The Commonwealth of Kentucky

**kynect State-Based Marketplace**

kynect health coverage

Together for a better Kentucky

# Report a Change and Case Maintenance Training Guide

Kentucky's transition to a State-Based Marketplace (SBM) is pending official authorization from the Centers for Medicare & Medicaid Services (CMS). Final approval is anticipated to occur later this summer. Future updates will be shared as appropriate.

September 17, 2021

## Document Control Information

### Document Information

| | |
|---|---|
| **Document Name** | Report a Change and Case Maintenance Introduction |
| **Project Name** | kynect State-Based Marketplace (SBM) |
| **Client** | Kentucky Cabinet for Health and Family Services |
| **Document Author** | Deloitte Consulting |
| **Document Version** | 2.0 |
| **Document Status** | Final Submission |
| **Date Released** | September 17, 2021 |

### Document Edit History

| Version | Date | Additions/Modifications | Prepared/Revised by |
|---|---|---|---|
| 1.0 | August 27, 2021 | Final Submission | Deloitte Consulting |
| 2.0 | September 17, 2021 | Revised Submission | Deloitte Consulting |

## Introduction

This course highlights some of the Report a Change and Case Maintenance processes used in kynect benefit. Agents and kynectors need to familiarize themselves with Report a Change and Case Maintenance processes to better assist Residents with their health coverage cases.

## Table of Contents

# 1 Report a Change and Case Maintenance in kynect benefits

The Report a Change and Case Maintenance processes in kynect benefits are designed to make updating a Resident's case straightforward for Agents, kynectors, and Residents. Residents should **report all changes in their information** in a timely manner to avoid interruptions in their benefits or having to repay benefits. Use the Report a Change process to complete the three categories of change:

1. **Add or Remove Household Members.**
2. **Modify other information such as income, expenses, resources, health, or health coverage.**
3. **Assist with life changes that may trigger a Special Enrollment Period (SEP).**
    - A SEP is triggered once the change is entered in kynect benefits.

**Please note:** The Special Enrollment Period Reason Screen is triggered in the Enrollment Manager Module.


## 1.1 Reporting a Change: What to Know

Agents and kynectors assist Residents with making updates to their cases in kynect benefits. These updates involve Residents reporting changes to their information. Correctly navigating these changes in kynect is key to appropriately updating a Resident's case. Agents and kynectors should be aware of the helpful Report a Change tips below.

**Existing Cases**

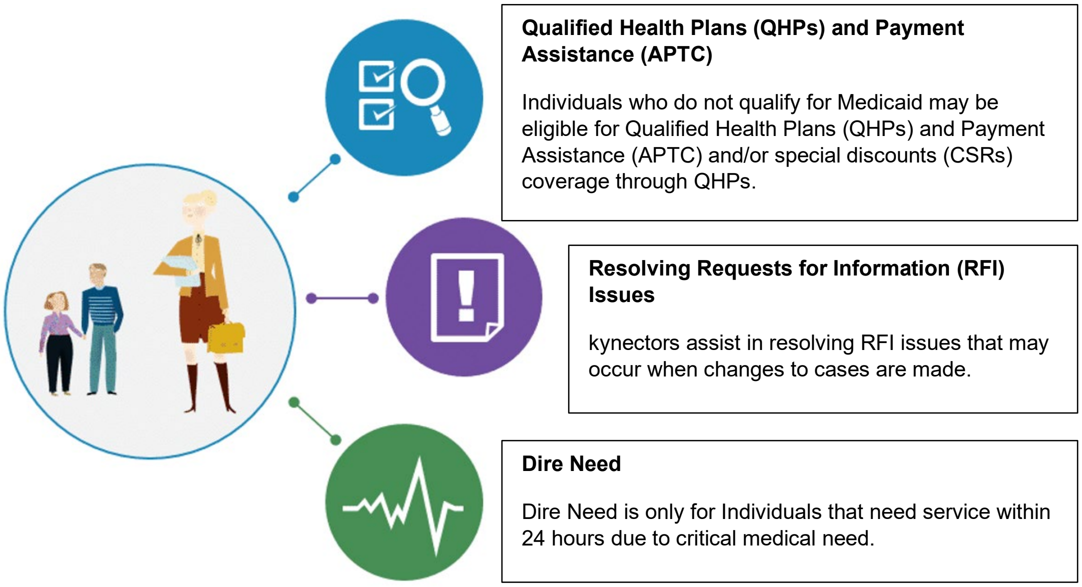
Updating a Resident's case could result in additional Requests for Information (RFI) or impact other programs (SNAP/KTAP/ Child Care). **It is important that kynectors inform Residents of any RFI.**

**Adding/Removing Individuals**

If an Individual is on an existing case, remove the Individual from that case before adding to a new case.

**Updating Income**

When updating income, **do not** delete the existing income reported. Add an end date for the existing income, and then add any new income.




## 1.2 Modifying Information

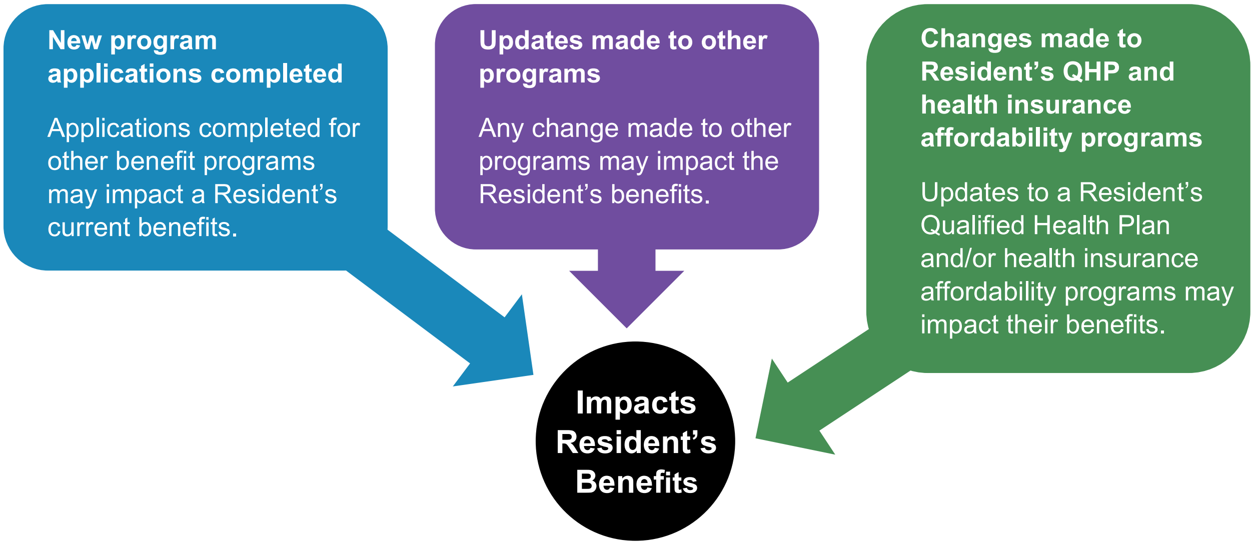
When Residents select “Modify other information such as income, expenses, resources, or health”, they are prompted to change any of the following information:

**Editable Information in kynect when Reporting a Change**

- Contact Information (Phone, Email Address)
- Relationship and Tax Filing Status
- Medicare Coverage
- Health Coverage
- Pregnancy
- Education
- Disability
- Citizenship
- Income
- Resources
- Expenses
- Living Arrangements
- Emergency Medical Condition (only prompted in kynect for non-citizens when modifying information)
- Member Information

## 1.3 The One Case Concept

The One Case Concept is important to keep in mind when assisting Residents. Even though Residents may have access to different programs and benefits, they essentially have one case that acts as a comprehensive profile for their personal information. Therefore, any changes made to their information impacts all programs with which they are associated. **Be sure to make Residents aware of these impacts**. The following may change a Resident's benefits.




## 1.4 Request for Information (RFI)

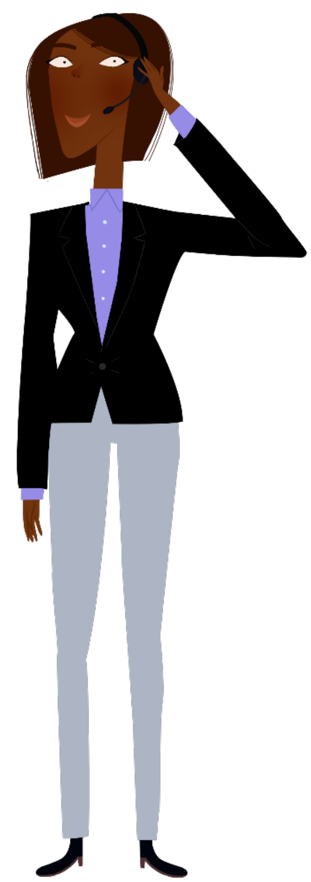
Any changes made to a Resident's case may generate a Request for Information (RFI) that the Resident is required to resolve. Be sure to make Residents aware of any RFI because they may directly impact their benefits.

**Pending Questions** An RFI is an indication that important information is needed to confirm outstanding questions for a Resident's case.

**Make Residents Aware of a RFI** When Reporting a Change or making any updates to a Resident's case, make them aware that a RFI may be generated.

**RFI Impacts on Other Benefits** For example, if you report a change in address on a Resident receiving Medicaid and SNAP benefits, they will receive an RFI requesting verification for shelter and utility expenses.

- The RFI may pend their case if they have SNAP benefits, but their Medicaid benefits would be approved.
- The case will show pending due to the household composition RFI. When a new address is reported SNAP also re-verifies Household Composition which is a required verification and if not returned SNAP eligibility will discontinue.



## 2 Report a Change Navigation

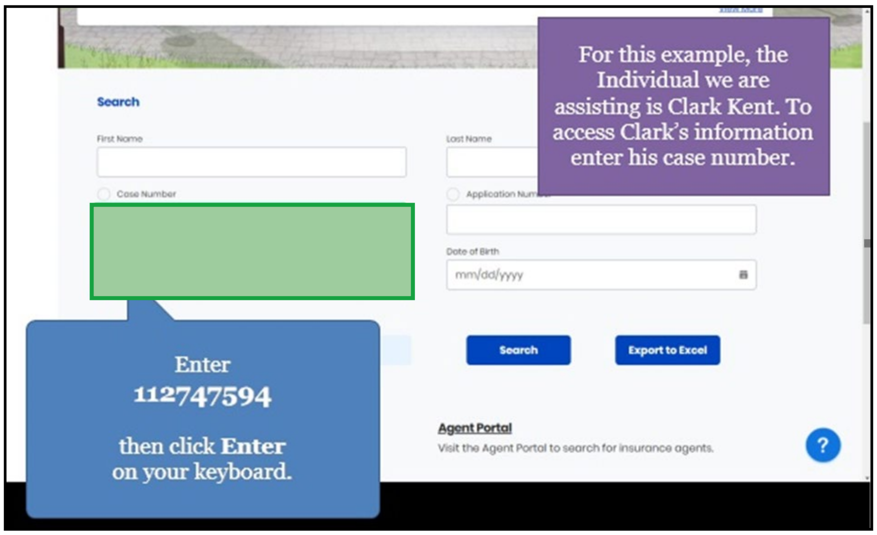
The Report a Change navigation demonstration walks through how to Report a Change in kynect benefits and highlights the following kynect benefits navigation process:

1. Reporting a Change for Resident's contact information.
2. Reporting a Change to add a Resident to a case.
3. Reporting a Change with loss of Employer-Sponsored Insurance (ESI).
4. Displaying Report a Change eligibility results.

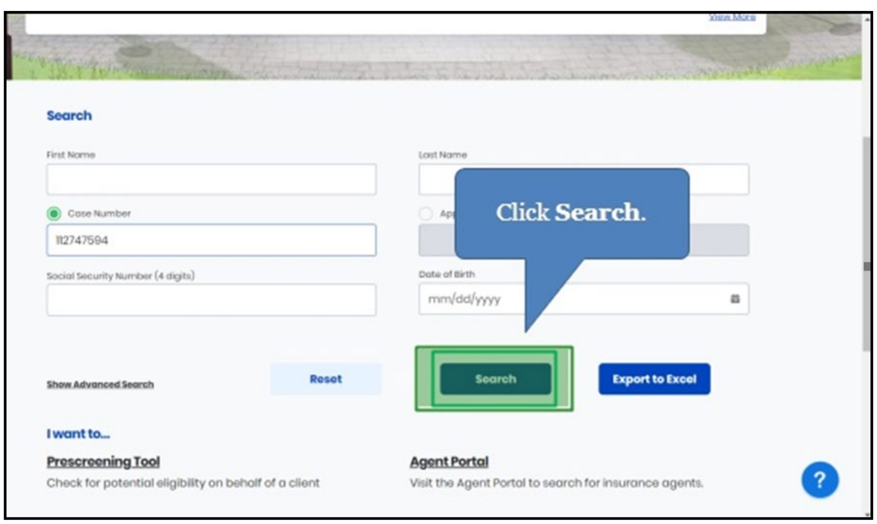
The following interactive navigation demonstration will walk you through assisting the Kent family in kynect benefits.

### 2.1 Accessing an Individual's Information

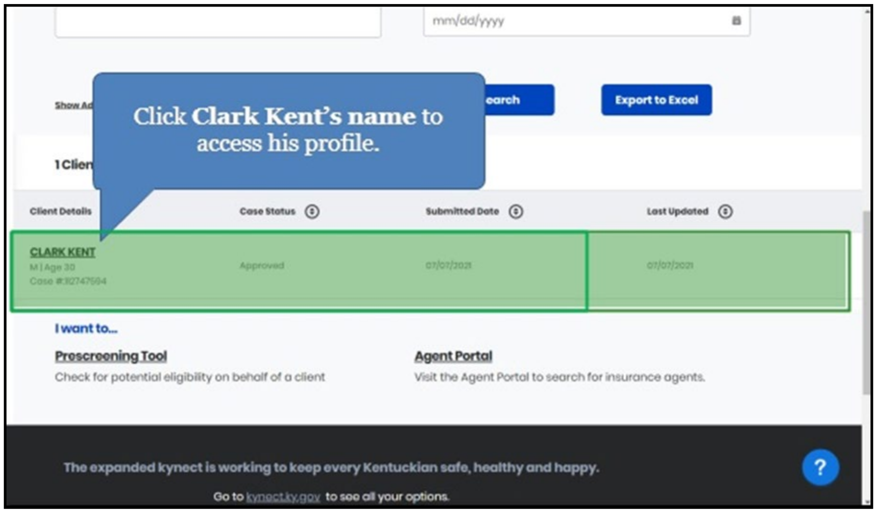
1. Enter the Individual's **Case Number** to begin the reported change.



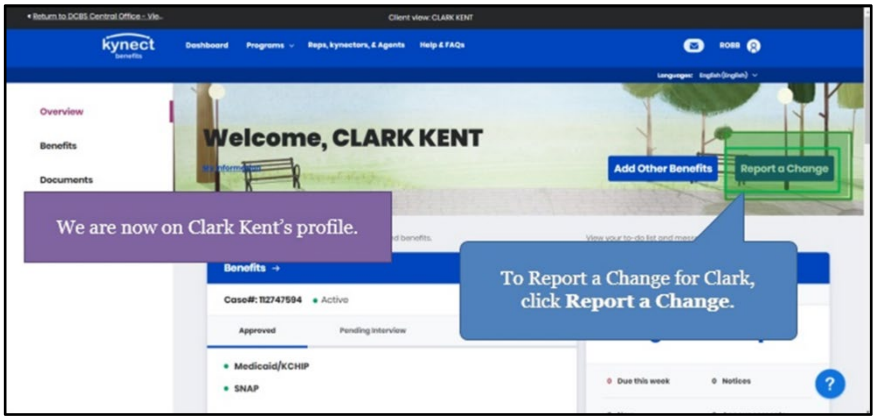

2. Click **Search** to search for the desired Individual.



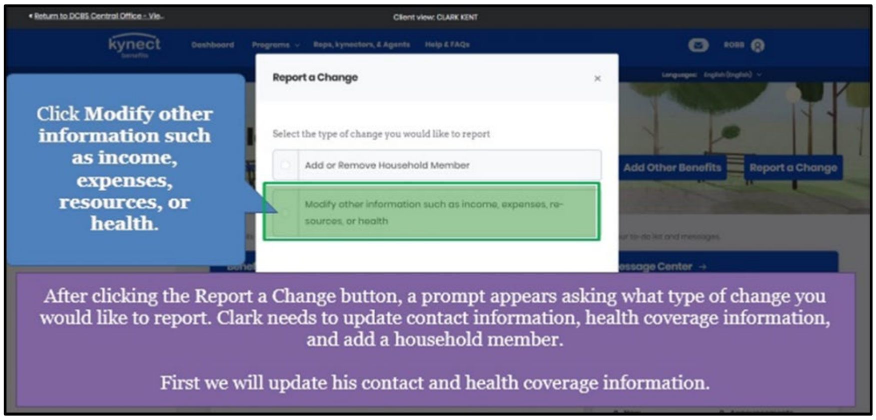
3. Click the **Individual's Name** to access their profile.



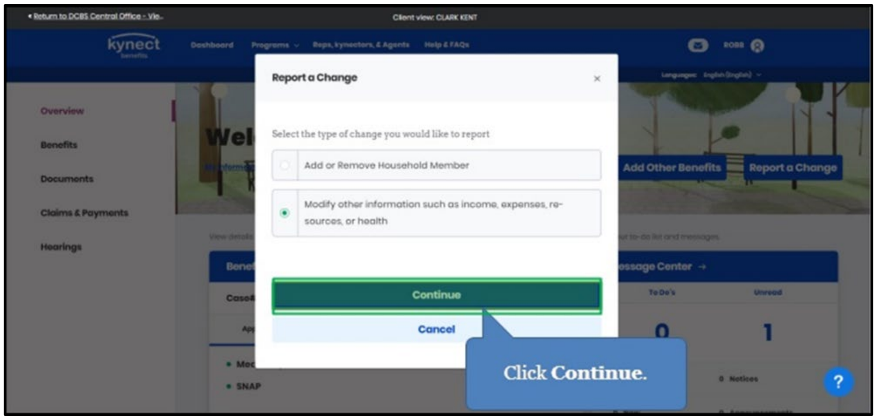

4. To Report a Change for the Individual, click **Report a Change**.



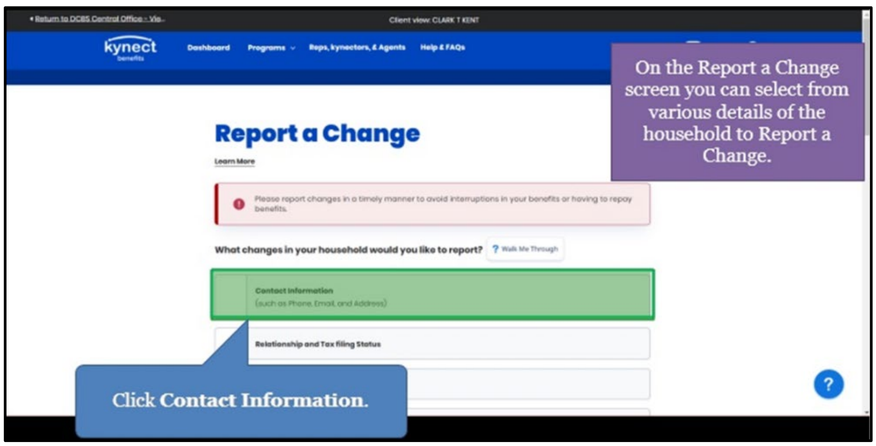

5. After clicking **Report a Change**, a prompt appears asking what type of change the Individual would like to report. Click **Modify other information such as income, expenses, resources, or health**.



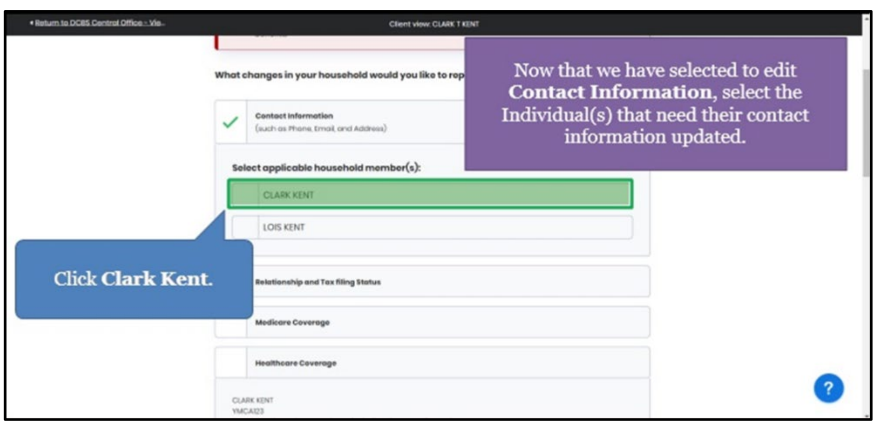
6. Click **Continue**.



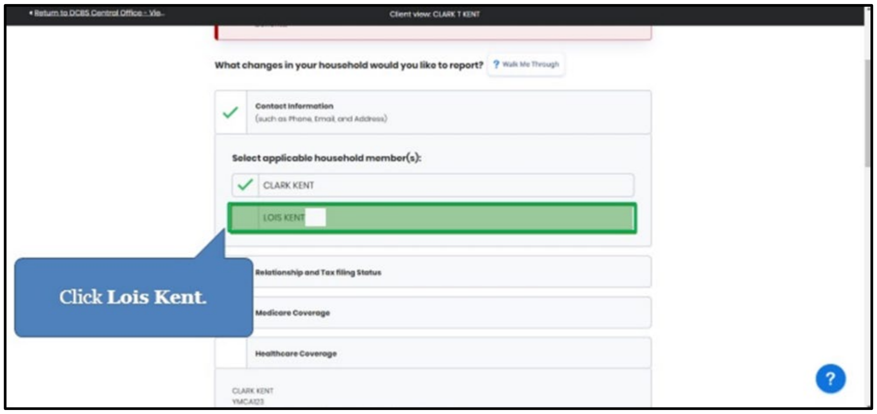

7. Click **Contact Information**.



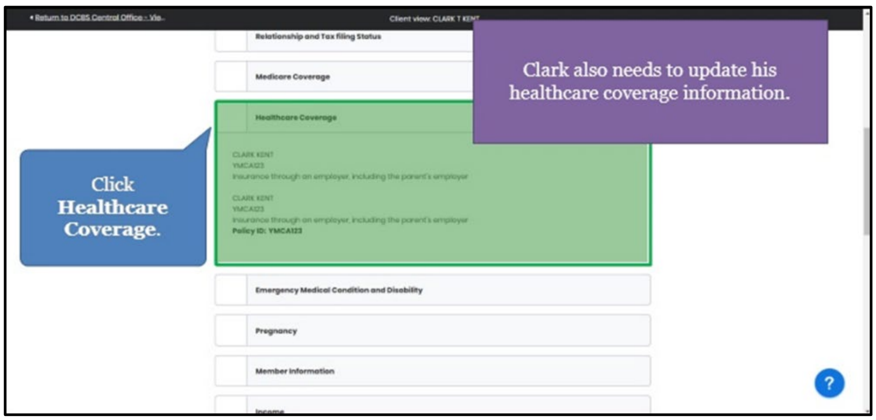

8. Select the **Individual(s)** who need their contact information updated.



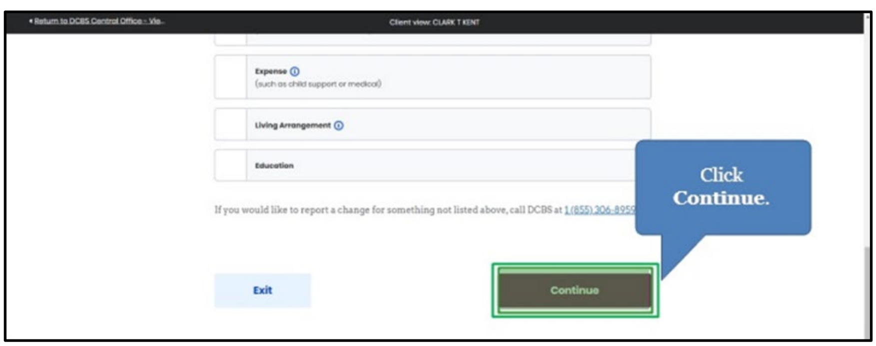
9. Select the **Household Member(s)** who need their contact information updated.




10. Click **Healthcare Coverage** to update the Individual's healthcare coverage information.

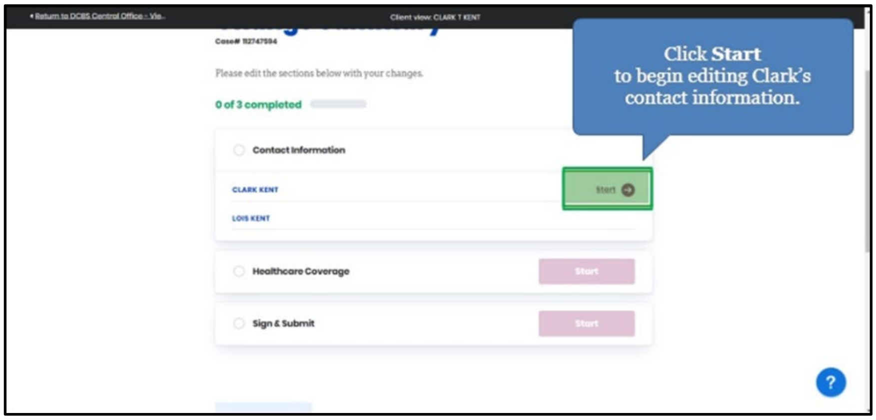



11. Click **Continue** to navigate to the **Change Summary** screen.

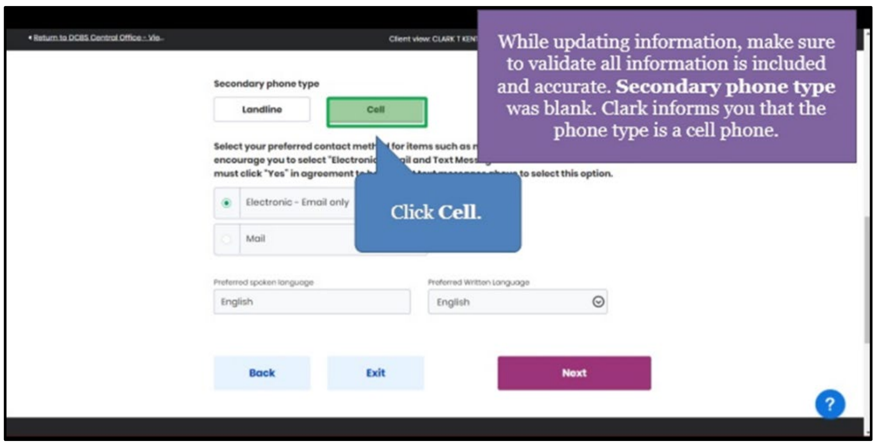


## 2.2 Reporting a Change for Resident's Contact Information

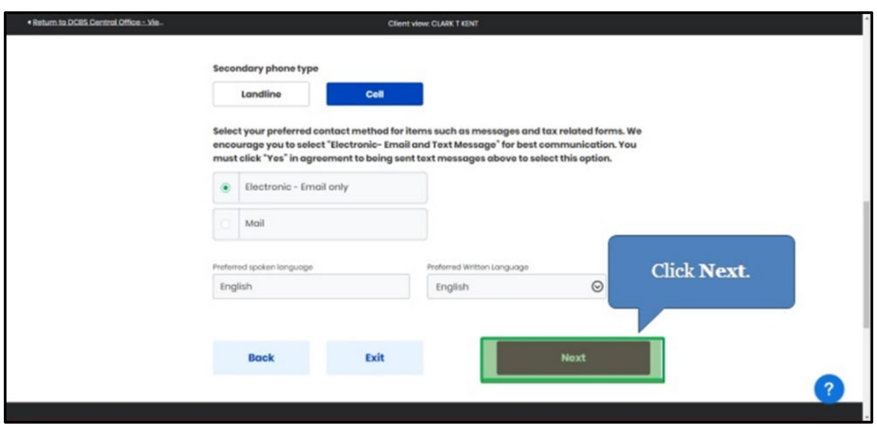
12. Click **Start** to edit the Individual's contact information.



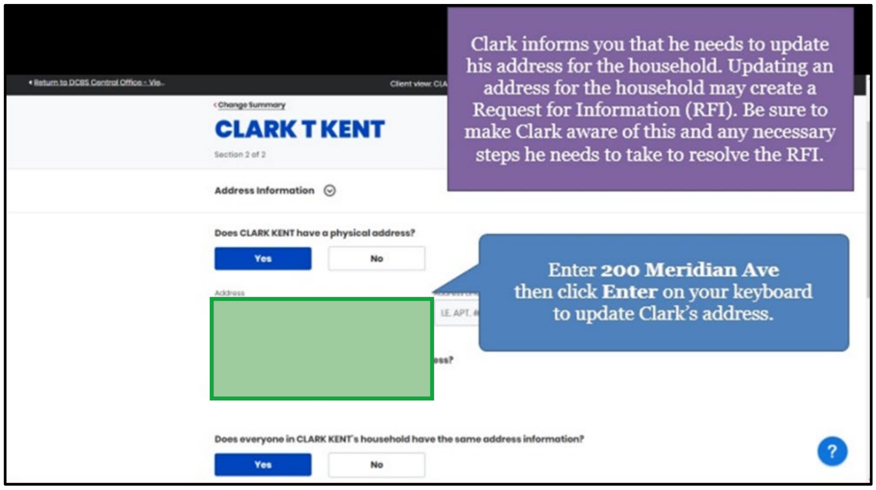

13. Click the **Cell** or **Landline box** to update the Individual's contact information.



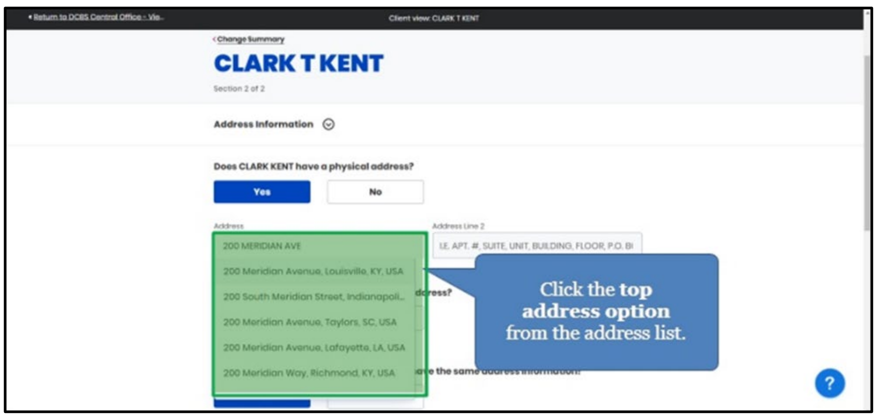

14. Click **Next** to continue updating the Individual's contact information.



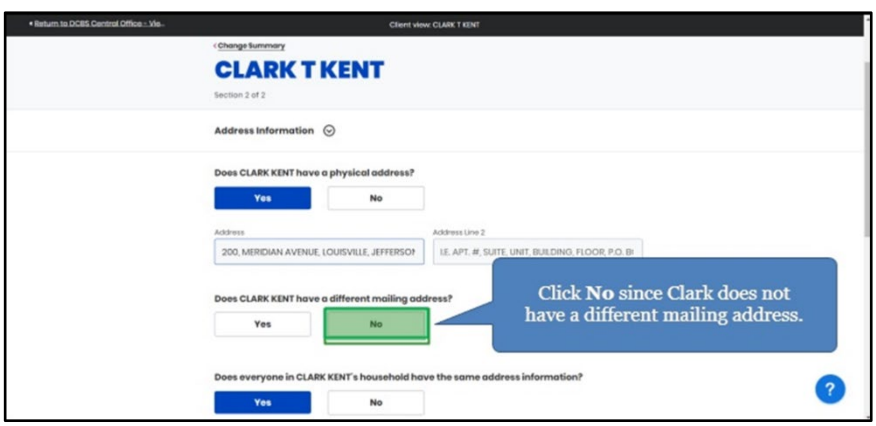
15. Enter the **Individual's Household Address**. Make the Individual aware that updating an address may create a Request for Information (RFI).



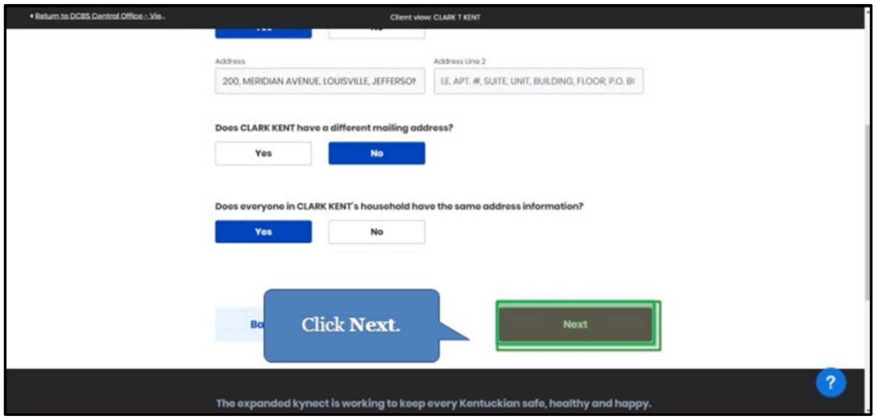

16. Select the **Individual's Address** from the drop-down.



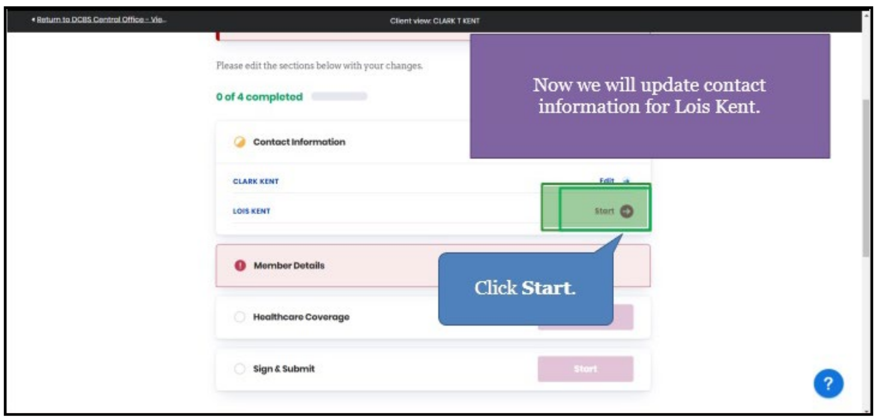

17. Click **Yes** or **No** for *Does the Individual have a different mailing address*.



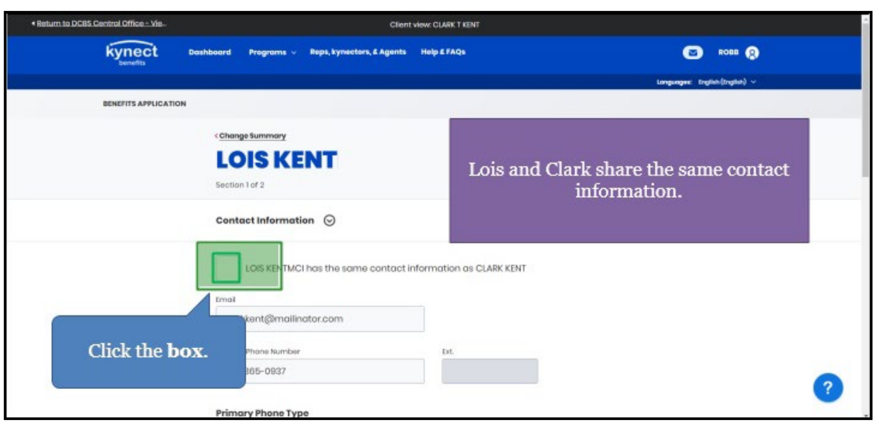
18. Click **Next** to continue updating contact information.



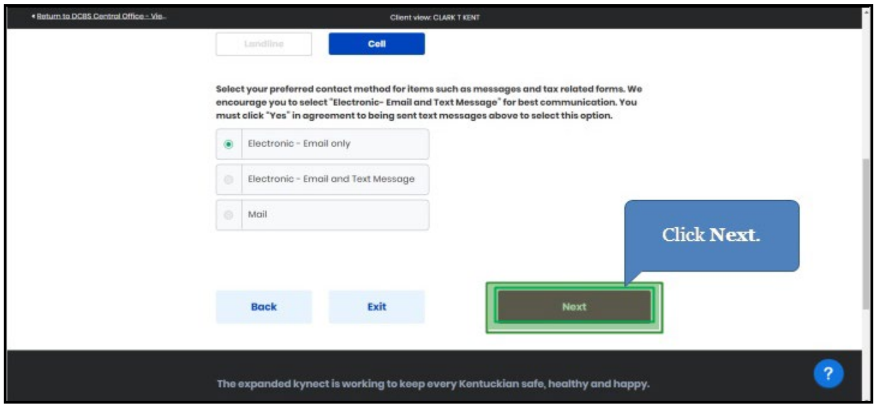

19. Click **Start** to update the Household Member(s) contact information.




20. If the Individual and Household Member(s) share the same contact information, check the **box** that says they have the same contact information.

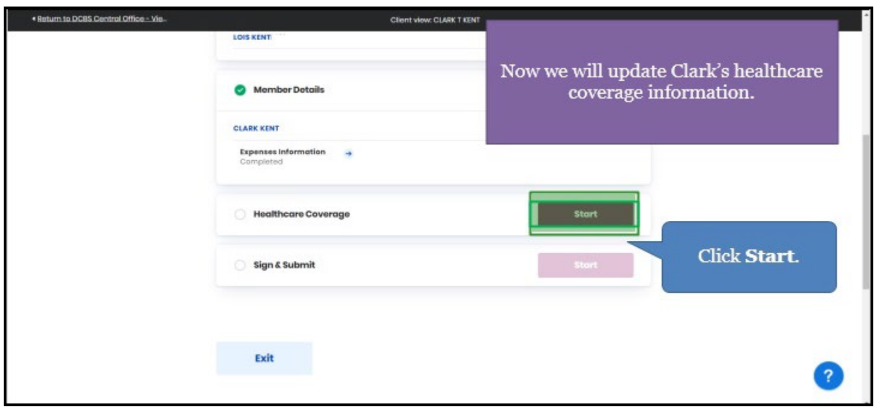


21. Click **Next** to complete the contact information update.

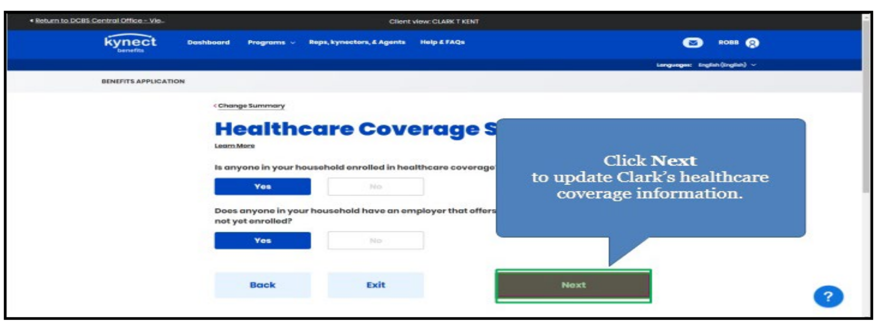



## 2.3 Reporting a Change for Resident's Health Coverage

22. Click **Start** to update the Individual's Healthcare Coverage.

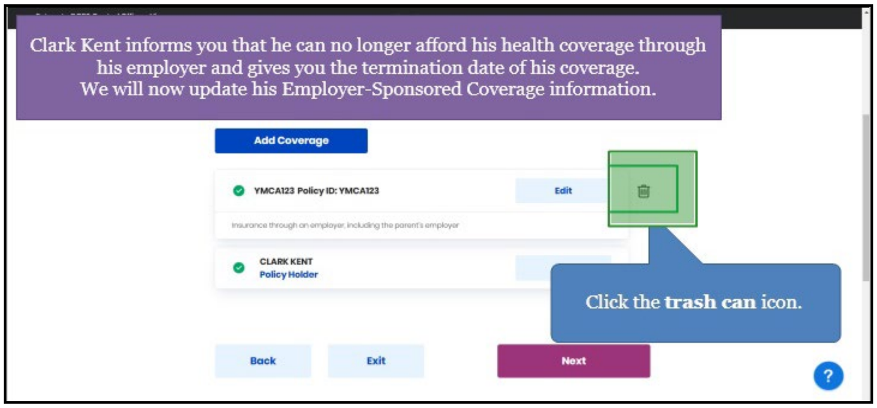



23. Click **Next** to update the Individual's healthcare coverage information.

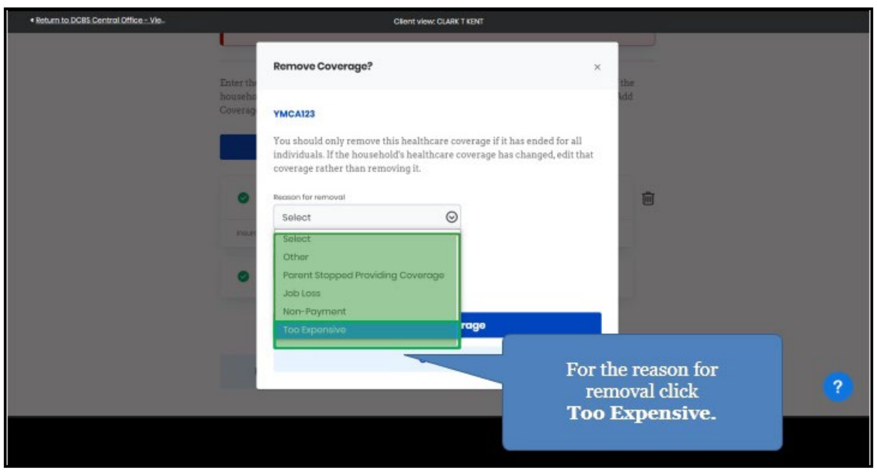


## 2.4 Reporting a Change with loss of Employer-Sponsored Insurance (ESI)

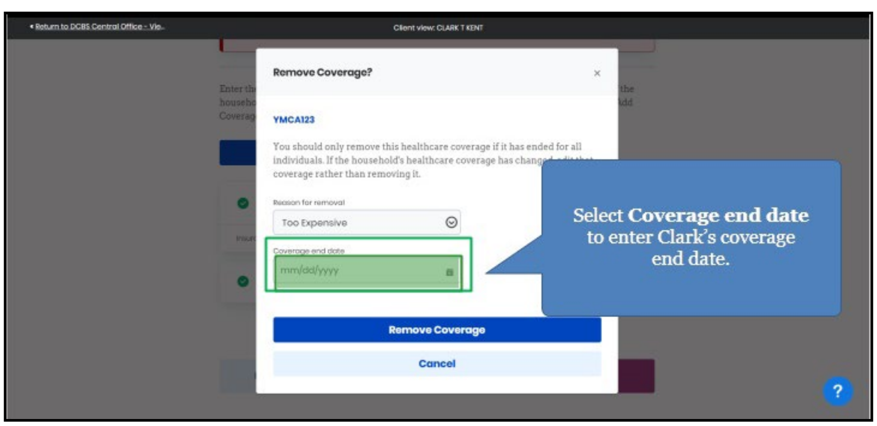
24. Click the **trash can** icon next to the Employer-Sponsored Insurance plan being terminated.



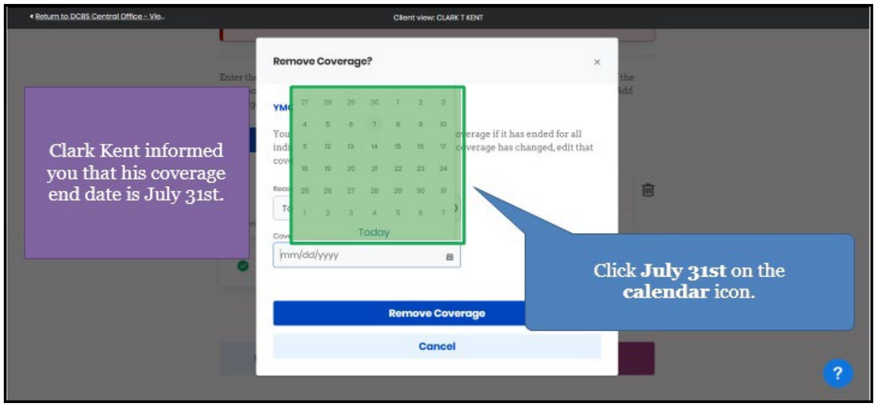

25. Select the **Reason for removal** from the drop-down.



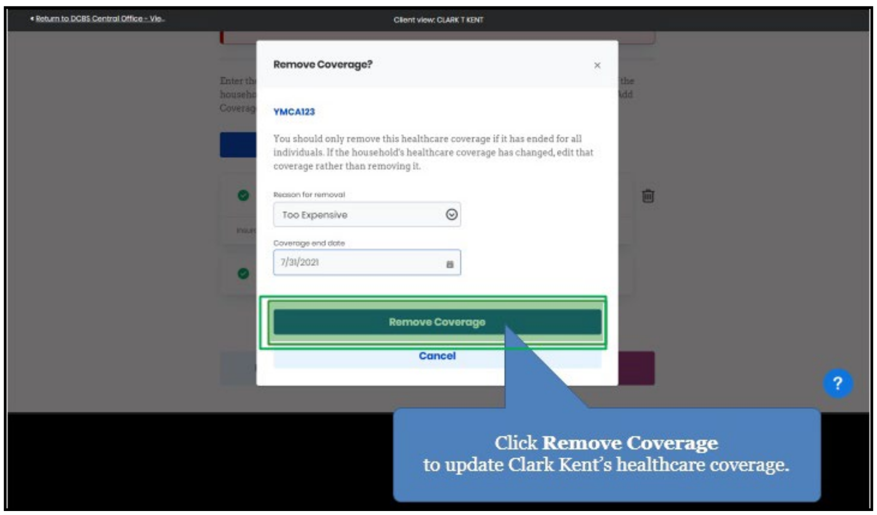

26. Enter the **Individual's Coverage end date**.



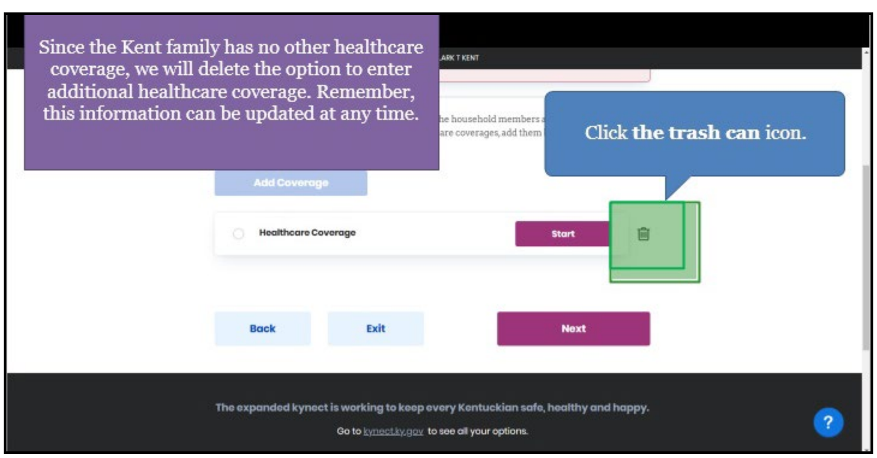
27. Select the appropriate **Year**, **Month**, and **Day** for the coverage end date from the calendar.



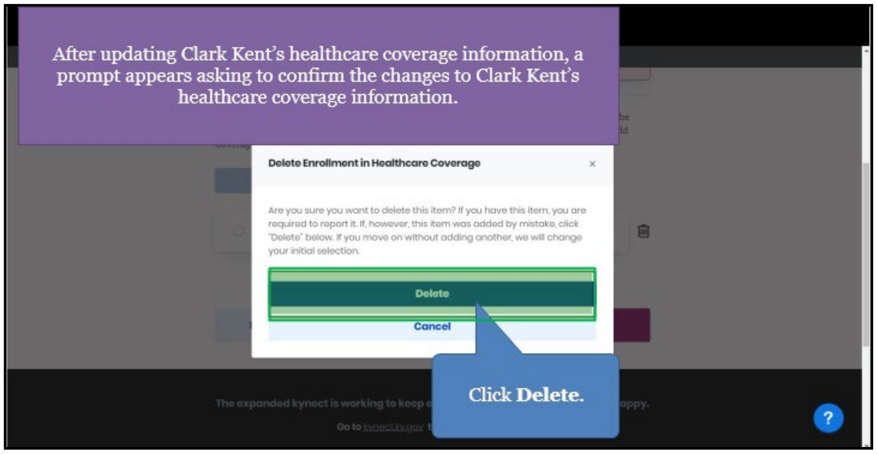

28. Click **Remove Coverage** to update the Individual's health coverage.



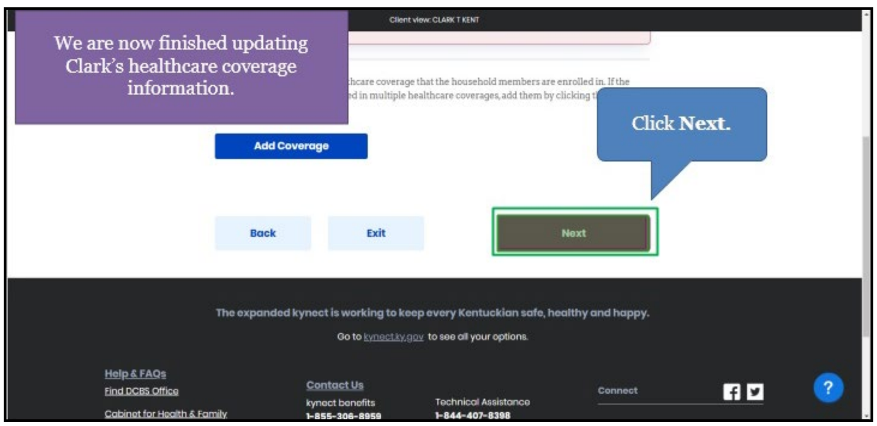

29. If the Individual has no other health coverage, delete the option to enter additional healthcare coverage by clicking the **trash can** icon.



30. A prompt will appear asking to confirm the changes to the Individual's healthcare coverage information. Click **Delete** to confirm.

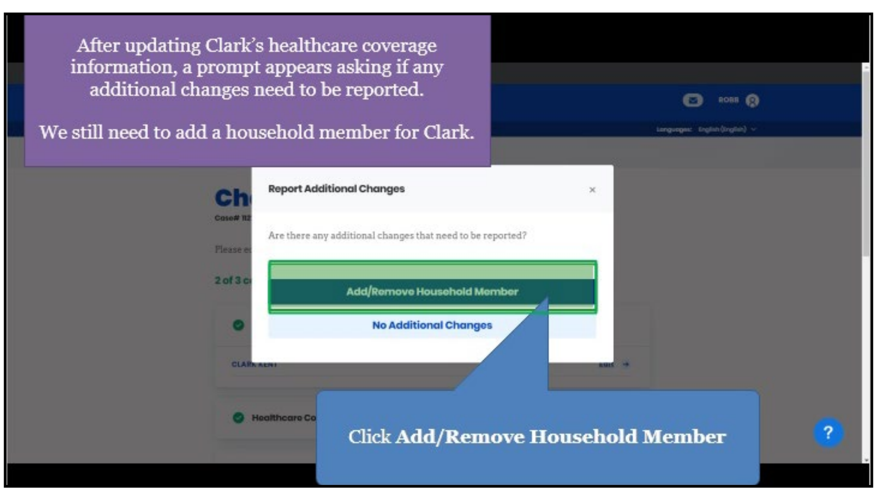



31. Click **Next** after the healthcare coverage information has been updated.

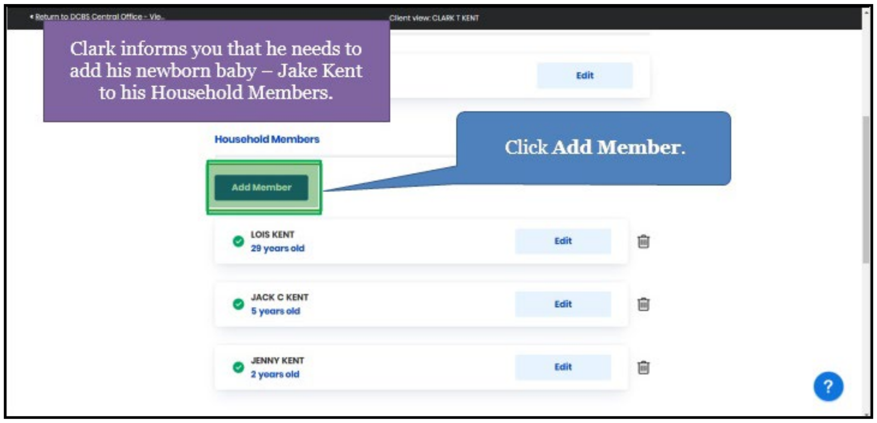



## 2.5 Reporting a Change to add a Resident to a case

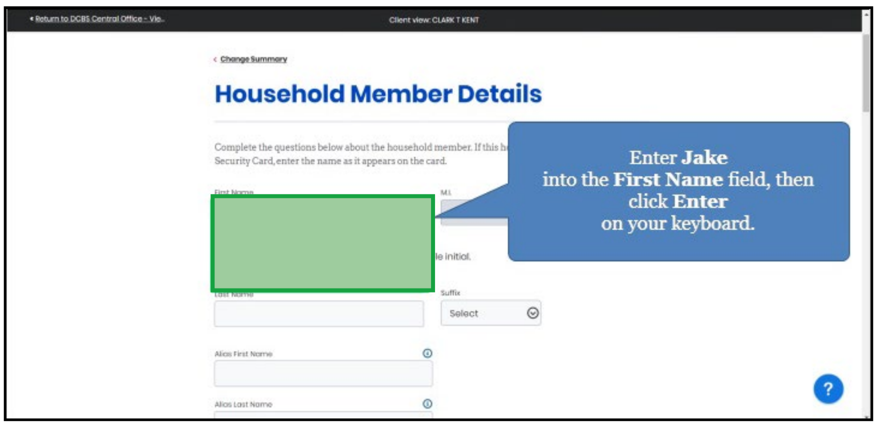
32. Click **Add/Remove Household Member** when the **Report Additional Changes** prompt displays.



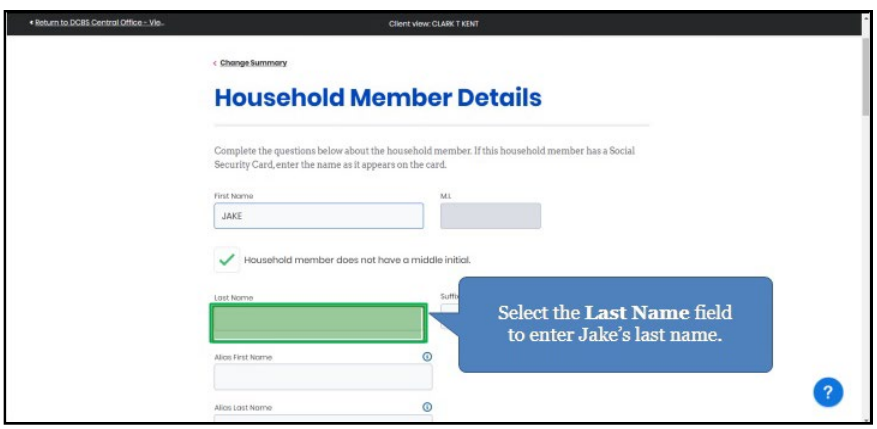
33. Click Add Member.



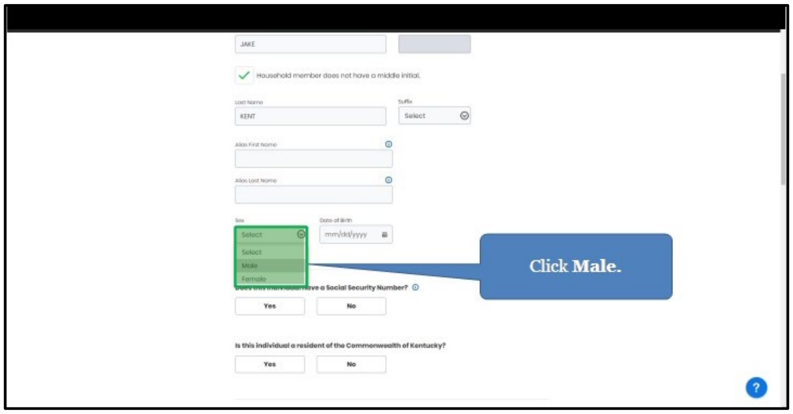

34. Enter the Household Member's **First Name** into the field.



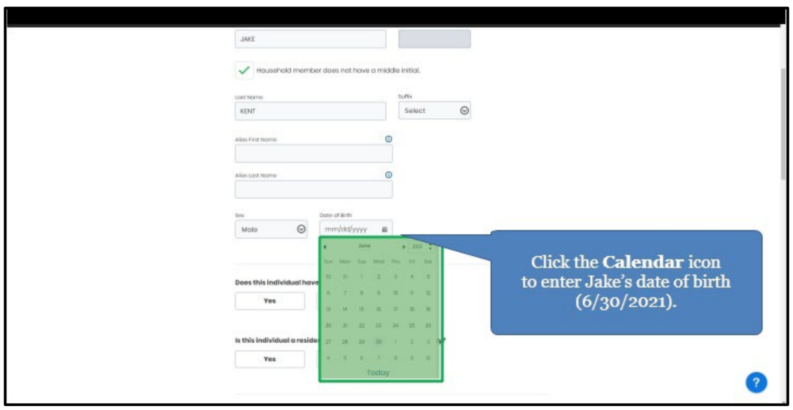

35. Enter the Household Member's **Last Name** into the field.



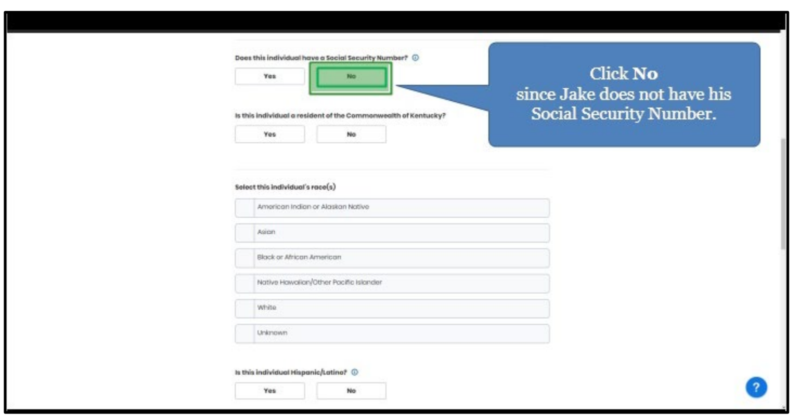
36. Select the Household Member's **Sex** from the drop-down.




37. Select the appropriate **Year**, **Month**, and **Day** for the Household Member's Date of Birth from the calendar.



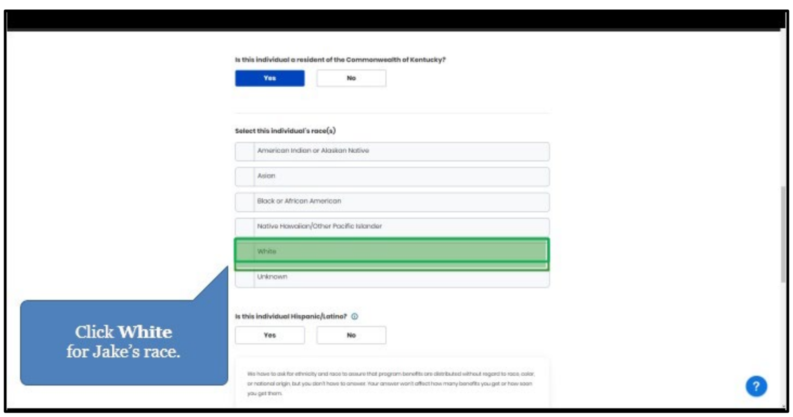

38. Click **Yes** or **No** for *Does this Individual have a Social Security Number*.



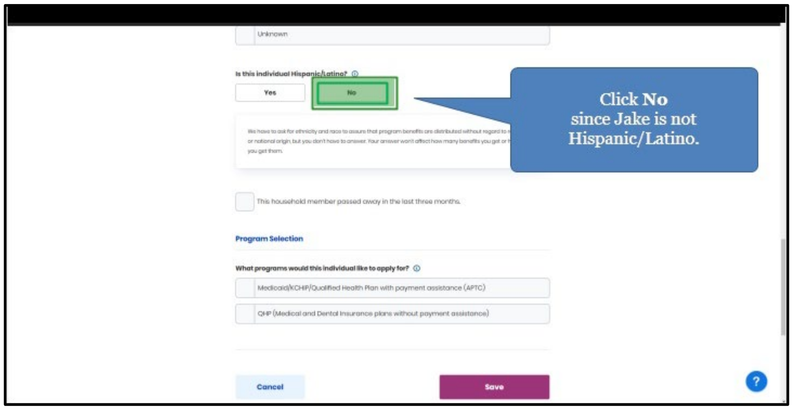
39. Check **why the Individual does not have a Social Security Number**.


40. Click **Yes** or **No** for *Is this Individual a Resident of the Commonwealth of Kentucky?*


41. Select the Household Member's **Race.**

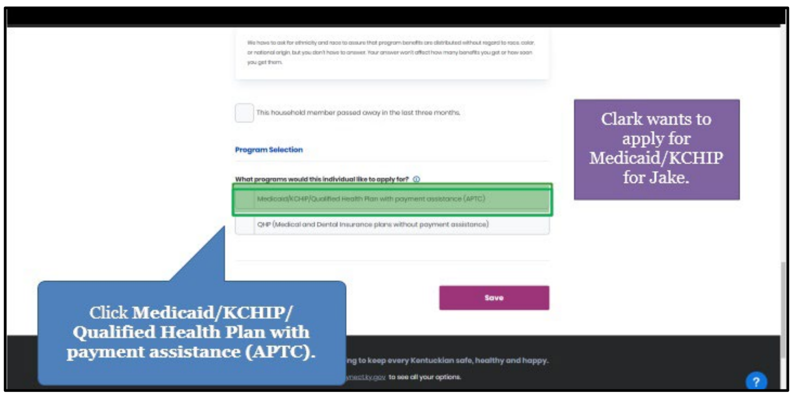


42. Click **Yes** or **No** for *Is this Individual Hispanic/Latino*

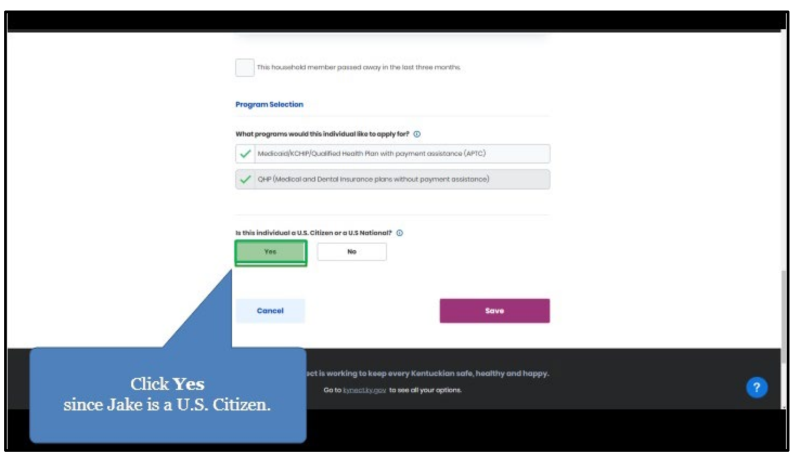



## 2.6 Applying for Medicaid/KCHIP

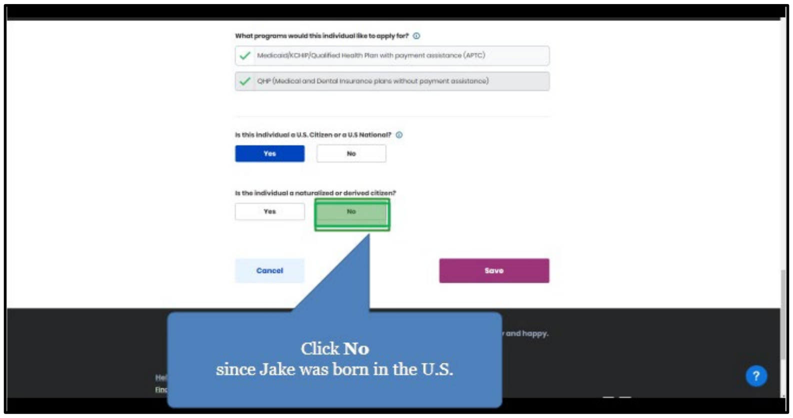
43. If the Individual wants to apply for Medicaid/KCHIP, check the **box** for Medicaid/KCHIP.



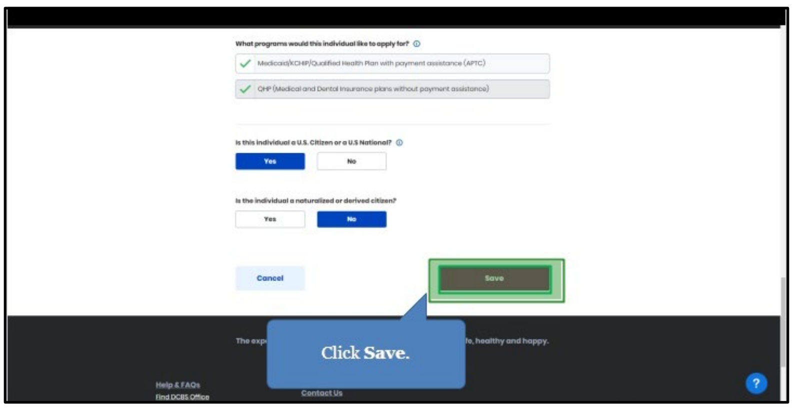

44. Click **Yes** or **No** for *Is this Individual a U.S. Citizen or U.S. National*?



45. Click **Yes** or **No** for *Is this Individual a naturalized or derived citizen?*

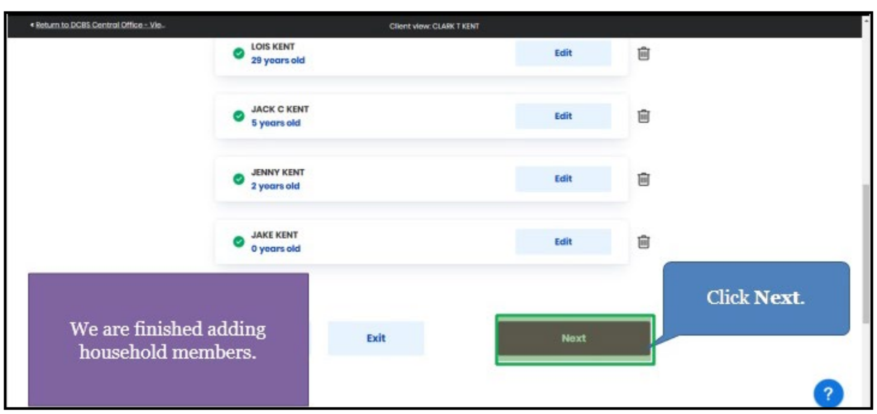



46. Click **Save** to confirm the selection.

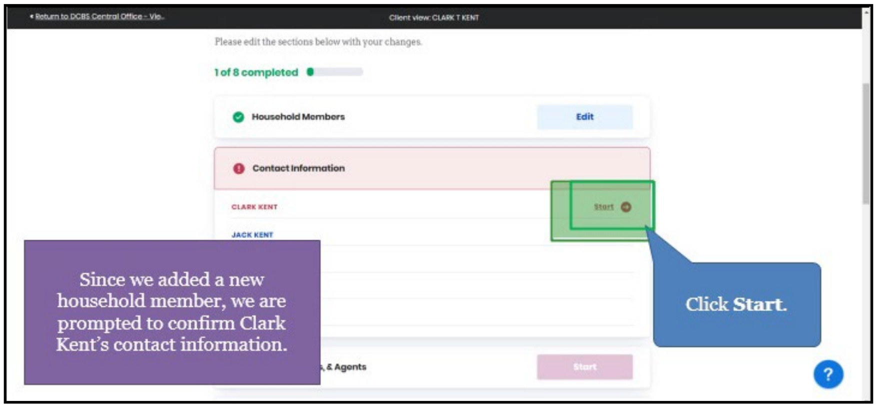



## 2.7 Confirming and Saving Household Members Information

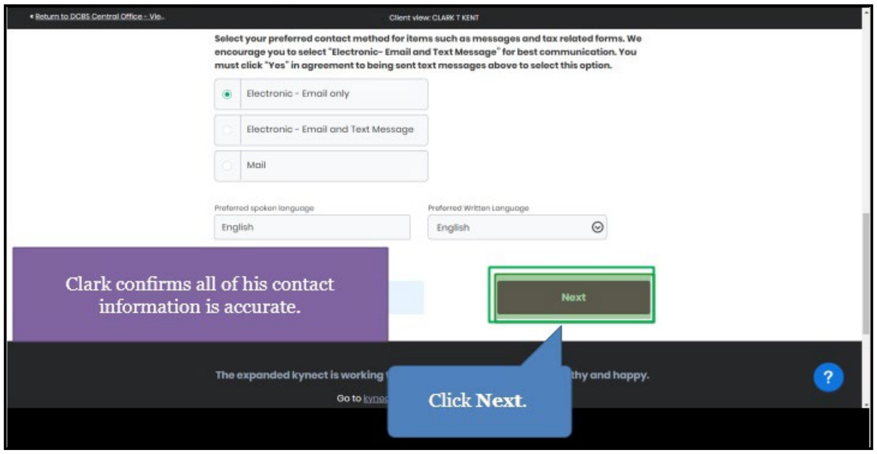
47. Click **Next** once all Household Members have been added.



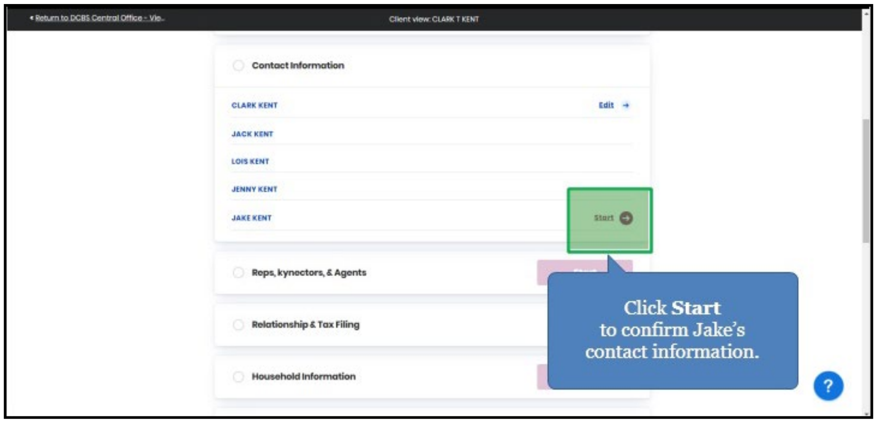
48. Click **Start** to confirm the Individual's contact information.



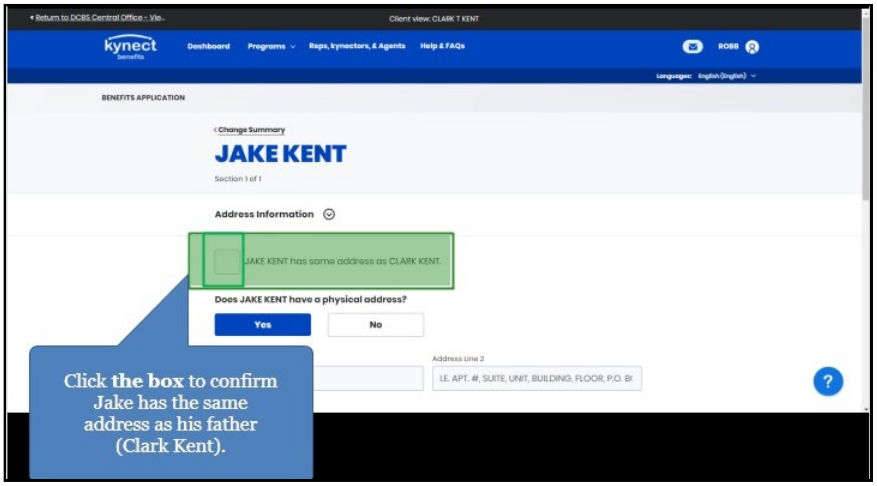

49. Click **Next** after confirming the Individual's information is accurate.



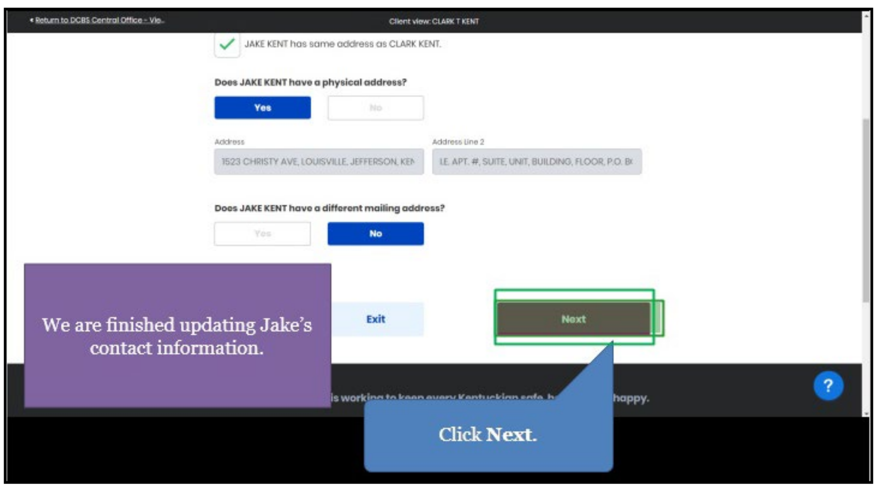

50. Click **Start** to confirm that the new Household Member's information is correct.



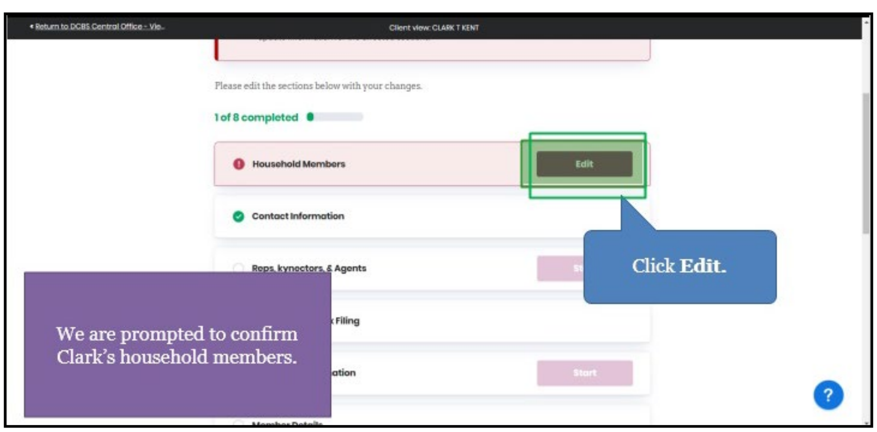
51. Check the **box** to confirm that the Individual and Household Member have the same address.



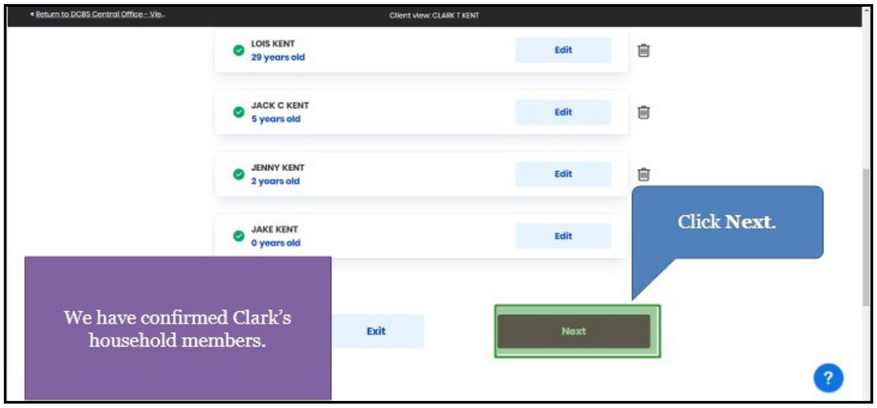

52. Click **Next** once the Household Member's information is updated.




53. Click **Edit** to continue to confirm the Household Members.

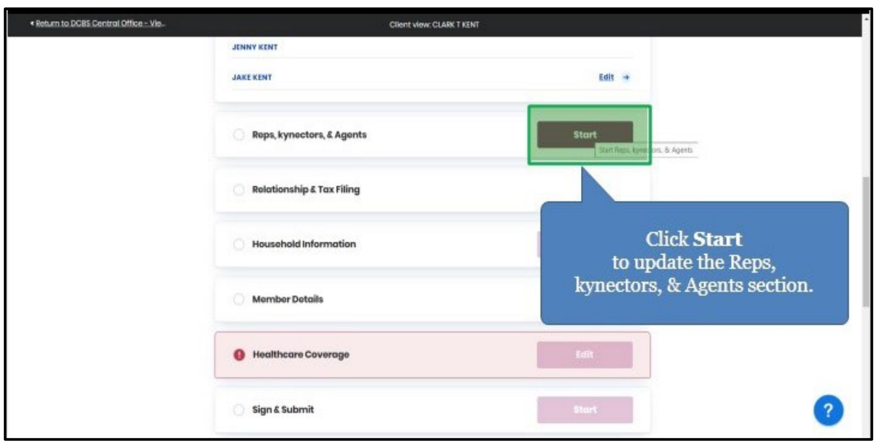


54. Click **Next** once all Household Members' information has been confirmed.

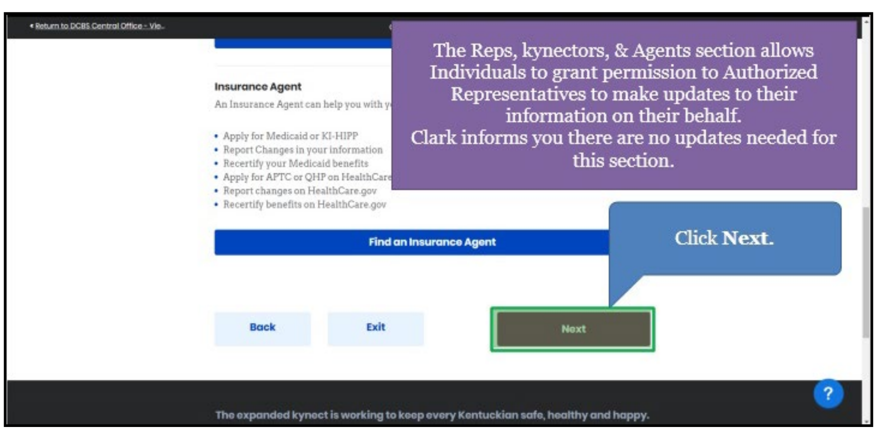



## 2.8 Reporting a Change to update the Authorized Representative, kynector, or Agent on a Resident's case

55. Click **Start** to navigate to the **Reps, kynectors, & Agents** screen.

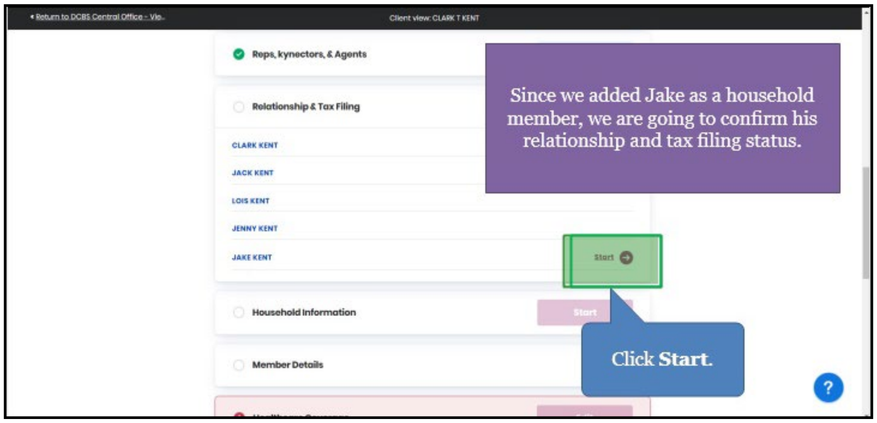



56. Click **Next** to continue with no updates.

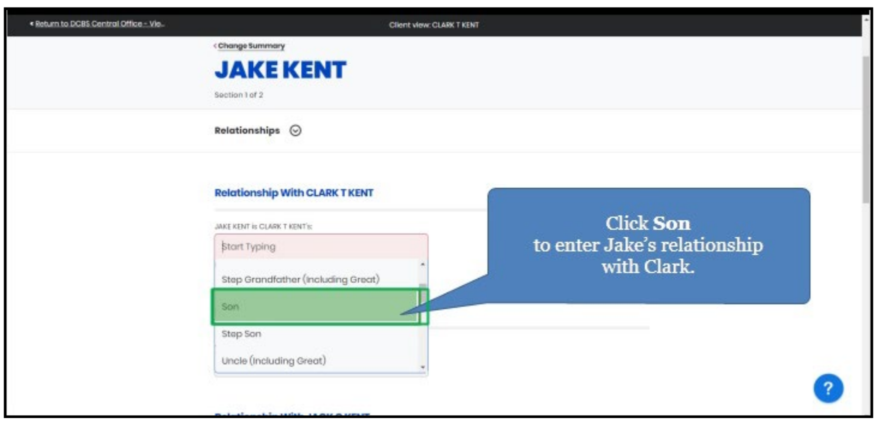


## 2.9 Confirming Relationships and Tax Filing Status

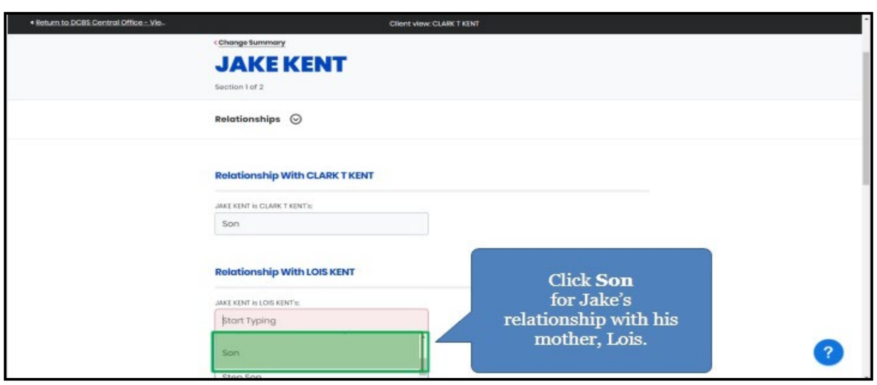
57. Click **Start** to confirm the new Household Member's relationship to the Individual and their tax filing status.



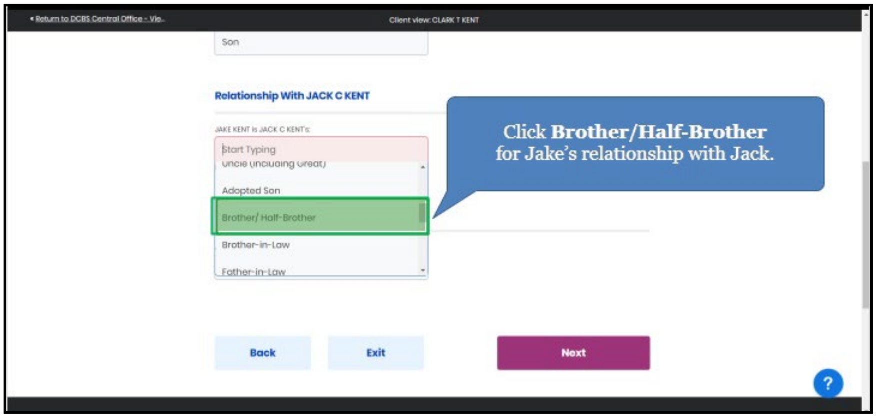

58. Select the primary Individual's **Relationship** to the new Household Member from the drop-down.



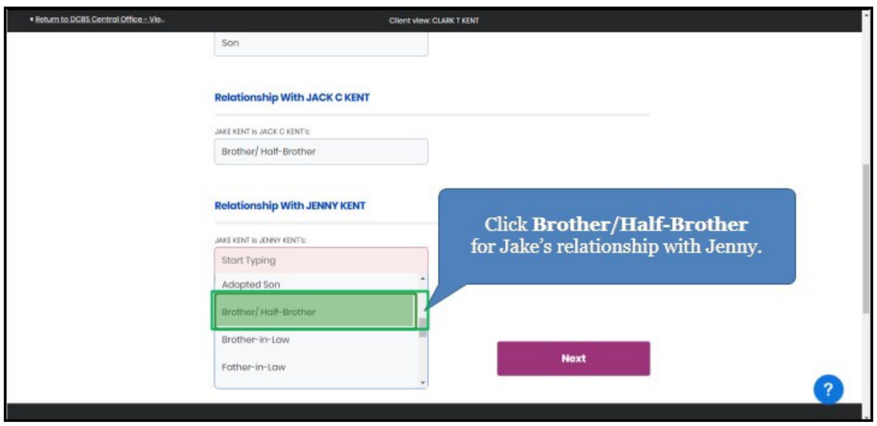

59. Select the Household Member(s) **Relationship** to the new Household Member from the drop-down.



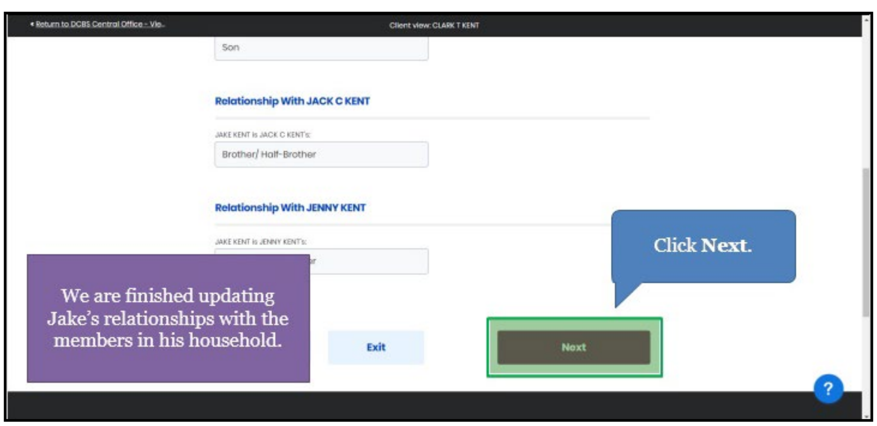
60. Select the Household Member(s) **Relationship** to the new Household Member from the drop-down.



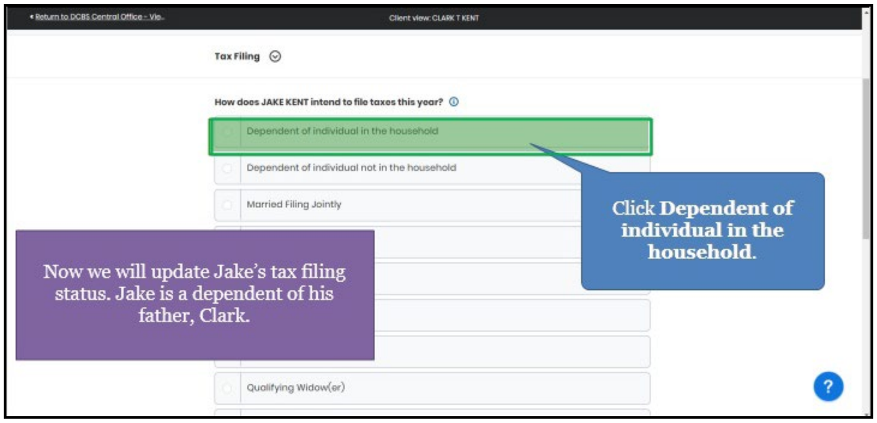

61. Select the Household Member(s) **Relationship** to the new Household Member from the drop-down.



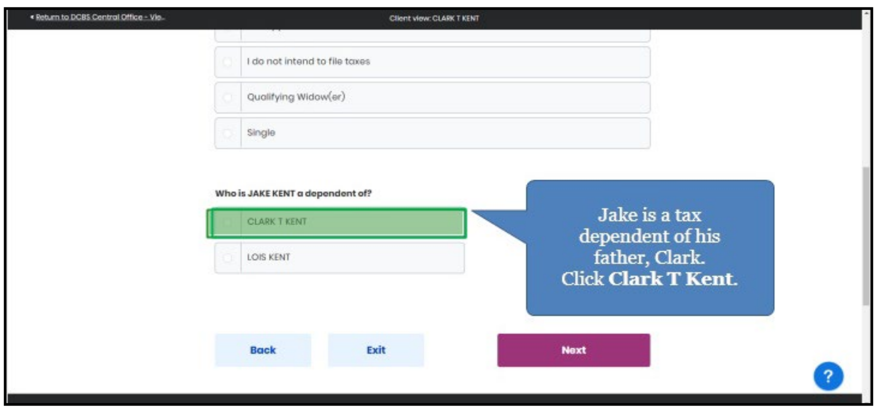

62. Once all household relationships for the new Household Member are updated, click **Next** to navigate to the **Tax Filing** screen.



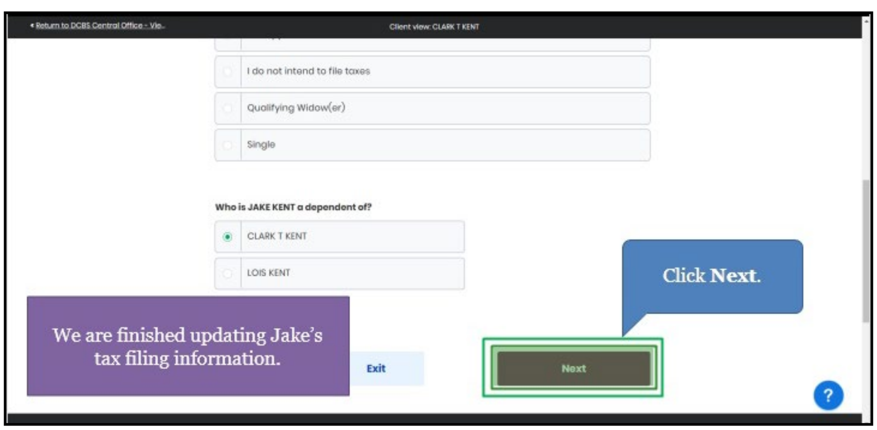
63. Click **Dependent of individual in the household** to update the tax filing status of the new Household Member.




64. Select **who the Household Member is a dependent of**.

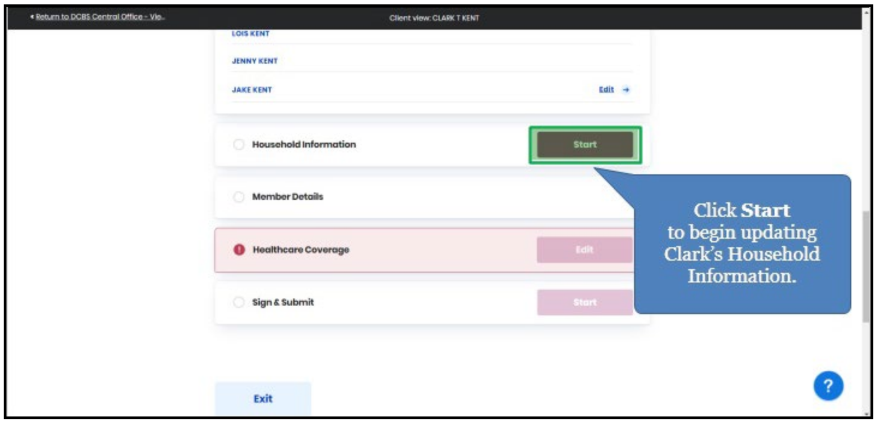



65. Click **Next**.

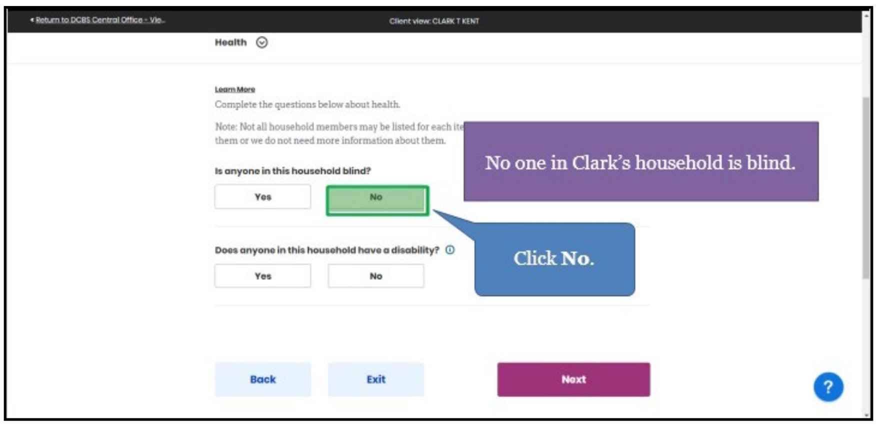


## 2.10 Updating Household Information

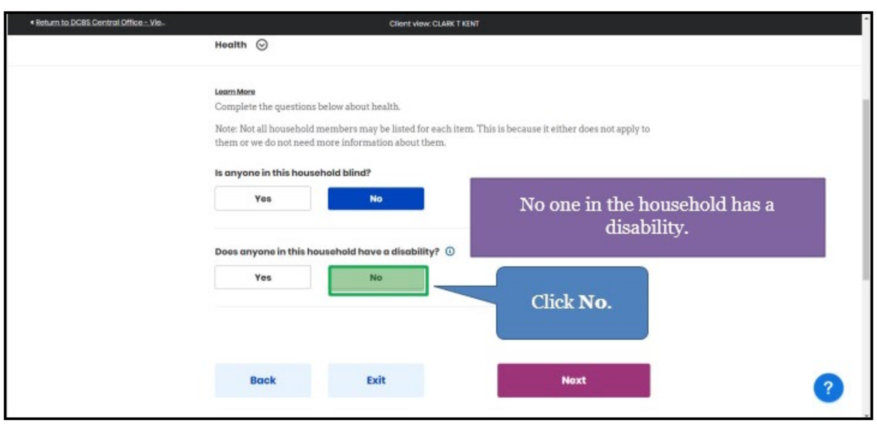
66. Click **Start** to update the Individual's household information.



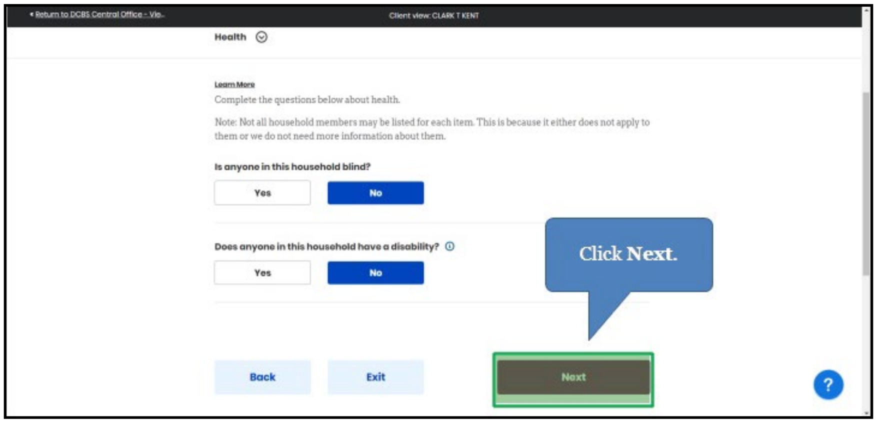

67. Click **Yes** or **No** for *Is anyone in the household blind*.



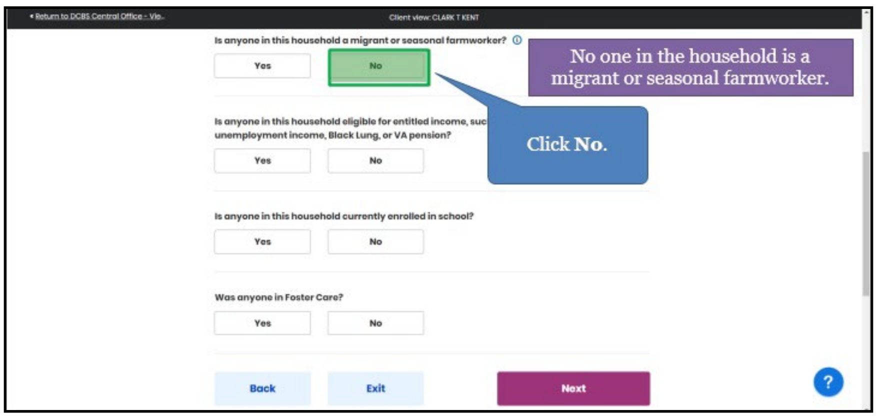

68. Click **Yes** or **No** for *Does anyone in the household have a disability*.



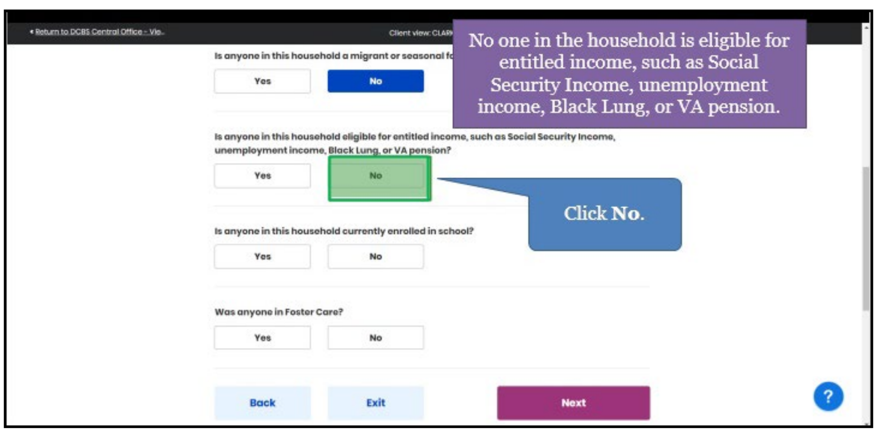
69. Click **Next** to continue.



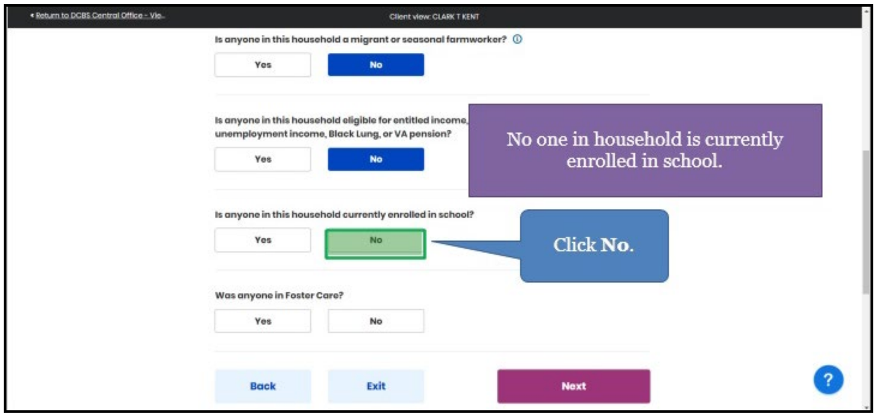

70. Click **Yes** or **No** for *Is anyone in the household a migrant or seasonal farmworker*.



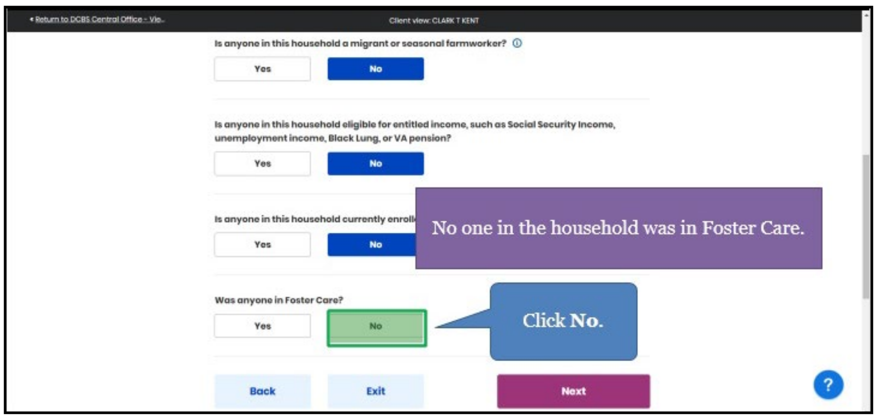

71. Click **Yes** or **No** for *Is anyone in the household eligible for entitled income*.



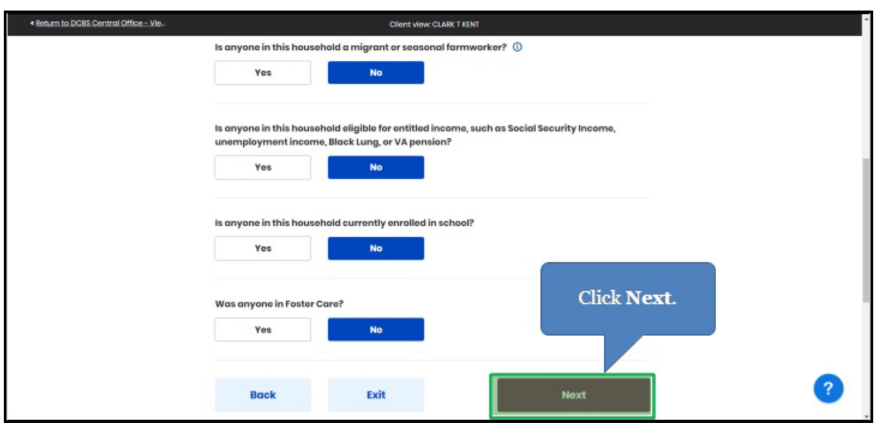
72. Click **Yes** or **No** for *Is anyone in the household currently enrolled in school*.



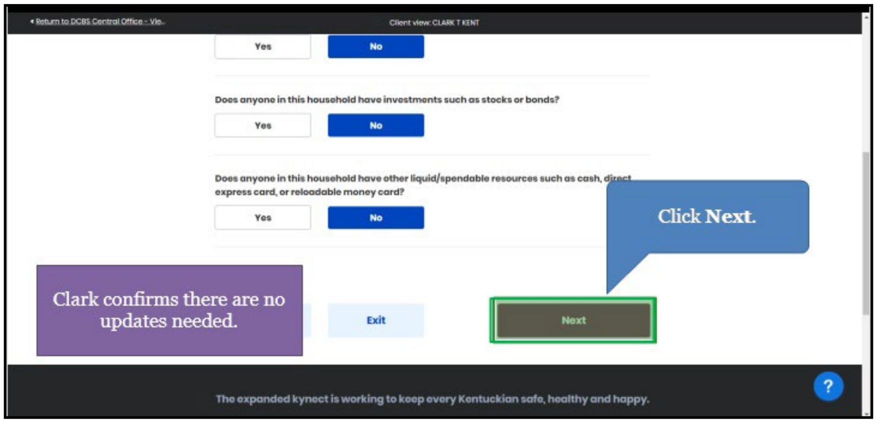

73. Click **Yes** or **No** for *Is anyone in the household in Foster Care*.



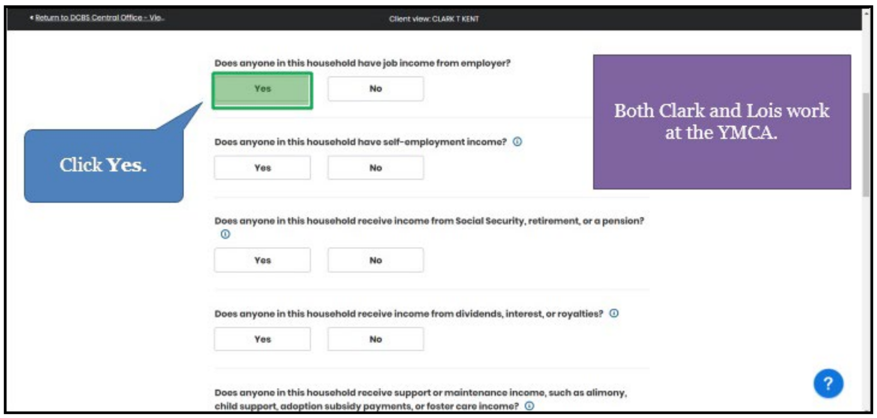

74. Click **Next** to continue.



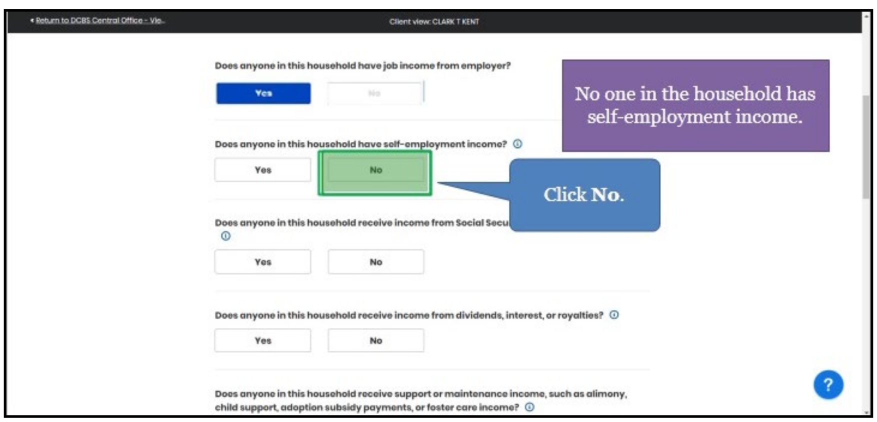
75. Click **Next** to continue with no updates.



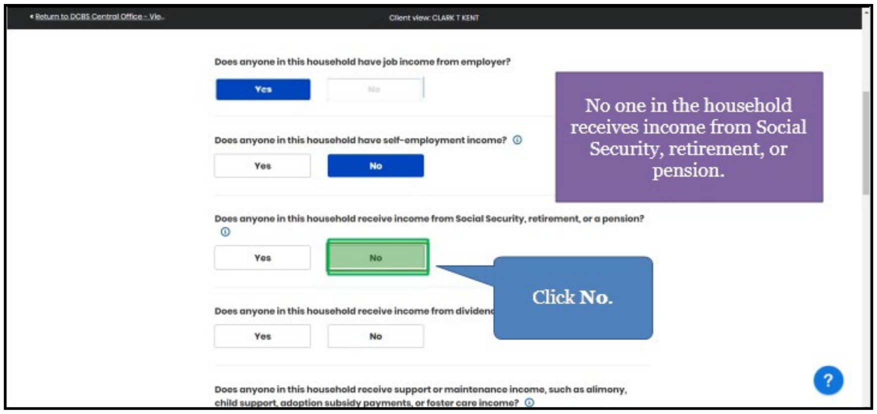

76. Click **Yes** or **No** for *Does anyone in this household have job income from an employer*.



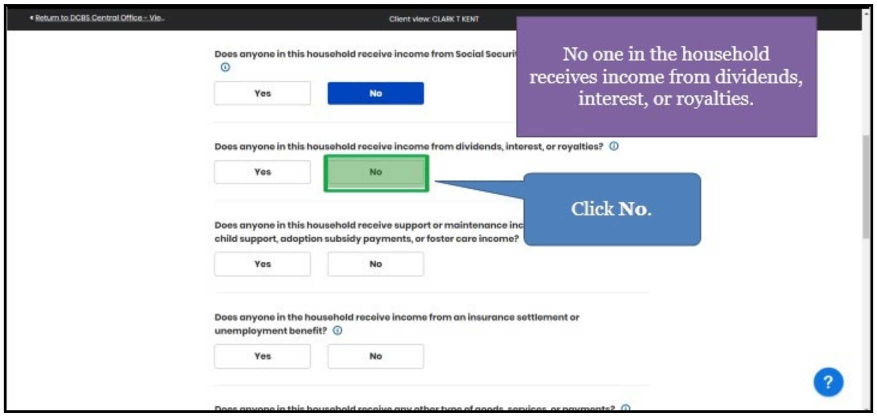

77. Click **Yes** or **No** for *Does anyone in the household have self-employment income*.



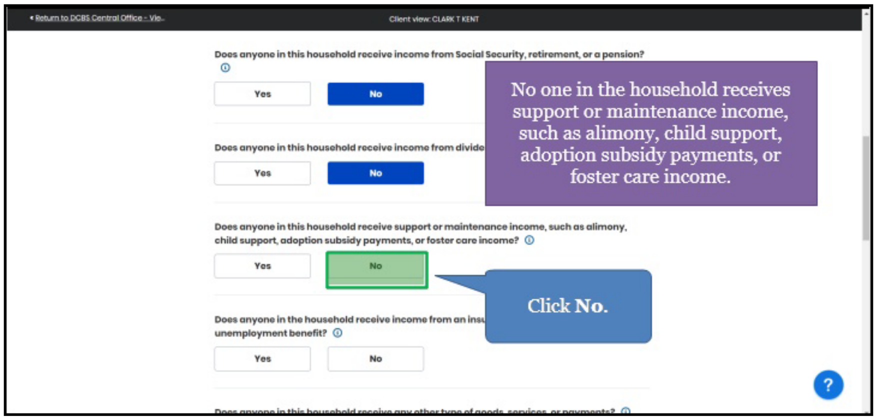
78. Click **Yes** or **No** for *Does anyone in the household receive income from Social Security, retirement, or pension*.



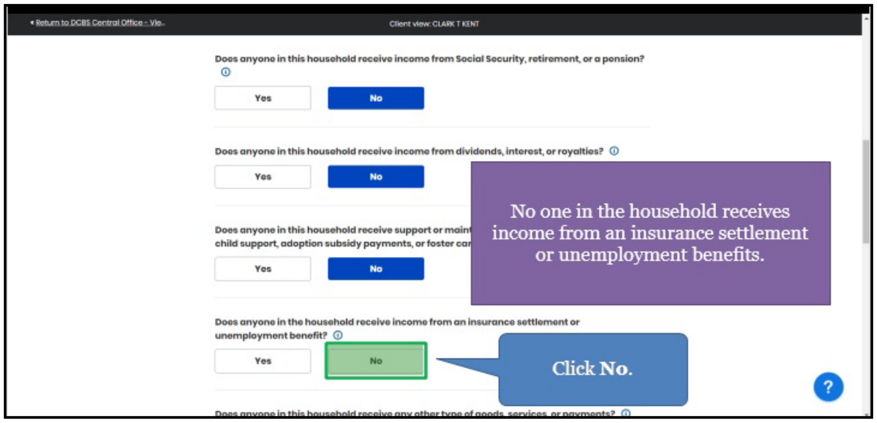

79. Click **Yes** or **No** for *Does anyone in the household receive income from dividends, interest, or royalties*.



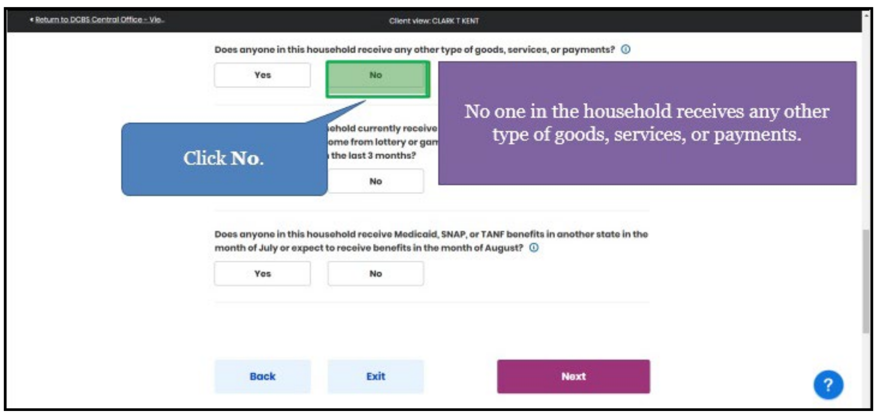

80. Click **Yes** or **No** for *Does anyone in the household receive support or maintenance income.*



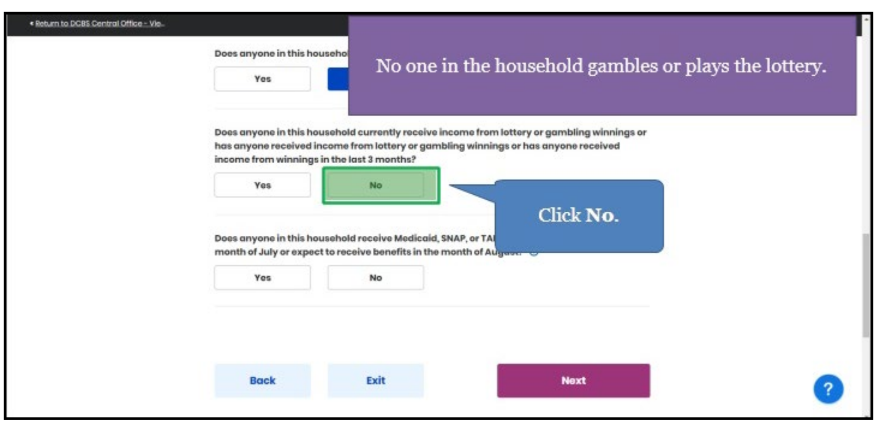
81. Click **Yes** or **No** for *Does anyone in the household receive income from an insurance settlement or unemployment benefits*.



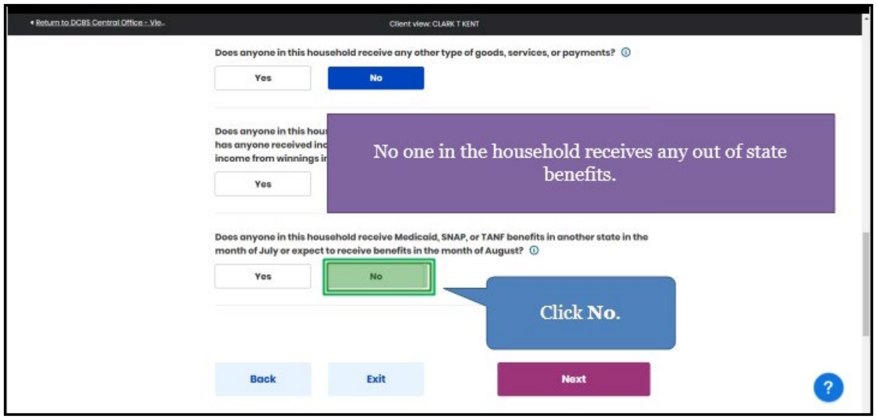

82. Click **Yes** or **No** for *Does anyone in the household receive any other type of goods, services, or payments.*



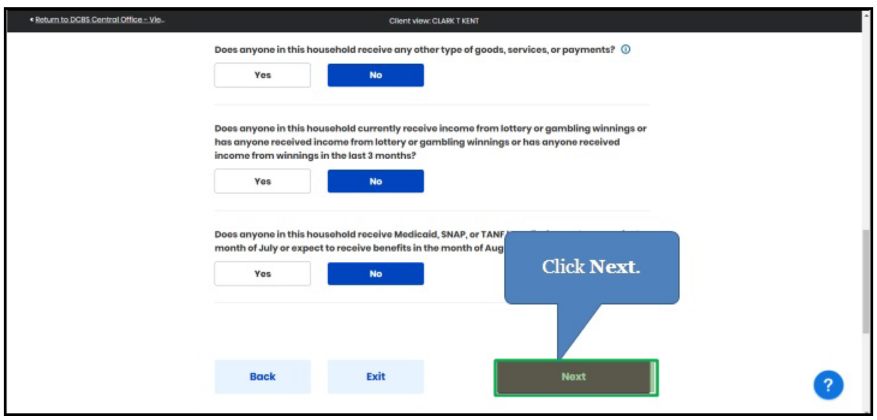

83. Click **Yes** or **No** for *Does anyone in the household gamble or play the lottery*.



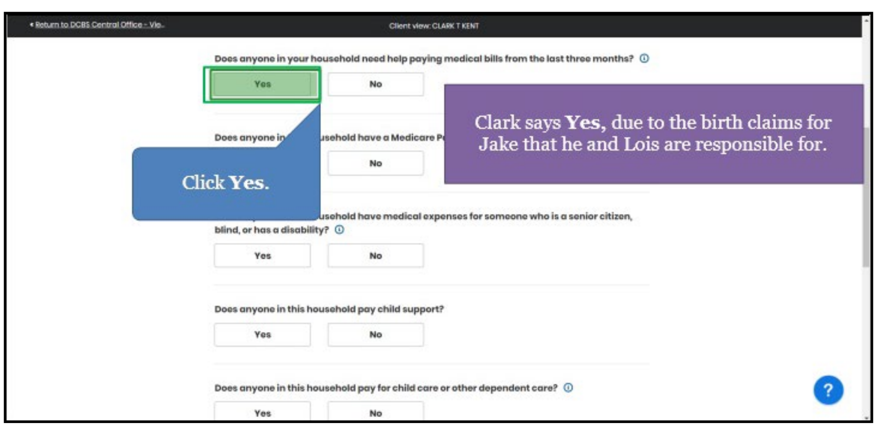
84. Click **Yes** or **No** for *Does anyone in the household receive or expect to receive Medicaid, SNAP, or TANF benefits in another state*.




85. Click **Next** to continue.

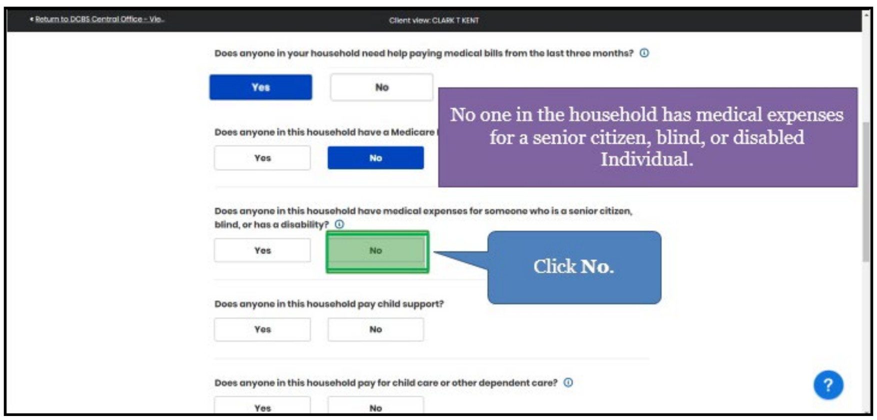



86. Click **Yes** or **No** for *Does anyone in hour household need help paying medical bills from the last three months*.

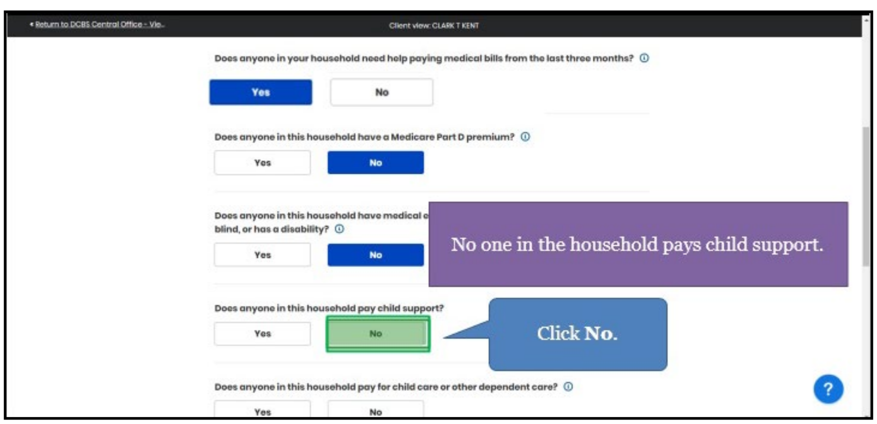


87. Click **Yes** or **No** for *Does anyone in the household have Medicare Part D Premium*.

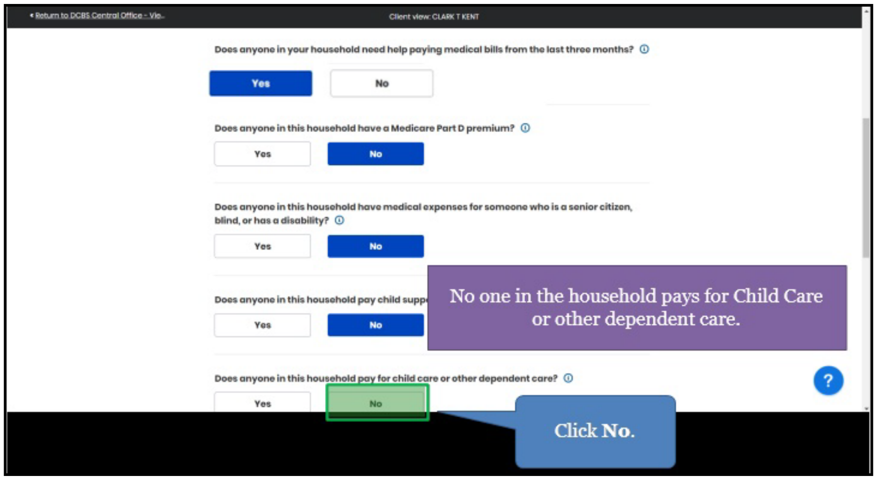

88. Click **Yes** or **No** for *Does anyone in the household have medical expenses for a senior citizen, blind, or disabled Individual*.



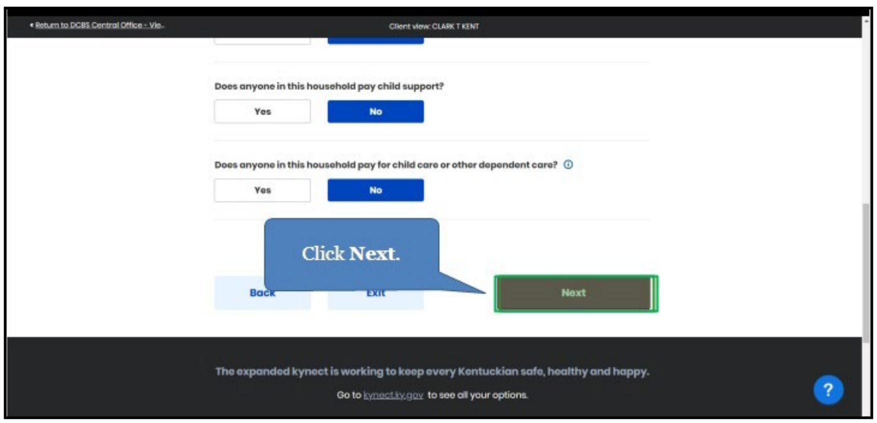

89. Click **Yes** or **No** for *Does anyone in the household pay child support.*



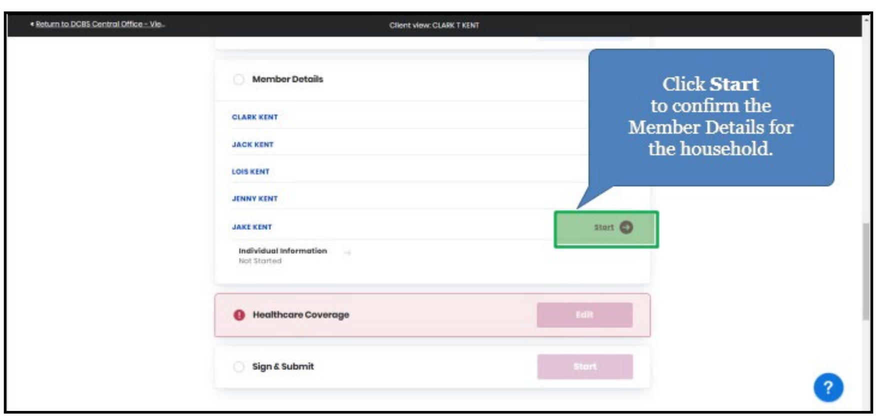
90. Click **Yes** or **No** for *Does anyone in the household pay for child care or other dependent care.*



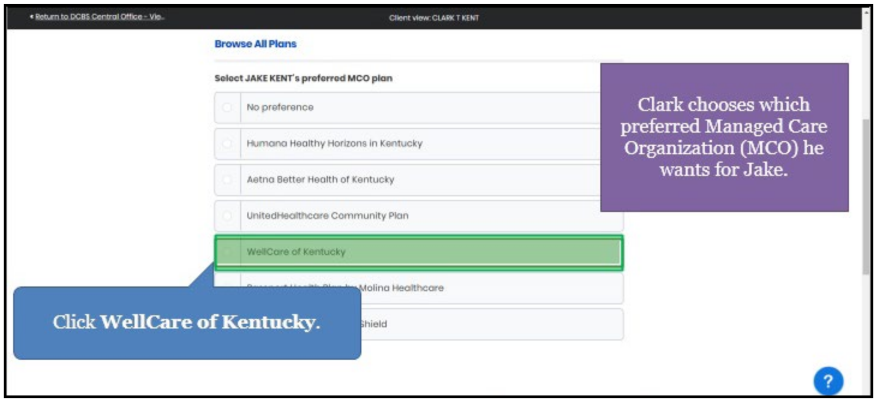

91. Click **Next** to continue.



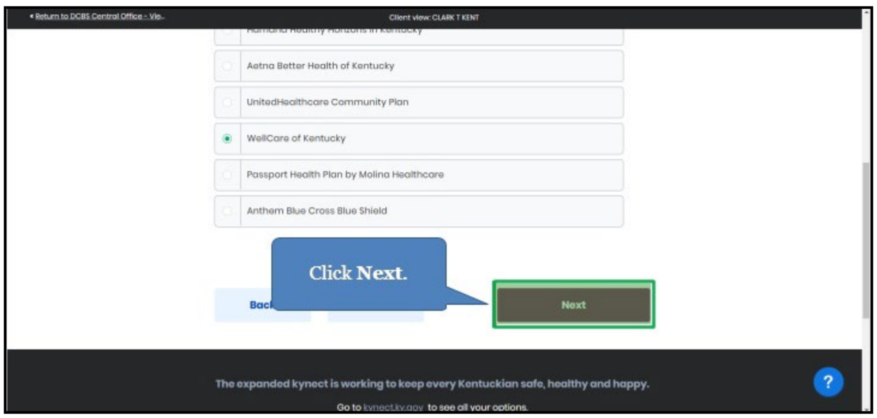

92. Click **Start** to confirm the Member Details for the household.



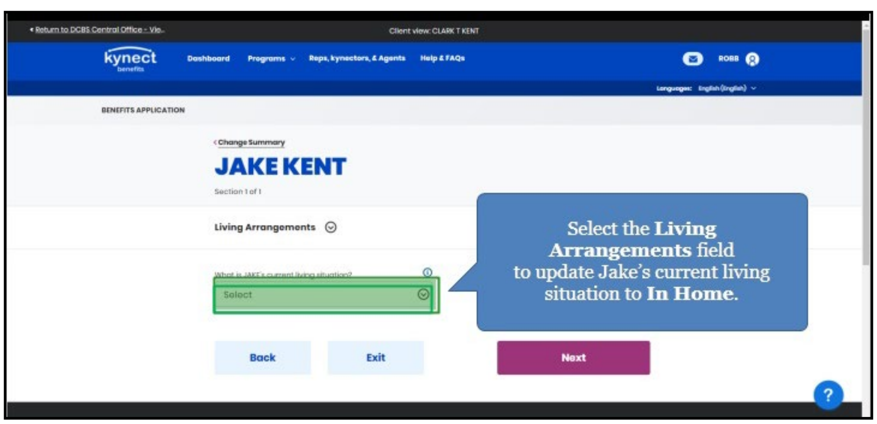
93. Check the **box** to choose the new Household Member's preferred Managed Care Organization (MCO) plan.



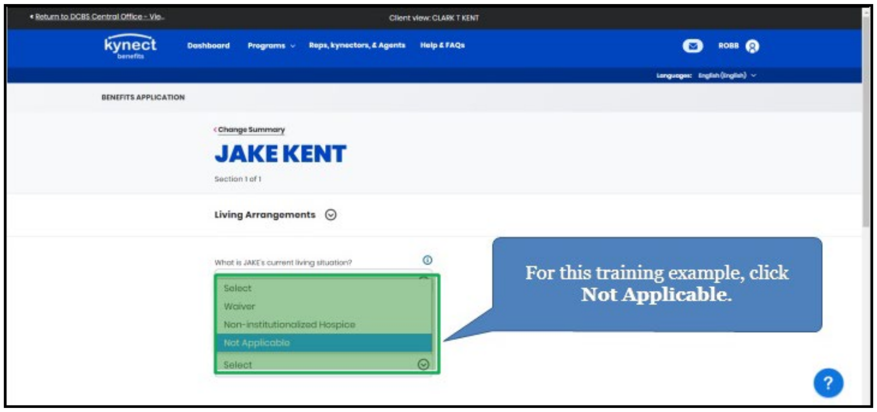

94. Click **Next** to continue.



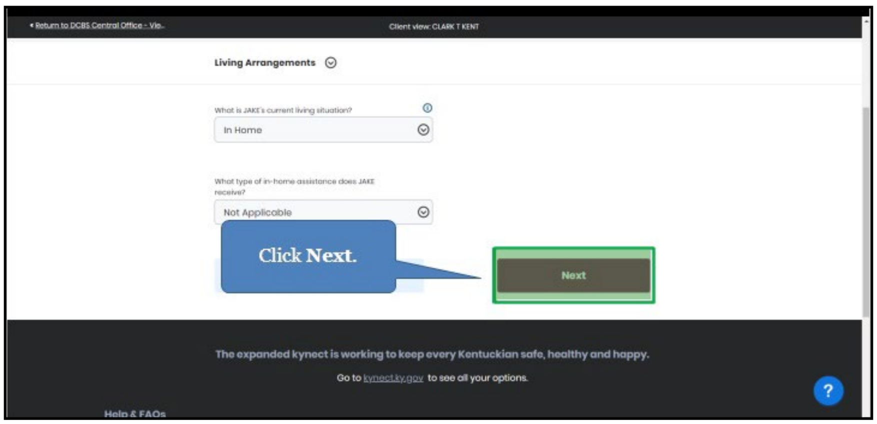

95. Select the **Living Arrangements** field to update the new Household Member's current living situation.



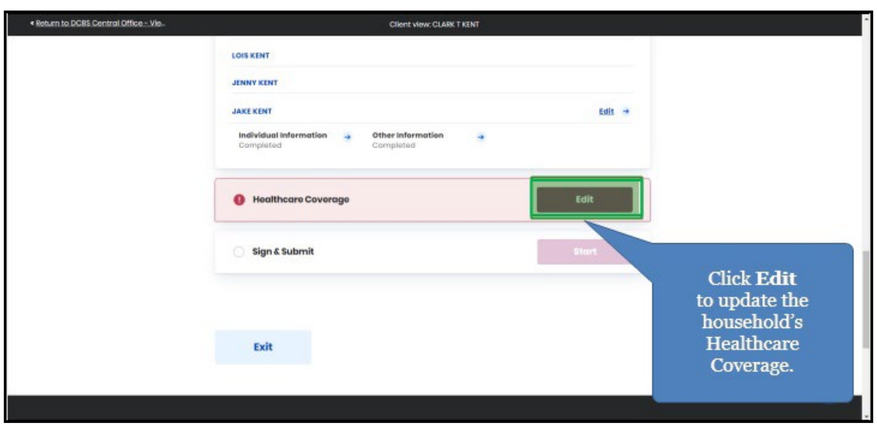
96. Select the appropriate in-home assistance from the drop-down.



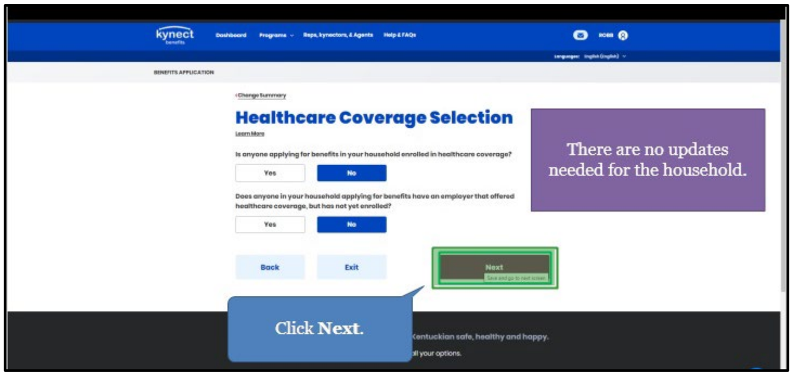

97. Click **Next** to continue.



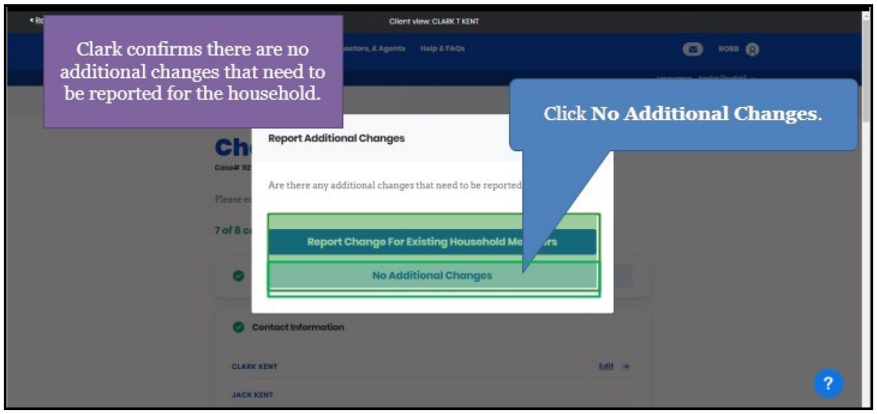

98. Click **Edit** to update the household's Health Coverage.



99. Click **Next**.

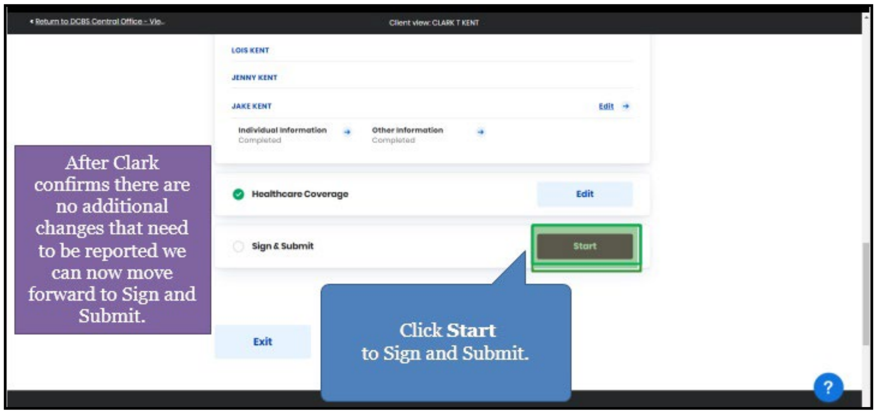



100. Select **Report Change for Existing Household Members** or **No Additional Changes**.

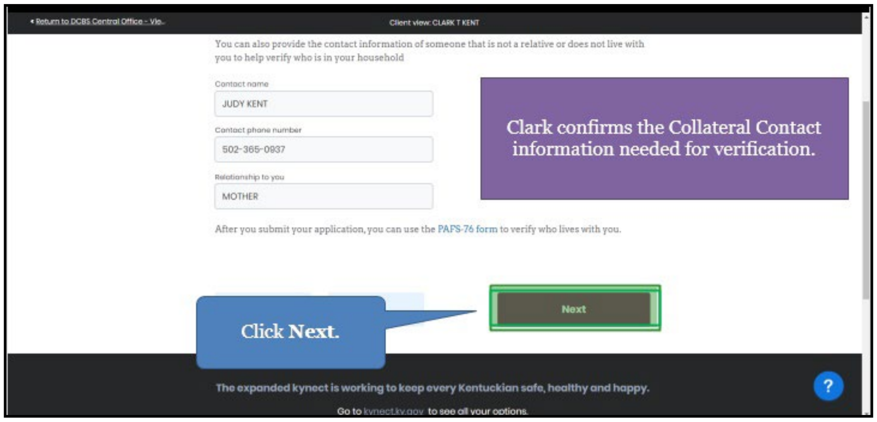



## 2.11 Sign & Submit Process

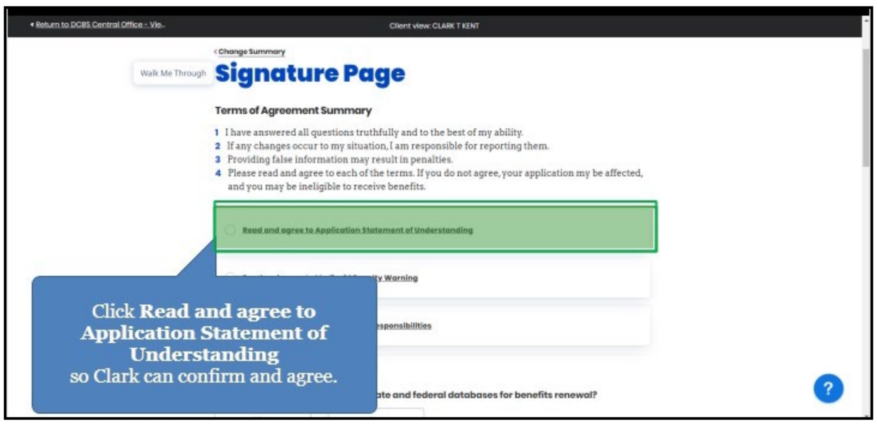
101. Click **Start** to Sign & Submit.



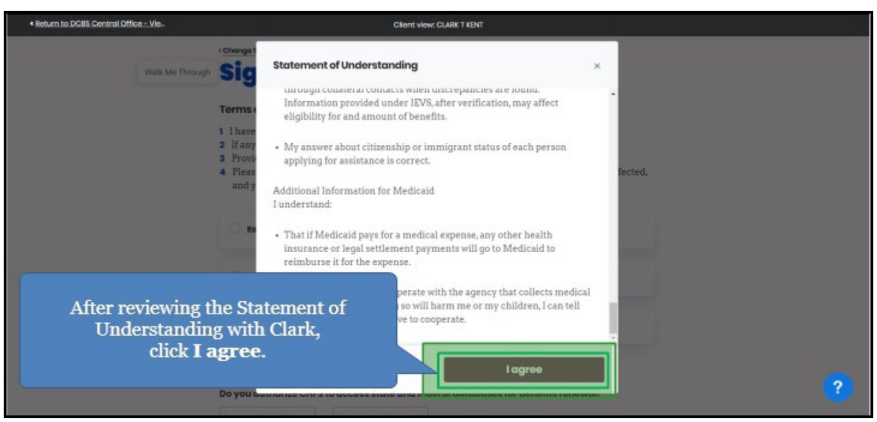
102. Click **Next** to confirm the Collateral Contact information needed for verification**.**



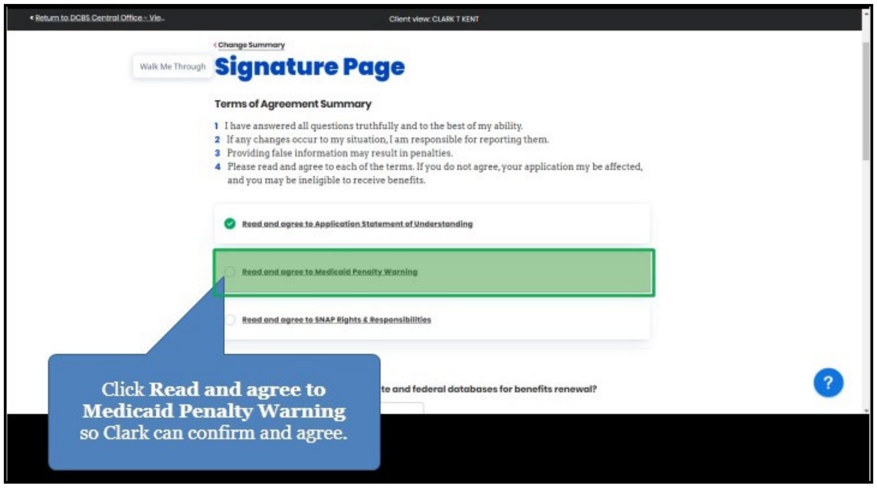

103. Click **Read and agree to Application Statement of Understanding** so the Individual can confirm and agree.



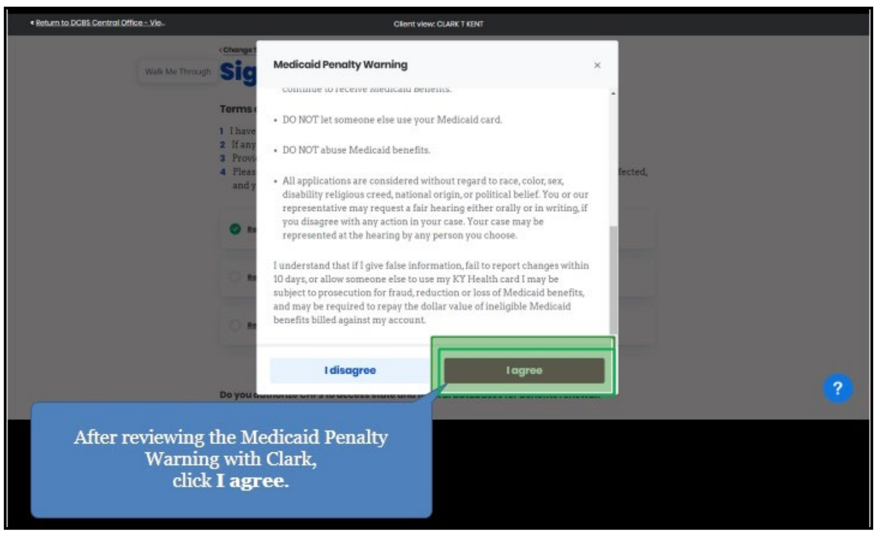

104. After reviewing the Statement of Understanding with the Individual, click **I agree**.



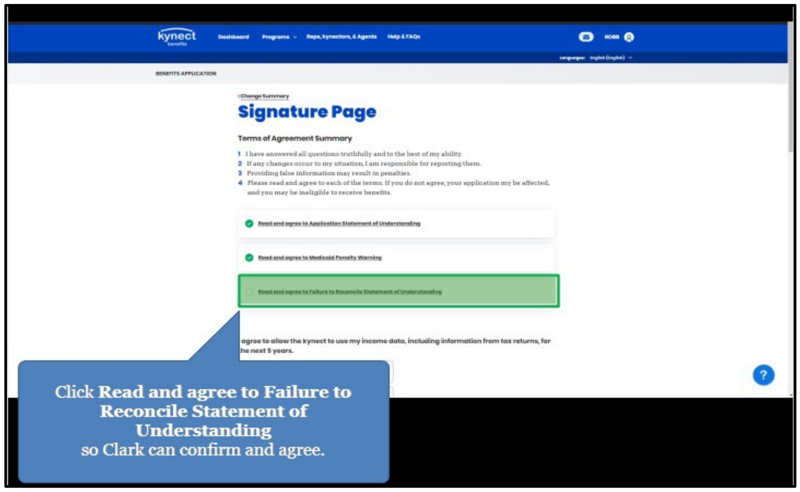
105. Click **Read and agree to Medicaid Penalty Warning** so the Individual can confirm and agree.



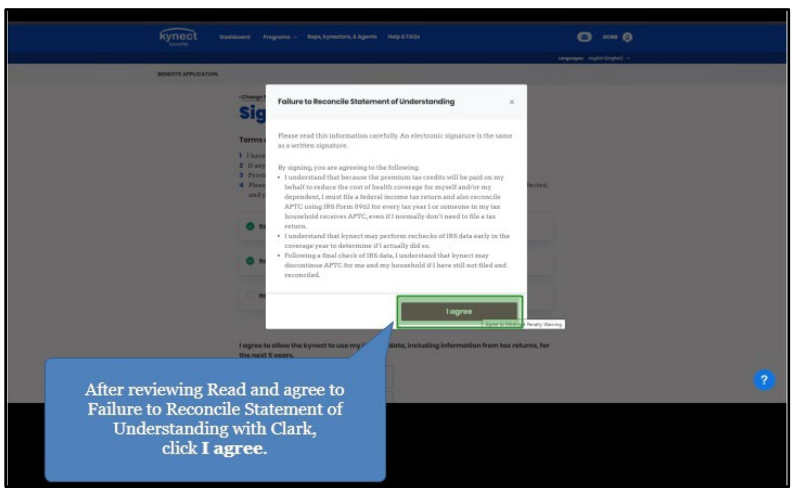

106. After reviewing the Medicaid Penalty Warning with the Individual, click **I agree**.



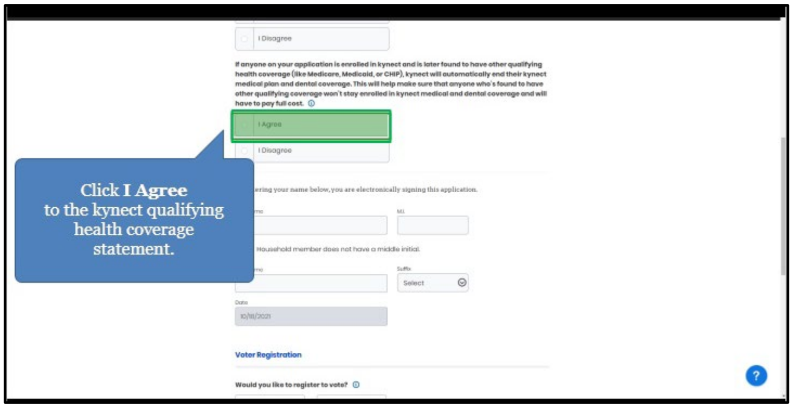
107. Click **Read and agree to Failure to Reconcile Statement of Understanding** so the Individual can confirm and agree.



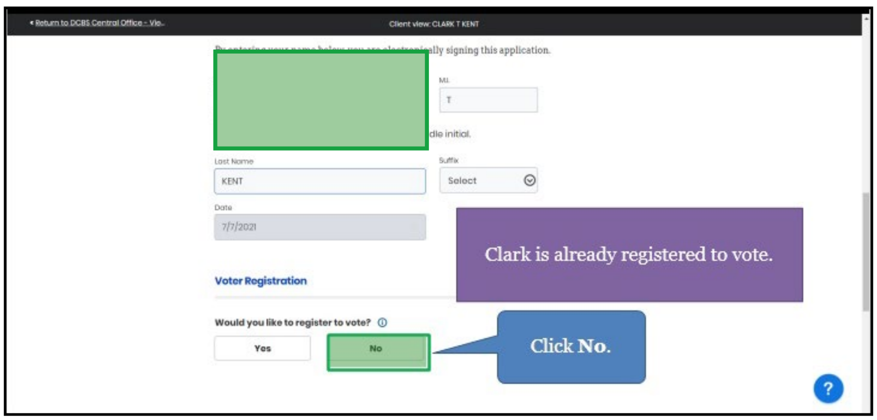

108. After reviewing SNAP Rights and Responsibilities with the Individual, click **I agree**.



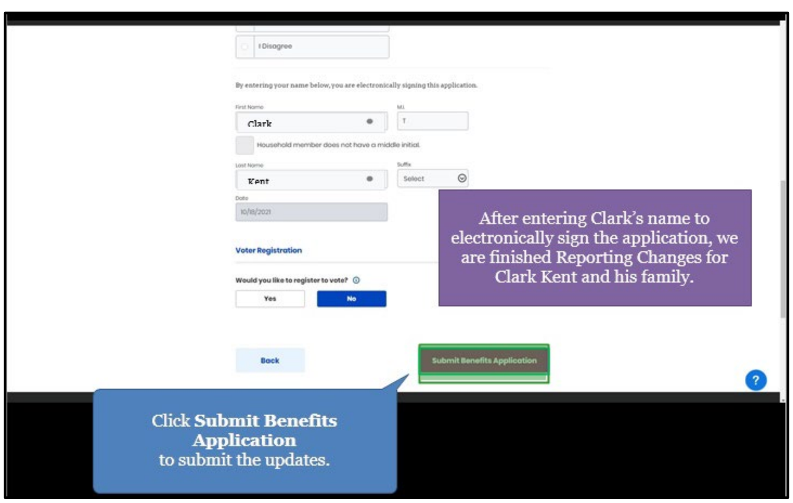
109. Click **I agree** to the kynect qualifying health coverage statement.



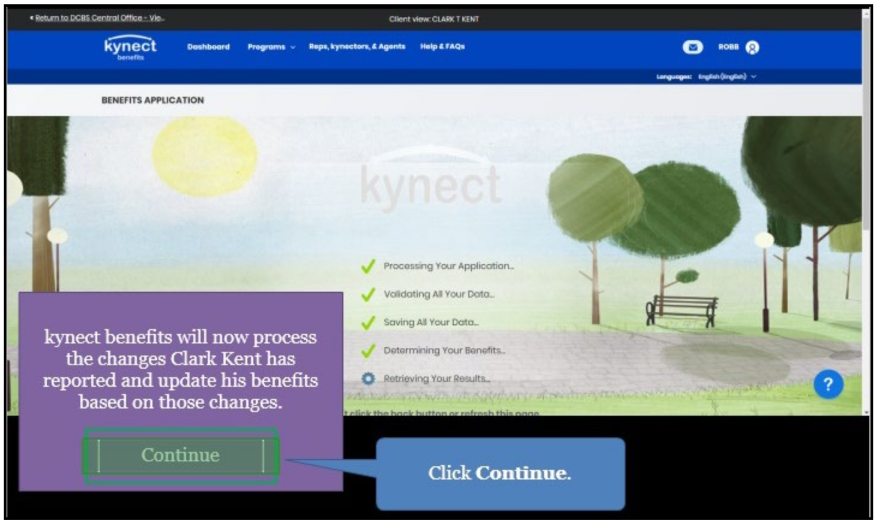

110. Click **Yes** or **No** for *Would the Individual like to register to vote*.




111. Click **Submit Benefits Application** to submit the updates once the electronic signature of the Individual is accounted for.

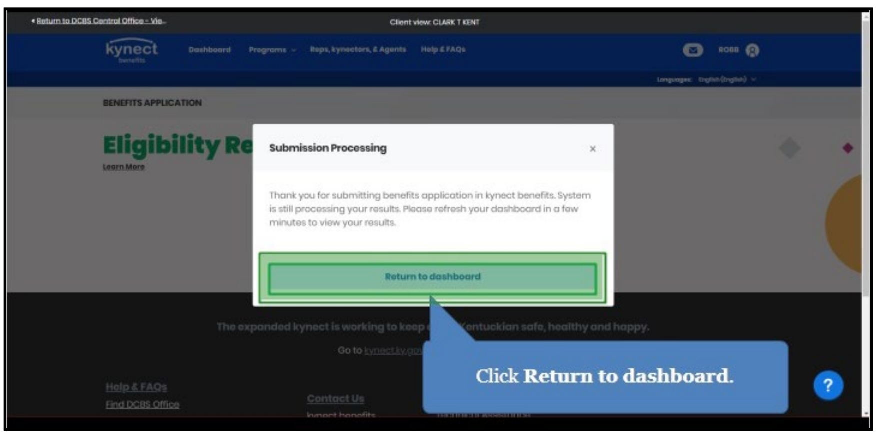


112. kynect benefits will now process the changes the Individual has reported and update their benefits based on those changes. Click **Continue**.

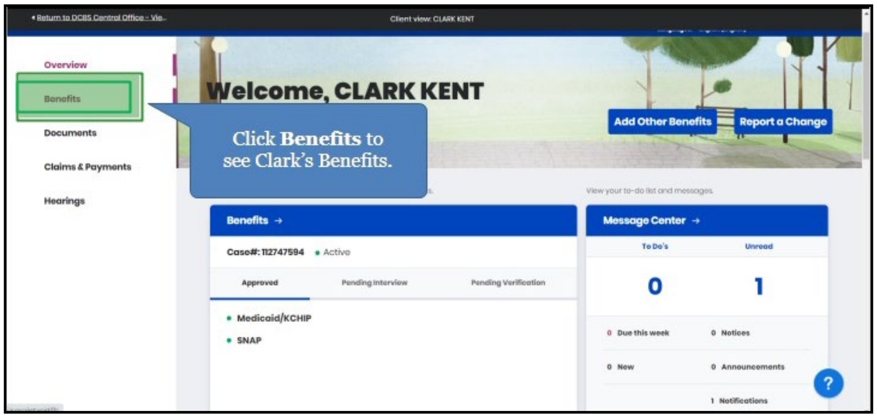



## 2.12 End of Reporting a Change Steps

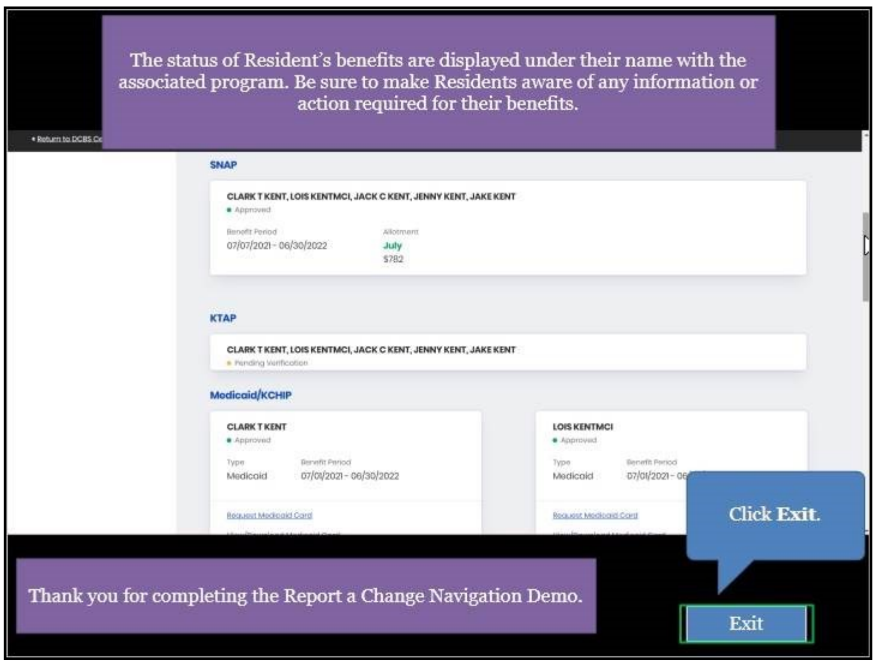
113. Click **Return to dashboard**.




114. Click **Benefits** to view the Individual's Benefits.




115. The **Benefits** screen displays all Benefits associated with the Individual and their household.



## 3 Assessment

1. Residents should report __________ in a timely manner to avoid interruptions in their benefits or having to repay benefits.

    a. Taxes
    b. All changes in information
    c. 401k retirement plans
    d. Medicare plans

2. The One Case Concept highlights that any changes made to a Resident's information impacts __________.

    a. Their taxes
    b. Their child care
    c. All programs with which they are associated
    d. Their job

3. A __________ is an indication that important information is needed to confirm outstanding questions for a Resident's case.

    a. Warrant
    b. Late notice
    c. Request for Information (RFI)
    d. Policy

4. Any changes made to a Resident's case may generate a __________ that the Resident is required to resolve.

    a. Request for Information (RFI)
    b. Email
    c. Tax
    d. Late fee

5. Are Agents and kynectors able to assist Residents with updates to their information in kynect benefits?

   a. Only on Tuesdays
   b. No
   c. Yes
   d. Only with certain Residents

6. ___________ completed for other benefit programs impact a Resident's benefits.
   a. Training videos
   b. Applications
   c. Doctor visits
   d. Webinars

7. Be sure to make Residents aware of any Request for Information (RFI) because they may ___________.
   a. Call the police.
   b. Directly impact their benefits.
   c. Contact their family members.
   d. Fine them $1,000.

8. Which information is editable when Reporting a Change in kynect?
   a. Contact information
   b. Prescription medications
   c. Vehicle registration number
   d. Grandparent's primary care doctor

9. Which of the following changes in information needs to be reported by the Resident?
   a. Address change
   b. Medication changes
   c. Changes in paid time off
   d. Doctor visits

10. Which information can you use to access a Resident's case?
   a. Their employee ID number
   b. Their case number
   c. Their job's tax number
   d. Their spouse's job's tax number