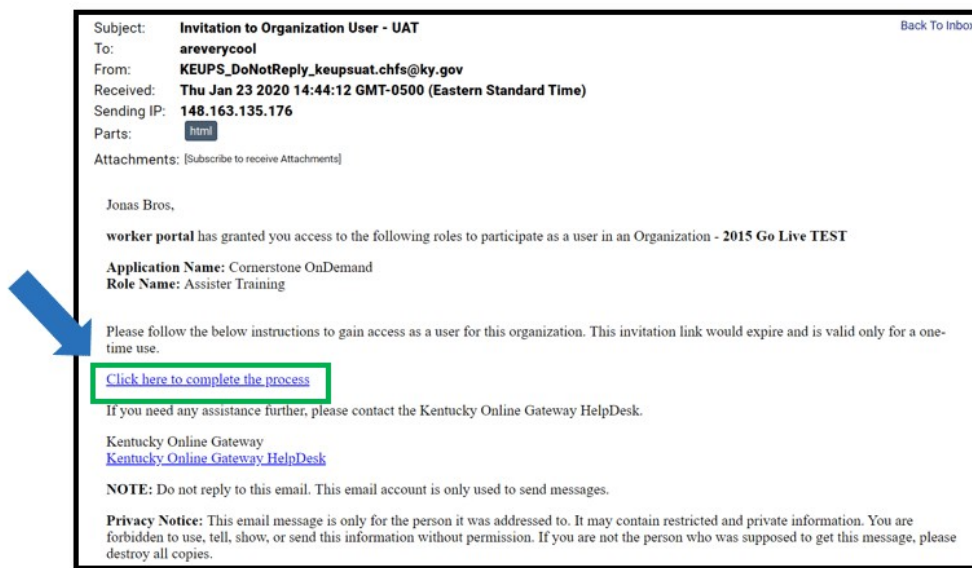
Assigning the Assister role in KYID

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 training and approves the kynector for their role.
- Organization Administrators are responsible for ensuring kynectors have been verified by KHBE and completed all their required trainings.

Click the image below to zoom in on the information.



kynector invitation email example

Please Note: For more information on how to invite kynectors from the Organization Management tool, please use the Quick Reference Guide located on the KHBE Website.

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

2.7.1 Organization Details

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.

Organization Details screen in KYID

2.7.2 Manage Users

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.

Home > Organizations > Assister Inc > Organization Users

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

Organization Users

Search Users

Export Users | Export User Access

First Name	Last Name	Email Address	Remove User From Organization	User Details
cit	03112021	cit.03112021@keups.net	Remove	Manage
Christopher	A Ward	uat_ssp_qeh_01@mailinator.com	Remove	Manage
PEBPOE	AAUPZA	PERF_SM_PERF_23@dispostable.com	Remove	Manage
Averley	Abigail	Averley.Abigail@dispostable.com	Remove	Manage
Benson	Adrien	UAT_MS_UATE_183@mailinator.com	Remove	Manage
Floyd	Adyson	UAT_MS_UATE_7@mailinator.com	Remove	Manage
Shayn	Aguila	UAT_MDS_UAT_130@mailinator.com	Remove	Manage
Diaz	Aiden	UAT_MS_UATE_11@mailinator.com	Remove	Manage
Kasey	Alhaji	UAT_SM_UATE_104cw@dispostable.com	Remove	Manage
Kai	Alice	UAT_PR_UAT_125@dispostable.com	Remove	Manage

Manager Users screen in KYID

2.7.3 Profile

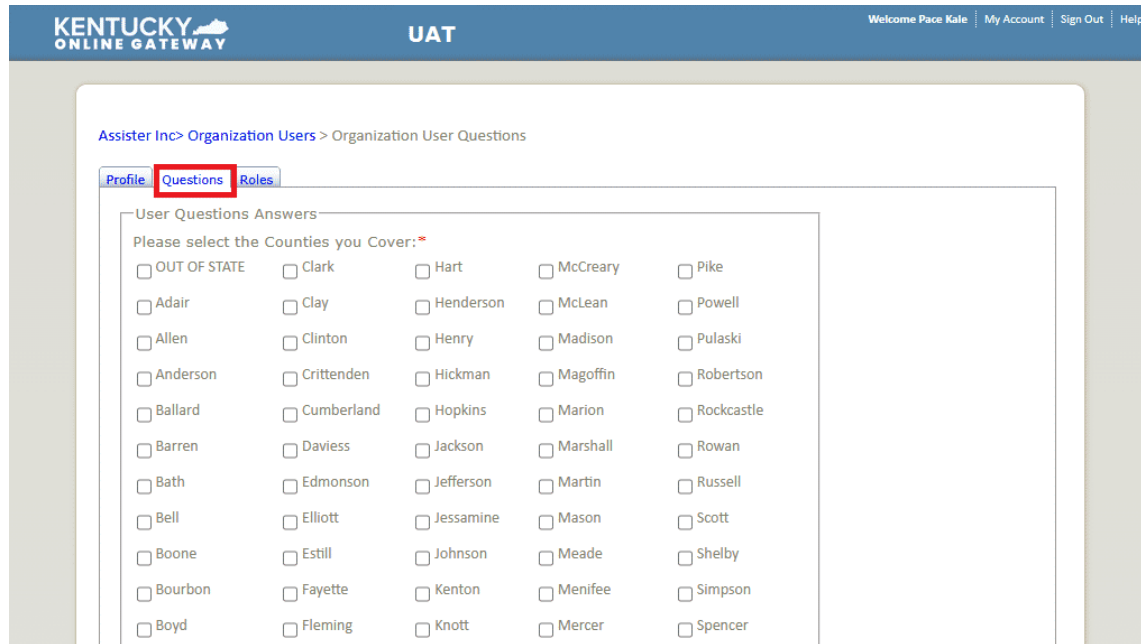
After clicking Manage next to the desired user, the Profile screen displays the selected Individual's information. Information displayed on this screen must be edited by the kynector, but Organization Administrators should confirm the information is accurate and work with the kynector to make updates 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.

The screenshot shows the 'Profile' screen in the KYID system. The header includes the 'KENTUCKY ONLINE GATEWAY' logo, 'UAT', and user information: 'Welcome Pace Kale | My Account | Sign Out | Help'. The breadcrumb trail is 'Assister Inc > Organization Users > A Ward, Christopher'. Below this are three tabs: 'Profile' (highlighted with a red box), 'Questions', and 'Roles'. The 'Profile' section is divided into three main areas: 'Registered Tokens' (showing 'MFA Credential Id' with a note 'There are no MFA records.'), 'Profile Information' (a form with fields for Job Classification, First Name (Christopher), Middle Name, Last Name (A Ward), Email Address (uat_ssp_qeh_01@mailin), and Language Preference (English)), and 'Contact' (a form with fields for Telephone (555-555-5555), Extension, Address 1 (11 Mill Creek Park), and Address 2).

Profile screen in KYID

2.7.4 Questions

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.



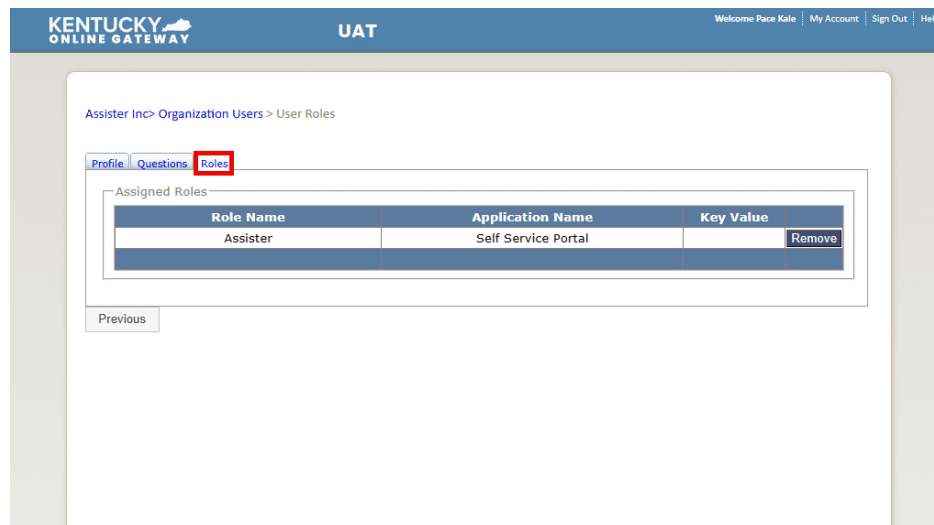
The screenshot shows the 'Questions' tab selected in the 'Organization User Questions' section. The 'Questions' tab is highlighted with a red box. The main content area is titled 'User Questions Answers' and contains a form with the instruction 'Please select the Counties you Cover: *'. The form lists 25 counties, each with an unchecked checkbox. The counties are arranged in five columns: OUT OF STATE, Clark, Hart, McCreary, Pike, Adair, Clay, Henderson, McLean, Powell, Allen, Clinton, Henry, Madison, Pulaski, Anderson, Crittenden, Hickman, Magoffin, Robertson, Ballard, Cumberland, Hopkins, Marion, Rockcastle, Barren, Daviess, Jackson, Marshall, Rowan, Bath, Edmonson, Jefferson, Martin, Russell, Bell, Elliott, Jessamine, Mason, Scott, Boone, Estill, Johnson, Meade, Shelby, Bourbon, Fayette, Kenton, Menifee, Simpson, and Boyd, Fleming, Knott, Mercer, Spencer.

OUT OF STATE	Clark	Hart	McCreary	Pike
☐	☐	☐	☐	☐
☐	☐	☐	☐	☐
☐	☐	☐	☐	☐
☐	☐	☐	☐	☐
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Questions screen in KYID

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.



Roles screen in KYID

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

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



KYID sign-in page — kyid.ky.gov

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.

Use this page to modify your account information. When finished, click the Save button at the bottom of the screen.

User Profile

Enroll to MFA

☐

* First Name

Pace

Middle Name

D

* Last Name

Kale

Address 1

123 W Main St

Address 2

City

Louisville

State

Kentucky

Zip Code

Telephone

Mobile

5025555555

Fax

* Language Preference

English

* E-Mail Address

UAT_MS_UATE_54@mailinator.com

* Verify E-Mail Address

UAT_MS_UATE_54@mailinator.com

Security Question & Answer

My Info screen in KYID

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.

* E-Mail Address

UAT_MS_UATE_54@mailinator.com

* Verify E-Mail Address

UAT_MS_UATE_54@mailinator.com

Security Question & Answer

Select security questions from the list below and provide an answer for each that you will remember. These questions will help the Help Desk verify your identity if you need assistance.

Question

In what city were you born? (Enter full name of city only)

* Answer

HBE

Question

What was the name of your first pet?

* Answer

HBE

Organization Questions

Organization User Information

☐

I understand that updating my user profile information and/or email address here may potentially update this information in all applications and systems connected to the Kentucky Online Gateway.

Save

Cancel

Privacy | Disclaimer

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Save Changes and Confirmation steps in KYID

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
- 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
- kynect After Action Reporting Tool (kAART) 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
- kynect After Action Reporting Tool (kAART) 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 trainings 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 completed courses. However, the KHBE team can confirm the completion of all trainings 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. 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.

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. Event Responsibilities

4.1 Outreach Management

Community outreach and enrollment events are important in providing information and services to Residents across the Commonwealth. At these events, either in-person or virtually, kynectors educate Kentucky communities about health coverage and the enrollment process, as well as connect with those Residents who may live in hard-to-reach areas. Organization Administrators provide oversight to ensure these events are properly organized and facilitated correctly.

The Goals of Outreach and Enrollment Events are to:

- Provide outreach and education to target audiences.
- Educate Kentuckians about KHBE and kynect.

4.2 Outreach Efforts

Organization Administrators and kynectors play a central role in coordinating outreach and enrollment activities throughout the Commonwealth of Kentucky.

4.2.1 Outreach Requirements

Key outreach requirements include:

- Utilize existing organization relationships for outreach to Residents.
- Educate Individuals about insurance affordability programs (including tax credits, Cost-Sharing Reductions, and Medicaid) and enrollment in Qualified Health Plans (QHPs).

4.2.2 Outreach Standards of Practice

Organization Administrators must adhere to the below outreach standards:

- Obtain prior approval from KHBE for materials used in media and mass communications, unless materials are found on the KHBE website.
- Provide best practices and guidance to kynectors.
- Submit events to KHBE for approval for the upcoming month at least five (5) business days prior to the first day of that month.
- To submit any private events, please access the Private Events tab on the Events Template.

- Send in any changes or cancellations to the event schedule as soon as the kynector is made aware.

4.3 Event Types

The different KHBE event types are described below:

Event Type	Description
Education	Education events provide opportunities to inform Residents and small businesses about Medicaid, Qualified Health Plans (QHPs), Advance Premium Tax Credit (APTC), Cost-Sharing Reductions (CSRs), Kentucky Children's Health Insurance Program (KCHIP), Kentucky Integrated Health Insurance Premium Payment (KI-HIPP) Program.
Enrollment	Enrollment events provide opportunities to assist Residents and small businesses in understanding health program enrollment information in order to make the right choice for their families and/or business.
Outreach	Outreach Events provide opportunities to engage and inform the public about kynect services, legislation, answer questions about the importance of health coverage, and enroll Residents in available health coverage options through Medicaid, QHPs, APTC, CSRs, KCHIP, and KI-HIPP.

4.4 KHBE Materials and Resources

Style guides give specific guidance on the requirements for how KHBE and kynect branding and visuals should be displayed. Event signs and posters communicate information designed to educate Residents about KHBE and the services available. Flyers and brochures are posted on the KHBE website for kynectors to distribute to Residents. kynectors need to print these materials for distribution since they are not intended for electronic distribution.

Organization Administrators should direct kynectors to KHBE.ky.gov for advertising and promotion guidelines for their events and outreach.

4.5 KHBE Materials and Advertising Approval Process

Step 1 — Review of Submission

Organization Administrators review edited advertising/promotional materials received from kynectors and make necessary edits for upcoming events. If any changes are made to KHBE materials (besides date/time/location) they are required to be submitted to KHBE.Program@ky.gov for approval.

Examples of items which may need approval are:

- Public service announcements
- Edited posters from the KHBE website

Step 2 — Turnaround Time

Organization Administrators should allow seventy-two (72) hours for KHBE to review advertising materials.

Note: Items such as text message campaigns and digital content for publications may require additional time for review by KHBE.

Step 3 — Approval or Denial

KHBE reviews the proposed changes to advertising materials and approves or denies the submission. KHBE sends the decision and feedback to Organization Administrators with necessary changes/updates required for materials.

Once the Organization Administrator receives the approved advertising materials from KHBE, they can be used and distributed as intended.

4.6 KHBE Events Calendar

kyneconnectors can view upcoming events on the KHBE events calendar. The events calendar tracks all educational, enrollment, and outreach events for KHBE. All kynecor events (public and private) must be notated on the Event Request Template and submitted for approval.

Events Calendar Expectations for kynecors:

- kynecors should regularly check the KHBE events calendar on the KHBE website to be aware of upcoming events.
- kynecors should submit planned events directly to their Organization Administrator (kynecors do not submit the Event Request Template to KHBE).

4.7 Events Request Template

kynecors must provide all details and information in the Event Request Template to their Organization Administrator when they are planning an event. Organization Administrators are responsible for submitting and sending updates to the Event Request Template to KHBE.

4.7.1 Events Request Template Overview

The following process details how to complete the required fields on the Events Request Template. kynecors must provide all details and information to their Organization Administrators when they are planning an event. All events, public and private, must first be submitted to their Organization Administrator for approval and then added to the Events Calendar.

Step 1 — Top Row

Top row fields are for designated information regarding the event: region, title, start/end times, etc. and should be completed accordingly. kynectors should provide as much detail as possible regarding the event.

For example:

1. Name of the event: Greenup - Christmas on the Square
2. Description: Speak to a kynector to learn more about health coverage options available to you.
3. Location: Outside - Main Street
4. Start Date/Time: 12/01/24 2:00 PM EST
5. End Date/Time: 12/01/2024 5:00 PM EST

Step 2 — Bottom Row

The bottom row contains different tabs representing the different months.

Step 3 — Descriptive Rows

Below the top row are the fields where descriptions and specific information should be provided with as much detail as possible.

For example:

1. Event Type: Enrollment or education
2. kynector name: Jane Doe
3. Contact Source Information: John Smith (888) 000-0000
4. kynector email: Jane.Doe@ky.gov
5. Physical Address: 1 Main Street, Greenup, KY 41144
6. Virtual Address: include event link (if applicable)
7. Longitude and Latitude: This is required on the Event Request Template whether the event is virtual or in person. It can only have a maximum of 6 decimal points.

Step 4 — Newly Rescheduled Events

Newly rescheduled events are highlighted in yellow.

Step 5 — Cancelled Events

- Cancelled events need to be highlighted in green with strikethrough for the originally scheduled event.
- Weather related cancellations are highlighted in gray with strikethrough for the originally scheduled event.
- Reasonable efforts should be made to avoid cancellation of advertised events.
- kynectors must notify their assigned Organization Administrator within three (3) days of the event scheduled date.

- Organization Administrators must send notification to KHBE of all possible cancellations.

4.7.2 Events Request Template Submission

- kynectors submit their completed event request to their assigned Organization Administrator for review.
- The Organization Administrator reviews, verifies accuracy of the information, and sends the Event Request Template to KHBE.

Note: kynectors do not submit event requests directly to KHBE.

4.8 Events Request Template Color Definitions

The Events Request Template consists of different colored events that represent the status of each event. It is important that all events are properly recorded in the correct color. Organization Administrators must use the color coding outlined below when notating new, rescheduled, and cancelled events.

Status	Color Coding
Newly rescheduled	Highlight in yellow.
Rescheduled	Highlight in blue with strikethrough for the originally scheduled event.
Cancelled (weather)	Highlight in gray with strikethrough.
Cancelled (other reason)	Highlight in green with strikethrough.

Organization Administrators should instruct kynectors that previously shaded calendar rows should be removed and the file name should be updated to include the date the change was made.

4.9 Events Request Template Submission Process

Event requests should be filled out completely in the Events Request Template with all required information. All event requests require review from Organization Administrators for accuracy prior to being submitted to KHBE for approval.

The submission process to KHBE is detailed in the steps below:

- kynectors submit a completed event request to the Organization Administrator.
- Organization Administrators compile event requests into one master template for their entire organization.
- Organization Administrators verify submitted information is accurate and color coded properly (if needed).
- The compiled master template is saved with the following naming convention: Organization Name, Month, and Event Request Date (e.g., CAK May Event Request 5.19.25).

- The master template is sent to KHBE at KHBE.Program@ky.gov for review.
- Organization Administrators should repeat this process throughout the month as events are changed or added, rename their master copy with the new date, and resend to KHBE at KHBE.Program@ky.gov.

4.10 Events Calendar Approval Process

Organization Administrators must review the Events Request Template for accuracy before submitting to KHBE for approval. Event requests submitted with errors are returned and require resubmission.

See below a few key facts about KHBE events:

1. The Events Request Template is tracked via Microsoft Excel and should be completed in its entirety with all required information.
2. The Events Request Template is reviewed for accuracy by Organization Administrators and sent to KHBE.Program@ky.gov for approval.
3. KHBE reviews the Events Request Template and sends their approval/denial decision back to the Organization Administrator.
4. The Events Calendar is published to the KHBE website for public engagement and awareness.

5. Enrollment Event Management

5.1 Enrollment Event Requirements

Organization Administrators ensure that kynectors successfully meet their requirement of hosting a minimum of one (1) successful public event in each county in the region per month, either in-person or virtually.

5.2 Five Criteria for Successful Events

1. Event is well advertised.
2. Event has appropriate signage throughout the venue.
3. Event is held in locations where Residents and potential Enrollees congregate.
4. Event yields at least ten (10) contacts or two (2) applications.
5. Event is properly staffed "at the table" within reason for the entire scheduled event time.

5.3 Event Management Checklist

The following topics provide a checklist of items and practices that an Organization Administrator must follow for all kynector events.

Step 1 — Advertising/Self-marketing

- There should be clear signs of promotional advertising of the event using KHBE approved posters and flyers.
- Organization Administrators should encourage kynectors to solicit cross-promotion and self-marketing opportunities by sending email communications and/or arranging in-person visits with stakeholders and media outlets.
- Self-marketing helps to expand the promotional reach of events and services kynectors offer by collaborating with various media outlets across different mediums.

Step 2 — Signage

There should be visible posting of KHBE approved materials throughout the event venue to communicate information about the programs and services offered by KHBE.

Step 3 — Facilities Requirements

The physical facility should be an appropriate establishment for sponsoring a KHBE event. kynectors should try their best to reserve venues that meet minimum facility requirements to meet the needs of Residents for the duration of the event.

These requirements include:

- Wi-Fi and network connectivity (secure)
- Appropriate seating availability
- Accessibility for persons with disabilities

Set the scene:

- Remove excess clutter from the area
- Present in a quiet area free from background noise

Please Note: Organization Administrators can find which counties are assigned to them in the Organization Management portal within KYID.

5.4 Outreach and Enrollment Event Best Practices

Community outreach and enrollment events are public facing events and should be handled accordingly. It is important that kynectors take certain measures and actions to ensure a successful event. Additionally, Organization Administrators must provide oversight for these events to confirm they are properly organized and facilitated correctly.

Below are best practices Organization Administrators should verify that kynectors are following for all events:

HIPAA Compliance: Maintain HIPAA compliance standards. For detailed information about HIPAA please visit the U.S. Department of Health and Human Services: <https://www.hhs.gov/hipaa/index.html>

Create metric-driven Goals: Have expectations to reach at least ten (10) contacts or two (2) applications per event.

kynector Oversight: Confirm kynectors complete metrics reporting after every event.

5.5 In-person Event Best Practices

There is a tremendous value for participants to attend an in-person event. Therefore, kynectors should thoroughly plan and advertise the event. Organization Administrators should verify that kynectors are incorporating the following practices as a part of their in-person events:

Punctuality: Events starting and ending on time is important for those participating at the event and for KHBE.

Billing: Billing of time should be accurate for the event and planning efforts.

Branding: All branding should be consistent with current standards and KHBE approved materials should be visible.

Q&A Segments: Question and answer (Q&A) segments are important for engaging participants.

Survey: Call-to-action: Pass out Customer Satisfaction Surveys when helping Residents with an application. Customer Satisfaction Surveys provide valuable feedback and helps improve future events.

5.6 Post Enrollment Event Management

Organization Administrators should receive detailed metric reports via kAART after every event from kynectors. Verify the following items are included:

- Number of contacts
- Number of applications
- Event address
- Title and description of the event
- Start/end times and point of contact (POC) information
- Photos of the kynector and their table at the event

5.7 Issue Escalation Guidelines

If Organization Administrators or kynectors have unresolved issues that require escalation, they should utilize the appropriate escalation path and follow the given resolution process stated by the representative.

Below is an escalation pathway guide so that the appropriate helpdesk is being contacted for the specified issue.

5.7.1 kynect Self-Service Portal (SSP) Issues

kynect SSP issues are typically technical access issues such as:

- Gaining access/become associated to an active case
- Speaking to Department for Community Based Services (DCBS)
- Reporting errors received in Self-Service Portal (SSP)

Please follow the below criteria when escalating these issues:

Check these materials first:

- kynect training materials on the DMS website: kynect benefits — Cabinet for Health and Family Services
- Release Notes
- kynector training materials at KHBE.ky.gov

If questions persist, take the following actions:

- [PSL Phone Number — to be inserted] (This number is NOT to be shared with the public).

Information to have prior to the call:

- The kynector ID
- The case/application number
- The Resident available (if they are trying to complete a case association)

Information to obtain from Professional Service Line (PSL) representative:

- Ticket number if it is a system issue
- Name of representative who provided assistance
- Case/application number of case if newly associated
- For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBE.Program@ky.gov.
- KHBE will review and escalate further as appropriate.
- When emailing KHBE, kynectors and Agents should include the ticket number from PSL, case number, description of issue, and screenshot of issue. No personally identifiable information (PII) can be included in the email.

5.7.2 Department for Medicaid Services (DMS) Issues

DMS issues are typically related to eligibility requirements for Residents.

Check these materials first:

- CHFS Policy Manuals on the DCBS website

If questions persist, take the following actions:

- For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBE.Program@ky.gov.
- KHBE will review and escalate further as appropriate.

5.7.3 Dire Need Issues

Dire Need issues are those requiring attention within a 24-hour period.

Check these materials first:

- The Friday Facts Newsletter

If questions persist, take the following actions:

- For any issue that remains unresolved or requires further escalation, notify KHBE by email kynectdireneed@ky.gov.
- When emailing the KHBE Dire Need Inbox, "Dire Need" must be typed in the subject line.
- Include an explanation of the "Dire Need" in the body of the email and indicate whether the "Dire Need" is for a Medicaid, QHP, or another case.
- Communicate the email as quickly as possible to ensure swift action.
- KHBE will review all "Dire Need" emails and escalate as appropriate.

5.7.4 KYID Helpdesk

The KYID Helpdesk should be contacted for account-related issues.

Check these materials first:

- KYID Materials on the KHBE Website.

If questions persist, take the following actions:

- These unresolved issues should be emailed to KYIDHelpdesk@ky.gov.
- When emailing KHBE, kynectors should include the ticket number from PSL, case number, description of issue, and screenshot of issue. No personally identifiable information (PII) can be included in the email.

Please Note: For the Agent and kynector Escalation Process graphic, please bookmark the Agent and kynector Escalation Process link on the KHBE Website.

6. Assessment Questions

The following questions are drawn from the knowledge checks throughout this course and will appear in the end-of-course assessment on COLT.

1. 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

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. Which of the following is included in the Financial Reporting Data that Organization Administrators are responsible for collecting?

- a. Monthly Event Photos
- b. Monthly Consumer Satisfaction Survey Results
- c. Timesheets
- d. kAART reports

4. Which of the following reports must Organization Administrators submit to KHBE each month?

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

5. 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

6. Which KYID role allows a user to complete SNAP and CCAP applications on behalf of a Kentucky Resident?

- a. Agency Admin
- b. Assister Training
- c. Assister Other Programs
- d. Qualified Entity Hospital

7. 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

8. 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

9. When changing a kynector's role assignment in KYID, what must happen first?

- a. A new KYID account must be created for the kynector
- b. The existing role must be removed before inviting the kynector to a new role
- c. KHBE must be notified by email before any role changes are made
- d. The kynector must re-complete all required trainings in COLT

10. Which organization grants final approval for kynectors to complete the onboarding process?

- a. CMS
- b. DOI
- c. KHBE
- d. DCBS

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

- a. True
- b. False

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

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

13. True or False: kynectors may use pre-approved event signs and posters found on the KHBE Website.

- a. True
- b. False

14. How long should Organization Administrators allow for KHBE to review advertising materials before an event?

- a. 24 hours
- b. 48 hours
- c. 72 hours
- d. 5 business days

15. kynectors should check the accuracy of scheduled events through which page found on the KHBE website?

- a. Presumptive Eligibility
- b. Monthly Events Calendar
- c. Organization Management
- d. kynect benefits dashboard

16. How are weather-related cancelled events annotated on the Event Request Template?

- a. Highlighted in yellow with strikethrough
- b. Un-highlighted with strikethrough
- c. Strikethrough only
- d. Highlighted in gray with strikethrough

17. What is the minimum number of successful public events kynectors are required to host in each county in their region per month?

- a. One (1)
- b. Two (2)
- c. Three (3)
- d. Four (4)

18. Facility requirements for in-person events include all of the following EXCEPT:

- a. Secure Wi-Fi and network connectivity
- b. Restroom access
- c. Accessible for persons with disabilities
- d. Gymnasium access

19. Which of the following should be distributed after helping Residents with an application?

- a. Customer Satisfaction Survey
- b. Event survey
- c. Facility Survey
- d. Reporting metrics

20. Which of the following resources should NOT be referenced if Organization Administrators and/or kynectors have unresolved issues?

- a. Monthly Events Template
- b. Agent and kynector Escalation Process
- c. Friday Facts
- d. Facts and Resources