

The Commonwealth of Kentucky **kynect State-Based Marketplace**



Report a Change and Maintaining Cases in kynect Certification Training Guide

July 18, 2025

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Introduction

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

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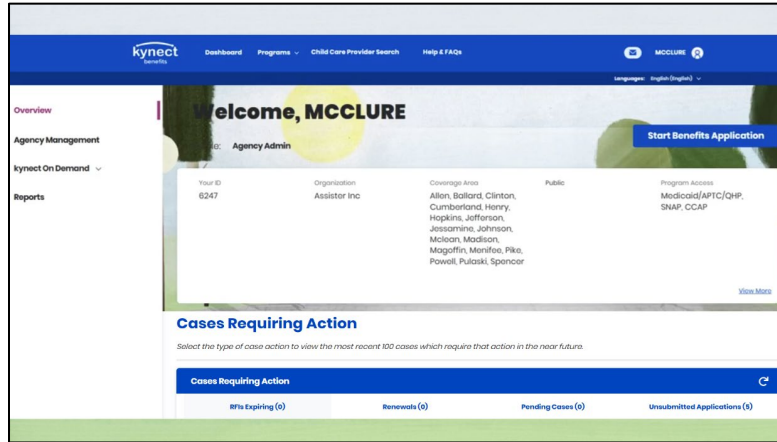
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1. Report a Change Overview

1.1 Locate Resident

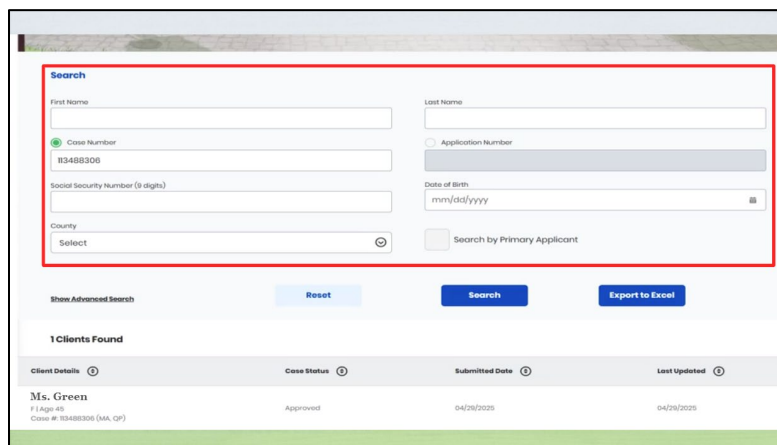
Slide Voice-over: This overview will begin in the kynect Dashboard.



Slide Voice-over: Once logged into the kynect Dashboard, users would navigate down to the third section of the screen to locate the *Resident Search* section. Here is where we would locate the Resident requesting a change.

Please note: From Agent Portal, Agents may navigate to the Resident Dashboard by clicking **Book of Business**. Next, select the applicable **Resident** to navigate to the **Client Details** screen. Finally, click **kynect benefits Dashboard** to navigate to the Resident Dashboard.

1. Enter applicable **search criteria** to locate the desired Resident.



Please note: When assisting a Resident, in order for the Report a Change functionality to display, the Resident must have at least one active case in Approved status for Agents and kynectors to be associated so they may take action on an active benefit program. Additionally, the Resident must be approved for a benefit program that aligns with the assistance provided by the Agent or kynector. Authorized Representatives have full access to all programs connected to the cases they manage.

1.2 Navigation

Slide Voice-over: This demonstration will begin in the *Resident search* section of the kynect Dashboard. From here, we will need to locate the specific Resident requesting a change. In this scenario, we will Report a Change on behalf of the Resident, Ms. Green. For this demonstration, we have already located Ms. Green's account through the case number.

2. To continue, click on the **name of the Resident**.

The screenshot shows the 'Search' section of the kynect interface. A red box highlights the search form, which includes fields for First Name, Last Name, Case Number (containing '13488306'), Application Number, Social Security Number (8 digits), Date of Birth (mm/dd/yyyy), and County. Below the search form are buttons for 'Show Advanced Search', 'Reset', 'Search', and 'Export to Excel'. Below the search form, a table titled '1 Clients Found' displays client information. The first row is highlighted with a red box, showing 'MS. GREEN' with details: 11 Age-42, Case # 13488306 (Yes, CAP), Case Status: Approved, Submitted Date: 04/28/2025, and Last Updated: 04/28/2025.

1.3 Report a Change: Overview 1

Slide Voice-over: The Report a Change and Case Maintenance process in kynect has been updated to make it easier for Residents, Agents, and kynectors to navigate. It is important for Residents to report any changes in their information promptly. Failing to report changes could result in repayment of benefits for Residents. The Report a Change process may be used to report two types of changes:

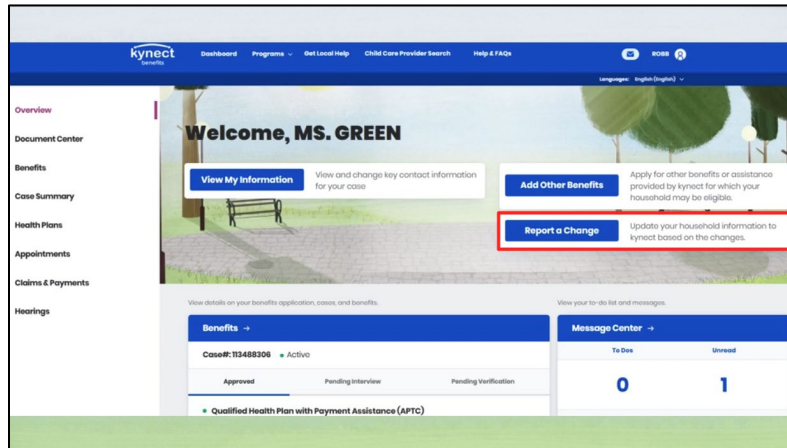
- Adding or removing a household member.
- Modifying other information such as income, expenses, resources, or health.

The screenshot shows the kynect dashboard for 'MS. GREEN'. The dashboard includes a navigation menu on the left with options like Overview, Document Center, Benefits, Case Summary, Health Plans, Appointments, Claims & Payments, and Hearings. The main content area features a 'Welcome, MS. GREEN' message with buttons for 'View My Information', 'Add Other Benefits', and 'Report a Change' (highlighted with a red box). Below the welcome message, there are two sections: 'Benefits' and 'Message Center'. The 'Benefits' section shows a table with Case # 13488306, Status: Active, and a list of benefits including 'Qualified Health Plan with Payment Assistance (APIC)'. The 'Message Center' section shows a table with 0 To Do and 1 Unread messages.

Please note: Changes reported may prompt a Request for Information (RFI) for the Resident. The most efficient way Agents, kynectors, and Authorized representatives can assist a Resident to submit documentation for a Request for Information, is by uploading documents to the Document Center located here on the Resident's Dashboard.

1.4 Report a Change: Overview 2

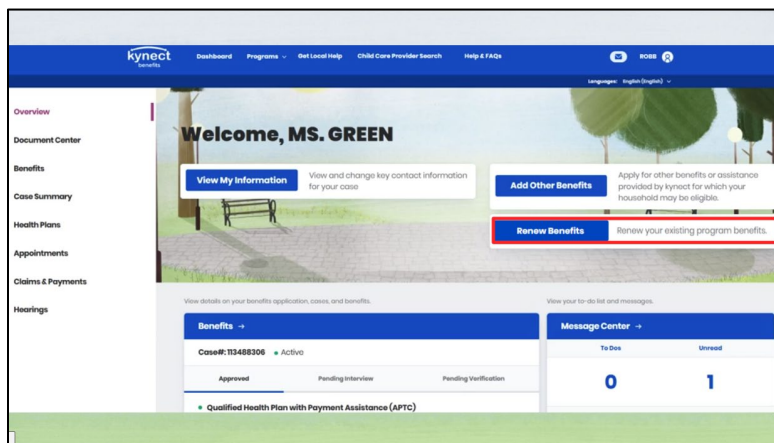
Slide Voice-over: Residents can report changes on their own as needed or request for changes to be made by an Agent or kynector. Once logged into the Resident's Dashboard, the user will see a button to the right labeled Report a Change.



Slide Voice-over: When a Resident's benefits are up for renewal, the **Report a Change** button is replaced by the **Renew Benefits** button. Any changes to case information will be handled during the renewal process and does not require users to submit via the Report a Change process.

Let's now walk through a few tips and helpful reminders.

3. Click **Report a Change**.



Please note: Change mode indicates a DCBS Caseworker is actively processing updates for the Resident. To prevent discrepancies, Agents and kynectors will not be able to make updates as the **Report a Change** button will not display until the DCBS Caseworker completes their task(s).

1.5 One Case Concept: Overview 1

Slide Voice-over: The One Case Concept is important to keep in mind when assisting Residents. Even though Residents may have access to different programs and benefits, Residents essentially have one case that acts as a comprehensive profile for their personal information. Simply put, the One Case Concept means that any change reported may impact other programs for which the Resident has applied. Below are key considerations to keep in mind:

- **Existing Cases:** When updating a Resident's case, it may trigger requests for more information or affect other programs like SNAP, KTAP, or Childcare.
- **Adding/Removing Members:** To avoid duplicative benefits, if an Individual is on an existing case, first remove the Individual from the existing case by contacting the Department for Community Based Services (DCBS) before adding them to a new case.
- **Income:** When updating income, do not delete the existing income reported. As a best practice, add an end date for the existing income records and then add any new income sources. This way, the Resident's income is correctly calculated and eligibility can be determined.

The One Case Concept

The One Case Concept means that any change reported may impact all programs for which the Resident has applied. Below are key considerations to keep in mind:

For this interaction, click on the + tabs to reveal more. Begin with the first tab labeled Existing Cases, and continue down.

Existing Cases +

Adding/Removing Members +

Income +

Welcome,

View My Information Add Other Benefits Report a Change

Benefits

Case# 11081030 Active

Agency	Starting Date	Ending Date	Program	Status
QualiHealth Plan with Payment Assistance (QPA)				0

1.6 One Case Concept: Overview 2

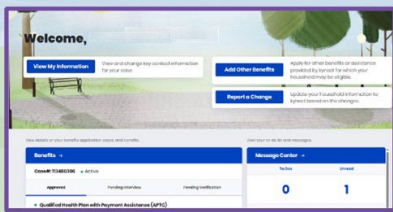
Slide Voice-over: Within each of the tabs shown below is the following information:

- **Eligibility Changes:** Individuals who do not qualify for Medicaid may be eligible for Qualified Health Plans (QHPs), Advance Premium Tax Credits (APTC), and/or Cost-Sharing Reductions (CSRs) coverage through QHPs. After applicable changes are reported, eligibility will be redetermined and Individuals who may not qualify for Medicaid could potentially be eligible for QHP, APTC, and CSRs.
- **Request for Information:** Example: When a Medicaid and SNAP recipient reports a change of address, the Resident receives a Request for Information (RFI) to verify shelter and utility expenses. This RFI may temporarily hold their SNAP benefits, but Medicaid benefits will remain approved. The case will show as pending due to the RFI. Additionally, SNAP requires re-verification of Household Composition, and failure to return this verification will lead to discontinuation of SNAP benefits. It is crucial for kynectors and Agents to stay aware of the deadline for submitting information to DCBS. Missing deadlines could result in a loss of coverage or benefits for the client. Keeping track of these dates helps ensure uninterrupted support.
- **Documentation:** When reporting a change that requires documentation, it is critical to ensure documents are uploaded properly. Agents/kynectors should use the Document Center on the kynect benefits Dashboard to upload documents.

The One Case Concept

The One Case Concept means that any change reported may impact all programs for which the Resident has applied. Below are key considerations to keep in mind:

For this interaction, click on the + tabs to reveal more. Begin with the first tab labeled Eligibility Changes, and continue down.



Benefits		Message Center	
Medicaid	APTC	0	1

+
Eligibility Changes
E

+
Request for Information
!

+
Documentation
EKG

2. Report a Change: Contact Information

2.1 Navigate to Report a Change

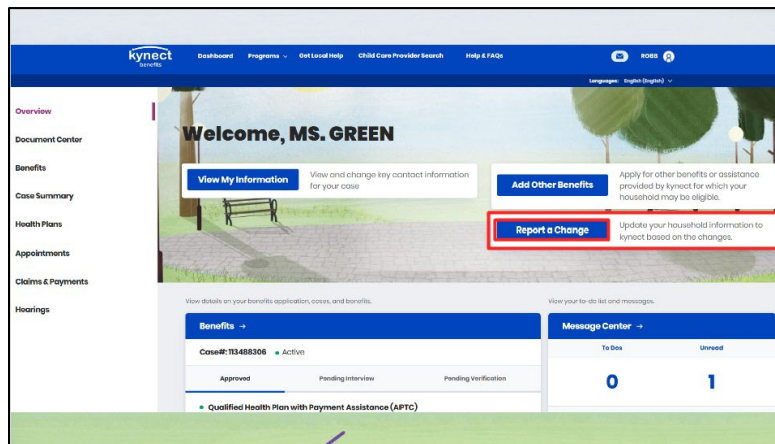
Slide Voice-over: For lesson two, we will be going over the process of reporting a demographic, as well as an income change for a Resident.

Agents and kynectors will then navigate to the Resident's kynect benefits Dashboard. Here, Residents can report changes on their own as needed or request for changes to be made by an Agent or kynector. As users navigate to the Resident's Dashboard, the user will see a button to the right labeled **Report a Change**. Updating a Resident's case with Report a Change is important because:

- The Resident's eligibility may have changed.
- The Resident may have life events that make them eligible for Special Enrollment.
- It helps to verify the Resident receives timely notifications and documentation from kynect.

During the demonstration, we will walk through the process to Report a Change for a few different scenarios a Resident could request. Let's now walk through the steps to complete the Report a Change process from the Resident Dashboard. In this scenario, The Resident, Ms. Green, has contacted you and requests to Report a Change in Demographic Information and Income. For this demonstration, we have already located Ms. Green's account.

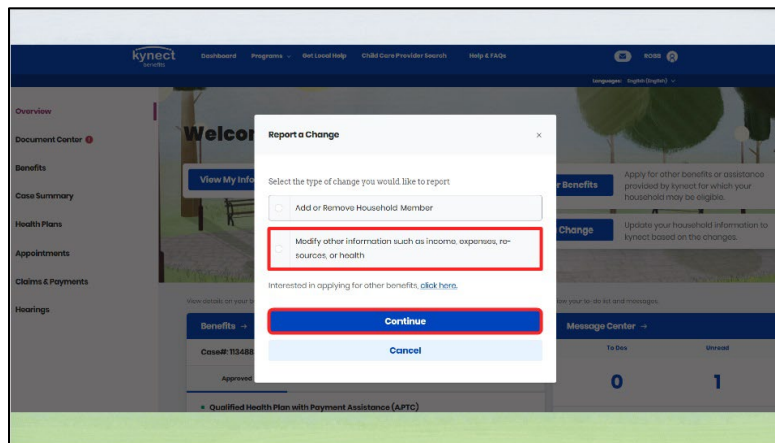
1. To begin, click **Report a Change**.



2.2 Select Type of Change

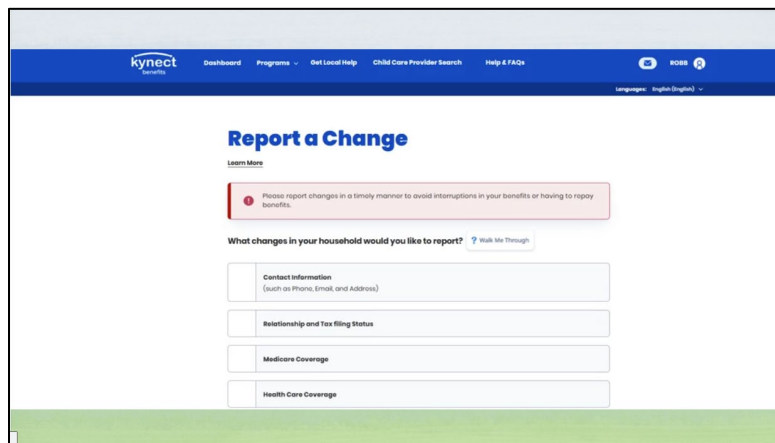
Slide Voice-over: After clicking the **Report a Change** button, a prompt appears asking about the type of change users would like to report.

2. Since the Resident would like to update contact information, select **Modify other information such as income, expenses, resources, or health**.
3. To proceed, click **Continue**.



2.3 Change in Contact Information

Slide Voice-over: If **Modify other information such as income, expenses, resources, or health** is selected, users will be directed to the **Report a Change** screen to select the information they would like to update, and to which household members the change applies.



Slide Voice-over: Displayed on screen are examples of change types a user would be able to select. Be aware that these categories may display differently depending on the program(s) the Resident is enrolled in.

The screenshot shows the kynect website interface. At the top is a navigation bar with links: Dashboard, Programs, Get Local Help, Child Care Provider Search, and Help & FAQs. Below the navigation bar, a message states: "When kynectors and Agents select 'Modify other information such as income, expenses, resources, or health,' they are prompted to change any of the following information:"

A list of categories is displayed in two columns:

- 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
- Member Information

To the right of the list is a preview of the "Report a Change" form. The form includes a title "Report a Change", a sub-header "What changes in your household would you like to report?", and several input fields with checkboxes for: Contact Information, Relationship and Tax Filing Status, Medicare Coverage, Health Coverage, Pregnancy, Education, Disability, Citizenship, Income, Resources, Expenses, Living Arrangements, Emergency Medical Condition, and Member Information.

Below the list, a note states: "These categories may display differently depending on the program(s) the Resident is enrolled in."

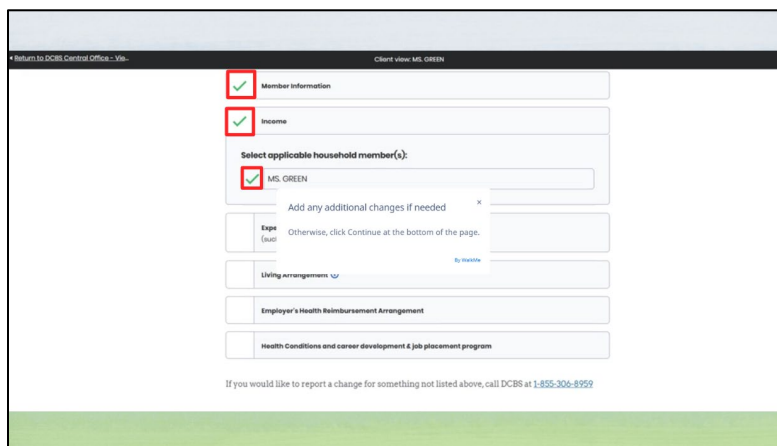
Slide Voice-over: A key functionality to mention is the walk me through functionality. This functionality is an integrated support tool which provides support and resources to kynect users. We will utilize this functionality to assist with selecting the changes needed. In this case, The Resident would like to update her last name. She explains to you that she has legally hyphenated her last name from Green to Green-Wood, for personal reasons. The Resident would also like to report additional income.

This screenshot shows the same "Report a Change" page as the previous one, but with a red box highlighting the "Walk Me Through" button located next to the question "What changes in your household would you like to report?". The button is labeled "Walk Me Through" with a question mark icon. A tooltip is visible over the button, containing the text "Click Information" and "Click the information you would like to change." Below the button, a list of categories is displayed, each with a corresponding input field: Contact Information (such as Phone, Email, and Address), Relationship and Tax Filing Status, Medicare Coverage, Health Care Coverage, Emergency Medical Condition and Disability, Pregnancy, and Member Information.

Slide Voice-over: To make the requested change:

4. Select the **Member Information** checkbox, along with the **income checkbox**.
5. We would also select the applicable **household member**.

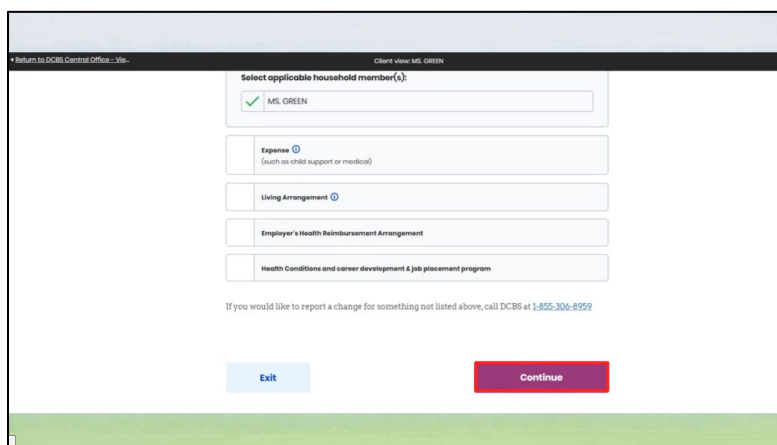
The walk me through feature displays the steps.



This screenshot shows a web form titled "Report a Change" for a client named "MS. GREEN". The form has several sections with checkboxes. The "Member Information" and "Income" checkboxes are checked and highlighted with red boxes. Under the "Select applicable household member(s):" section, "MS. GREEN" is selected and highlighted with a red box. Below this, there is a section for "Add any additional changes if needed" with a text input field and a "Continue" button. At the bottom of the form, there is a link to "If you would like to report a change for something not listed above, call DCBS at 1-855-306-8959".

Slide Voice-over: Once selected, we will need to move to the bottom of the page to continue. If more than one change is needed on a case, users may select multiple change options.

6. Click **Continue** to move forward.



This screenshot shows the same "Report a Change" form, but now the "Continue" button is highlighted in red at the bottom right. The "Member Information" and "Income" checkboxes are still checked. The "Select applicable household member(s):" section shows "MS. GREEN" selected. The "Add any additional changes if needed" section is still present. At the bottom, there is a link to "If you would like to report a change for something not listed above, call DCBS at 1-855-306-8959".

2.4 Select Household Member

Slide Voice-over: We are directed to the **Household Member's** screen. To the left, users will see the case number for the Resident as well as a progress indicator key. From here, we will need to select **Edit** to make the change for the Resident.

7. Click **Edit**.

The screenshot shows the 'Household Members' screen in the kynect system. On the left, a sidebar displays the case number 'Case# K3488306' and a progress indicator showing '0 of 3 completed'. The 'Household Members' section is highlighted. The main content area is titled 'Household Members' and includes instructions: 'Add all current household members, any household members who have passed away in the last 3 months, and tax dependents.' Below this, there is a section for 'Head of Household' with a card for 'MS. GREEN', 45 years old. An 'Edit' button is located to the right of this card. At the bottom of the screen, there are 'Exit' and 'Next' buttons.

2.5 Update Household Member Details

Slide Voice-over: From here, on the **Household Member Details** screen, we will make the changes for the Resident. Ms. Green has shared that she has made a legal last name change and holds documentation to support the last name modification from Green, to now Green-Wood. Once this is complete, as a best practice, be sure to make any other applicable updates on this screen as needed for the Resident. Ms. Green-Wood has verified that all other information is current.

The screenshot shows the 'Household Member Details' screen in the kynect system. The left sidebar displays the case number 'Case# K3488306' and a progress indicator showing '0 of 3 completed'. The 'Household Members' section is highlighted. The main content area is titled 'Household Member Details' and includes instructions: 'Complete the questions below about the household member. If this household member has a Social Security Card, enter the name as it appears on the card.' Below this, there are several input fields: 'First Name' (MS), 'Last Name' (GREEN-WOOD), 'Sex' (Female), and 'Date of Birth' (04/09/1980). A checkbox labeled 'Household member does not have a middle initial' is checked. A 'Suffix' dropdown menu is also visible. At the bottom of the screen, there are 'Exit' and 'Next' buttons.

Slide Voice-over: At this time, no other household detail information would need to be updated.

8. To proceed to the next step in the process, click **Save**.

The screenshot shows a web form titled "Program Selection". It contains two sections with checkboxes. The first section, "What programs would this individual like to apply for?", has two options: "Medicaid/CHIP/Qualified Health Plan with payment assistance (APTC)" and "CHIP (Medical and Dental insurance plans without payment assistance)". Both are checked. The second section, "Is this individual a U.S. Citizen or a U.S. National?", has "Yes" selected. Below that, "Is the individual a naturalized or derived citizen?" has "No" selected. At the bottom are "Cancel" and "Save" buttons.

2.6 Demographic Change Pop-up

Slide Voice-over: Once a demographic detail is changed and **Save** is selected, users will receive the following pop-up displayed on the screen. This review is done to protect system integrity, verify the change, and confirm the correct Individual receives the appropriate benefits. A Caseworker will be notified of the change and may reach out to the Resident within ten business days. No changes will reflect in the system until the change is approved by the Caseworker. As a best practice, we encourage the Resident to provide proof of the change by uploading relevant documents to the Document Center on the Resident Dashboard.

9. Click **Continue** to proceed.

The screenshot shows a "Demographic Change Review Required" pop-up window. The text inside reads: "You have chosen to update a demographic detail. In order to confirm the change, a Case Worker will be notified and may reach out to you within the next ten business days. Your changes will not reflect until a Case Worker approves them. Please provide proof of the change by uploading relevant documents in the Document Center. If multiple demographic changes are needed, please ensure that all are included at a single time for the case worker to review all at once." At the bottom of the pop-up is a "Continue" button. The background shows the same "Program Selection" form as in the previous screenshot, but it is dimmed.

Please note: Updating any demographic details for a Resident, such as last name in this instance, will automatically trigger a DCBS Caseworker review.

2.7 Update Corresponding Screens

Slide Voice-over: The changes have not yet been reflected. We will now need to review, and update any additional sections impacted by the updated information. For a change in Demographic Information, users will need to confirm contact and address details as well.

2.8 Confirm Contact Information

Slide Voice-over: The Report a Change process in kynect benefits shows Residents only the screens that need updating, along with any related screens based on their selected change category.

10. Update the **phone number**.
11. Select **Cell** as the primary phone type.
12. Select **Yes** to text message alerts.

☐ I would like to opt out of detailed case updates via email and text. Examples of these messages include benefits application updates, recurring renewal reminders, and document upload reminders.

Note: If you check this box, you will still receive general notifications and digital correspondences related to your case.

Email:

Primary Phone Number: Ext.:

Primary Phone Type

Click here to allow kynect and your health insurance carriers, or Medicaid Managed Care Organization, to send text message alerts to your phone number (Standard data rates may apply).

⊕ Add Secondary Phone Type

Preferred Spoken Language: Preferred Written Language:

13. Click **Next** to confirm address information.

Primary Phone Type

Click here to allow kynect and your health insurance carriers, or Medicaid Managed Care Organization, to send text message alerts to your phone number (Standard data rates may apply).

⊕ Add Secondary Phone Type

Preferred Spoken Language: Preferred Written Language:

Does applicant need assistance for effective communication?

Please note: It is important to check the contact and address information of Residents. This verifies their details and preferred communication method are correct, allowing them to receive timely documents and notices from kynect about their benefits.

2.9 Confirm Address Information

Slide Voice-over: We are then directed to the **Address Information** screen. Similar to the **Contact Information** screen, best practice is to verify that all address information is correct. The Resident has confirmed that no updates are required to her household address information.

Case# 13488306

Step 4 completed

Household Members

Contact Information

MS. GREEN

Member Details

Review, Sign & Submit

What is MS. GREEN's physical address?

Address: 2625 SCOTTSDALE RD

Address Line 2: 1E APT. #, SUITE, UNIT, BUILDING, FLOOR, P.O. B

City: BOWLING GREEN

State: Kentucky

County: Warren

Zip Code: 42004

Zip4 Code: 4477

☐ MS. GREEN does not have a physical address

☐ MS. GREEN's mailing address is different from the provided physical address

Back Exit Next

2.10 Scenario One Continued: Report Change in Income

Slide Voice-over: Continuing with the change request in Scenario one, the Resident would like to request an update to their current income.

14. To continue with the changes, scroll down and click **Next**.

Scenario 1: The Resident has contacted you and requests a change to Demographic Information and Income.

Income & Subsidies Information

MS. GREEN

Review, Sign & Submit

Progress Indicators Key

Income sources that don't appear in this list, please add them.

Learn More

The income source(s) below have already been reported for MS. GREEN. You will have opportunity to modify them later.

Income Source	Amount
Other Self Employment	\$30000.00/year

Add Income

Back Exit Next

2.11 Avoid Removing Income

Slide Voice-over: Users are then directed to the **Remove Existing Income** screen. This screen provides users with the option to remove existing income. If there is a change in salary or position, choose to edit existing income option which can be found in the next screen. In this case, the checkbox labeled, **The Resident still receives the above source of income**, is selected.

15. Click **Next**.

Please note: Income should only be removed if the Resident no longer receives the income. Removing income may trigger an RFI.

2.12 Report Change in Existing Income: 1

Slide Voice-over: The Resident would like to update her existing income.

16. Select **Other Self Employment**.

2.13 Report Change in Existing Income: 2

Slide Voice-over: The Resident has requested to select **Bi-Weekly** as the income frequency.

17. Select **Bi-weekly** as the income frequency from the dropdown menu.

2.14 Report Change in Existing Income: Gross

Slide Voice-over: The Resident has shared that due to an increase in business, she expects to average \$1,700 every two weeks gross.

18. Enter the **dollar amount** in the field shown.

2.15 Report Change in Existing Income: Expenses

Slide Voice-over: Next, we will need to confirm any expenses. The Resident shares that due to the increase in business, her bi-weekly expenses will average out to \$192.31 every two weeks.

19. Click **Next** to proceed.

2.16 Adjusted Annual Income

Slide Voice-over: We are directed to the **Adjusted Annual Income** screen. The **Adjusted Annual Income** screen projects the income entered on the previous screen over the course of a full year. If modifications are made to the estimated yearly income, the amount entered will be considered when evaluating eligibility. In a case where the Resident shares that this estimated total is incorrect, Residents may elect to select **No**. This will then allow users to enter an updated estimate for the Resident. Residents will also need to enter the reason, such as seasonal work, gig worker, etc.

Slide Voice-over: For this case, **Yes**, is selected, The Resident confirms the annual estimate is correct.

20. Click **Next** to move forward.

The screenshot shows the 'kynect' logo and navigation menu at the top. The main heading is 'BENEFITS APPLICATION' for 'MS. GREEN'. A progress bar indicates '2 of 4 completed'. The left sidebar lists sections: Household Members, Contact Information, Member Details, Income & Subsidies Information (selected), Review, Sign & Submit, and Progress Indicators Key. The main content area is titled 'Adjusted Annual Income' and states: 'We calculated the below yearly income based on the income and expenses you reported.' It shows an 'Estimated Yearly Income' of '\$1899.84'. A question asks: 'Is the estimated yearly income amount of \$1899.84 a good estimate of your income in 2023?'. The 'Yes' button is highlighted with a red box. At the bottom are 'Back', 'Exit', and 'Next' buttons.

Please note: Income entered in the *application's income subsidies* section will be projected on an annual basis. Medicaid assesses monthly income, while APTC considers annual income. Sometimes, the annual income amount must be adjusted due to changes during the year that affect it.

2.17 No Additional Changes

Slide Voice-over: Users will then be directed to a prompt where we have the choice to report additional changes or confirm no additional changes are needed. In this scenario, there are no additional changes needed.

21. Click **No Additional Changes**.

The screenshot shows the 'kynect' logo and navigation menu. The main heading is 'Application Review'. A message states: 'You can review your application and make changes before you sign and submit.' A modal window titled 'Report Additional Changes' is open, asking 'Are there any additional changes that need to be reported?'. It has two buttons: 'Add/Remove Household Member' and 'No Additional Changes', with the latter highlighted by a red box. The background shows a list of household members.

2.18 Application Review

Slide Voice-over: We are then directed to the **Application Review** screen to confirm the updated details are correct. As a best practice, Agents, kynectors, and Authorized Representatives should always double-check the Individual's details for accuracy. It is worth noting that the **Application Review** screen will only display the sections of the application which have been updated. From here, users would submit the Benefits Application to process the update and reevaluate the Individual's eligibility. The process to sign and submit an application was covered in Course 3: *Processing Applications in kynect*. For demonstration purposes, we will move to the next lesson.

22. Click **Next** to complete the lesson.

Application Review

You can review your application and make changes before you sign and submit.

Expand All | Collapse All

Household Members

US, GREEN, Nicole (Head of Household)	06/15/1989
Date of Birth	Yes
Is US Citizen	Medicaid (CHIP/Qualified Health Plan with payment assistance (CHIP))
Program(s) Applied for	CHIP (Medicaid and Dental Insurance plans with payment assistance)
Is American Indian or Alaska Native	No

Head of Household Contact Information

US, GREEN, Nicole	mygreen@state.gov
Email	555-555-5555
Primary Phone Number	Electronic - Email and Text Message
Preferred method of getting notices	English
Preferred written language	3525 SCOTTSMILLE RD, SCOTTSMILLE, WAVERLY, KENTUCKY, 42204, 4277
Physical Address	3525 SCOTTSMILLE RD, SCOTTSMILLE, WAVERLY, KENTUCKY, 42204, 4277
Mailing Address	

Member Details - Income Summary

US, GREEN, Nicole	\$7,702.00 (9-month)
Self employment income	\$25,000.00
Estimated annual income	

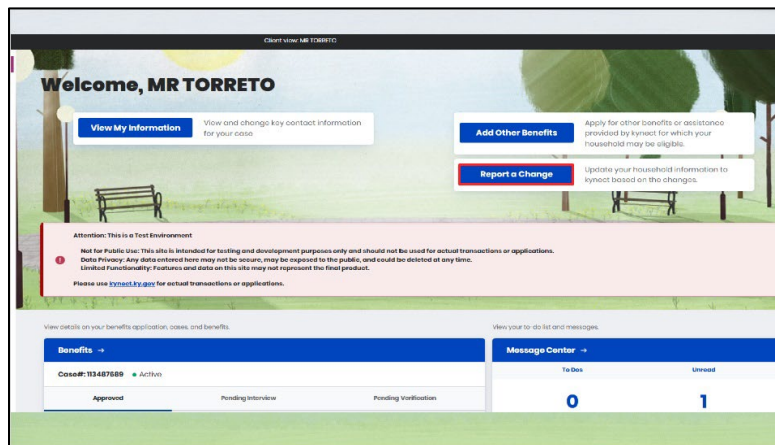
Please note: When processing most changes, an RFI will often be generated. These RFIs request Residents to upload supporting documentation through the Document Center found on the Resident Dashboard.

3. Report a Change: Add Resident

3.1 Scenario Two: Add Member(s)

Slide Voice-over: Now, we will review the process to add a member. In the next scenario, we will Report a Change for Mr. and Mrs. Torreto, a newlywed couple who wishes to add Mrs. Torreto to the plan. Additionally, the newlyweds want to include the birth of their newborn child. We will first add both Individuals to the case, then add them to the plan. Both events qualify for a Special Enrollment Period. We will walk through the process step-by-step and highlight key points to be aware of during the process.

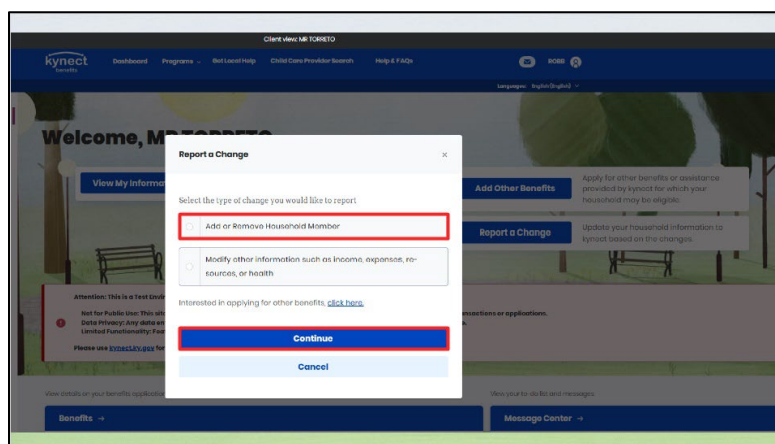
1. Click **Report a Change** to begin.



3.2 Select Change Type: Add/Remove Member

Slide Voice-over: In this case:

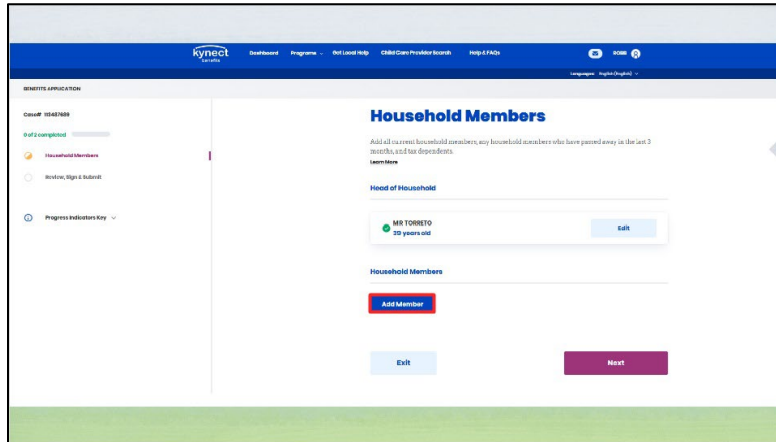
2. Select **Add or Remove Household Member** as the change type.
3. Click **Continue**.



3.3 Add Member(s)

Slide Voice-over: Agents, kynectors, and Authorized Representatives will be prohibited from adding them to the current case. If the Resident believes the member match to be an error, the Resident may contact the DCBS line to review.

4. Click the blue box labeled **Add member** to continue.

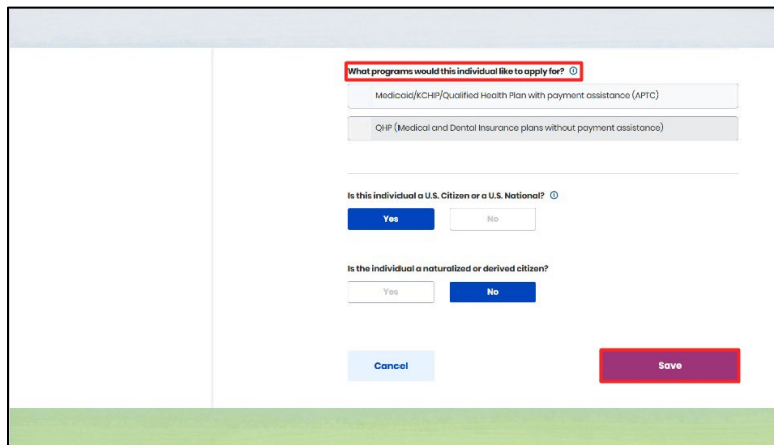
A screenshot of the kynect web application interface. The top navigation bar is blue with the kynect logo and links for Dashboard, Programs, Get Local Help, Global Case Provider Search, and Help & More. Below this, a sidebar on the left shows a progress bar for '0 of 2 completed' and a list of steps: 'Household Members' (highlighted), 'Review, Sign & Submit', and 'Progress Indicators Key'. The main content area is titled 'Household Members' and includes instructions: 'Add all current household members, any household members who have passed away in the last 3 months, and tax dependents. Learn More'. Under the heading 'Head of Household', there is a card for 'MR TORRETO' who is '30 years old', with an 'Exit' button. Below this is a section for 'Household Members' with a red 'Add Member' button. At the bottom of the main area are 'Exit' and 'Next' buttons.

Please note: When adding additional household members, if their full name, date of birth, Social Security Number, and gender match an existing Individual within kynect, it will trigger a full member match.

3.4 Enter Household Details

Slide Voice-over: Completing the *Household Details* section was covered in Course 3: *Processing Applications in kynect*. For the purpose of this demonstration, we have included all the necessary information for the members we plan to add. A key callout to communicate is that when adding a member, the Resident will be asked, what programs would this Individual like to apply for? The Resident can check the box if they are requesting coverage through kynect. If they are being added to the tax household but not requesting benefits, the checkboxes should be left blank. Be sure the Resident is aware that each program has a different set of eligibility requirements.

5. Click **Save** to continue.



The screenshot shows a web form titled "What programs would this individual like to apply for?". Below the title are two checkboxes: "Medicaid/KCHIP/Qualified Health Plan with payment assistance (APTC)" and "CHIP (Medical and Dental Insurance plans without payment assistance)". Below these are two questions: "Is this individual a U.S. Citizen or a U.S. National?" with "Yes" and "No" buttons, and "Is the individual a naturalized or derived citizen?" with "Yes" and "No" buttons. At the bottom are "Cancel" and "Save" buttons. A red box highlights the title "What programs would this individual like to apply for?".

3.5 Added Household Members

Slide Voice-over: We have successfully added spouse and child. It is important to familiarize yourself with the programs the Resident is applying for and how adding members may could their benefits. Locate more information on [SNAP](#), in the resources tab. Once the members are added, you will then need to complete the application process for members applying for coverage. Agents, kynectors, and Authorized Representatives will need to complete the application flow for the newly added members as reviewed in Course 3: *Processing Applications in kynect*. We will, however, point out key items to be mindful of in the application process when adding a member.

Case# 153487689

0 of 2 completed

Household Members

Review, Sign & Submit

Progress Indicators Key

Head of Household

MR TORRETO
38 years old

Edit

Household Members

Add Member

MRS TORRETO
35 years old

Edit

JUNIOR TORRETO
0 years old

Edit

Exit

Next

Please note: When adding the birth of a child, different programs such as SNAP may have different rules.

3.6 Confirm Contact & Address

Slide Voice-over: When adding members, there may be Requests for Information that will need to be provided by the Resident. Please be sure to review and verify that all contact information and address information is up to date for the added members.

kynect

Dashboard Programs Get Local Help Child Care Provider Search Help & FAQs

Language: English (English)

BENEFITS APPLICATION

Case# 153487689

0 of 2 completed

Household Members

Contact Information

MRS TORRETO

JUNIOR TORRETO

Paper, In-person, & Agents

Relationship & Tax Filing

Household Information

Member Details

Health Care Coverage

Employer's Health Reimbursement Arrangement

Review, Sign & Submit

JUNIOR TORRETO

Section 1 of 1

Address Information

JUNIOR TORRETO has same address as MR TORRETO.

What is JUNIOR TORRETO's physical address?

Address Address Line 2

501 HANLEY RD. LE APT. W, SUITE, UNIT, BUILDING, FLOOR, P.O. B.

City State

PRUDICH Kentucky

County

MUSKOGEE

Zip Code Zip+4 Code

42201

3.7 Verify Tax Filing

Slide Voice-over: In the *Tax Filing* section, when adding members, if there are changes to the Head of Household, we will need to report that change. For any new members added, the Resident will need to confirm the tax filing status of the members being added.

☐ Married Filing Separately

☐ I do not intend to file taxes

Is MR TORRETO claiming any household members as dependents previous year?

Did MR TORRETO reconcile premium tax credits on his tax return for the last two consecutive tax years? Select Yes below if:

- You received payment assistance to help for coverage.
- You filed federal income tax returns for the last two consecutive years, and you used payment assistance. For example, in the year 2024 and 2023 you got help paying coverage and you also filed tax returns for both years.
- You submitted IRS Form 8962 with these tax returns.

Please note: Married couples must file taxes jointly to be eligible for APTC. Additionally, Verify the Resident is aware that the Head of Household must reconcile their Premium Tax Credits to remain eligible for APTC.

3.8 Add Income

Slide Voice-over: On the *Income* section of the application:

6. Ensure that the income is accurate and updated.
7. Any income for members added should be included at this time by selecting the **Add Income** button.

Income Summary

Details are required for MRS TORRETO's income source(s) listed below. If MRS TORRETO has other income sources that don't appear in this list, please add them.

[Learn More](#)

The income source(s) below have already been reported for MRS TORRETO. You will have opportunity to modify them later.

Other Self Employment
\$32000.00/year

3.10 Signature Page

Slide Voice-over: As mentioned in the application course, it is important to read the terms and agreements and enter the required information. For this demonstration, we have pre-filled all the necessary information and fields. Continuing on the **Signature** page, the Resident needs to decide whether to agree or disagree with allowing kynect to use their income data, including tax returns, for the next five years. This agreement enables kynect to passively renew benefits each year. Please reference Course 3: *Processing Applications in kynect*, for more information about passive and active renewals. Additionally, if anyone on the application is found to be eligible for other qualifying coverage such as Medicaid or Medicare, kynect will automatically terminate their enrollment thereby preventing payment of a full price QHP. By submitting the application, we will trigger a Special Enrollment Period. We will now need to take just a few additional steps to complete a Special Enrollment.

9. To begin the next step, click **Submit Benefits Application**.

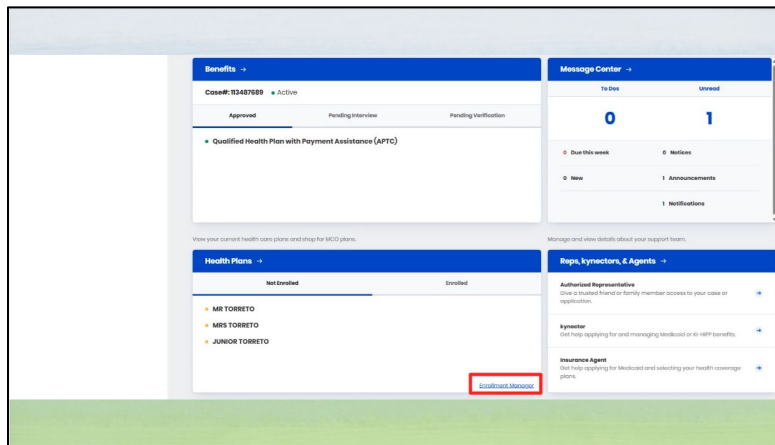
The screenshot displays the 'Signature' page of the kynect application system. The form includes the following elements:

- Last Name:** A text input field containing 'TORRETO'.
- Suffix:** A dropdown menu with 'Select' and a search icon.
- Date:** A date picker showing '05/01/2025'.
- Voter Registration:** A section with the heading 'Voter Registration' and the question 'Would you like to register to vote?'. It features two buttons: 'Yes' and 'No'.
- Message:** A text box stating 'Voter Registration Forms will be sent to your mailing address.'
- Navigation:** At the bottom, there are two buttons: 'Back' and 'Submit Benefits Application'.

3.11 Navigate to Enrollment Manager

Slide Voice-over: If the Resident is applying for benefits for the added household members, we will need to complete the process by navigating to the Enrollment Manager. A Special Enrollment Period is triggered once the change is entered in kynect. To complete the special enrollment process for the two added members,

10. Scroll down and click **Enrollment Manager**, to navigate to the Enrollment Manager Module.

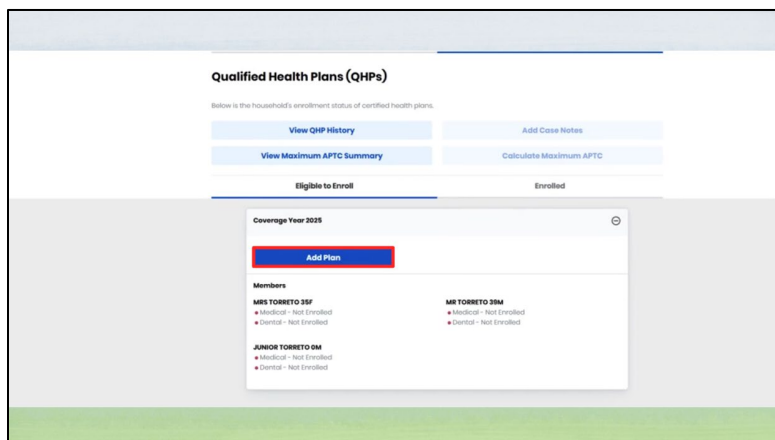


Please note: The Special Enrollment Period Reason screen is triggered in the Enrollment Manager module.

3.12 Enrollment Manager

Slide Voice-over: We are then directed to the **Enrollment Manager** screen.

11. Scroll down and click **Add Plan**.



3.13 Special Enrollment Justification

Slide Voice-over: Here, we will need to select the Special Enrollment reason that applies to the Resident's change. This is where users will need to justify how the added members qualify for Special Enrollment. For more information on Special Enrollment, see the [Special Enrollment](#) link located in the Resources tab.

Slide Voice-over: For adding a spouse:

12. Select the reason as **Gain of dependent due to marriage**.
13. Enter the **date of the change**.

Slide Voice-over: To be eligible, the change must have happened in the last 60 days. March 5, 2025 is entered. Also, newly eligible Individuals must provide verification that at least one spouse had prior coverage and proof of marriage.

14. The Head of Household had prior coverage, so **Yes** is selected.

Please note: Most Special Enrollment Periods reported could potentially trigger an RFI. Be sure the Resident is informed that they may be required to submit documentation to proceed with the enrollment.

Slide Voice-over: If approved, coverage would begin on the first day of the month following plan selection. For adding the birth of a child:

15. The Resident would like to select **Gain of dependent due to birth in the last 60 days**.
16. Enter the **date of birth**.

Slide Voice-over: In this case, if approved, coverage will be retroactive to the date of the event, or the first of the month following the event, if requested by the qualified Individual.

Slide Voice-over: Be aware that in both cases, the enrollment will pend and documentation should be uploaded to the Document Center in support of the reported changes. Documentation needs to be submitted prior to the initial premium payment to effectuate coverage.

17. Select the **box** at the bottom of the screen to verify eligibility for Special Enrollment.
18. Click **Next** to continue forward.

3.14 Add Plan

Slide Voice-over: For the final step in the process, if the Resident would like to apply for benefits, we need to help the Resident shop and compare plans based on the needs of the household. We covered shopping for plans in Course 2: *Navigating the kynect Dashboard*. Please refer to that course for information on how to shop for and compare plans.

The screenshot shows the 'Add New Plan' page in the kynect Enrollment Manager. The page header includes the kynect logo and 'Enrollment Manager'. Below the header, the case number '113487689' is displayed. The main heading is 'Add New Plan'. A sub-heading reads: 'Select the members to enroll in a health insurance plan. By checking multiple members, you are able to enroll members together when you shop. You may shop for a new plan by clicking "Shop for Plans".' Below this, there are two sections: 'Select Members' and 'Select Coverage Type'. The 'Select Members' section shows three members: 'MRS TORRETO 35F', 'MR TORRETO 39M', and 'JUNIOR TORRETO 0M', each with a green checkmark. The 'Select Coverage Type' section shows two options: 'Medical' and 'Dental', each with a green checkmark. A red box highlights the 'Shop for Plans' button at the bottom right of the form.

Slide Voice-over: The following medical and dental plans have been selected for the Resident.

19. Click **Checkout** to move to the final step in the process.

The screenshot shows the 'Checkout' page in the kynect Enrollment Manager. The page displays two columns of plan details. The left column is titled 'Dental' and shows the 'Anthem Dental Family Preventive' plan with a premium of \$26.46 per month. The right column is titled 'Medical' and shows the 'Everyday Bronze' plan with a premium of \$491.45 per month. Both columns list the members: 'MR TORRETO 39M', 'MRS TORRETO 35F', and 'JUNIOR TORRETO 0M'. At the bottom of the page, there are two buttons: 'Cancel' and 'Checkout'. A red box highlights the 'Checkout' button.

3.15 Sign and Submit

Slide Voice-over: For the final step, we will need to electronically sign and submit. Sign & Submit submits the Special Enrollment request. Supporting documentation should be uploaded and a DCBS Caseworker will need to review to confirm eligibility.

20. Click **Sign and Submit**.

The screenshot shows the 'Sign & Submit' page in the Kynect system. At the top, there are two links: 'Back to SSP Dashboard' and 'Back to Enrollment Manager'. The main heading is 'Sign & Submit'. Below this, there is a disclaimer: 'Please read this information carefully. Your signature makes this application valid. An electronic signature is the same as a written signature. Medicaid, KCHIP and Kynect are part of the Cabinet for Health and Family Services (CHFS). By signing, you agree to the following:'. This is followed by two lines of text: 'I am signing this application under penalty of perjury which means I have given true answers to all the questions on this form to the best of my knowledge and belief. I know that I may be subject to penalties under federal and/or state law if I provide false and/or untrue information.' and 'I know that I must tell Kynect if anything changes from what I entered on this application.'. Below this, it says 'Electronically sign this request by entering your name below:'. There are four input fields: 'First Name' (containing 'MR'), 'Last Name' (containing 'TORRETO'), 'MI' (empty), and 'Suffix' (a dropdown menu showing '--Select--'). There is also a 'Date' field showing '04/23/2025'. At the bottom, there are three buttons: 'Back' (blue), 'Exit' (blue), and 'Sign & Submit' (red).

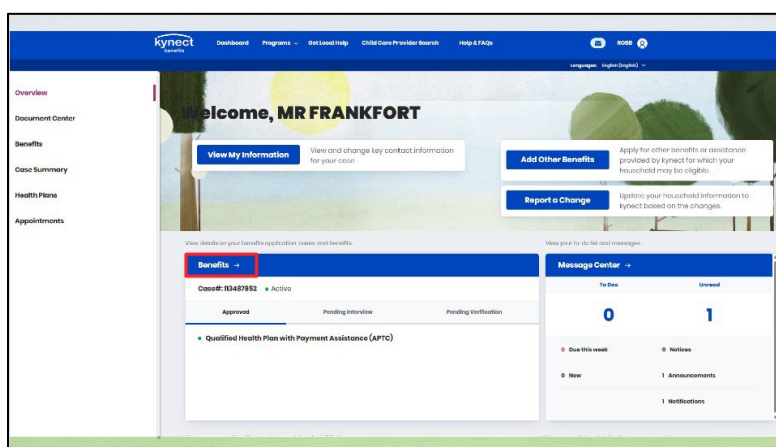
4. Report a Change: Remove Head of Household

4.1 Scenario Three: Transition to Medicare

Slide Voice-over: In lesson four, we will be going over the process of reporting a change to disenroll the Head of Household from a plan due to transitioning to Medicare.

Another common change scenario is the Head of Household transitioning to Medicare due to turning 65. In the final scenario, we will walk through the process to Report a Change in which Mr. Frankfort, the Head of Household, will need to disenroll due to the transition to Medicare. This demonstration will outline that process, best practices, and areas to be mindful of. This process will begin from the Resident Dashboard for Mr. Frankfort.

1. To begin the removal process, click **Benefits**.

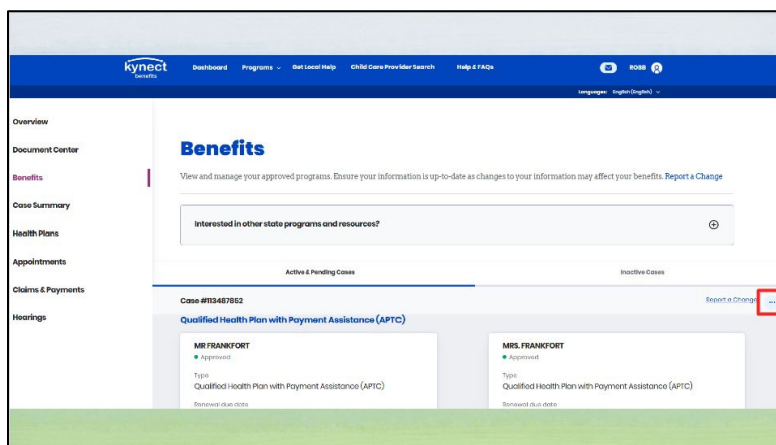


Please note: Prior to turning 65 and enrolling in Medicare, eligible Individuals should disenroll from their QHP plan ahead of their transition so there is no gap in coverage. This also helps to avoid the possibility of a Medicare late enrollment penalty. The Resident transitioning to Medicare must also disenroll themselves and any household members from the current QHP. Then, enroll household members who are not eligible for Medicare into a new QHP. Disenrollment of other household members is only needed if the Head of Household or policy holder is transitioning to Medicare. For more information, please be sure to review the link labeled, [Removing Head of Household](#), which can be found in the **Resources** tab.

4.2 Benefits Screen

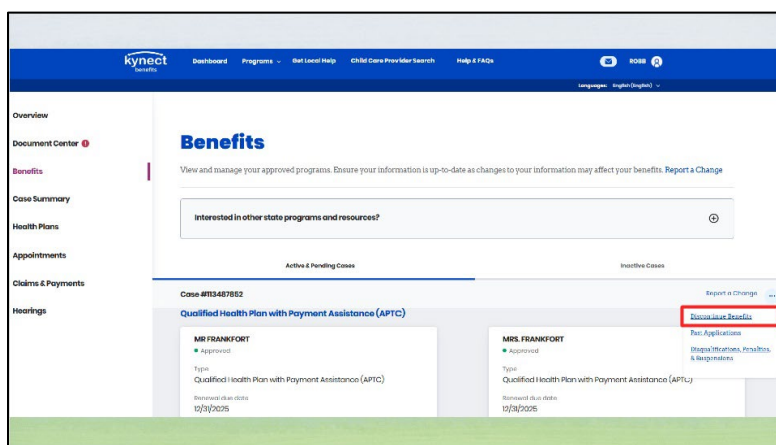
Slide Voice-over: We are now on the Benefits page where we will need to Discontinue benefits for Mr. Frankfort. By discontinuing benefits, we would remove Mr. Frankfort from requesting coverage and from the selected plan. However, he can still be included in the tax household.

- Click the **three-dot icon** next to Report a Change to continue to the next step.



4.3 Discontinue Benefits

- Click **Discontinue Benefits**.



4.4 Discontinue Benefits Continued

4. Select the **program** and **household member** to discontinue benefits.

Discontinue Benefits
Case # 10487852

On discontinuing this benefit, the Commonwealth of Kentucky will no longer provide you assistance.

Select the program and the household member to discontinue benefits.

☒ Medicaid/CHIP/Qualified Health Plan with payment assistance (APIC)

☒ MR FRANKFORT

☐ MRS FRANKFORT

☒ QHP (Medical and Dental insurance plans without payment assistance)

☒ MR FRANKFORT

☐ MRS FRANKFORT

Slide Voice-over: The member is the primary subscriber, Mr. Frankfort. Then, we will need to select the reason for discontinuance of benefits from the dropdown.

5. Select **Client Request** as the reason.
6. Click **Discontinue Benefits** to continue.

☒ MR FRANKFORT

☐ MRS FRANKFORT

☒ QHP (Medical and Dental insurance plans without payment assistance)

☒ MR FRANKFORT

☐ MRS FRANKFORT

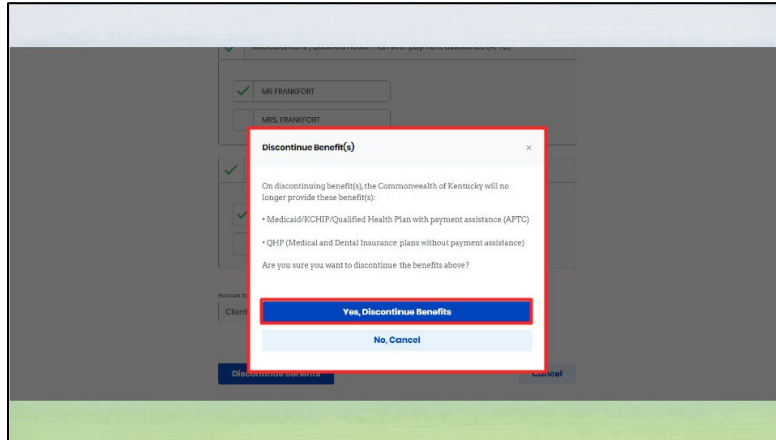
Reason for discontinuation of benefit(s)

Discontinue Benefits Cancel

4.5 Yes, Discontinue Benefits

Slide Voice-over: Here we will need to confirm that the Resident would like to move forward with Discontinuing benefits.

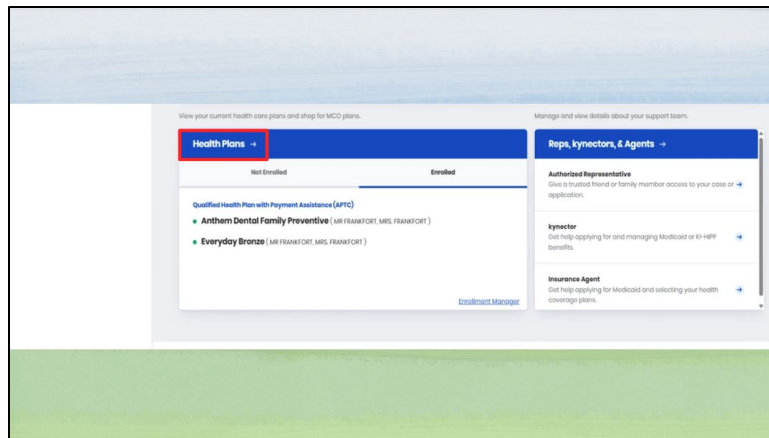
7. Click **Yes, Discontinue Benefits**.



4.6 Navigate to Health Plans

Slide Voice-over: To complete the process, navigate back to the Resident's Dashboard. We would then navigate to the **Health Plans** link found at the bottom of the page.

8. Scroll down and click **Health Plans**.



4.7 Disenroll/Cancel

Slide Voice-over: We are then directed to the Enrollment Manager Module screen. Here is where we would disenroll the Resident along with the remaining household members.

- To continue, click **Disenroll/Cancel** which can be found at the bottom of the page.

The screenshot shows the 'Enrollment Manager Module' screen. At the top, there are two tabs: 'View Maximum APTC Summary' and 'Calculate Maximum APTC'. Below these are two sub-tabs: 'Eligible to Enroll' and 'Enrolled'. The 'Enrolled' tab is selected. The main content area shows a summary for 'Coverage Year 2025' under the plan 'Everyday Basics - Medicaid'. The summary includes the following information:

Premium You Pay	Monthly Premium	Applied Payment Assistance
\$137.59 per month	\$187.59 per month	\$490 per month

Below this table, there are two sections for individual members:

- MRS. FRANKFORT 60F**: Approved. Enrollment ID# 1009407332.
- MR FRANKFORT 64**: Approved. Policy ID# 1009407332.

At the bottom left, there is a red box containing the text 'Disenroll/Cancel'.

Please note: Following the removal of Mr. Frankfort, who is the Head of Household, the remaining household members, which in this case is Mrs. Frankfort, will need to be re-enrolled. If they enroll in the same plan, any plan accumulators that have built up over the year, such as deductibles, copays, and out-of-pocket maximums, will roll over. However, If the remaining household members enroll in a different plan, those accumulators will be reset. As a best practice, it is best to place the younger spouse as the primary subscriber on a plan, this way if the older spouse needs to transition to Medicare, the remaining members will not need to disenroll.

4.8 Submit Disenrollment

Slide Voice-over: For the final step in the process to discontinue benefits and disenroll the Resident:

10. Select the **Disenroll** radio button.
11. Enter the applicable **coverage end date**, which should be prior to when Medicare coverage becomes effective to avoid a gap in coverage.
12. To finalize the change, click **Submit**.

The screenshot shows a web application interface with a modal dialog box titled "Disenroll / Cancel From Plan". The dialog has a close button (X) in the top right corner. Inside the dialog, there is a warning message: "Changing the default data on this page could create a gap in coverage." Below this, it says "Please choose from the below available options:". There are two radio buttons: "Disenroll" (which is selected) and "Cancel". Below the radio buttons, there is a text input field labeled "Coverage End Date" with a calendar icon to its right. A red rectangle highlights the "Submit" button, which is blue with white text. Below the "Submit" button is a "Cancel" button, which is light blue with dark blue text. At the bottom of the dialog, there are three small text labels: "\$11.84 per month", "\$11.84 per month", and "\$0 per month". The background of the application shows a header with "Eligible to Enroll" and "Enrolled" tabs, and a sidebar with various navigation options.