

The Commonwealth of Kentucky



Quick Reference Guide

kynector/Authorized Representative Dashboard





This Quick Reference Guide is designed to help kynectors and Authorized Representatives complete the necessary steps to navigate their dashboard.

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Please Note: Residents who still need help after referencing this Quick Reference Guide can call **(855) 459-6328** for additional assistance.



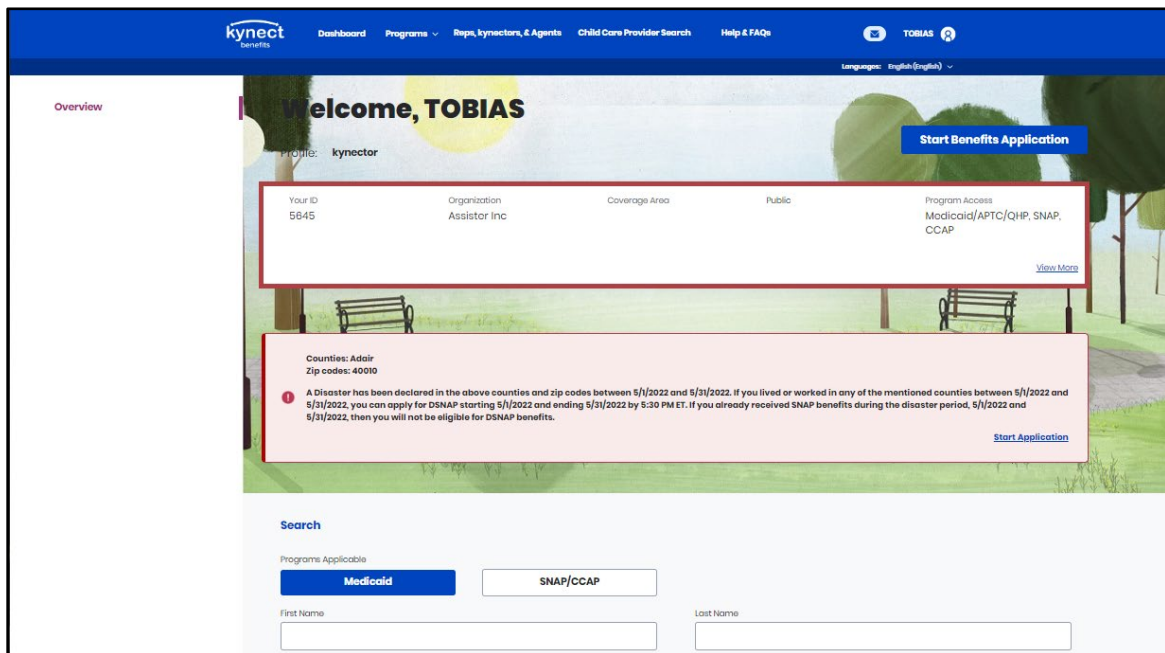
kynector/Authorized Representative Dashboard Overview

The kynector/Authorized Representative Dashboard helps kynectors and Authorized Representatives search and find the cases for their associated Residents. kynectors and Authorized Representatives must have an active Kentucky Online Gateway (KOG) account to access their dashboard.

kynector/Authorized Representative Dashboard Details

The top half of the kynector/Authorized Representative dashboard includes the details below.

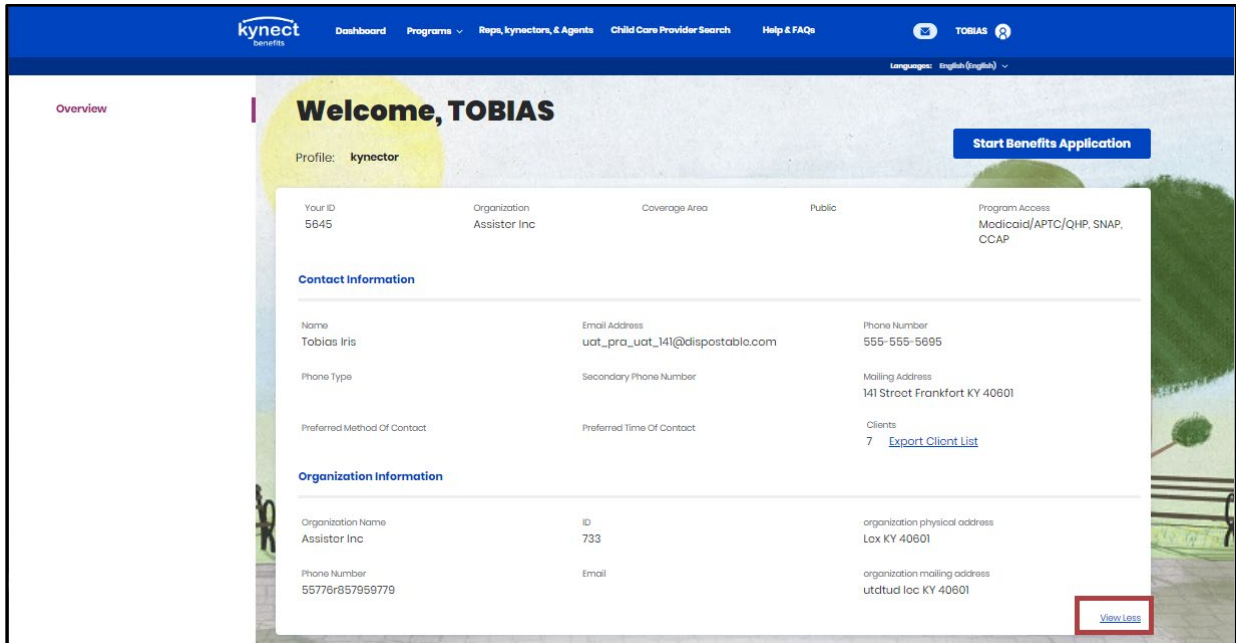
- ID Number
- Organization
- Coverage Area
- Public or Private Status
- Number of associated Resident cases
- Program Access



Please Note: The screenshot above displays the kynectors/Authorized Representative ID number. kynectors use the kynector ID when they call the Professional Services Line.



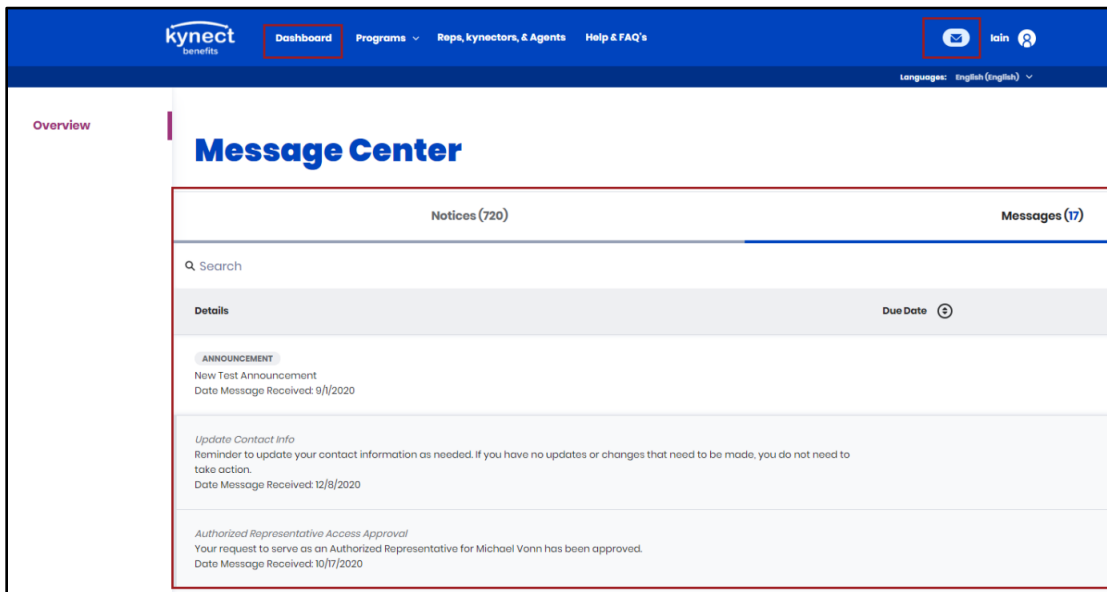
1. Click “View More” to reveal Contact Information and Organization Information.



2. Click “View Less” to hide the information.

View Message Center

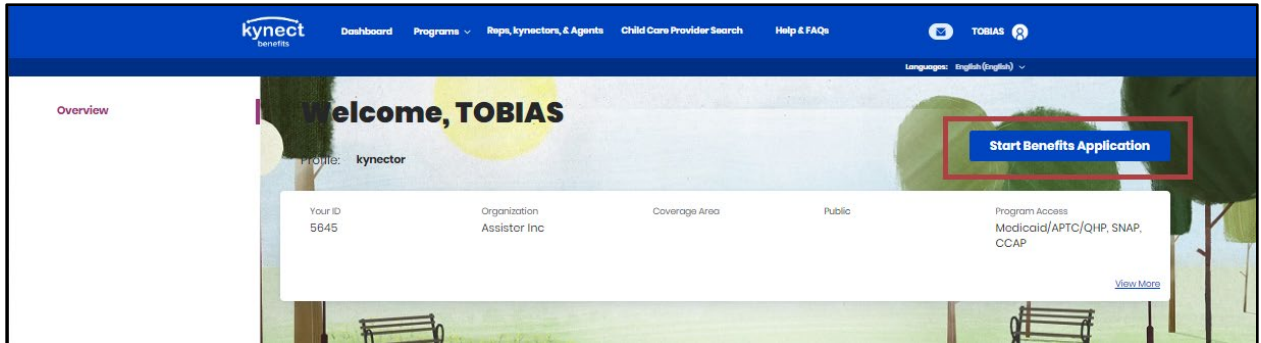
1. Click the Message Center icon to view Announcements, Messages, and Notifications for the cases for Residents. Accessibility to Notifications and To-Do's depend on the role and associated programs.
2. Click “Dashboard” on the top menu to return to the kynector/Authorized Representative dashboard.



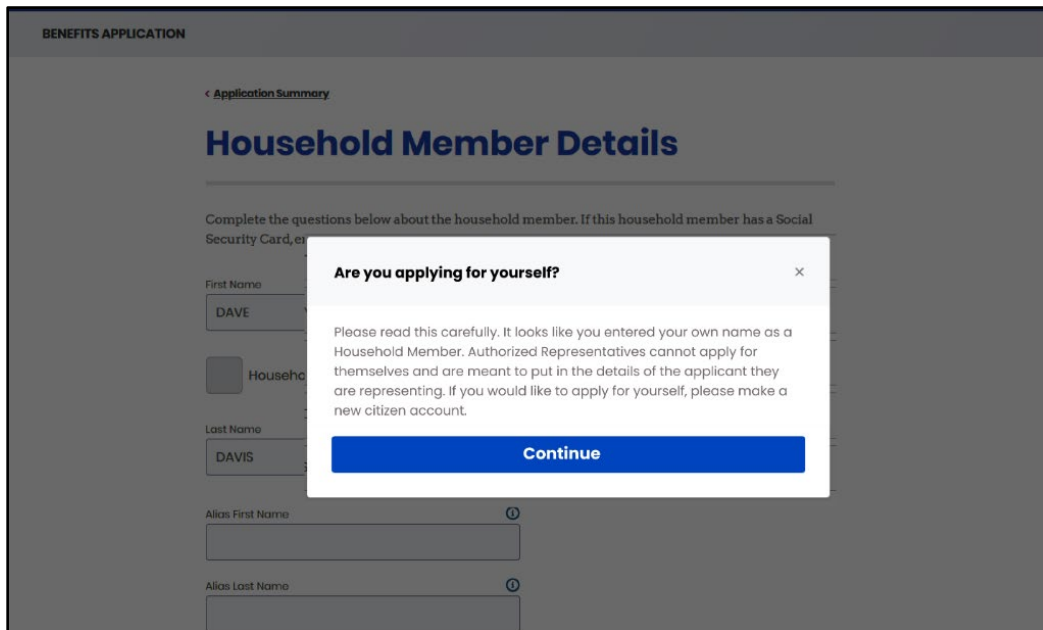


Start Benefits Application

1. Click “Start Benefits Application” to begin the process of completing a benefits application on behalf of a Resident.



Please Note: The following screen appears if an Authorized Representative tries to complete a benefits application for themselves:



Please Note: If another user is currently completing an application for the Individual, then the following message displays: “You cannot access this Application since another user is currently editing this application.” If the user already in the application is inactive for 10 minutes or longer, then they are kicked out of the system.



Please Note: If a kynector is associated with more than one organization, they will receive the following screen after clicking “Start Benefits Application.”

The screenshot shows a dialog box titled "Select kynector Organization" with a close button (X) in the top right corner. Below the title, there is a prompt: "Select the organization you would like to create the application on behalf of". There are two radio button options: "Westchester Hospital" and "Eastchester Clinic". At the bottom of the dialog, there are two buttons: a blue "Continue" button and a light blue "Cancel" button.

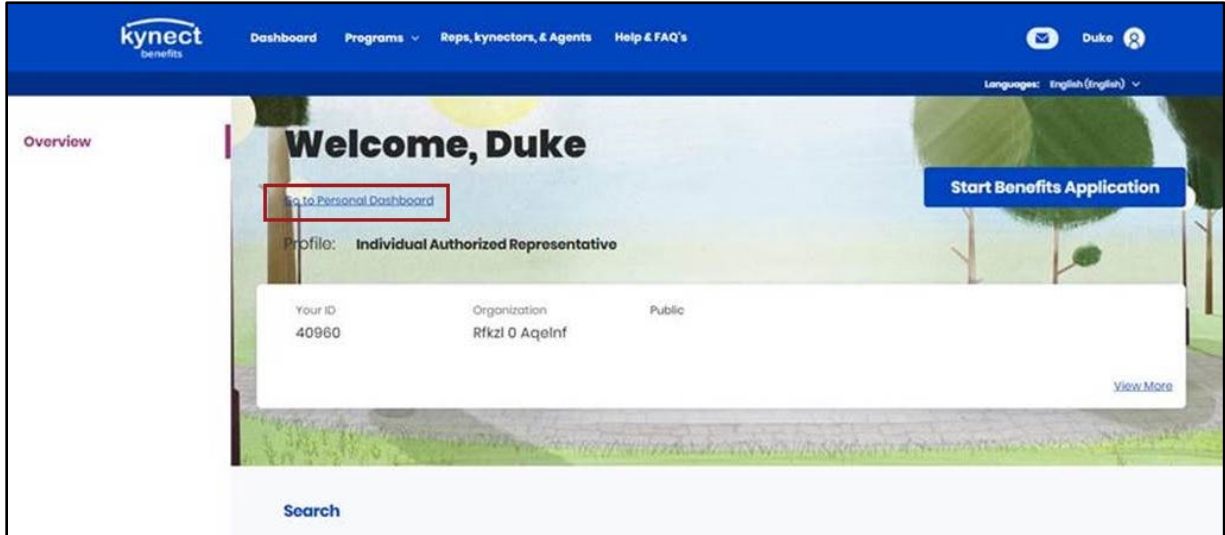


Please Note: If a partial match occurs when the Individual information entered matches with an existing Individual on kynect, a notification is sent to the Message Center in Agent Portal for agents, and the Message Center in kynect for kynectors, with the following message displayed: “The application you have submitted for <Name> with <ApplicationID> has resulted in a Partial Match and requires additional verification from our end. Our team has begun investigating the Partial Match Task and is working to find a solution. We’ll keep you updated on the outcome of the Partial Match Task within 2-3 business days. We appreciate your patience while we wait, and we advise against submitting multiple applications. If you have any inquiries regarding this, please contact the professional services line at 1-855-326-4650.”



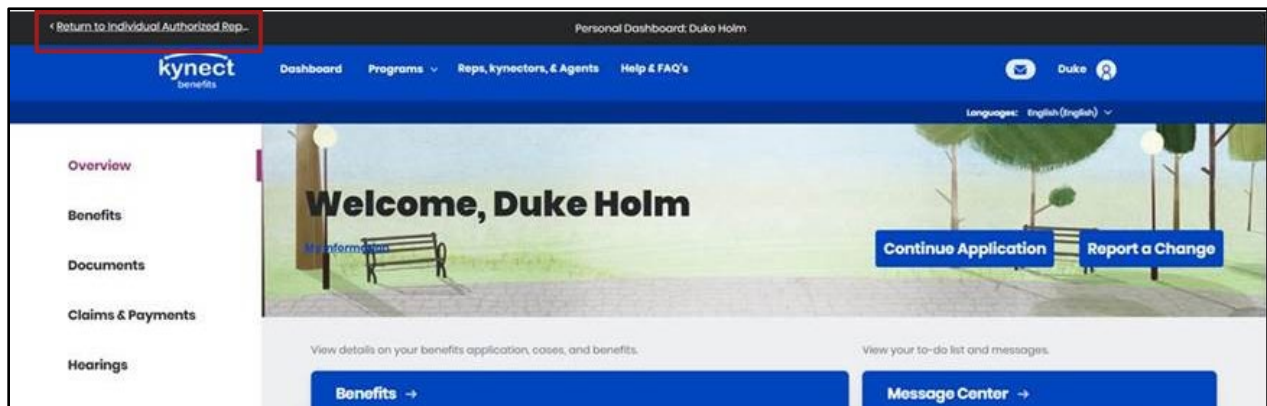
Navigating to the Personal Dashboard

1. Click “Go to Personal Dashboard” to navigate to the other dashboards. If the user has a Resident role, they are taken to the Personal dashboard where they apply for benefits or manage benefits information.



Please Note: If the user has additional roles, this option may read differently. An example would be “Go to the Authorized Representative Dashboard.”

2. Click “Return to kynector Dashboard” or “Return to Individual Authorized Representative Dashboard” to return to the kynector or Authorized Representative Dashboard.





Viewing Associated Resident Dashboard and Adding Case Notes

After a Resident has added the kynector or Authorized Representative to their kynect benefits account, the Resident’s case will appear under Clients. The Clients section includes the following details:

- Resident Details (Name, Gender, Age, as or Case Number)
- Case Status
- Submitted Date
- Last Updated

Search

Programs Applicable

Medicaid SNAP/CCAP

First Name

Last Name

Case Number

Application Number

Social Security Number (9 digits)

Date of Birth

Address Line 1

[Show Advanced Search](#)

7 Clients Found

Client Details	Case Status	Submitted Date	Last Updated
DENNIS WRIGHT M Age 38 Application #: 600900819	Unsubmitted		05/24/2022
MARY BAIN F Age 36 Application #: 600900561	Unsubmitted		05/24/2022
DARLENE HUDSON F Age 34 Case #: 11298871	Approved	05/24/2022	05/24/2022
REBA BATT F Age 32 Application #: 600900521	Unsubmitted		05/20/2022



Please Note: If a Resident has multiple cases, the most recent one appears under last updated. Click “Export to Excel” to export a list of Resident cases and details. The export includes a list of Requests for Information for the Residents. kynectors can only export after searching.



Searching for Resident Cases

The Search tool is useful for kynectors and Authorized Representatives who have multiple clients. The Search tool also allows kynectors to distinguish between searches for Medicaid clients and SNAP/CCAP clients if they have multiple roles. The Search tool only returns results for associated Residents. The Search tool allows users to search by First Name, Last Name, Case Number, Application Number, Social Security Number, Date of Birth, and Address.

1. First, kynectors with multiple roles should toggle between “Medicaid” and “SNAP/CCAP” depending on the type of search.



Please Note: The Search tool’s toggle between Medicaid and SNAP/CCAP is only available for kynectors. The program toggle feature does not appear on the Search tool for Authorized Representatives.

2. kynectors and Authorized Representatives can click “Search” to get a full list of Resident cases to which they are associated.

The screenshot shows a search interface with the following elements:

- Search** (header)
- Programs Applicable** section with two buttons: **Medicaid** (selected) and **SNAP/CCAP**.
- Search criteria fields:
 - First Name
 - Last Name
 - Case Number (radio button selected)
 - Application Number (radio button selected)
 - Social Security Number (9 digits)
 - Date of Birth (mm/dd/yyyy)
 - Address Line 1
- Buttons at the bottom: [Show Advanced Search](#), **Reset**, **Search** (highlighted with a red box), and **Export to Excel**.



3. Search by First Name, Last Name, Case Number, Application Number, Social Security Number, Date of Birth, and Address for all cases. kynectors search for SNAP/CCAP clients, the “M.I.”, “Suffix”, and “Sex” fields also appear.
4. Used the advanced search to search with additional fields if necessary.



Please Note: If a kynector or Authorized Representative does not have a Medicaid or Other Program Assister role, the below message appears in lieu of the Search tool.

The screenshot shows the kynect benefits dashboard. The top navigation bar includes 'Dashboard', 'Programs', 'Reps, kynectors, & Agents', and 'Help & FAQs'. The user is logged in as 'XQALSC'. The main content area features a 'Welcome, XQALSC' message and a 'Profile: kynector' section. Below this is a table with the following data:

Your ID	Organization	Coverage Area	Private	Program Access
4130	Kynector Group			

Below the table is a message: 'You are not yet configured with any program access, please reach out to your manager to ensure your profile is fully set-up before logging back into kynect benefits.'



Steps to Accessing a Client's Resident Dashboard

1. Click on a Client's Name to be taken to the client's Resident Dashboard.

Client Details	Case Status	Submitted Date	Last Updated
MICHAEL DOE M Age 25 Case # :112254198	Approved	12/20/2020	12/20/2020
MICHAEL DOE M Age 26 Case # :112254199	Approved	12/20/2020	10/13/2020
MICHAEL DOE M Age 25 Case # :112254185	Approved	10/08/2020	10/08/2020

2. View the Resident Dashboard in "Client View".

The screenshot shows the Kynect Benefits Client View dashboard for Michael S. Doe. The page features a blue header with the Kynect logo and navigation links: Dashboard, Programs, Reqs, kynectors, & Agents, and Help & FAQ's. A user profile icon for 'Iain' is visible in the top right. The main content area has a large banner with the text 'Welcome, MICHAEL DOE' and a blue button labeled 'Add Other Benefits'. Below the banner is a pink notification bar with a red exclamation mark icon and the text 'New Test Announcement'. At the bottom, there are two blue buttons: 'Benefits' and 'Message Center', both with right-pointing arrows. A sidebar on the left contains a list of menu items: Overview, Benefits, Documents, Hearings, and Client Case Notes.





3. From the Client View, kynectors and Authorized Representatives may complete the processes below on behalf of the Resident while in Client View:
- View active Benefit Programs
 - Start a Benefits Application by clicking “Add Other Benefits”
 - Report a change in Resident information by clicking “Report a Change”
 - View Resident To-Do’s, Notifications, and Announcements in the Message Center
 - Request a Medicaid Card
 - Use the Prescreening Tool



Please Note: The actions that are available is dependent on the benefit programs and the permissions granted by the Resident.



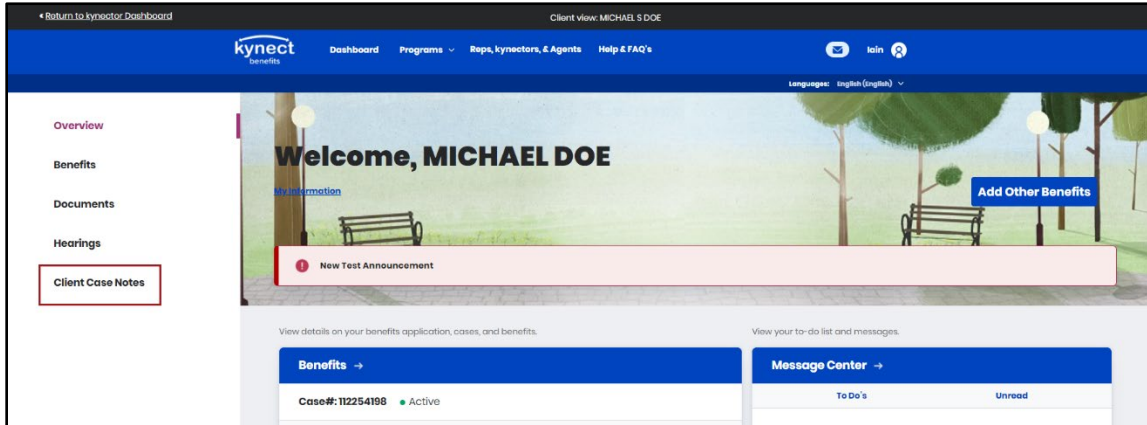
Please Note: If a Resident is a dependent, a banner displays at the top of the Resident Dashboard which indicates that the Resident is not the Head of Household and tells the kynector or Authorized Representative who is.



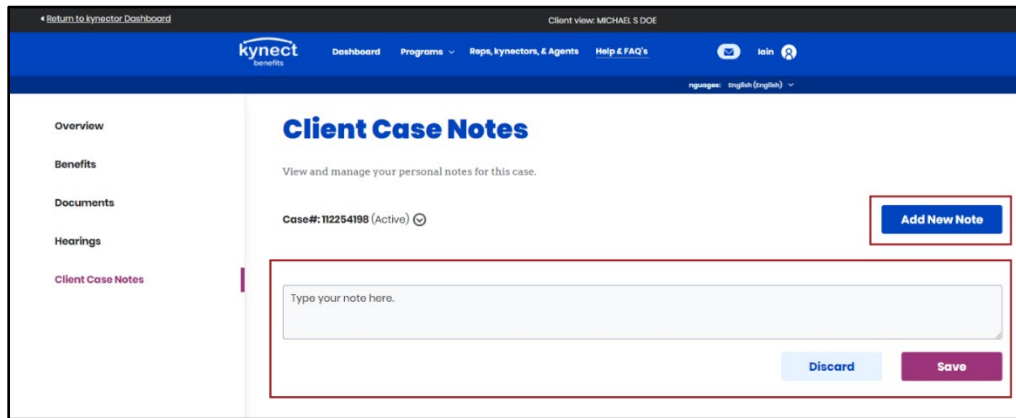
Below are the steps for kynectors and agency administrators to add Client Case Notes.

Steps to Add Client Case Notes

1. Click “Client Case Notes” on the side menu on a computer or the menu icon on a mobile device.

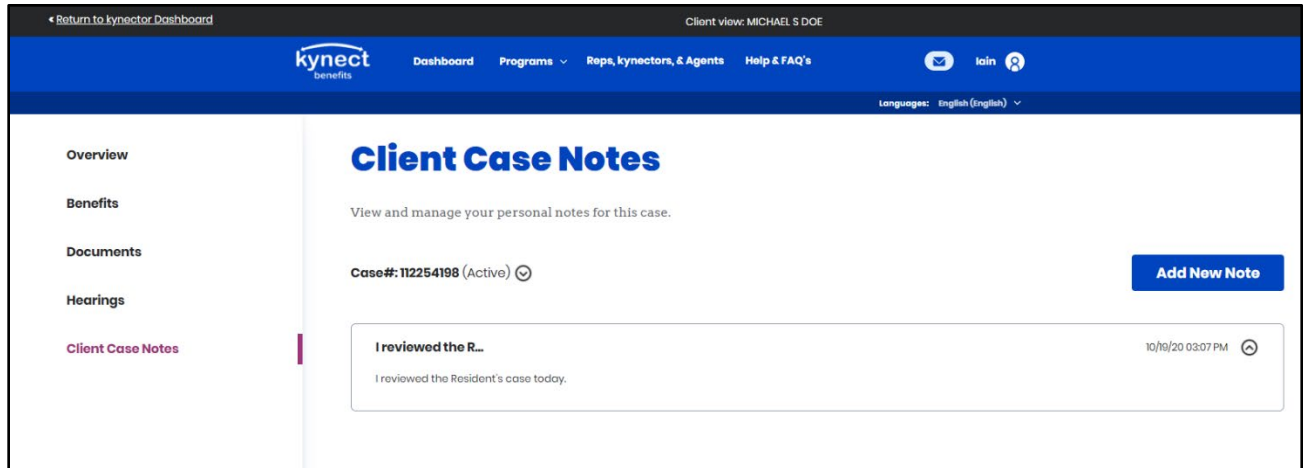


2. Click “Add New Note”.
3. Type the Case note in the note field.
4. Click “Save”.





5. View the Case Note in the Client Case Notes page.



Please Note: Accessibility to see Case Notes depends on the user’s role and the associated benefit programs. DCBS staff will not be able to view the notes entered through kynect benefits.

6. Click “Return to kynector Dashboard” in the top left corner of the page to return to the kynector Dashboard.
7. Click “Yes, Exit” to confirm the exit back to the kynector dashboard.