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

February 20, 2026

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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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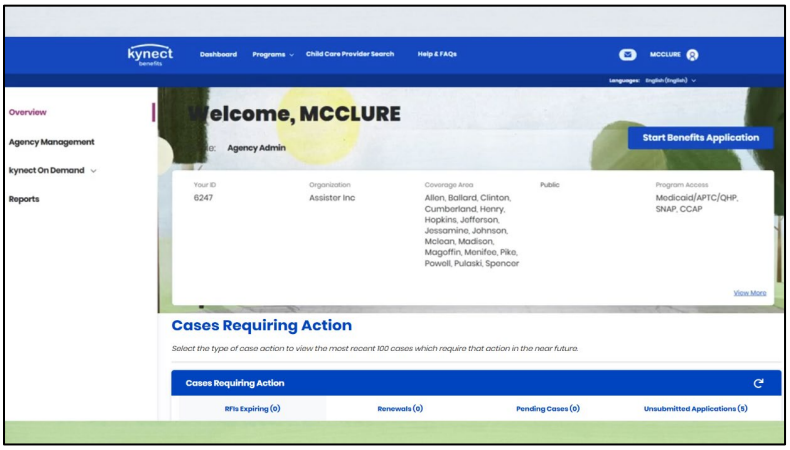
1. Report a Change Overview

1.1 Locate Resident

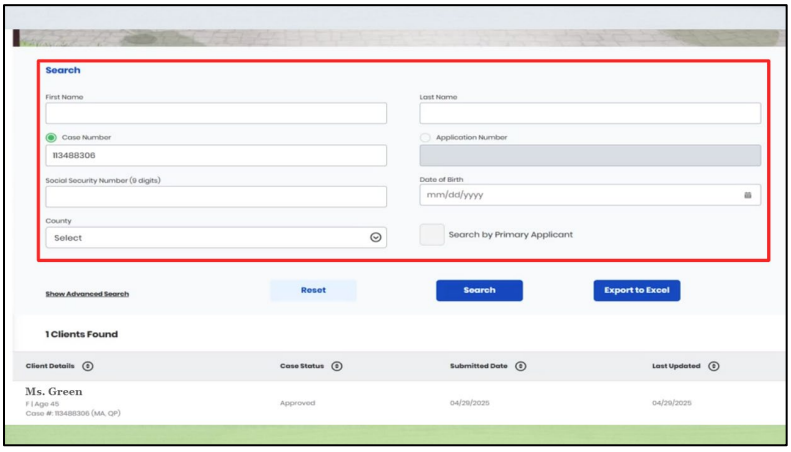
Slide Voice-over: This overview will begin in the kynect Dashboard.



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 selecting **Book of Business**. Next, select the applicable **Resident** to navigate to the **Client Details** screen. Finally, select **kynect benefits Dashboard** to navigate to the Resident Dashboard.

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

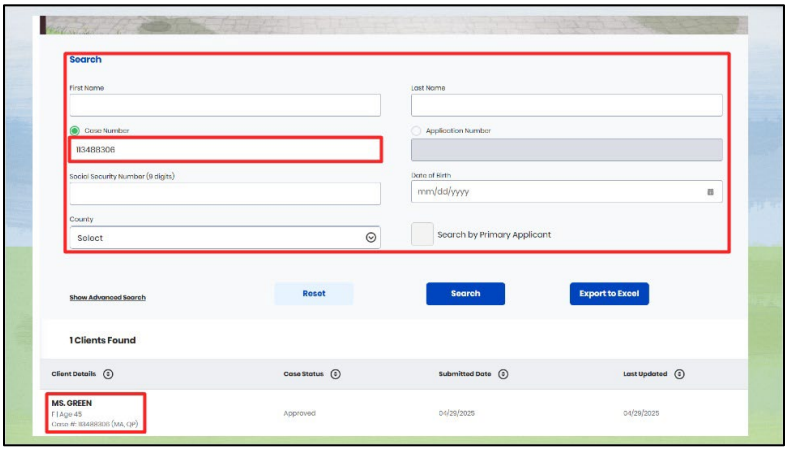


Please note: When assisting a Resident, in order for the Report a Change functionality to display, the Resident must have at least one active case in Approved status for Agents and kynectors to be associated so they may take action on an active benefit program. Additionally, the Resident must be approved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

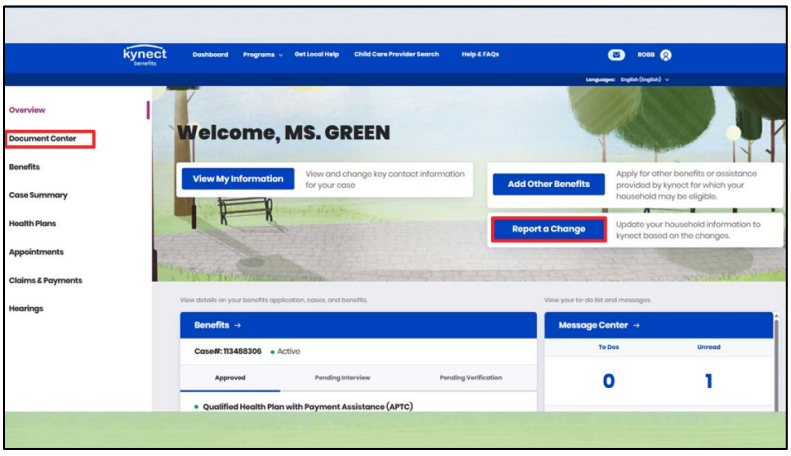
2. To continue, select the **name of the Resident.**



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:

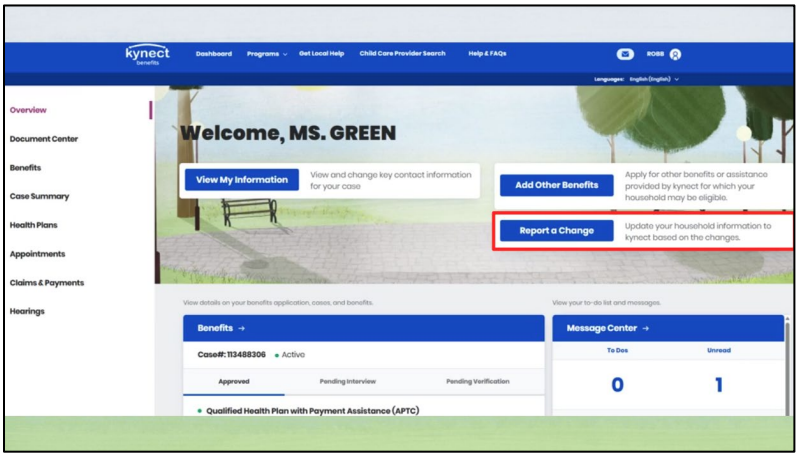
- Adding or removing a household member.
- Modifying other information such as income, expenses, resources, or health.



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

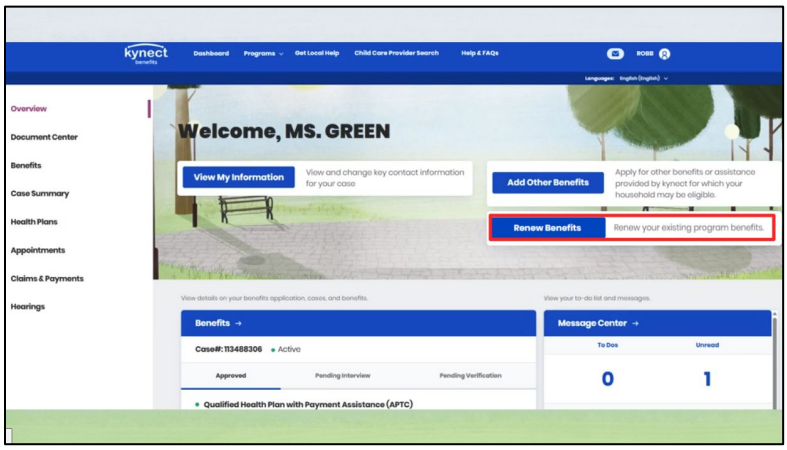
Slide Voice-over: Residents can report changes on their own as needed or request for changes to be made by an Agent or kynector. Once logged into the Resident's Dashboard, the user will see a button to the right labeled Report a Change.



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. For more information please visit the Report a Change Quick Reference Guide found on the KHBE website.

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

3. Select **Report a Change**.

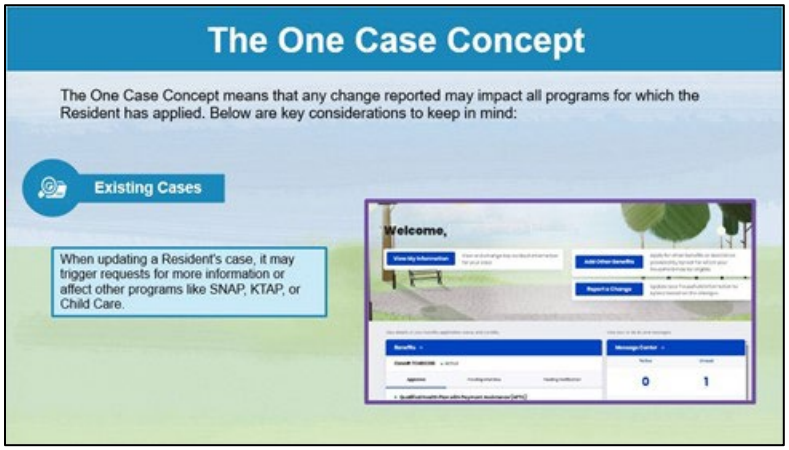


Please note: Change mode indicates a DCBS Caseworker is actively processing updates for the Resident. To prevent discrepancies, Agents and kynectors will not be able to make updates as the **Report a Change** button will not display until the DCBS Caseworker completes their task(s).

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:

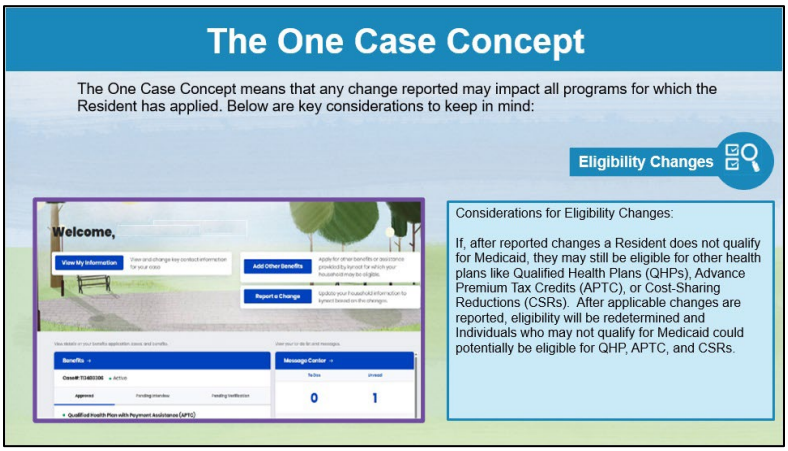
- **Existing Cases:** When updating a Resident's case, it may trigger requests for more information or affect other programs like SNAP, KTAP, or Childcare.
- **Adding/Removing Members:** To avoid duplicative benefits, if an Individual is on an existing case, first remove the Individual from the existing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

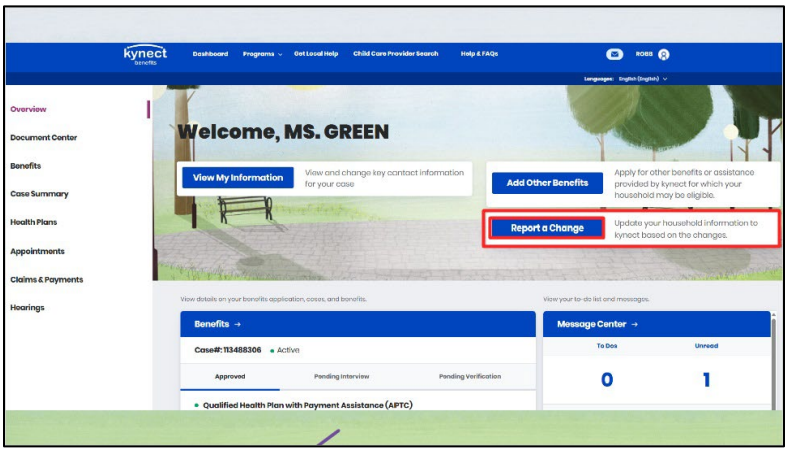
- **Eligibility Changes:** Individuals who do not qualify for Medicaid may be eligible for Qualified Health Plans (QHPs), Advance Premium Tax Credits (APTC), and/or Cost-Sharing Reductions (CSRs) coverage through QHPs. After applicable changes are reported, eligibility will be redetermined and Individuals 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

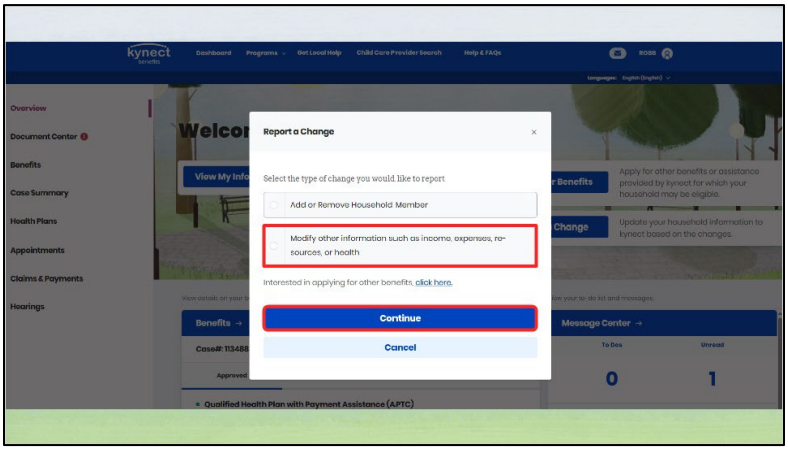
During the demonstration, we will walk through the process to Report a Change for a few different scenarios a Resident could request. Let's now walk through the steps to complete the Report a Change process from the Resident Dashboard. In this scenario, The Resident, Ms. Green, has contacted you and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

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

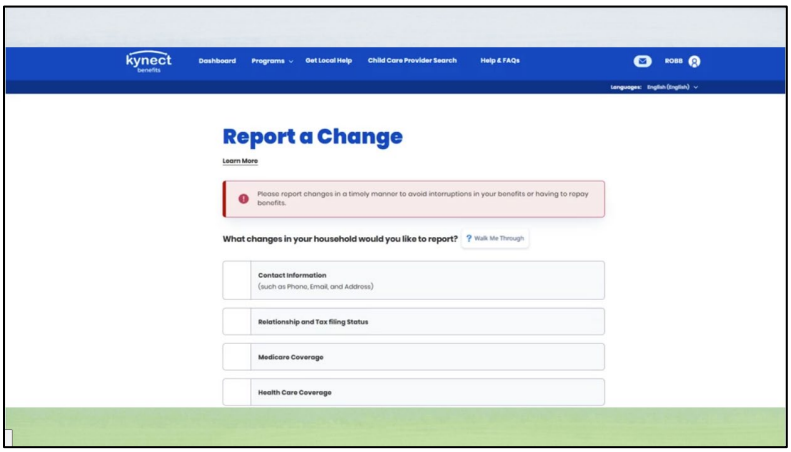


Slide Voice-over: After selecting the **Report a Change** button, a prompt appears asking about the type of change users would like to report.

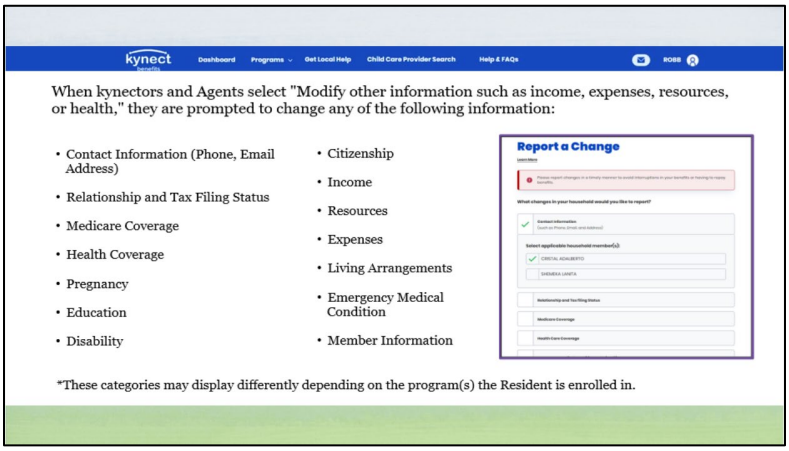
2. Since the Resident would like to update contact information, select **Modify other information such as income, expenses, resources, or health**.
3. To proceed, select **Continue**.



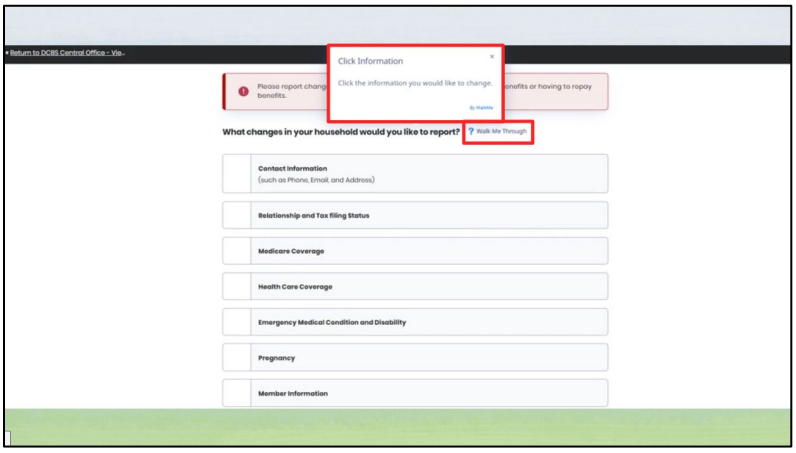
Slide Voice-over: If **Modify other information such as income, expenses, resources, or health** is selected, users will be directed to the **Report a Change** screen to select the information they would like to update, and to which household members the change applies.



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.



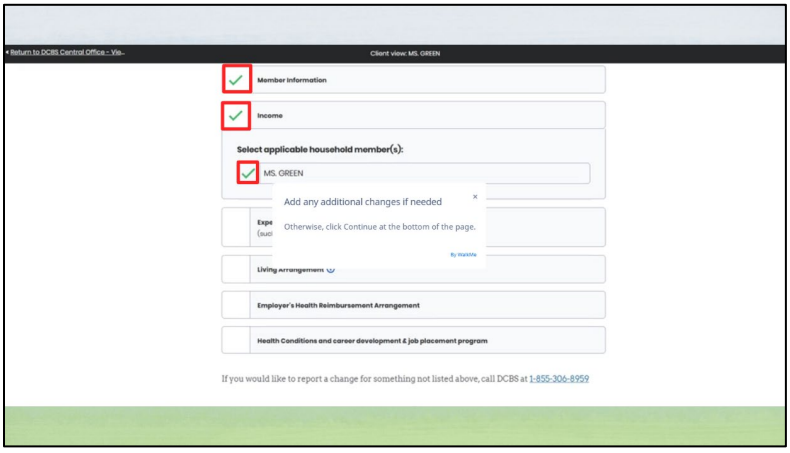
Slide Voice-over: A key functionality to mention is the walk me through functionality. This functionality is an integrated support tool which provides support and resources to kynect users. We will utilize this functionality to assist with selecting the changes needed. In this case, The Resident would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



Slide Voice-over: To make the requested change:

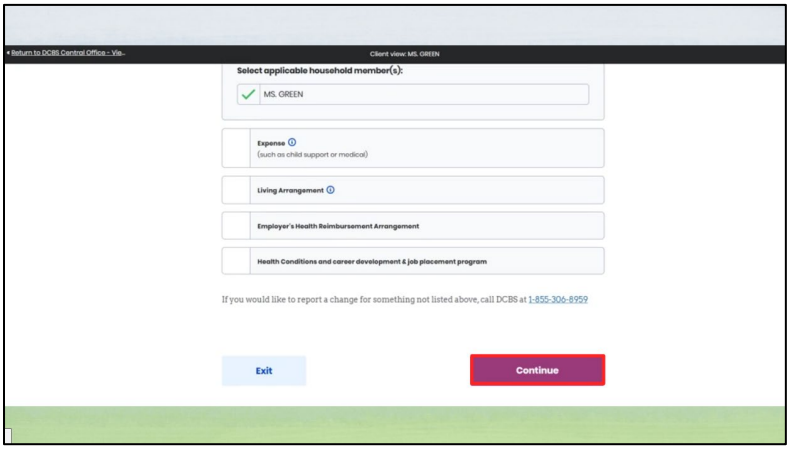
4. Select the **Member Information** checkbox, along with any additional criteria which may need to be updated.
5. Select the applicable **household member**.

The walk me through feature displays the steps.



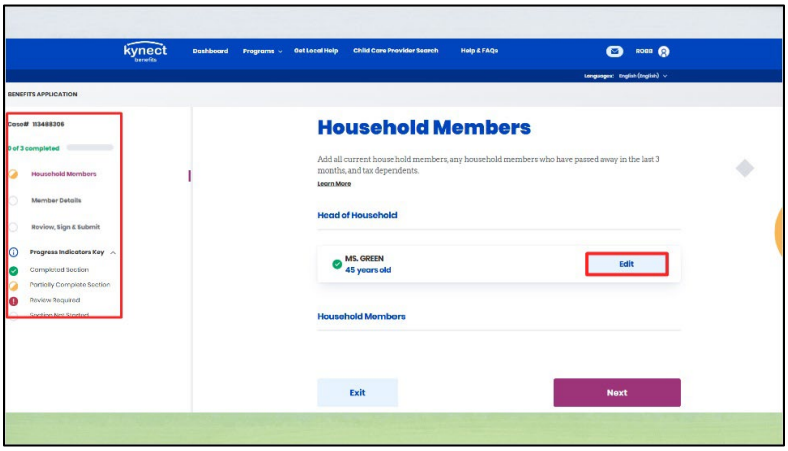
Slide Voice-over: Once selected, move to the bottom of the page to continue. If more than one change is needed on a case, users may select multiple change options.

6. Select **Continue** to move forward.

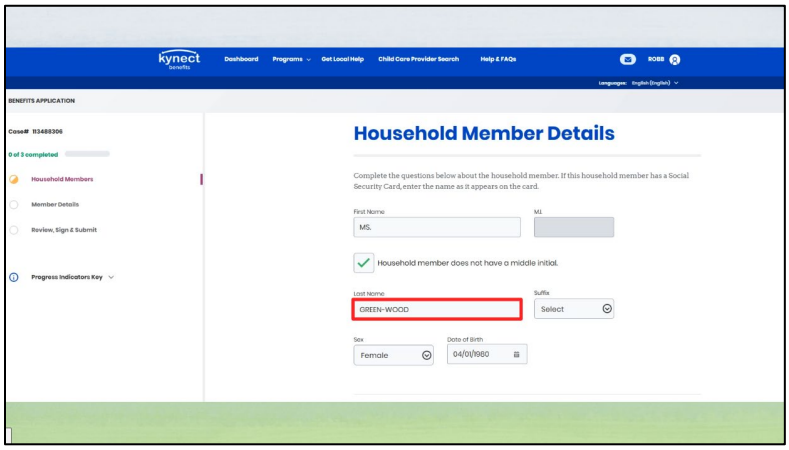


Slide Voice-over: We are directed to the **Household Members** screen. To the left, users will see the case number for the Resident as well as a progress indicator key. From here, we will need to select **Edit** to make the change for the Resident.

7. Select **Edit**.

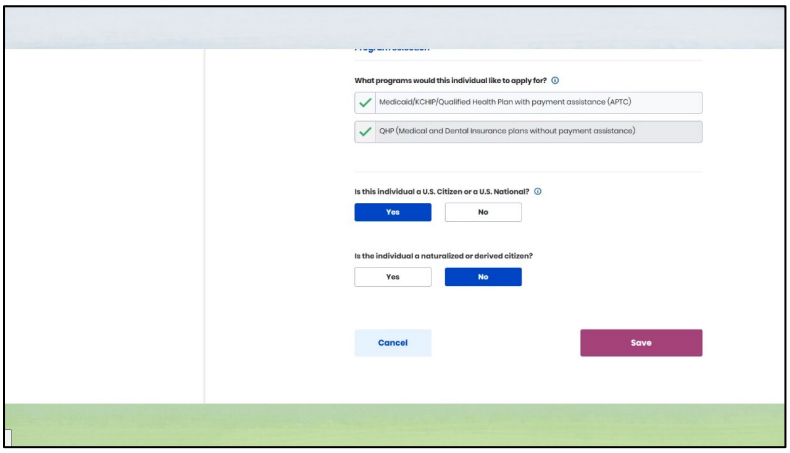


Slide Voice-over: From here, on the **Household Member Details** screen, we will make the changes for the Resident. Ms. Green has shared that she has made a legal last name change and holds documentation to support the last name modification from Green, to now Green-Wood. Once this is complete, as a 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.



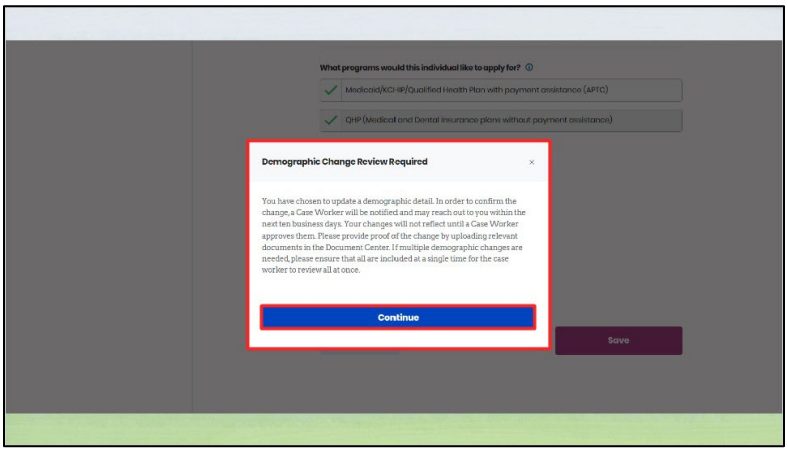
Slide Voice-over: At this time, no other household information would need to be updated.

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



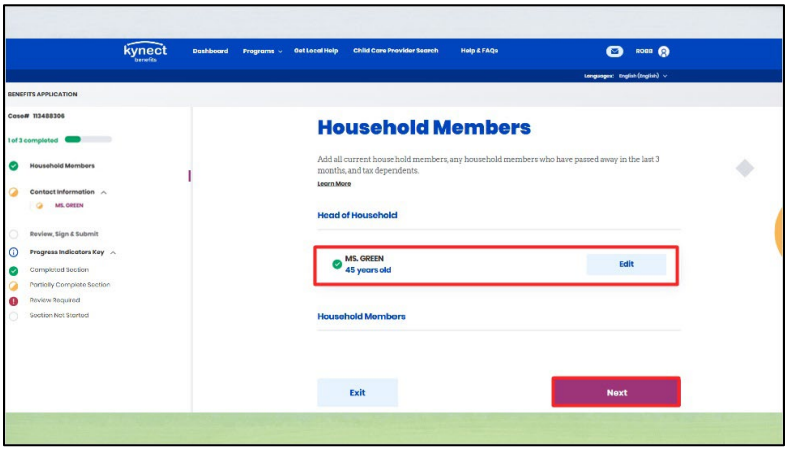
Slide Voice-over: Once a demographic detail is changed and **Save** is selected, users will receive the following pop-up displayed on the screen. This review is done to protect system integrity, verify the change, and confirm the correct Individual receives the appropriate benefits. A Caseworker will 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. Select **Continue** to proceed.

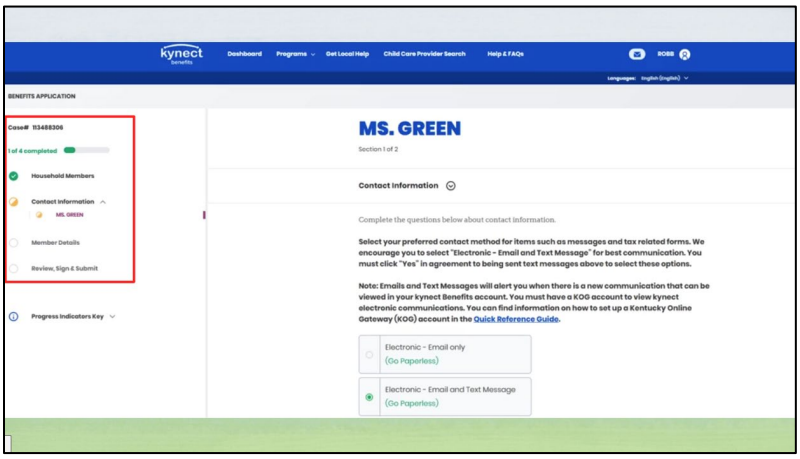


Please note: Updating any demographic details for a Resident, such as last name in this instance, will automatically trigger a DCBS Caseworker review.

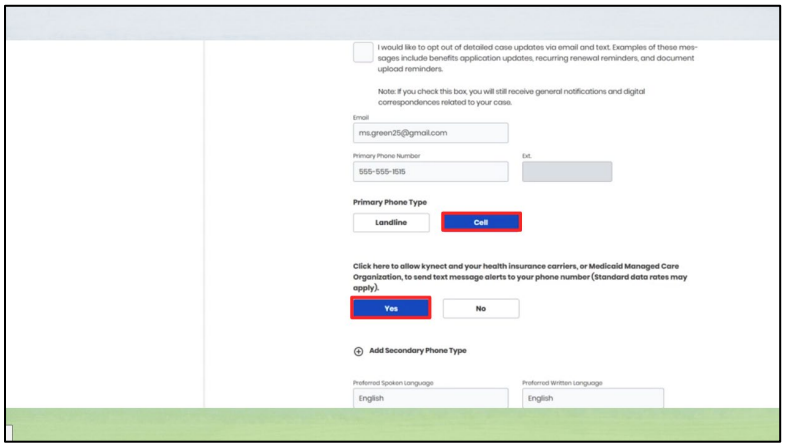
Slide Voice-over: The changes have not yet been reflected. We will now need to review, and update any additional sections impacted by the updated information. For a change in Demographic Information, users will need to confirm contact and address details as well.



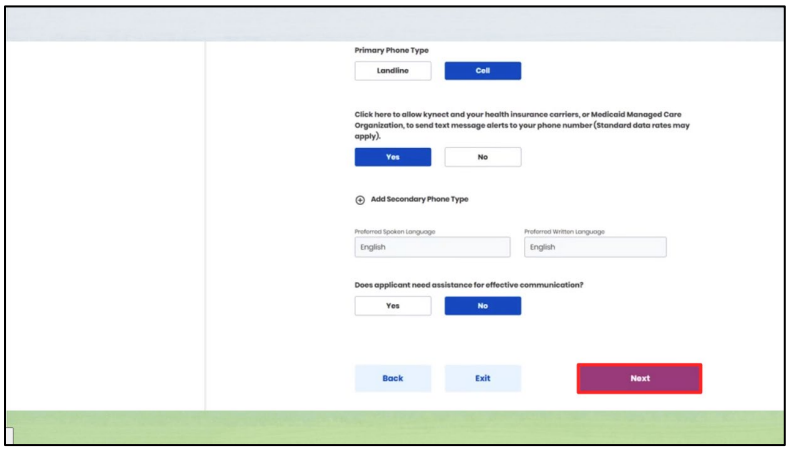
Slide Voice-over: The Report a Change process in kynect benefits shows Residents only the screens that need updating, along with any related screens based on their selected change category.



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



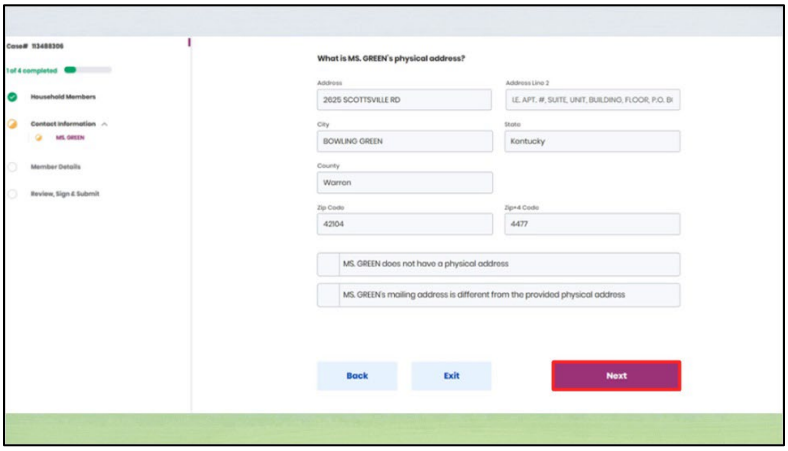
13. Select **Next** to confirm address information.



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.

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.

14. Select **Next** to review the reported changes and complete the Report a Change process.



For additional scenario examples for report a change, please visit the Report a Change Scenario Guide found on the KHBE website.