The Commonwealth of Kentucky
kynect State-Based Marketplace

kynect
health coverage
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Report a Change and Maintaining Cases in kynect Certification Training Guide

July 18, 2025

Document Control Information

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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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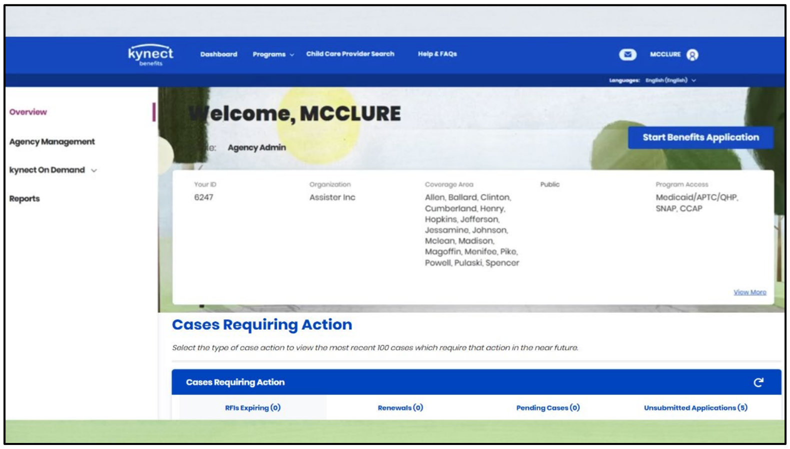
1. Report a Change Overview

1.1 Locate Resident

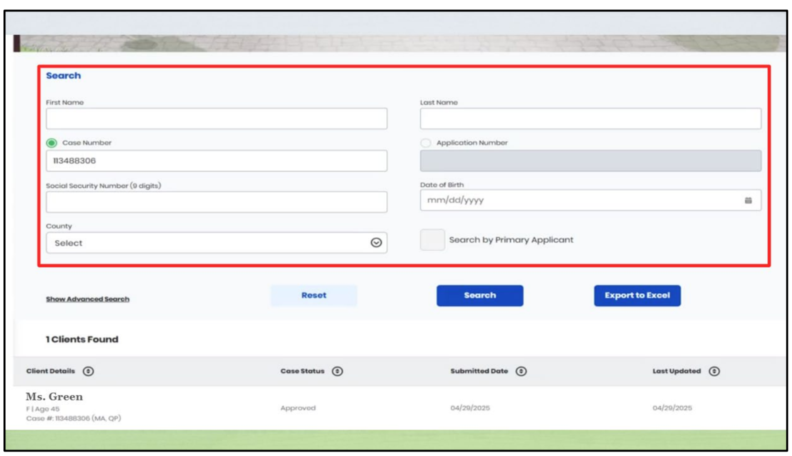
Slide Voice-over: This overview will begin in the kynect Dashboard.



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**.**

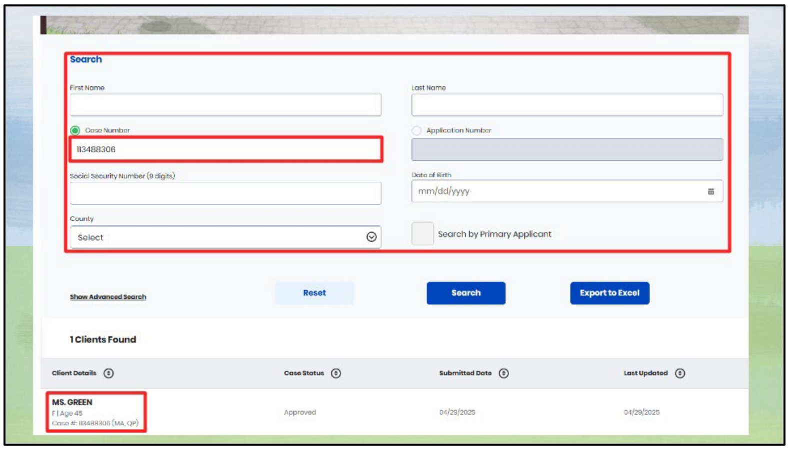


Please note: When assisting a Resident, in order for the Report a Change functionality to display, the Resident must have at least one active case in Approved status for Agents and kynectors to be associated so they may take action on an active benefit program. Additionally, the Resident must be approved 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.

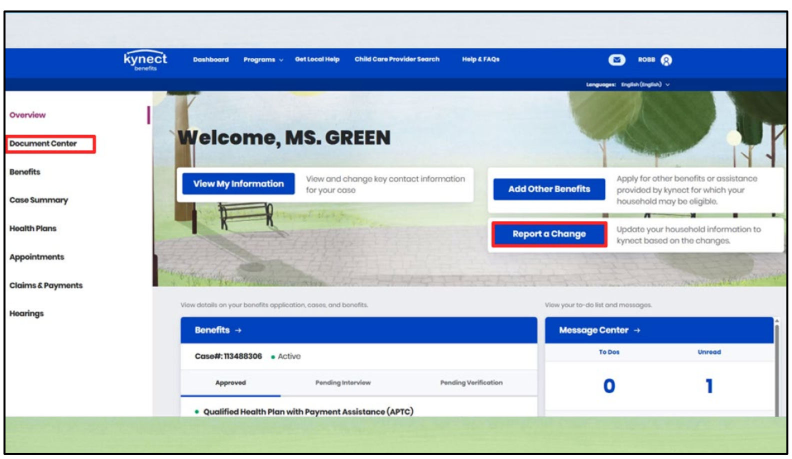
2. To continue, click on the **name of the Resident.**



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:

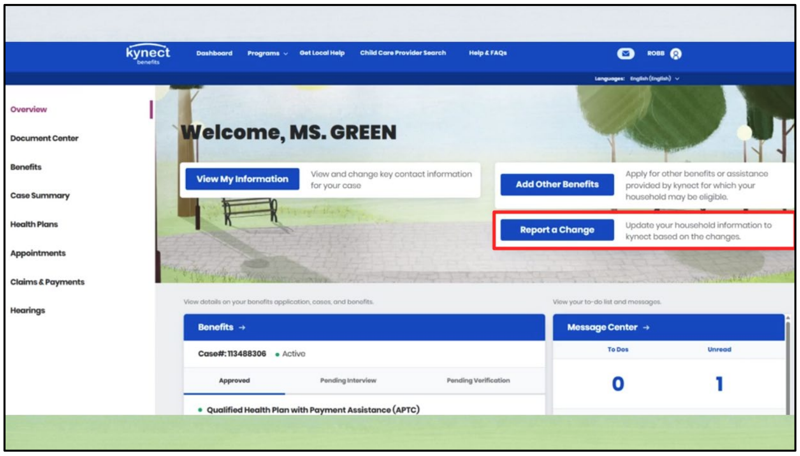
- Adding or removing a household member.
- Modifying other information such as income, expenses, resources, or health.



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

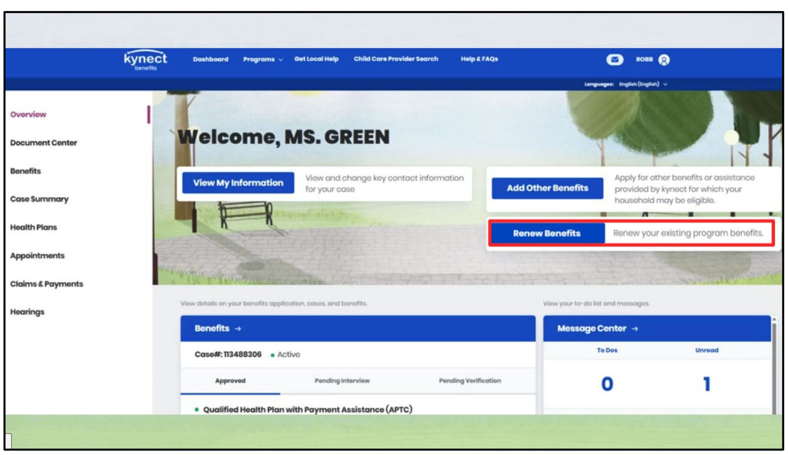
Slide Voice-over: Residents can report changes on their own as needed or request for changes to be made by an Agent or kynector. Once logged into the Resident's Dashboard, the user will see a button to the right labeled Report a Change.



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**.

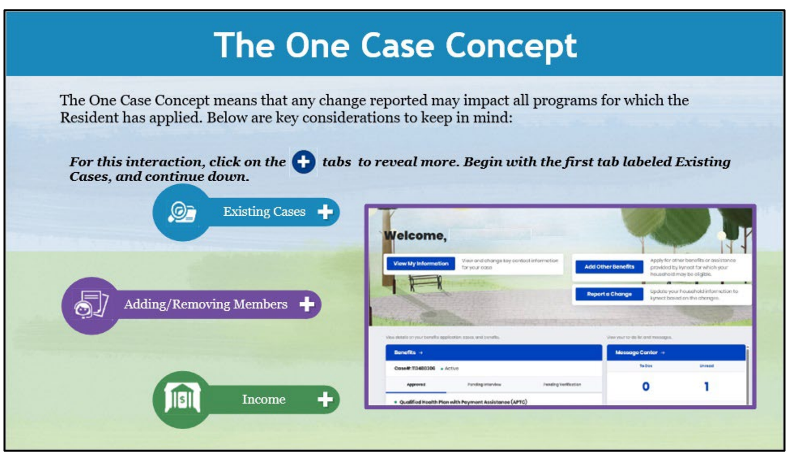


Please note: Change mode indicates a DCBS Caseworker is actively processing updates for the Resident. To prevent discrepancies, Agents and kynectors will not be able to make updates as the **Report a Change** button will not display until the DCBS Caseworker completes their task(s).

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:

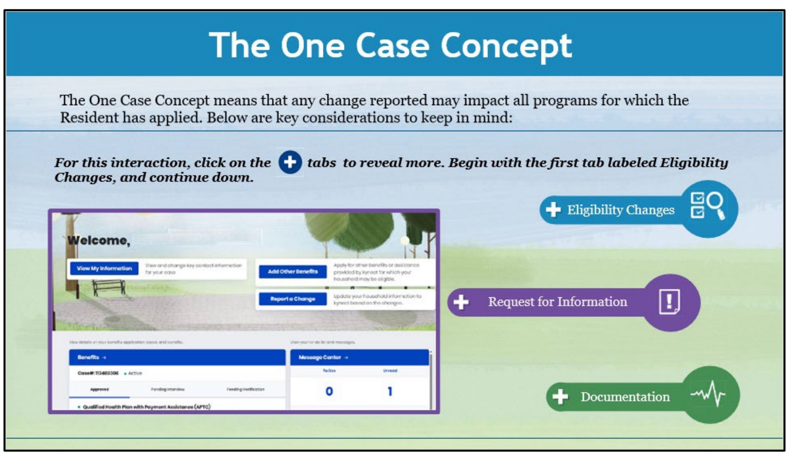
- **Existing Cases:** When updating a Resident's case, it may trigger requests for more information or affect other programs like SNAP, KTAP, or Childcare.
- **Adding/Removing Members:** To avoid duplicative benefits, if an Individual is on an existing case, first remove the Individual from the existing 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.



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.



2. Report a Change: Contact Information

2.1 Navigate to Report a Change

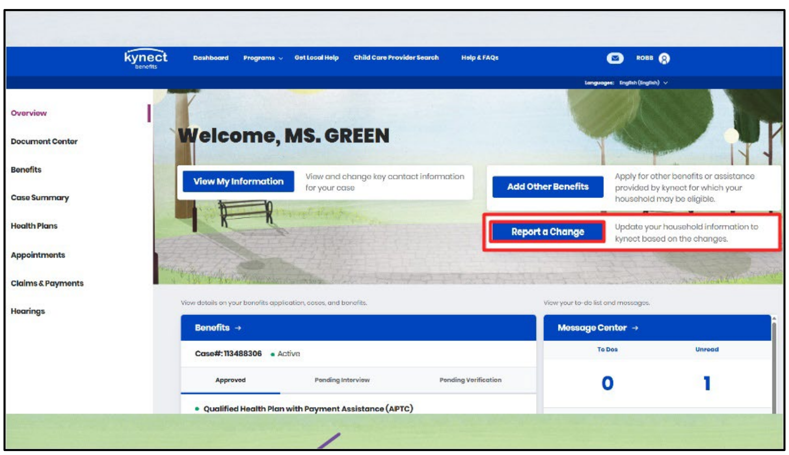
Slide Voice-over: For lesson two, we will be going over the process of reporting a demographic, as well as an income change for a Resident.

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.

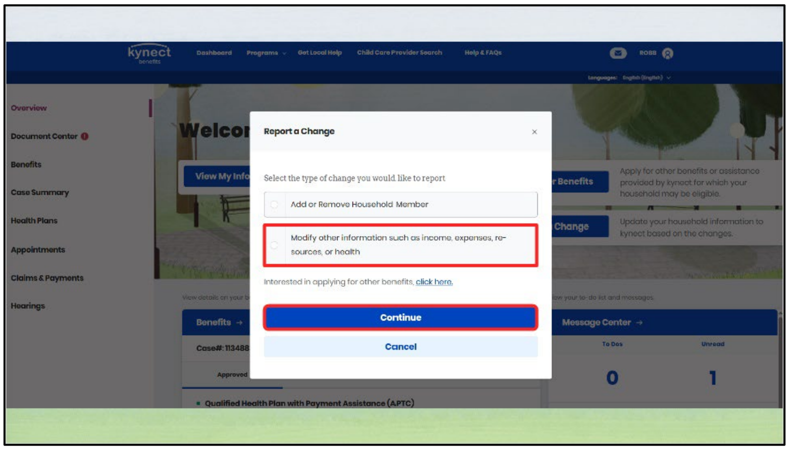
1. To begin, click **Report a Change**.



2.2 Select Type of Change

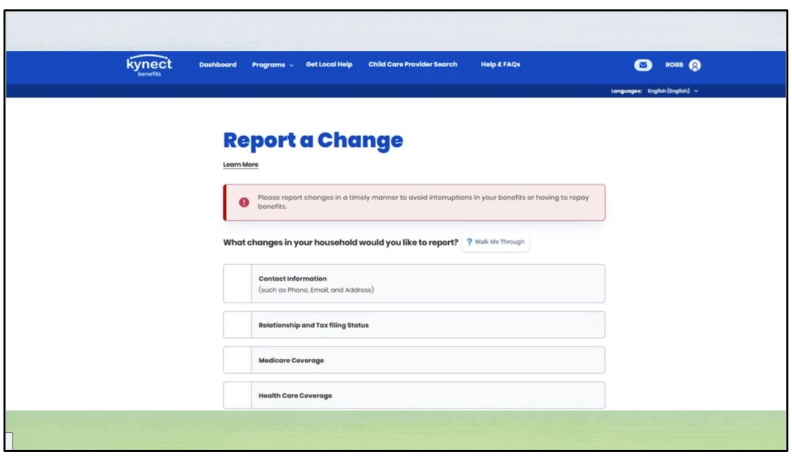
Slide Voice-over: After clicking the **Report a Change** button, a prompt appears asking about the type of change users would like to report.

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**.

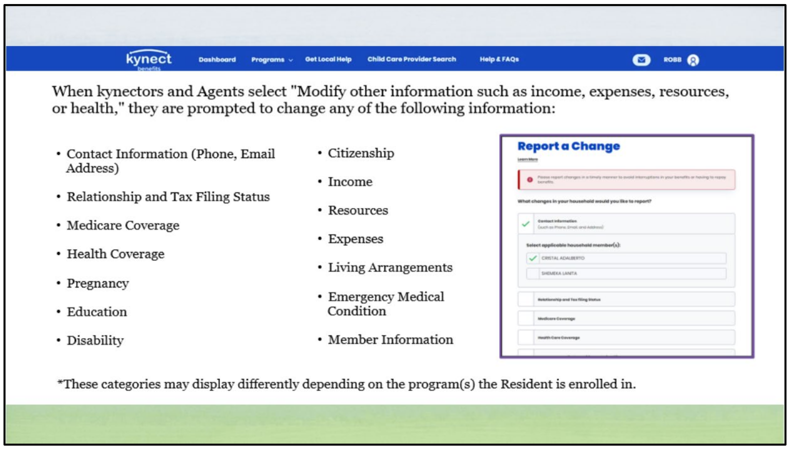


2.3 Change in Contact Information

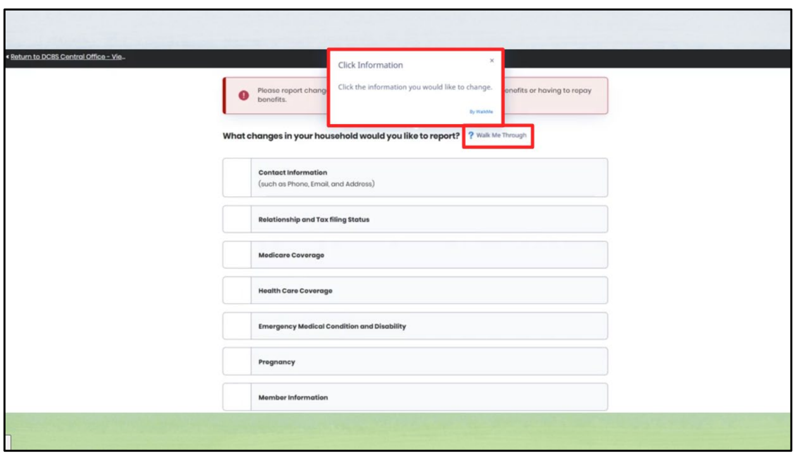
Slide Voice-over: If **Modify other information such as income, expenses, resources, or health** is selected, users will be directed to the **Report a Change** screen to select the information they would like to update, and to which household members the change applies.



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.



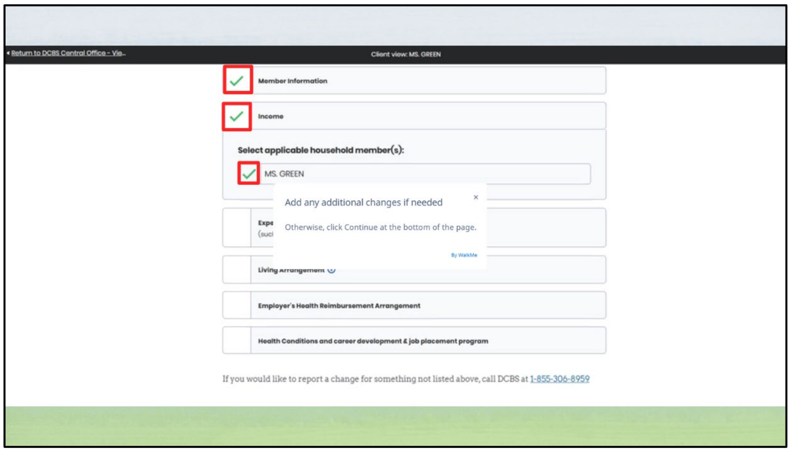
Slide Voice-over: A key functionality to mention is the walk me through functionality. This functionality is an integrated support tool which provides support and resources to kynect users. We will utilize this functionality to assist with selecting the changes needed. In this case, The Resident would 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.



Slide Voice-over: To make the requested change:

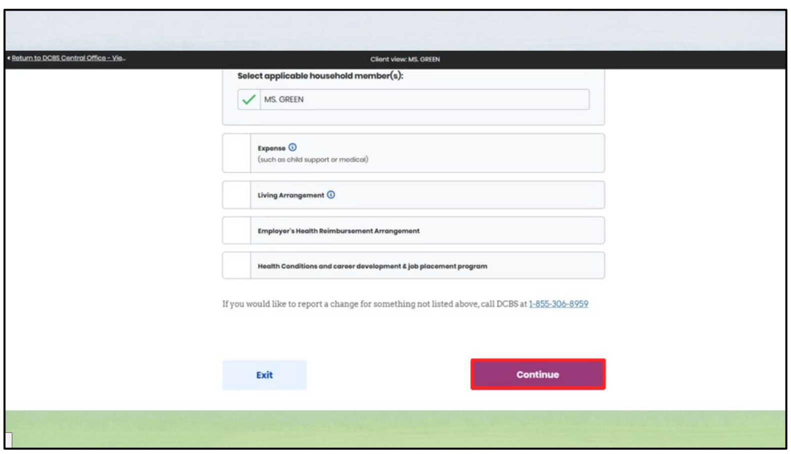
4. Select the **Member Information** checkbox, along with the **income checkbox**.
5. We would also select the applicable **household member**.

The walk me through feature displays the steps.



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.

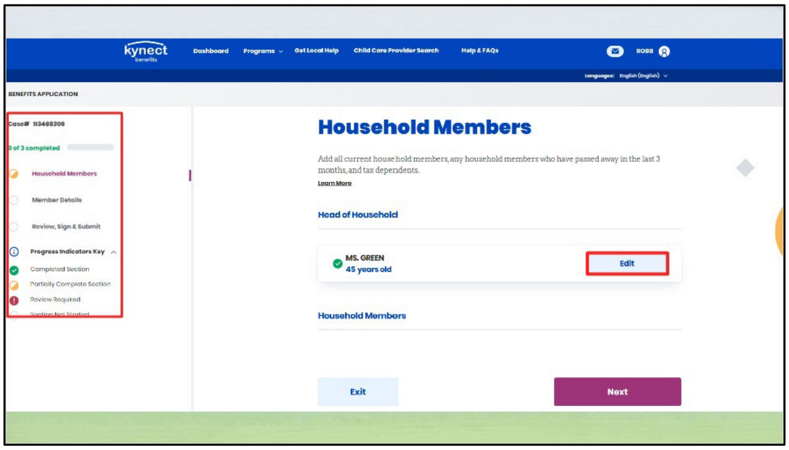
6. Click **Continue** to move forward.



2.4 Select Household Member

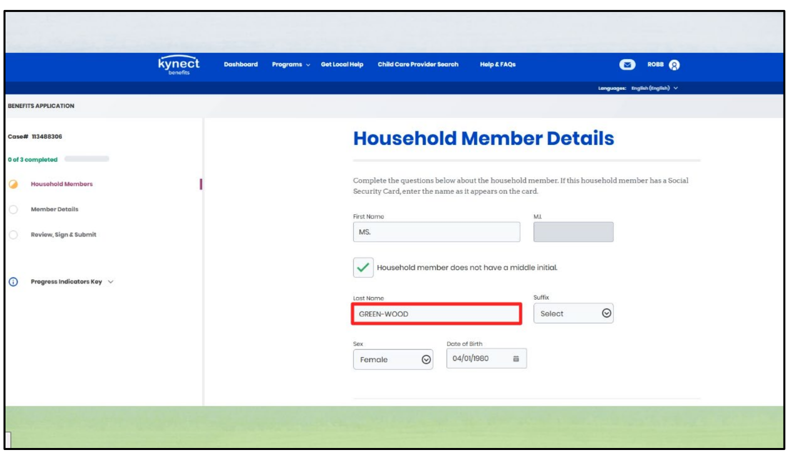
Slide Voice-over: We are directed to the **Household Member's** screen. To the left, users will see the case number for the Resident as well as a progress indicator key. From here, we will need to select **Edit** to make the change for the Resident.

7. Click **Edit**.



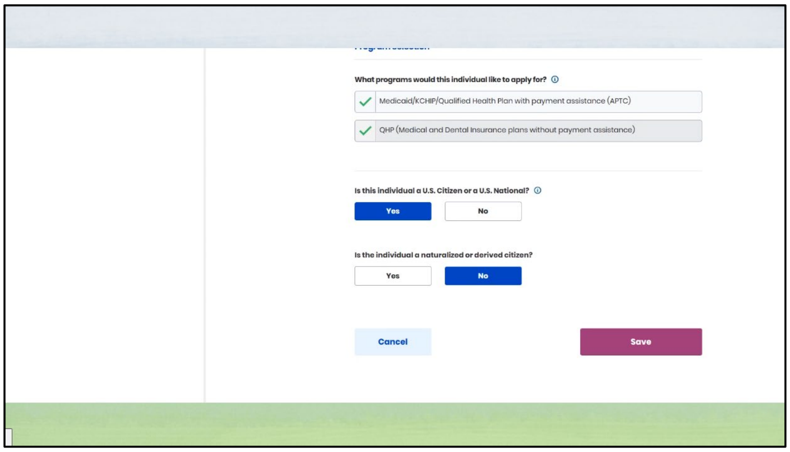
2.5 Update Household Member Details

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.



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

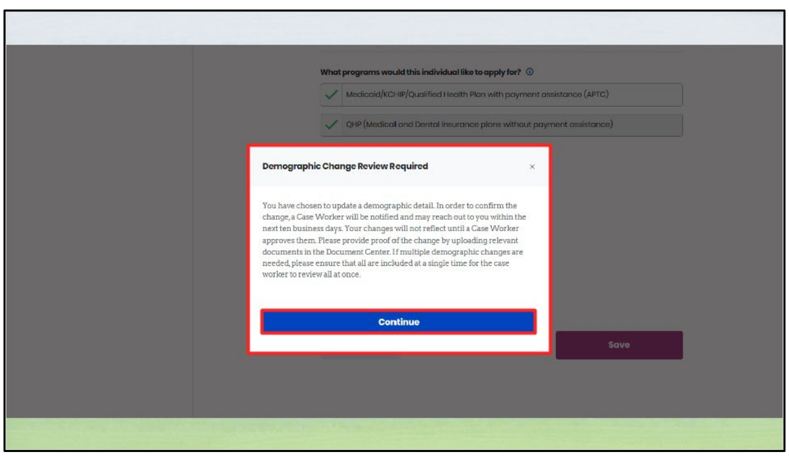
8. To proceed to the next step in the process, click **Save**.



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.

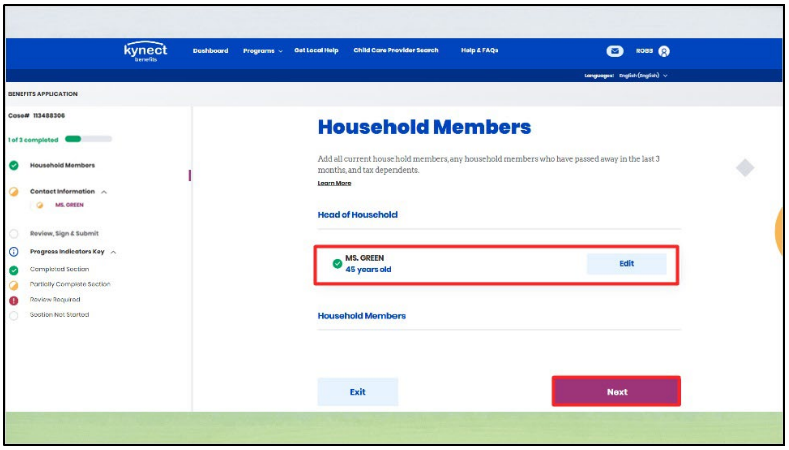
9. Click **Continue** to proceed.



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

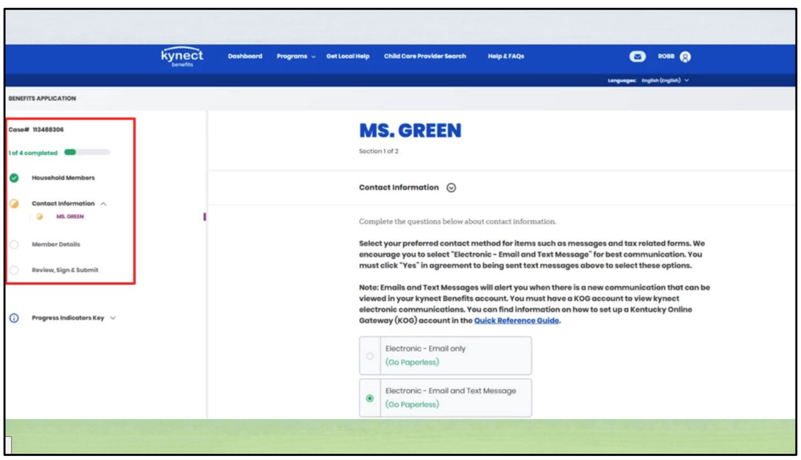
2.7 Update Corresponding Screens

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.

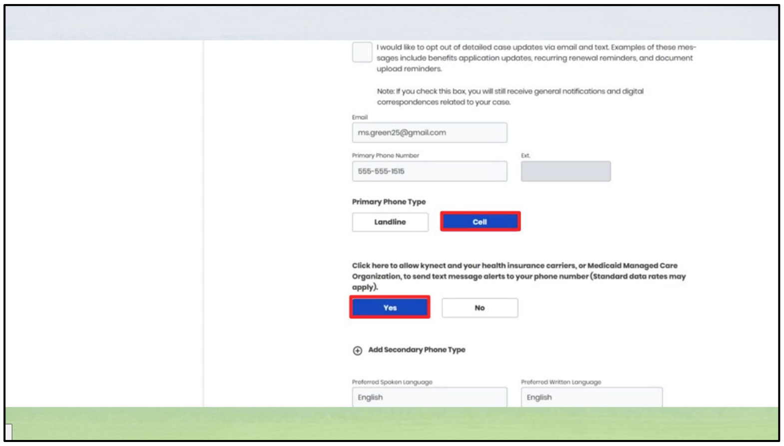


2.8 Confirm Contact Information

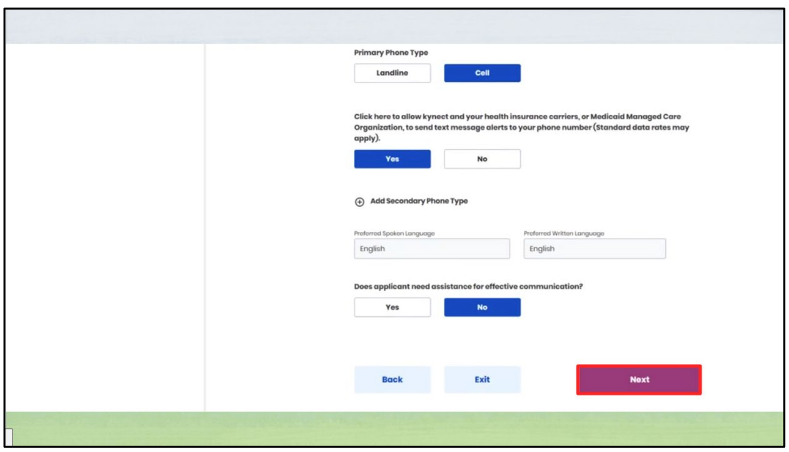
Slide Voice-over: The Report a Change process in kynect benefits shows Residents only the screens that need updating, along with any related screens based on their selected change category.



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



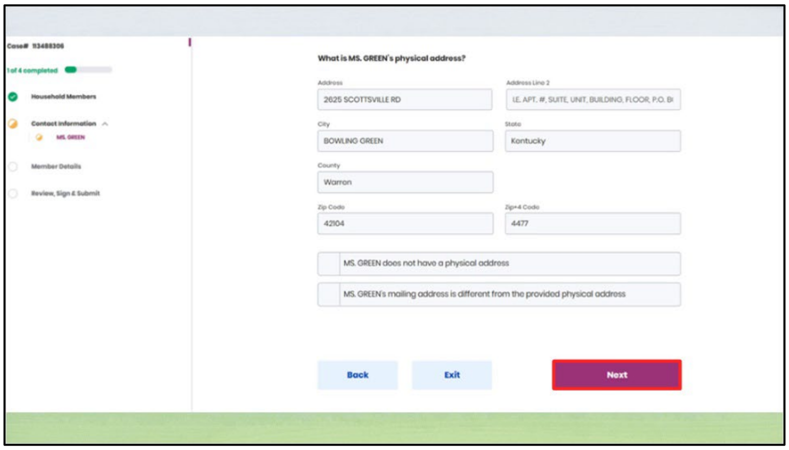
13. Click **Next** to confirm address information.



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

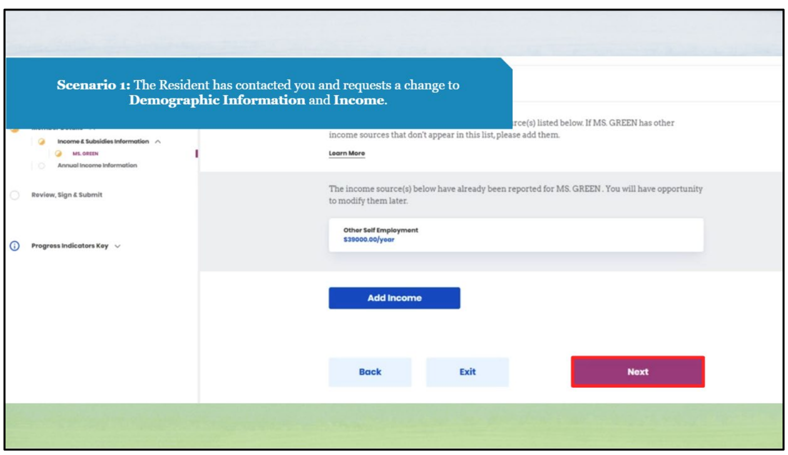
Slide Voice-over: We are then directed to the **Address Information** screen. Similar to the **Contact Information** screen, best practice is to verify that all address information is correct. The Resident has confirmed that no updates are required to her household address information.



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.

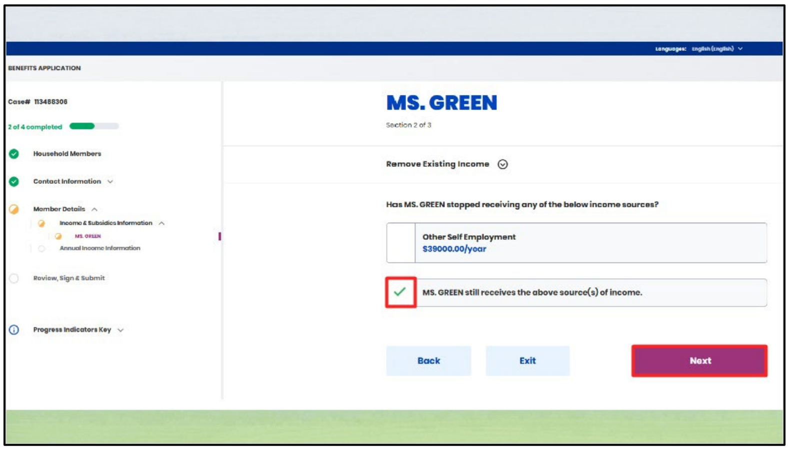
14. To continue with the changes, scroll down and click **Next**.



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**.

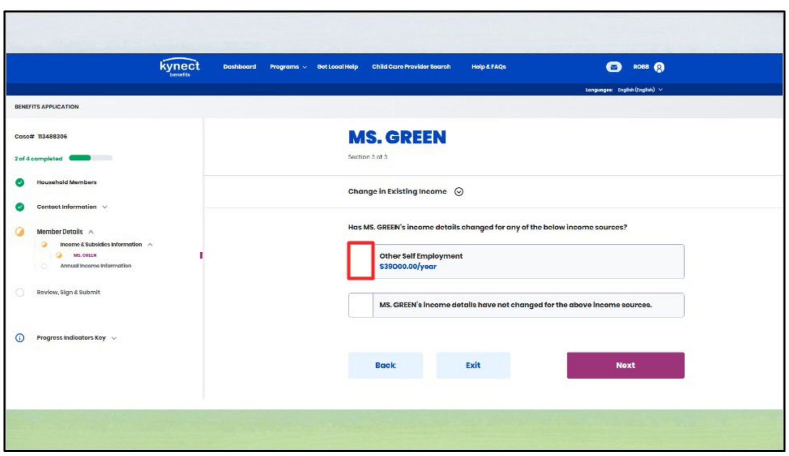


Please note: Income should only be removed if the Resident no longer receives the income. Removing income may trigger an RFI.

2.12 Report Change in Existing Income: 1

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

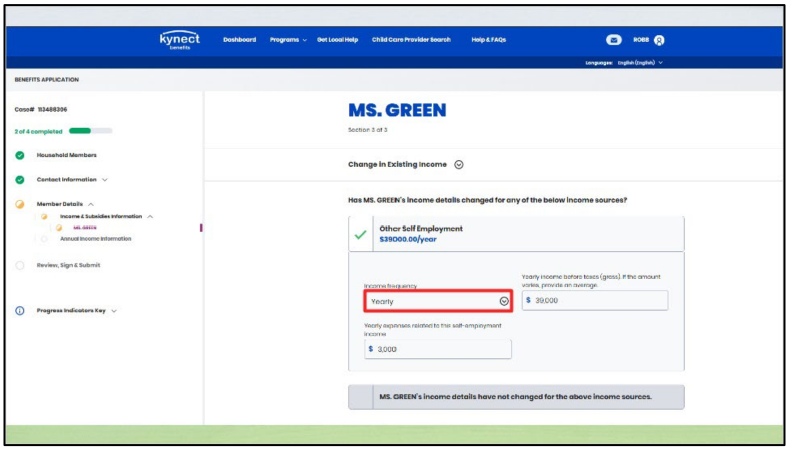
16. Select **Other Self Employment**.



2.13 Report Change in Existing Income: 2

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

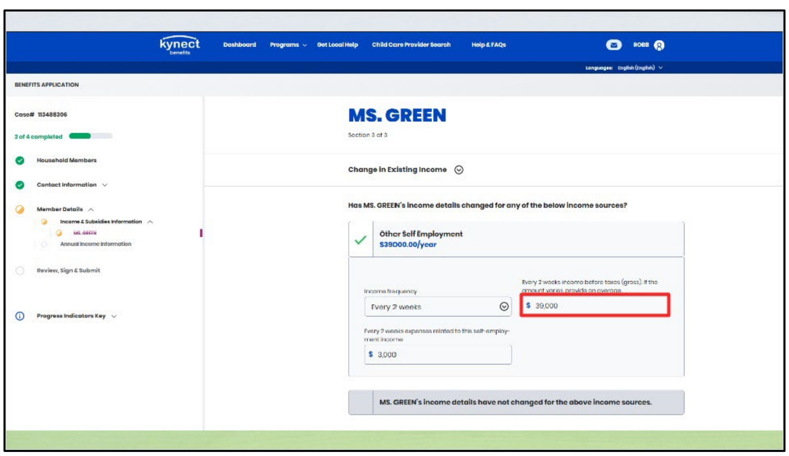
17. Select **Bi-weekly** as the income frequency from the dropdown menu.



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.

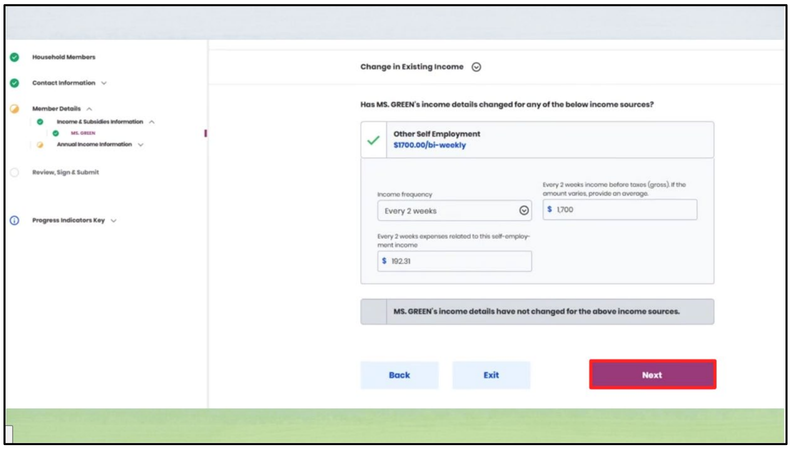
18. Enter the **dollar amount** in the field shown.



2.15 Report Change in Existing Income: Expenses

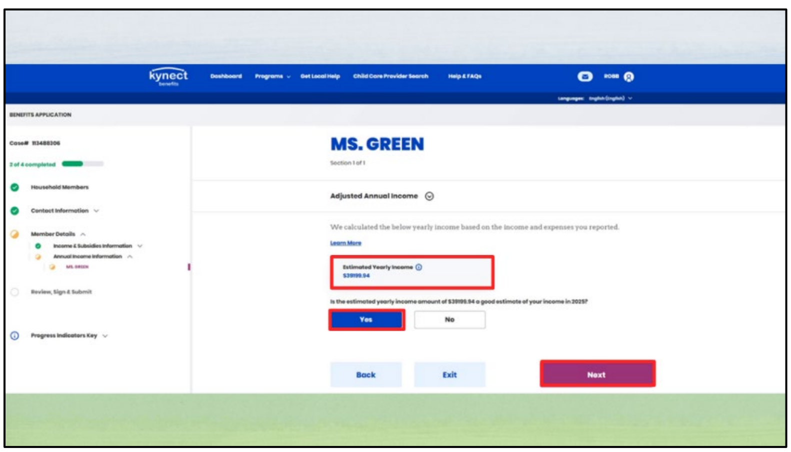
Slide Voice-over: Next, we will need to confirm any expenses. The Resident shares that due to the increase in business, her bi-weekly expenses will average out to $192.31 every two weeks.

19. Click **Next** to proceed.



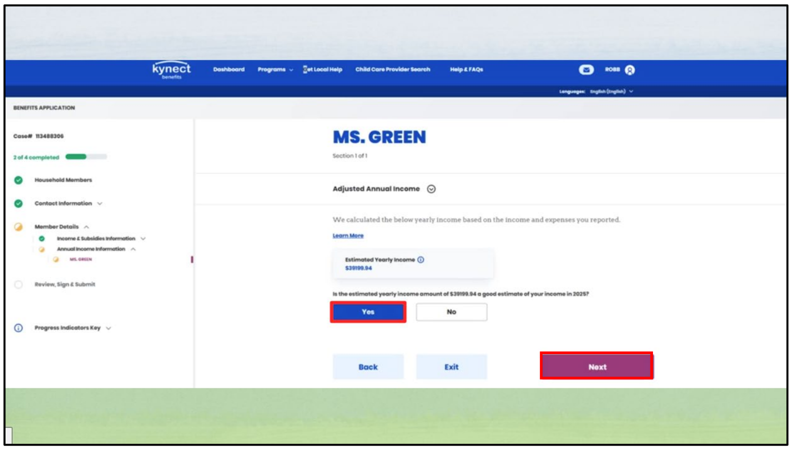
2.16 Adjusted Annual Income

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.

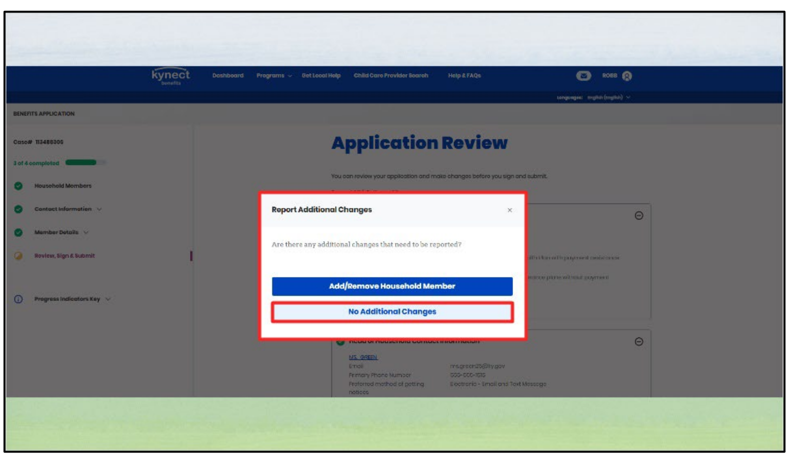


Please note: Income entered in the *application's income subsidies* section will be projected on an annual basis. Medicaid assesses monthly income, while APTC considers annual income. Sometimes, the annual income amount must be adjusted due to changes during the year that affect it.

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.

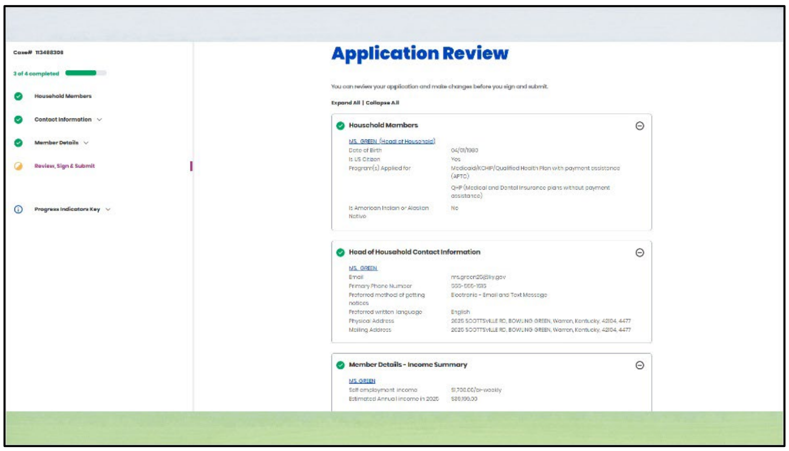
21. Click **No Additional Changes.**



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.



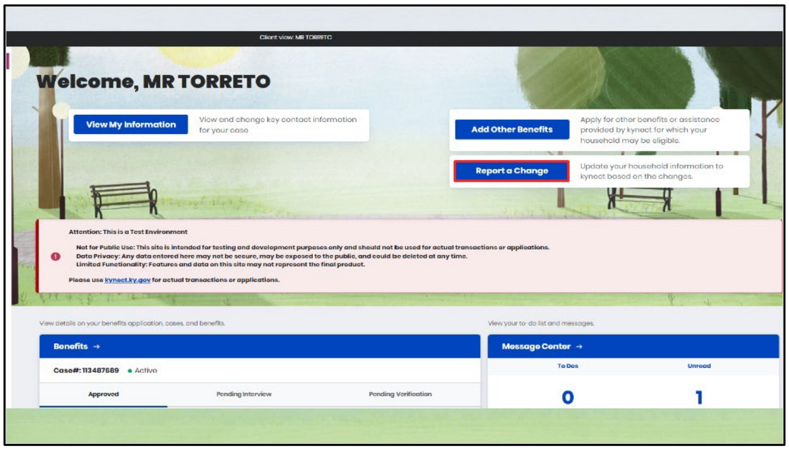
Please note: When processing most changes, an RFI will often be generated. These RFIs request Residents to upload supporting documentation through the Document Center found on the Resident Dashboard.

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.

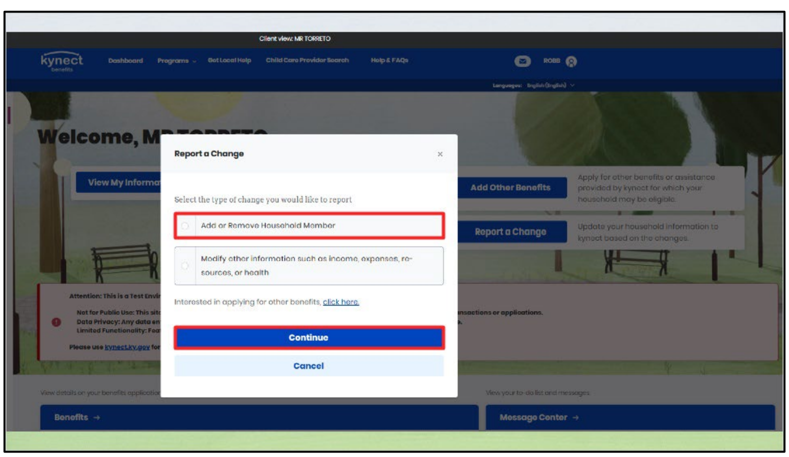
1. Click **Report a Change** to begin.



3.2 Select Change Type: Add/Remove Member

Slide Voice-over: In this case:

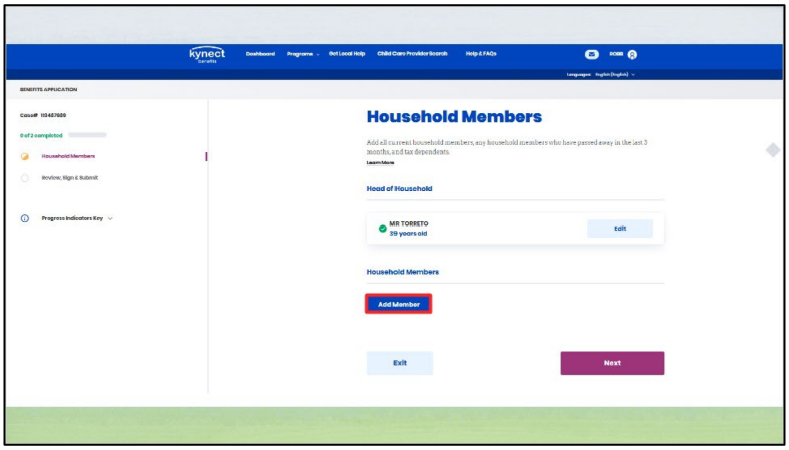
2. Select **Add or Remove Household Member** as the change type.
3. Click **Continue.**



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.

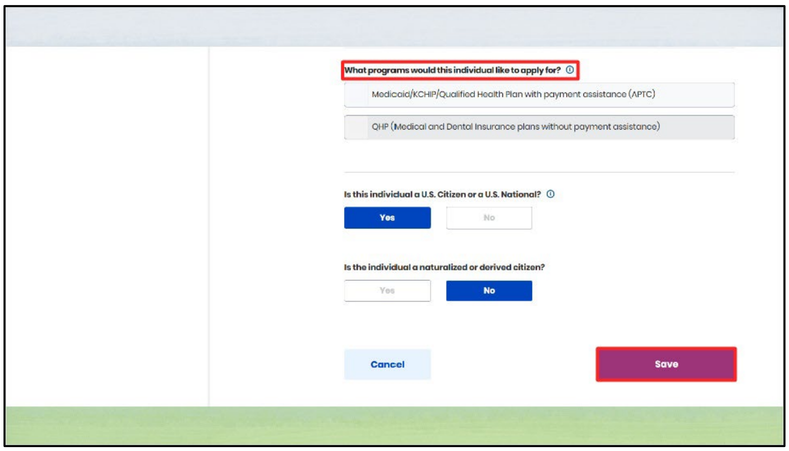


Please note: When adding additional household members, if their full name, date of birth, Social Security Number, and gender match an existing Individual within kynect, it will trigger a full member match.

3.4 Enter Household Details

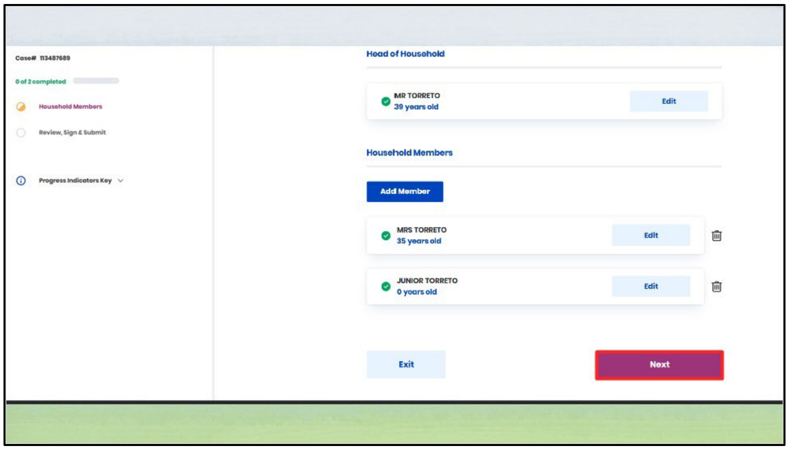
Slide Voice-over: Completing the *Household Details* section was covered in Course 3: *Processing Applications in kynect*. For the purpose of this demonstration, we have included all the necessary information for the members we plan to add. A key callout to communicate is that when adding a member, the 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.



3.5 Added Household Members

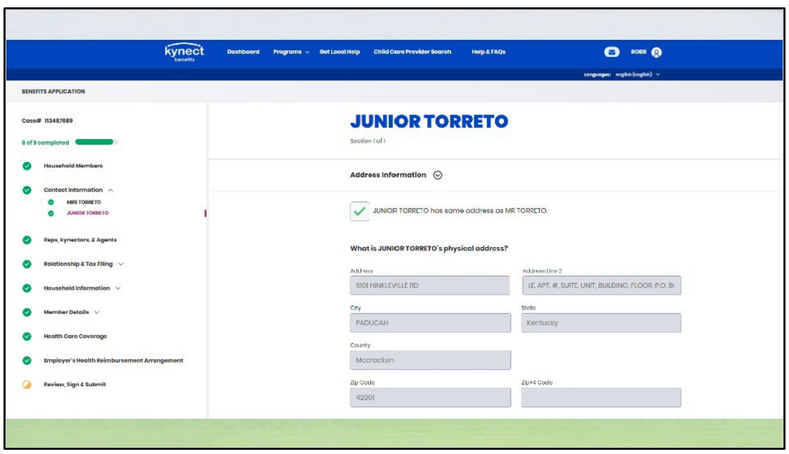
Slide Voice-over: We have successfully added spouse and child. It is important to familiarize yourself with the programs the Resident is applying for and how adding members may could their benefits. Locate more information on [SNAP](#), in the resources tab. Once the members are added, you will then 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.



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

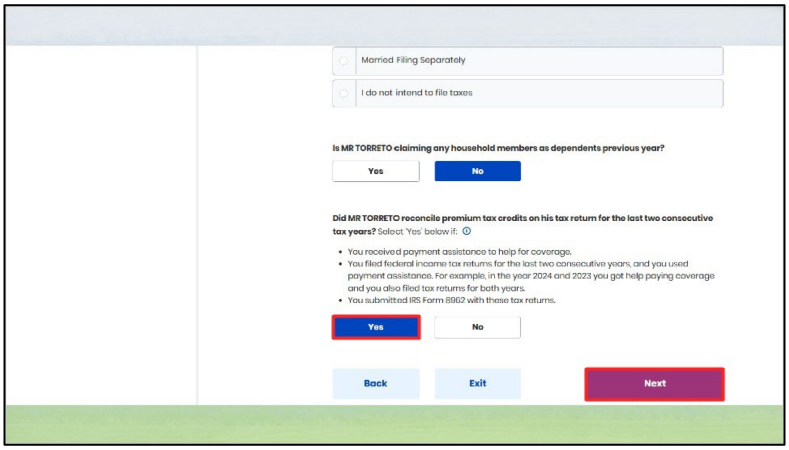
3.6 Confirm Contact & Address

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.



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.

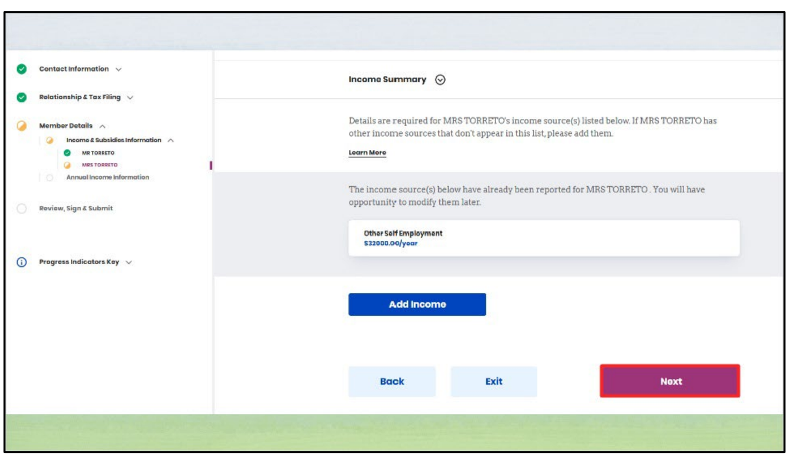


Please note: Married couples must file taxes jointly to be eligible for APTC. Additionally, Verify the Resident is aware that the Head of Household must reconcile their Premium Tax Credits to remain eligible for APTC.

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.

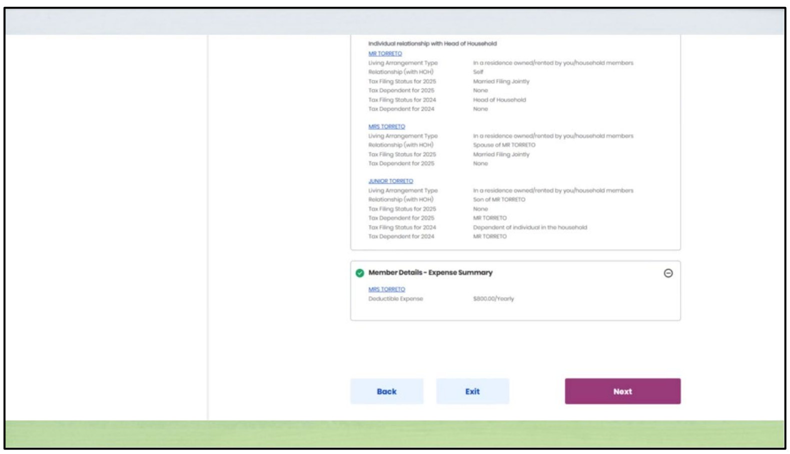


Please note: Marriage and the birth of a child could impact household size, household income amount, and eligibility for benefit programs. Agents, and kynectors should be aware of how these additions could impact the Resident's eligibility and where they fall on the Federal Poverty Level (FPL). For more information on household size and Federal Poverty Levels, review the **Federal Poverty Level** Resource located in the resource tab.

3.9 Application Review

Slide Voice-over: For Demonstration purposes we will jump to the **Application Review** screen. All other application details were covered in Course 3: *Processing Applications in kynect*. As a reminder, be sure to complete all sections and do a thorough review with the Resident. As a best practice here on the **Application Review** screen, it is important to review the application and changes thoroughly to confirm accuracy. Review and confirm changes for the added members.

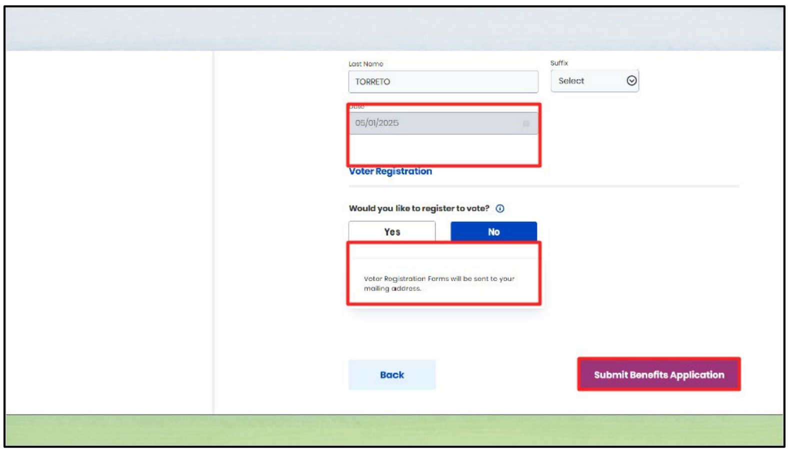
8. Click **Next** to move to the **Signature** page.



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.

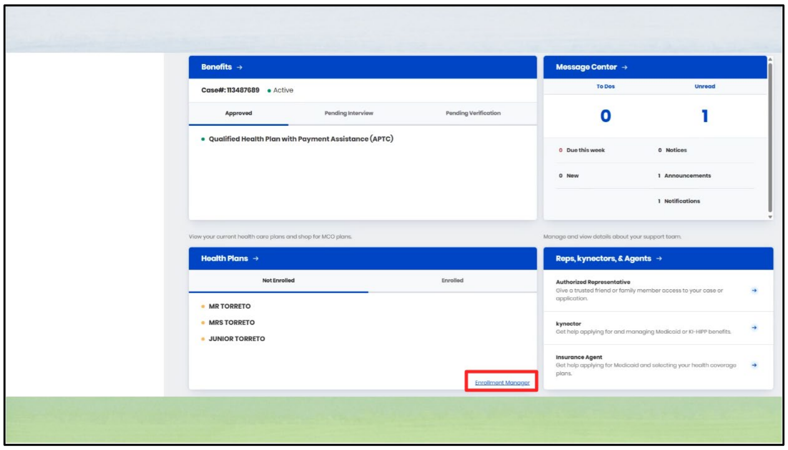
9. To begin the next step, click **Submit Benefits Application**.



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.

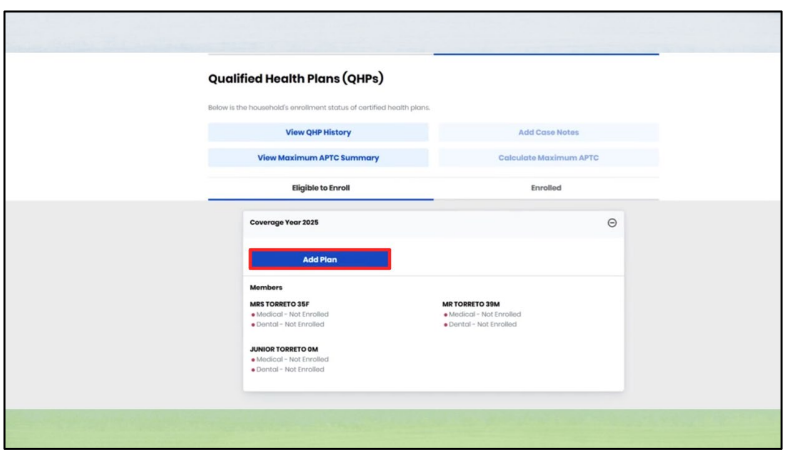


Please note: The Special Enrollment Period Reason screen is triggered in the Enrollment Manager module.

3.12 Enrollment Manager

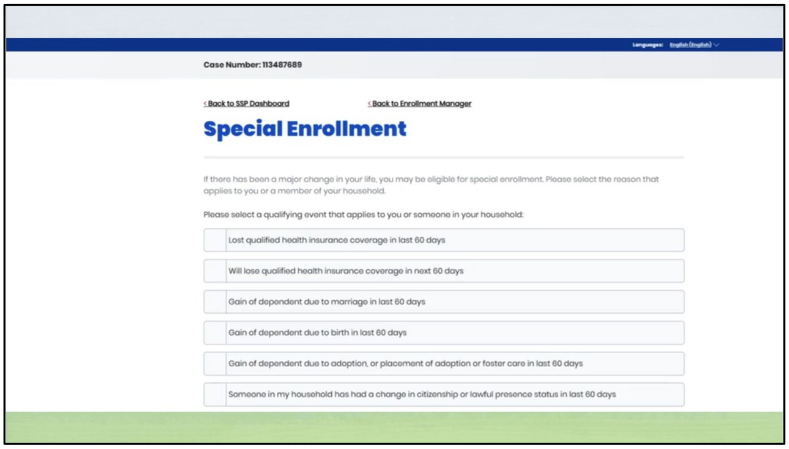
Slide Voice-over: We are then directed to the **Enrollment Manager** screen.

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.

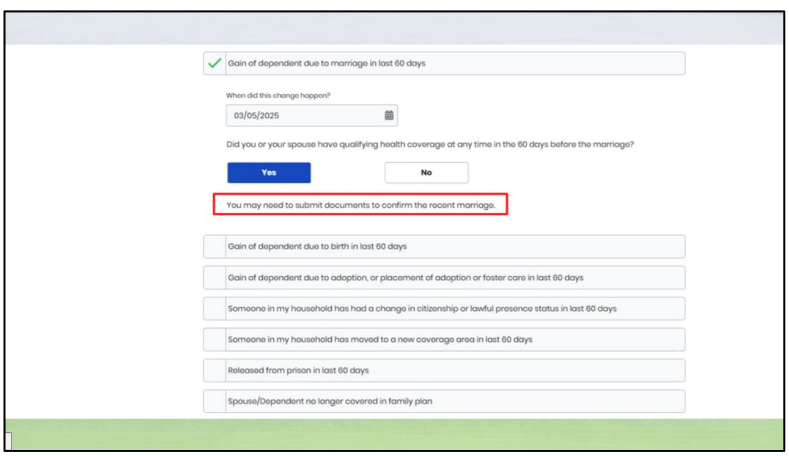


Slide Voice-over: For adding a spouse:

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.

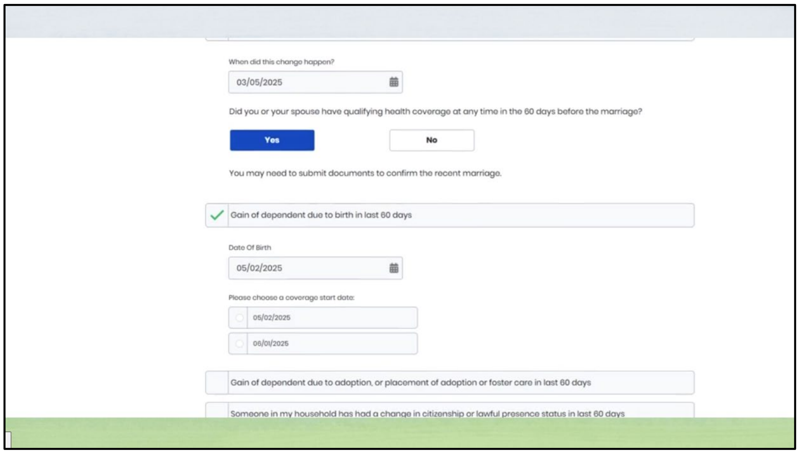


Please note: Most Special Enrollment Periods reported could potentially trigger an RFI. Be sure the Resident is informed that they may be required to submit documentation to proceed with the enrollment.

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:

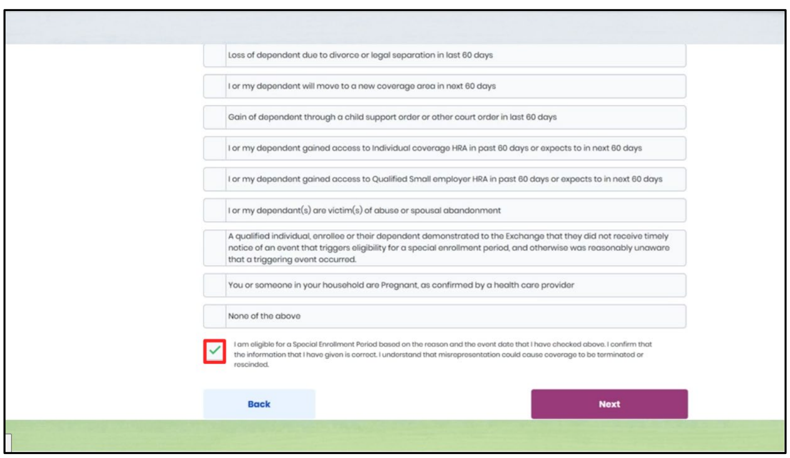
15. The Resident would like to select **Gain of dependent due to birth in the last 60 days**.
16. Enter the **date of birth**.

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.



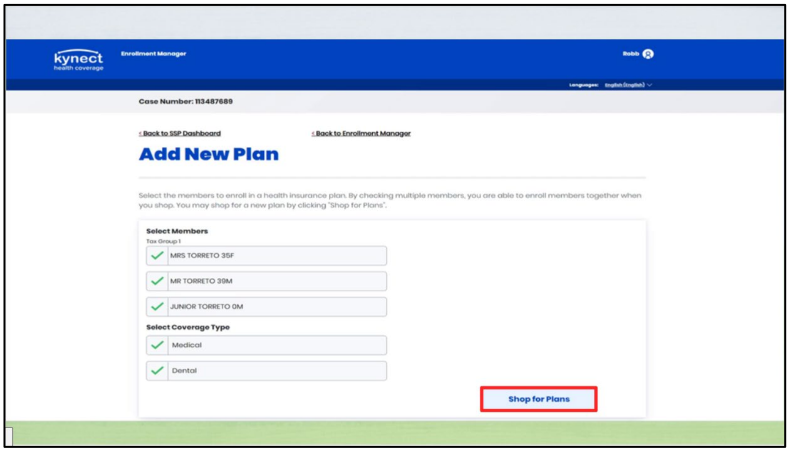
Slide Voice-over: Be aware that in both cases, the enrollment will pend and documentation should be uploaded to the Document Center in support of the reported changes. Documentation needs to be submitted prior to the initial premium payment to effectuate coverage.

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



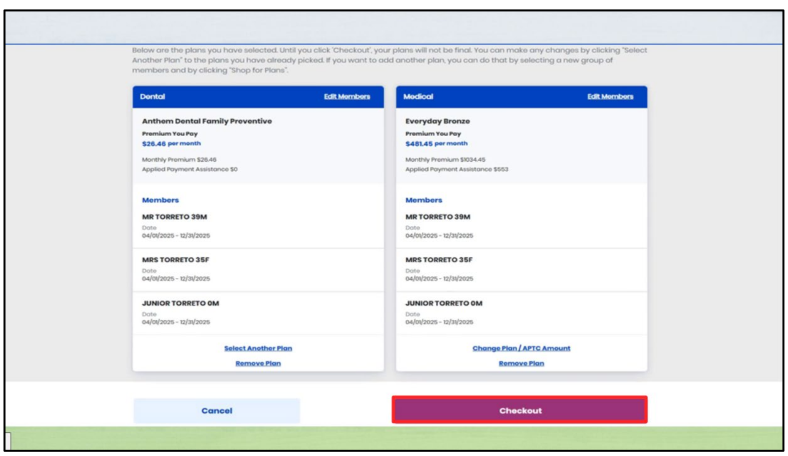
3.14 Add Plan

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.



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

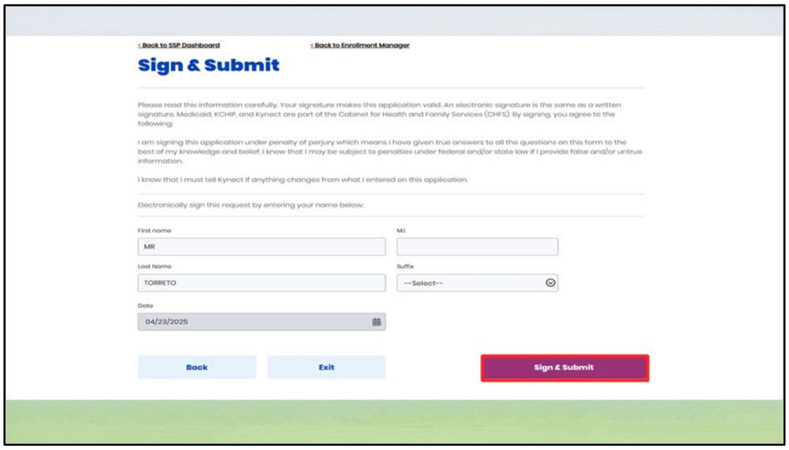
19. Click **Checkout** to move to the final step in the process.



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**.



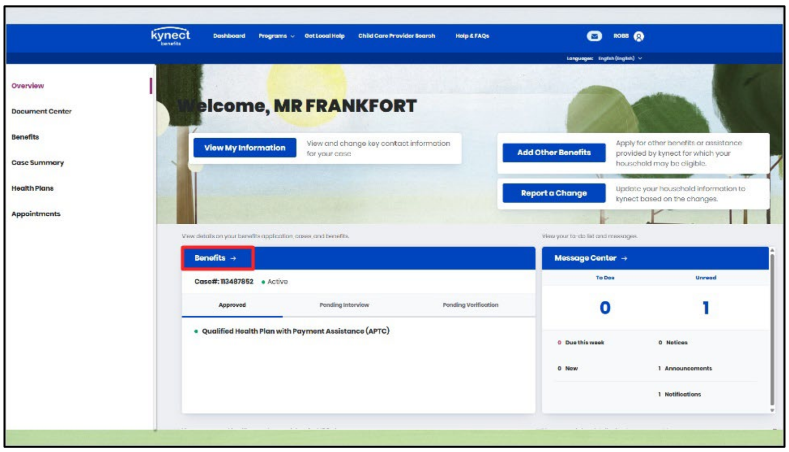
4. Report a Change: Remove Head of Household

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.**

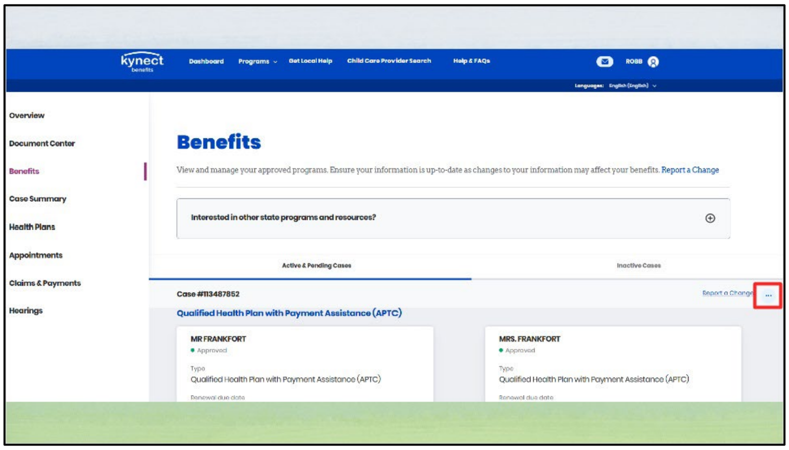


Please note: Prior to turning 65 and enrolling in Medicare, eligible Individuals should disenroll from their QHP plan ahead of their transition so there is no gap in coverage. This also helps to avoid the possibility of a Medicare late enrollment penalty. The Resident transitioning to Medicare must also 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

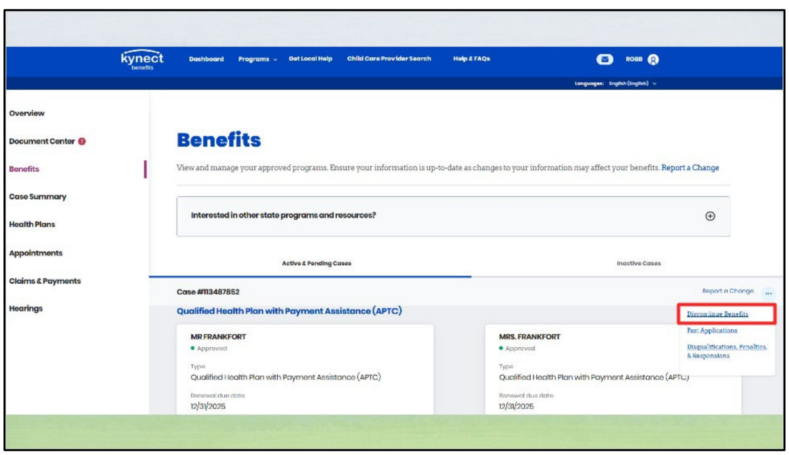
Slide Voice-over: We are now on the Benefits page where we will need to Discontinue benefits for Mr. Frankfort. By discontinuing benefits, we would remove Mr. Frankfort from requesting coverage and from the selected plan. However, he can still be included in the tax household.

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



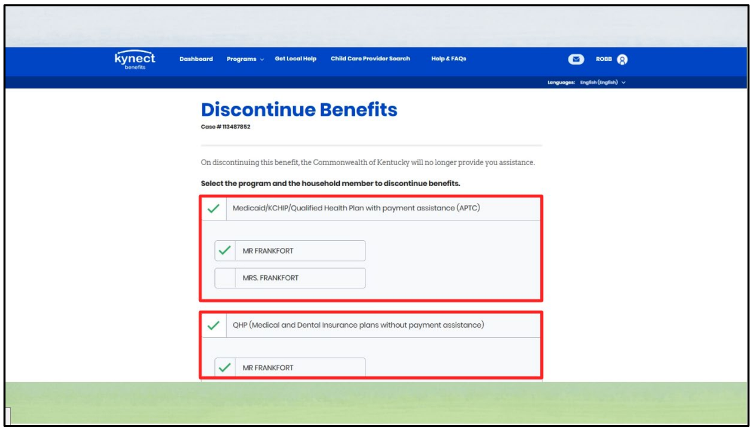
4.3 Discontinue Benefits

3. Click **Discontinue Benefits**.



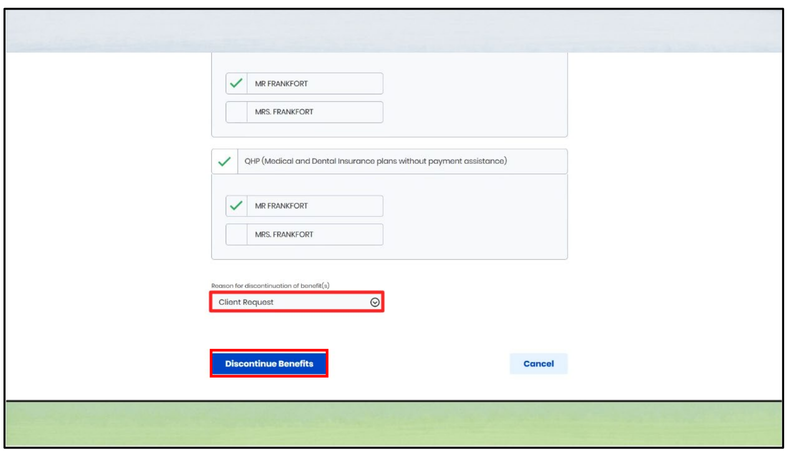
4.4 Discontinue Benefits Continued

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



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.

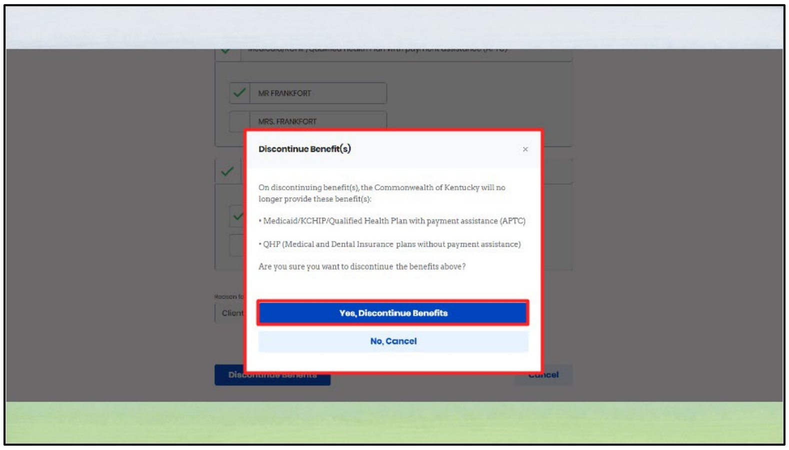
5. Select **Client Request** as the reason.
6. Click **Discontinue Benefits** to continue.



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.

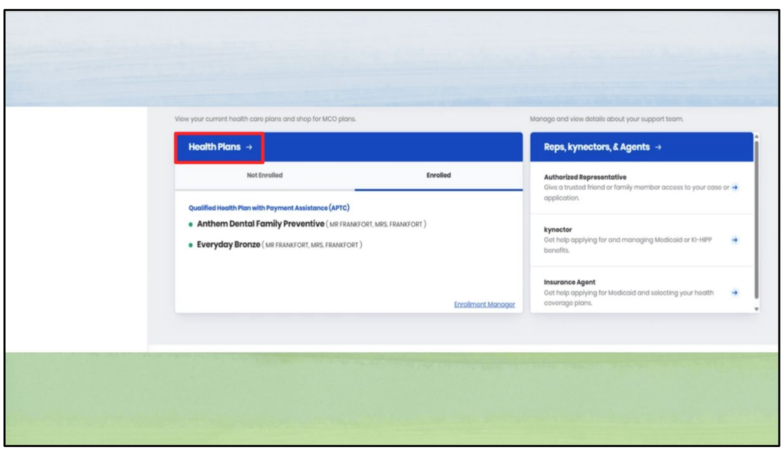
7. Click **Yes, Discontinue Benefits**.



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.

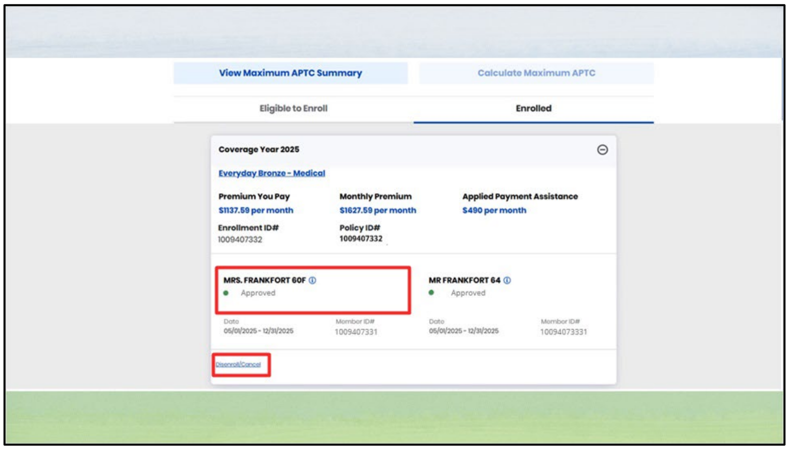
8. Scroll down and click **Health Plans**.



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.

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



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**.