

The Commonwealth of Kentucky



kynect
benefits

**Quick Reference Guide
Scheduling Appointments**





This Quick Reference Guide is designed to help kynect benefits users complete the necessary steps to schedule an appointment in kynect benefits.

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Please Note: Residents who still need help after referencing this Quick Reference Guide may call **855-4kynect** (1-855-459-6328) for additional assistance.



Scheduling an Appointment

Appointments may be scheduled through kynect benefits. Appointments are scheduled from the **Appointments** tab on the **Resident Dashboard**. Clicking the **Appointments** tab opens the **Appointment Summary** screen where appointments may be viewed, scheduled, and managed. The kynect benefits users with access to schedule appointments include:

- Residents
- kynectors
- Agents
- Authorized Representatives

A link to schedule appointments is also available in the *I want to...* section at the bottom of the **Home Dashboard**. These links are available for additional kynect benefits users such as kynectors, Agents, and Authorized Representatives. Additional kynect benefits users use these links to schedule appointments for Residents not in the kynect benefits system.

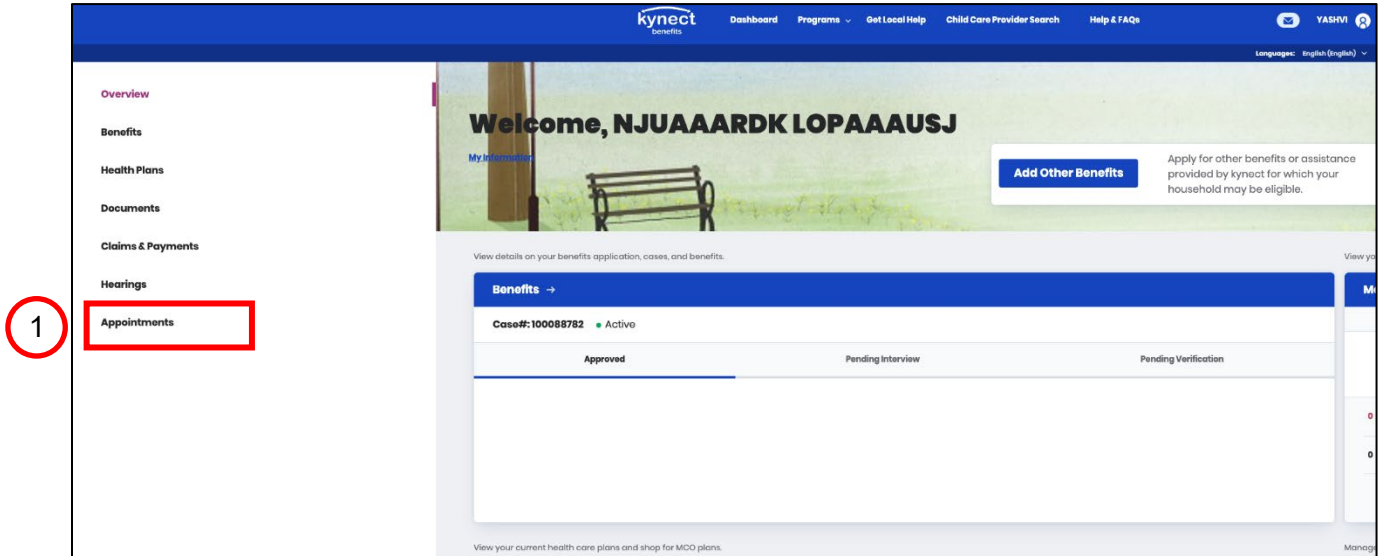
Lastly, Residents can also schedule an appointment at the end of Food Assistance, Cash Assistance, and Child Care Assistance applications. Follow the steps below to schedule an appointment in kynect benefits.



Please Note: The **Member Details** and **Reasons for Scheduling this Appointment** screens are not included in the appointment scheduling flow for appointments scheduled at the end of select applications. The **Schedule Later** button is available in this scheduling flow and kynect benefits Users can leave this appointment scheduling flow at any time by clicking on the **Schedule Later** button.

Steps to Schedule an Appointment

1. Click on the **Appointments** tab from the **Resident Dashboard's** left navigation panel.



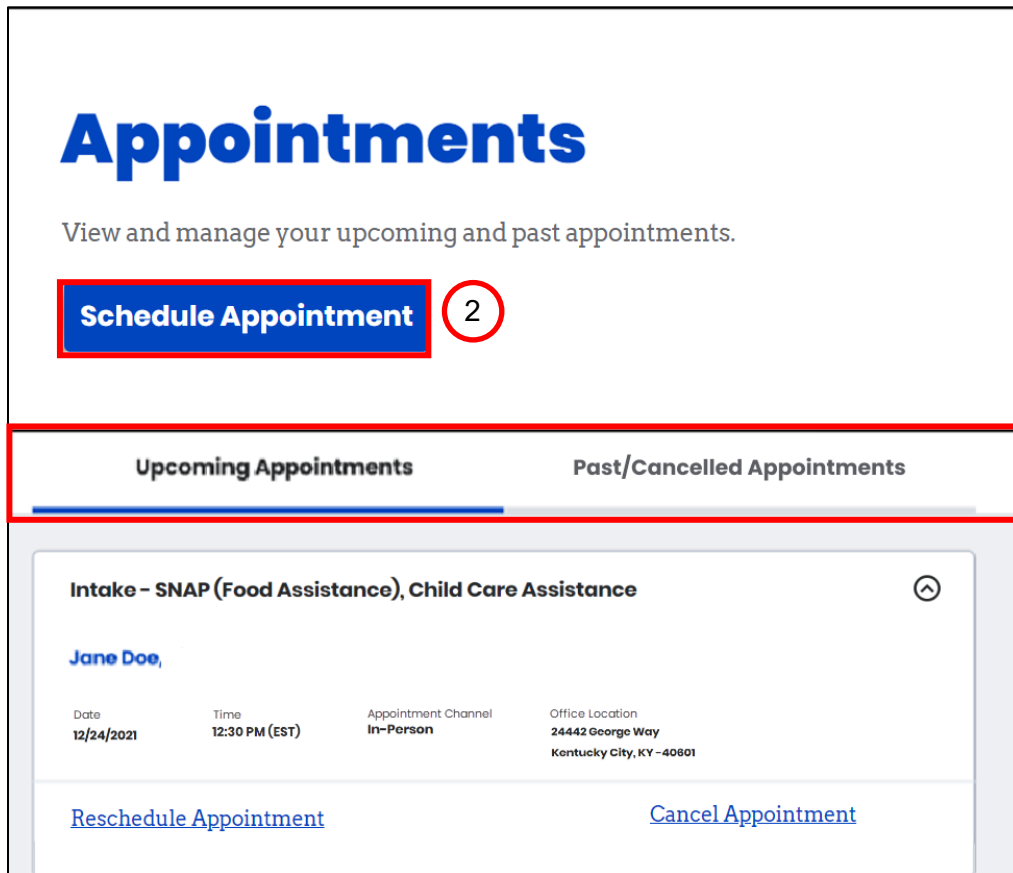
- The **Appointment Summary** screen displays the **Schedule Appointment** button and the **Upcoming Appointments** and **Past/Cancelled Appointments** tabs. These tabs display information for upcoming and past or cancelled appointments. Click **Schedule Appointment**.



Please Note: The **Reschedule Appointment** and **Cancel Appointment** links appear under the **Upcoming Appointments** tab to manage appointments. If the **Appointment Channel** is **Video**, a **Join Meeting** link appears under **Conference Link** instead of an address under **Office Location**.

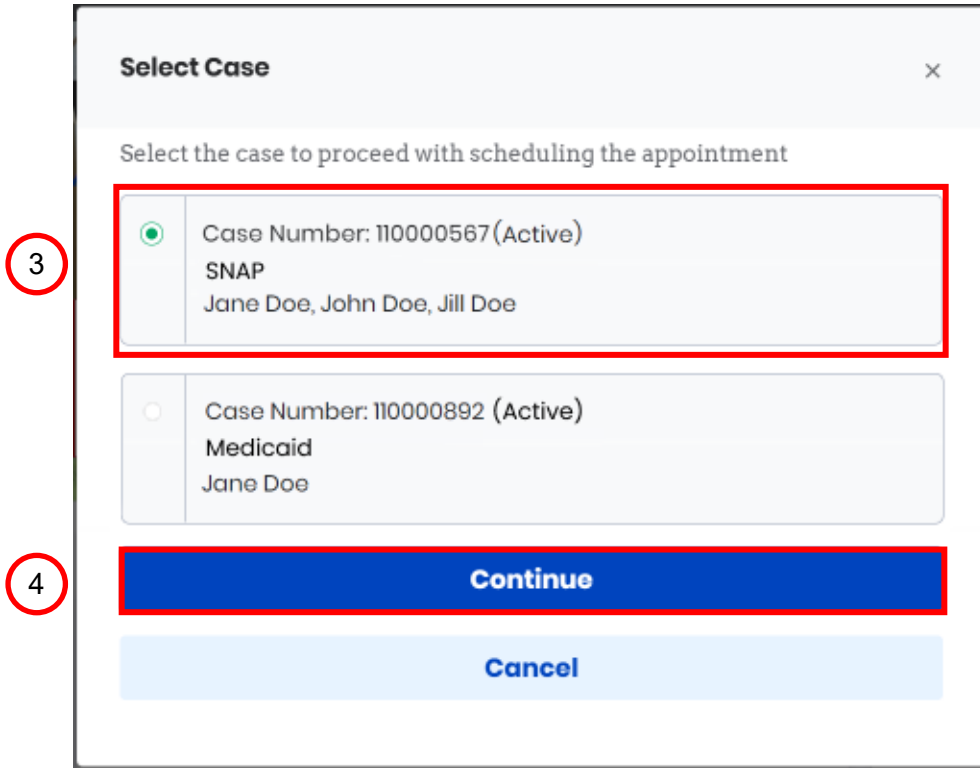


Please Note: Residents not active in the kynect benefits system cannot have video appointments scheduled for them or scheduled on their behalf by additional kynect benefits users.



The screenshot shows the 'Appointments' page. At the top, the title 'Appointments' is in large blue font, followed by the subtitle 'View and manage your upcoming and past appointments.' Below this is a blue button labeled 'Schedule Appointment' with a red border and a circled '2' next to it. Underneath are two tabs: 'Upcoming Appointments' (active, with a blue underline) and 'Past/Cancelled Appointments'. The 'Upcoming Appointments' tab displays a card for an appointment titled 'Intake - SNAP (Food Assistance), Child Care Assistance' for 'Jane Doe'. The appointment details are: Date: 12/24/2021, Time: 12:30 PM (EST), Appointment Channel: In-Person, Office Location: 24442 George Way, Kentucky City, KY - 40601. At the bottom of the card are two links: 'Reschedule Appointment' and 'Cancel Appointment'.

3. Select the radio button of the applicable case if the Resident has multiple active cases.
4. Click **Continue**.

A screenshot of a "Select Case" dialog box. The dialog has a title bar with "Select Case" and a close button (X). Below the title bar, there is a prompt: "Select the case to proceed with scheduling the appointment". There are two radio button options. The first option is selected and is highlighted with a red box; it includes a green radio button, the text "Case Number: 110000567 (Active)", "SNAP", and "Jane Doe, John Doe, Jill Doe". The second option is unselected and includes a white radio button, the text "Case Number: 110000892 (Active)", "Medicaid", and "Jane Doe". At the bottom of the dialog, there are two buttons: a blue "Continue" button and a light blue "Cancel" button. A red box highlights the "Continue" button. To the left of the dialog, there are two red circles containing the numbers "3" and "4", which correspond to the steps in the list above.

5. Select the Resident's name from the **Member** drop-down. Once selected, the Resident's information is prepopulated, including the **First Name**, **Last Name**, **Email**, **Primary Phone Number**, and **Address**.
6. Update the **Email**, **Primary Phone Number**, and **Preferred Contact Method**, as needed.
7. Click **Next**.

[Appointment Summary](#)

Schedule Appointment

Step 1 of 6

Member Details

Member

5

First Name ML

Last Name Suffix

6 Primary Phone Number

Address Address Line 2

If you would like to update your address, please report a change to your case.

Select your preferred contact method for appointments

Click here if you would like to receive text message notifications too. Please note that this option is only for Medicaid and Qualified Health Plan programs.

Choose to receive your notices and notifications electronically to get on time information via SMS/Email and through the message center on kynect benefits and reduce environmental impact.

[Back](#) [Next](#) 7



Please Note: The **Email** field is mandatory if **Electronic – Email only** is selected for Step 6. The **Phone Number** and **Email Address** fields are mandatory if **Electronic – Email and Text Message** is selected for Step 6.

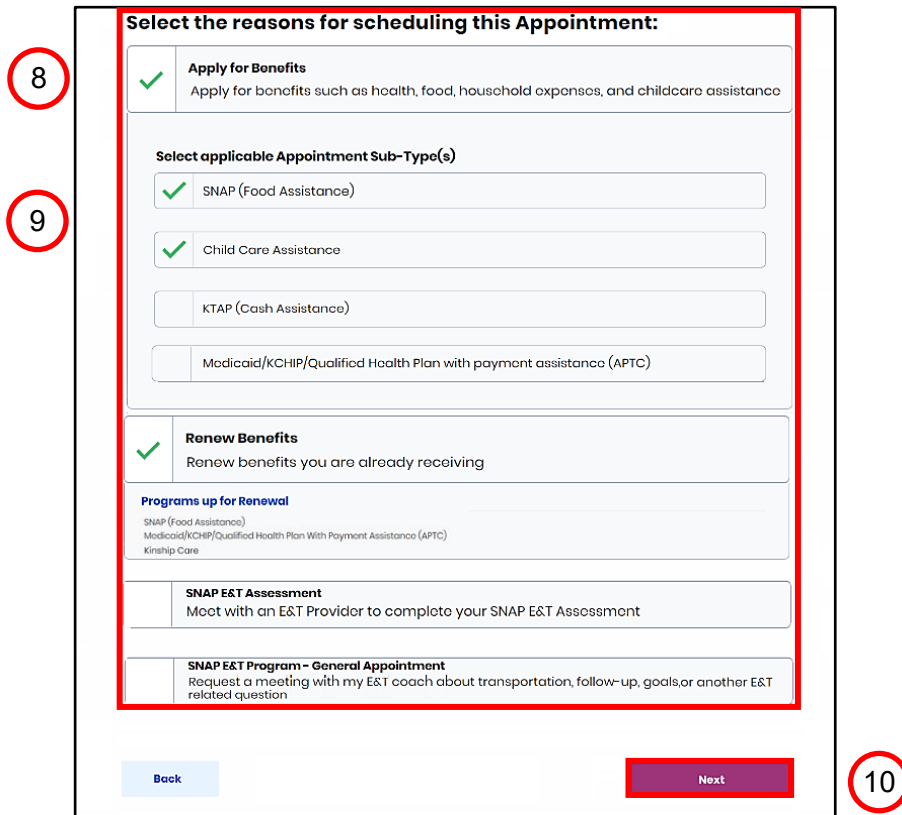


Please Note: This screen is not available if scheduling an appointment at the end of the benefits application.



Please Note: If **Mail** is selected from the **Select your preferred contact method for appointments** drop-down, the Resident has entered a **Primary Phone Number**, and the Resident's case has Medicaid or a Qualified Health Program (QHP), the **Click here if you would like to receive text message notifications too. Please note that this option is only for Medicaid and Qualified Health Plan programs** checkbox displays allowing the Resident to opt-in to receive text message notifications along with their mail notifications.

8. Click the reason(s) for scheduling the appointment. When selecting an appointment, please note that:
 - **SNAP Employment and Training (E&T) Assessment and E&T Program – General Appointment** may only be selected if the Resident is approved for SNAP E&T.
 - The SNAP E&T appointments may not be selected along with the **Apply for Benefits** or **Renew Benefits** appointments.
 - The **Renew Benefits** appointment is not displayed if there are no programs up for renewal.
9. Select the applicable appointment sub-type under the appointment reasons after selecting a reason for scheduling the appointment.
10. Click **Next**.



Select the reasons for scheduling this Appointment:

8 **Apply for Benefits**
Apply for benefits such as health, food, household expenses, and childcare assistance

9 **Select applicable Appointment Sub-Type(s)**

SNAP (Food Assistance)

Child Care Assistance

KTAP (Cash Assistance)

Medicaid/KCHIP/Qualified Health Plan with payment assistance (APTC)


Renew Benefits
Renew benefits you are already receiving


Programs up for Renewal
SNAP (Food Assistance)
Medicaid/KCHIP/Qualified Health Plan With Payment Assistance (APTC)
Kinship Care

SNAP E&T Assessment
Meet with an E&T Provider to complete your SNAP E&T Assessment

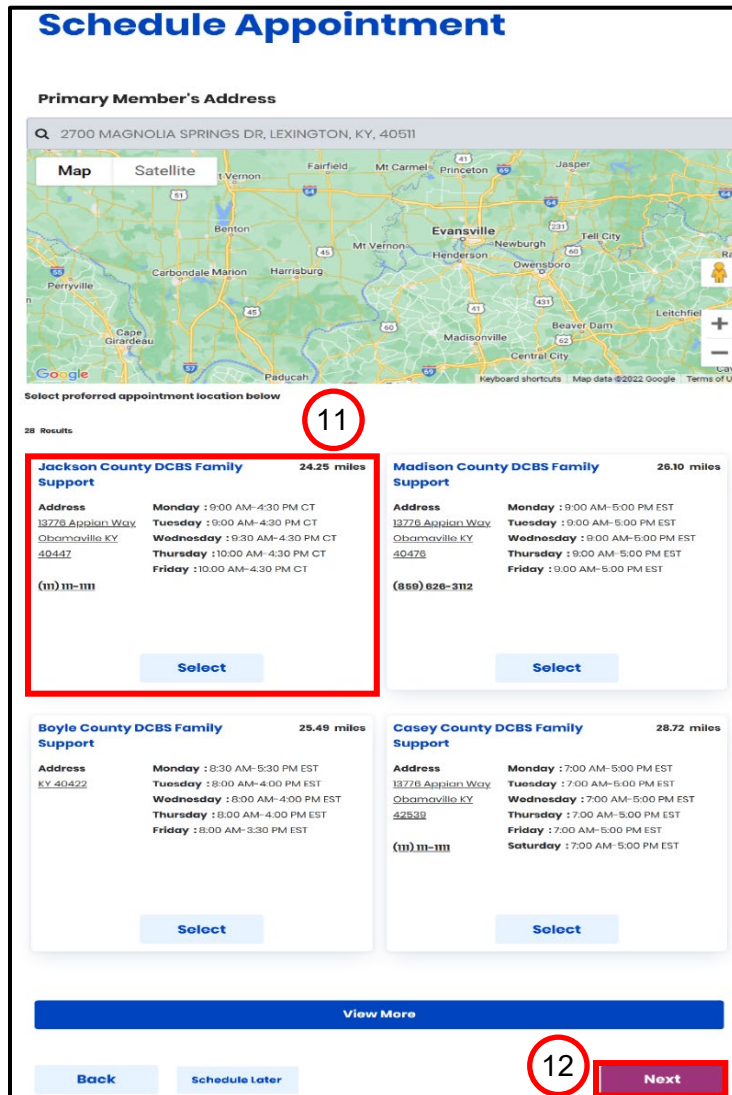
SNAP E&T Program – General Appointment
Request a meeting with my E&T coach about transportation, follow-up, goals, or another E&T related question

10

 **Please Note:** This screen is not available if scheduling an appointment at the end of the benefits application.

 **Please Note:** Residents cannot schedule an appointment to apply for FAST from kynect benefits. If a Resident wants to apply for FAST, they should contact their local DCBS office to schedule an appointment.

11. The office card displays the **Appointment Location Hours, Address, Phone,** and **Distance** from the Resident’s address to the office’s address and allows Residents to select their preferred appointment location.
12. Click **Next**.



Schedule Appointment

Primary Member's Address
 2700 MAGNOLIA SPRINGS DR, LEXINGTON, KY, 40511

Select preferred appointment location below

28 Results

County	Distance	Address	Hours	Phone
Jackson County DCBS Family Support	24.25 miles	13776 Appleton Way, Obamasville KY 40447	Monday: 9:00 AM-4:30 PM CT Tuesday: 9:00 AM-4:30 PM CT Wednesday: 9:30 AM-4:30 PM CT Thursday: 10:00 AM-4:30 PM CT Friday: 10:00 AM-4:30 PM CT	(888) 828-3112
Madison County DCBS Family Support	26.10 miles	13776 Appleton Way, Obamasville KY 40478	Monday: 9:00 AM-5:00 PM EST Tuesday: 9:00 AM-5:00 PM EST Wednesday: 9:00 AM-5:00 PM EST Thursday: 9:00 AM-5:00 PM EST Friday: 9:00 AM-5:00 PM EST	(888) 828-3112
Boyle County DCBS Family Support	25.49 miles	KY 40422	Monday: 8:30 AM-5:30 PM EST Tuesday: 8:00 AM-4:00 PM EST Wednesday: 8:00 AM-4:00 PM EST Thursday: 8:00 AM-4:00 PM EST Friday: 8:00 AM-3:30 PM EST	
Casey County DCBS Family Support	28.72 miles	13776 Appleton Way, Obamasville KY 42838	Monday: 7:00 AM-5:00 PM EST Tuesday: 7:00 AM-5:00 PM EST Wednesday: 7:00 AM-5:00 PM EST Thursday: 7:00 AM-5:00 PM EST Friday: 7:00 AM-5:00 PM EST Saturday: 7:00 AM-5:00 PM EST	(888) 828-3112

View More

Back Schedule Later **Next**

13. Click the calendar icon to search for and select a date from the **Search available timeslots from** field.
14. Click **Next**.


< Appointment Summary

Schedule Appointment

Step 4 of 6

Search Appointments from:
Appointments cannot be scheduled for the same day or within the next 24 hours

Search available timeslots from:

 **13**

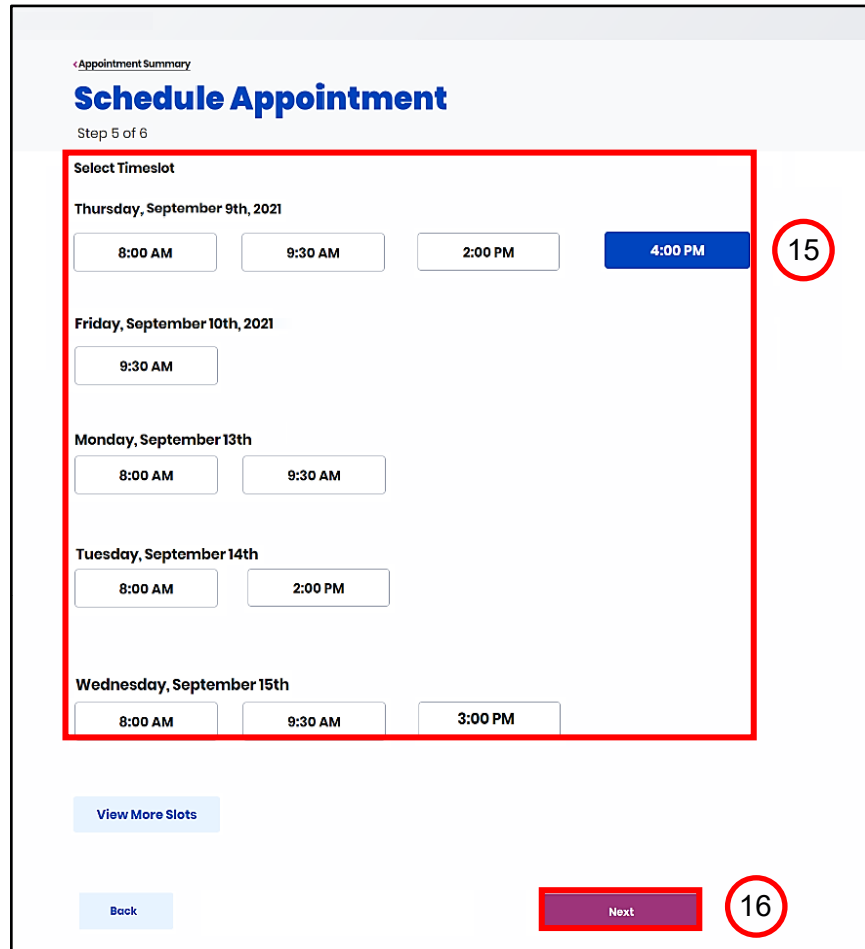
[Back](#) [Next](#) **14**



Please Note: The **Search Available timeslots from** field does not allow same day appointments or appointments in the next 24 hours.

15. Select an available appointment timeslot. Click the **View More Slots** button under the last available appointment date listing to view more time slots.

16. Click **Next**.

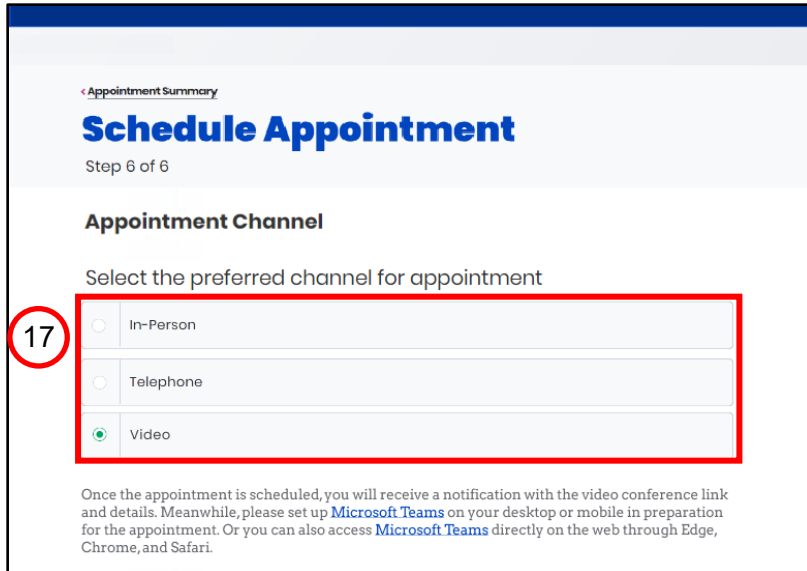


The screenshot shows the 'Schedule Appointment' screen, Step 5 of 6. The 'Select Timeslot' section is highlighted with a red box. It displays appointment slots for several dates: Thursday, September 9th, 2021 (8:00 AM, 9:30 AM, 2:00 PM, 4:00 PM); Friday, September 10th, 2021 (9:30 AM); Monday, September 13th (8:00 AM, 9:30 AM); Tuesday, September 14th (8:00 AM, 2:00 PM); and Wednesday, September 15th (8:00 AM, 9:30 AM, 3:00 PM). The 4:00 PM slot on Thursday is selected. Below the 'Select Timeslot' section is a 'View More Slots' button. At the bottom of the screen are 'Back' and 'Next' buttons. A red circle highlights the 'Next' button, and another red circle highlights the number '15' in the top right corner of the screenshot.



Please Note: The **View More Slots** button does not display if there are no more timeslots. The **Select Timeslot** screen does not display appointments in the next 24 hours.

17. Select the **Preferred Channel** from the **Appointment Channel** list. **In-Person**, **Telephone**, and **Video** are options from which one may be selected.



Appointment Summary

Schedule Appointment

Step 6 of 6

Appointment Channel

Select the preferred channel for appointment

<input type="radio"/>	In-Person
<input type="radio"/>	Telephone
<input checked="" type="radio"/>	Video

Once the appointment is scheduled, you will receive a notification with the video conference link and details. Meanwhile, please set up [Microsoft Teams](#) on your desktop or mobile in preparation for the appointment. Or you can also access [Microsoft Teams](#) directly on the web through Edge, Chrome, and Safari.



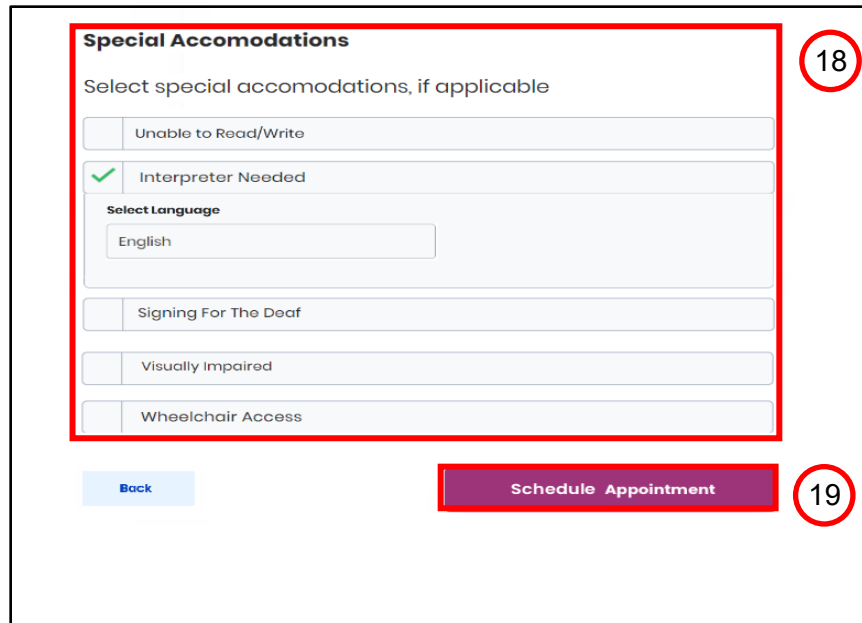
Please Note: Video Appointments may not be available for all DCBS Offices.

18. Select any applicable special accommodations from the Special Accommodations list if required by the Resident.



Please Note: The **Special Accommodations** list corresponds with each preferred channel for appointment.

19. Click **Schedule Appointment**.



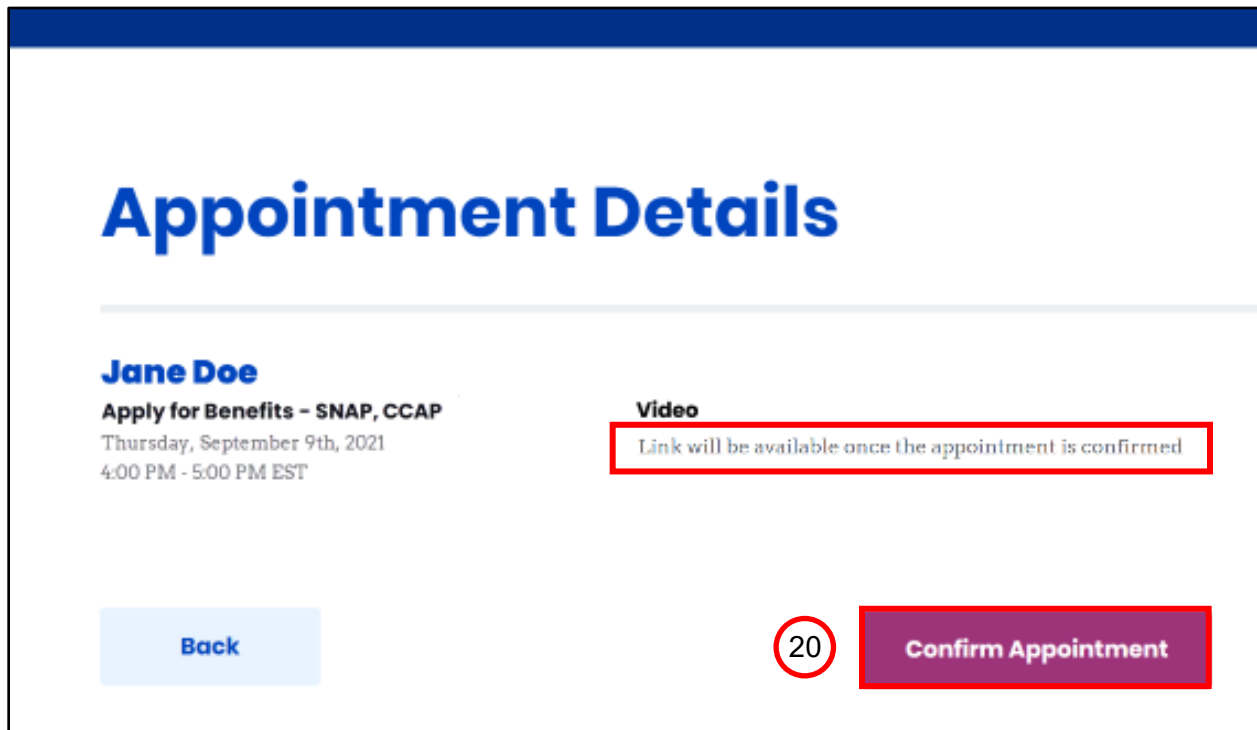
The screenshot shows a form titled "Special Accommodations" with the instruction "Select special accommodations, if applicable". The form contains several checkboxes: "Unable to Read/Write", "Interpreter Needed" (checked with a green checkmark), "Signing For The Deaf", "Visually Impaired", and "Wheelchair Access". Below the "Interpreter Needed" checkbox is a "Select Language" dropdown menu with "English" selected. At the bottom of the form are two buttons: "Back" and "Schedule Appointment". A red box highlights the "Interpreter Needed" checkbox and the "Schedule Appointment" button. A red circle with the number "18" is next to the "Interpreter Needed" checkbox, and another red circle with the number "19" is next to the "Schedule Appointment" button.



Please Note: Residents and additional kynect benefits users may set up Microsoft Teams on their desktop or mobile in preparation for the appointment. Once the Video Appointment is selected and confirmed, links are provided to download Teams to a desktop, laptop, or mobile device.

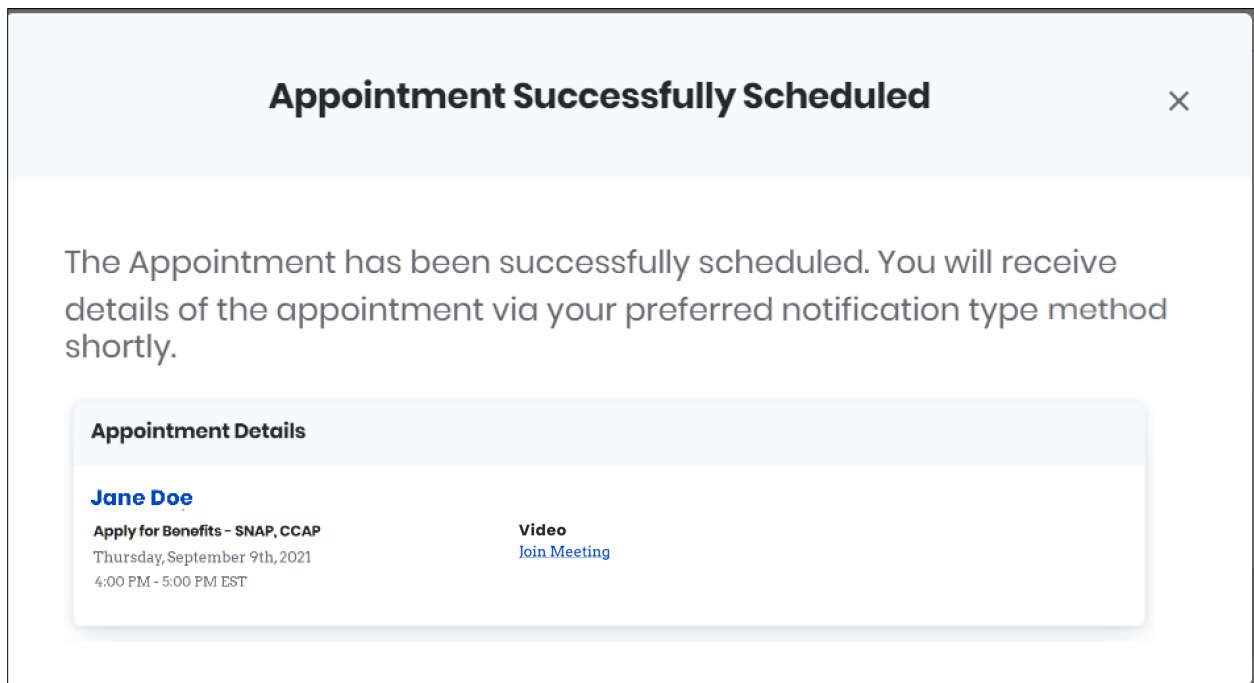
kynect benefits users may also click the Appointment link to access Microsoft Teams directly on the web through Edge, Chrome, or Safari.

20. Click **Confirm Appointment** to finalize the appointment.



The screenshot shows the 'Appointment Details' page for Jane Doe. The appointment is for 'Apply for Benefits - SNAP, CCAP' on Thursday, September 9th, 2021, from 4:00 PM to 5:00 PM EST. A 'Video' section indicates that the link will be available once the appointment is confirmed. At the bottom, there is a 'Back' button, a circled '20', and a 'Confirm Appointment' button.

21. Once the appointment is confirmed the **Appointment Successfully Scheduled** pop-up displays with the confirmed appointment details. If the **Appointment Channel** is **Video**, the link to join the video displays in the **Appointment Details**.



The screenshot shows a 'Appointment Successfully Scheduled' pop-up. The message states: 'The Appointment has been successfully scheduled. You will receive details of the appointment via your preferred notification type method shortly.' Below the message is a summary of the appointment details, including the name 'Jane Doe', the appointment title 'Apply for Benefits - SNAP, CCAP', the date and time 'Thursday, September 9th, 2021, 4:00 PM - 5:00 PM EST', and a 'Video' section with a 'Join Meeting' link.

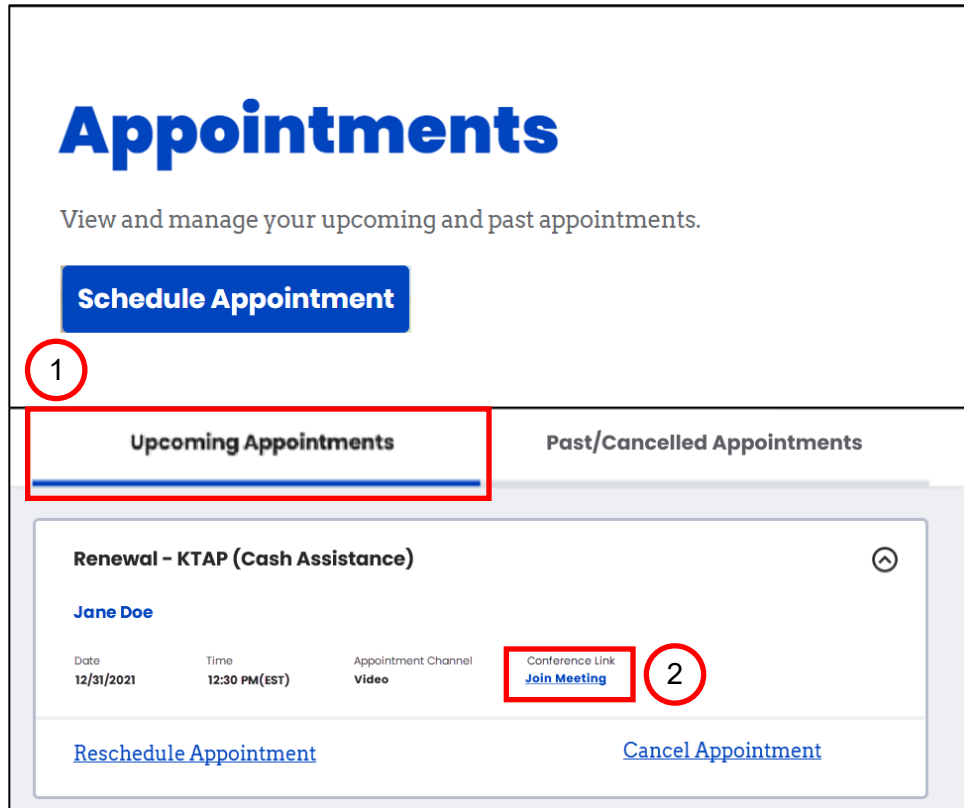
22. Residents receive an email or text notification based on the preferred contact method selected in kynect confirming the appointment. If the channel is **Video** a shortened **Video Conference** link to join the meeting is sent.



Please Note: If **Email** or **SMS** are chosen as the **Preferred Contact Method** a reminder Email or SMS is sent the day before with the shortened link to join the meeting.

Steps to Join a Scheduled Video Appointment in Microsoft Teams

1. Select the **Upcoming Appointments** tab on the Resident **Appointment Summary** screen.
2. In the **Appointment Details** section click **Join Meeting**.



The screenshot displays the 'Appointments' section of the Kynect portal. At the top, there is a blue button labeled 'Schedule Appointment'. Below this, a red circle with the number '1' highlights the 'Upcoming Appointments' tab, which is also outlined in red. The 'Past/Cancelled Appointments' tab is visible to the right. Under the 'Upcoming Appointments' tab, a card for 'Jane Doe' is shown with details for a 'Renewal - KTAP (Cash Assistance)' appointment on 12/31/2021 at 12:30 PM (EST) via Video. A red circle with the number '2' highlights the 'Join Meeting' button under the 'Conference Link' section. At the bottom of the card, there are links for 'Reschedule Appointment' and 'Cancel Appointment'.

Appointments

View and manage your upcoming and past appointments.

[Schedule Appointment](#)

1

Upcoming Appointments Past/Cancelled Appointments

Renewal - KTAP (Cash Assistance) ⌵

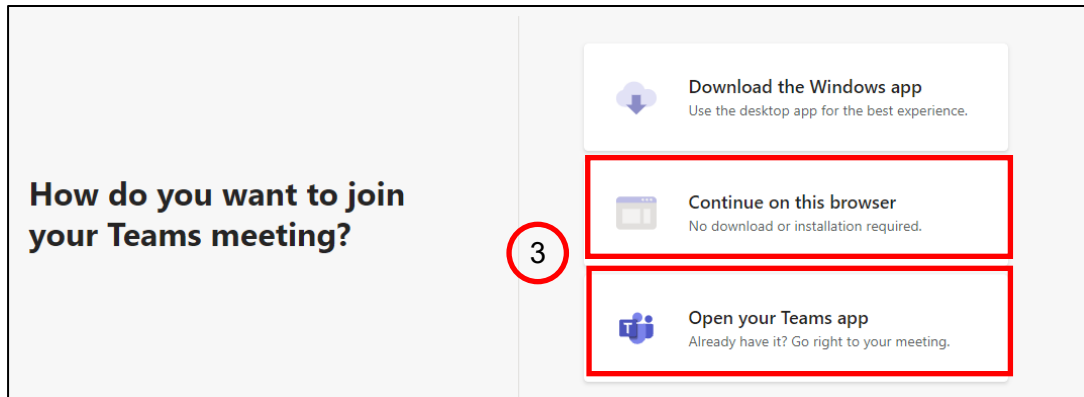
Jane Doe

Date	Time	Appointment Channel	Conference Link
12/31/2021	12:30 PM(EST)	Video	Join Meeting

[Reschedule Appointment](#) [Cancel Appointment](#)

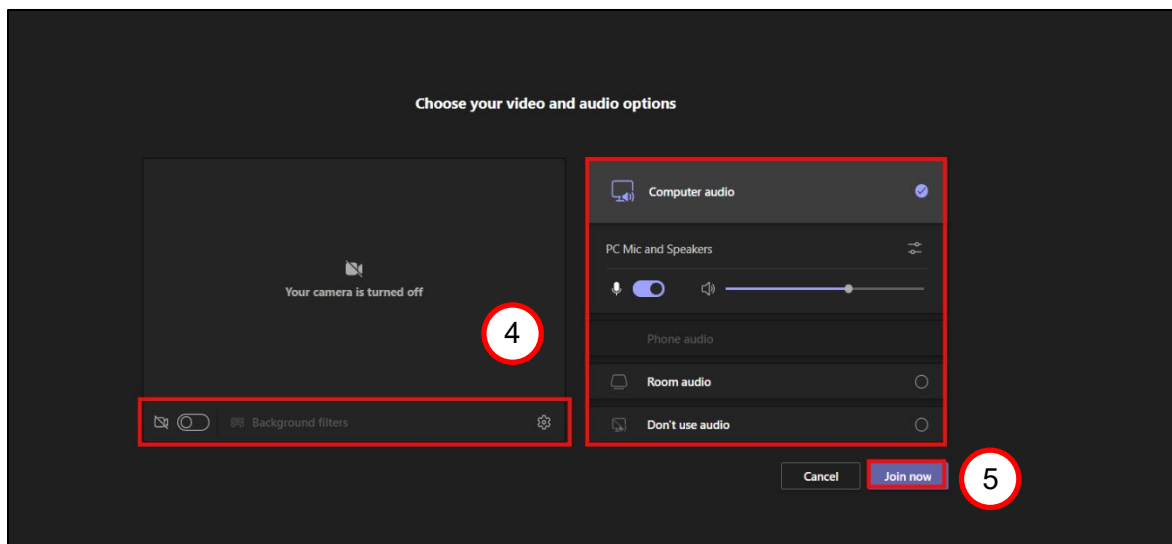
2

3. A new browser window pop-up asks how the Resident would like to join the meeting with the Microsoft Teams application. If the Teams app is installed on the device, the select **Open your Teams app**. Otherwise, select **Continue on this browser** to open the meeting.



Please Note: For best results, use one of the following preferred web browsers: Google Chrome, Microsoft Edge, or Safari (version 11.6 and above). If using a non-preferred web browser (e.g. Firefox), it is recommended to use the Microsoft Teams App, which may be downloaded on the [Microsoft Teams website](#). If not using a preferred browser, certain Microsoft Teams functionalities may not work as expected.

4. Enter your **Name** (First and Last) and check that the camera and microphone are toggled on.
5. Click **Join now**.

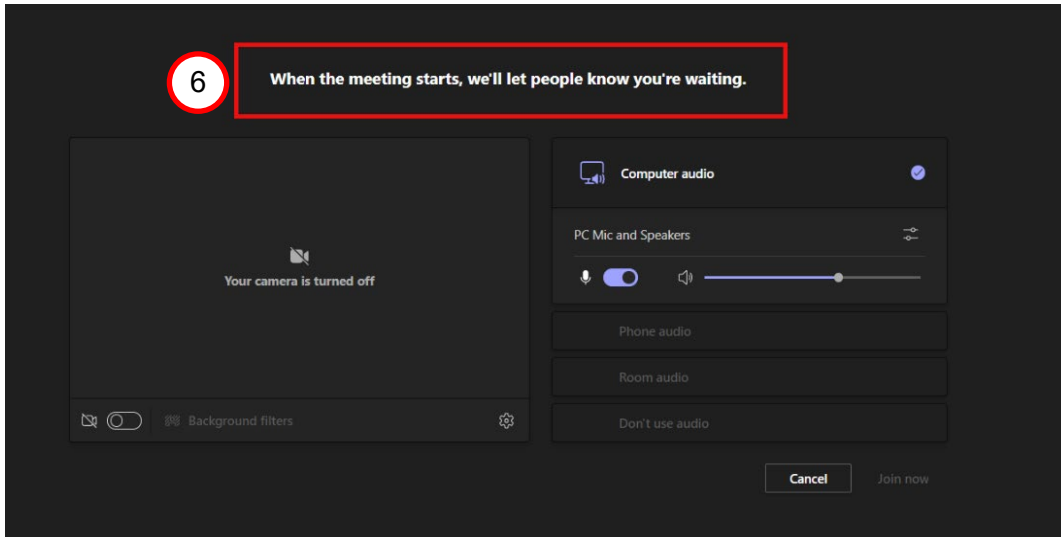


Please Note: If using the Microsoft Teams App, the username automatically integrates with the App.

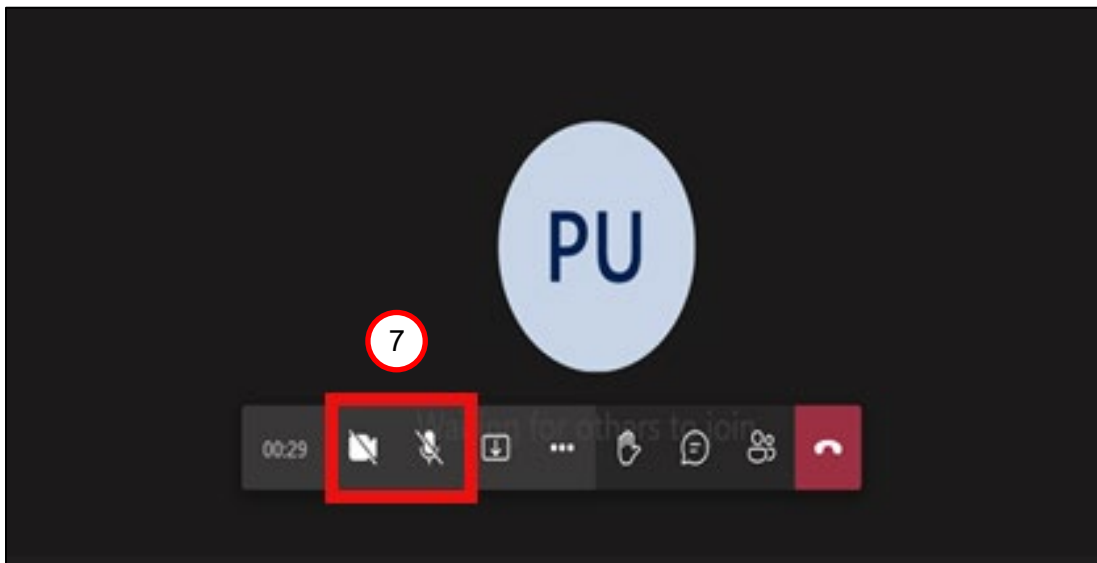


Please Note: Audio and video are turned off by default. The user may keep their audio/video on or off while waiting to join a meeting.








6. If waiting for the worker to join the meeting, the **When the meeting starts, we'll let people know you're waiting** or **Waiting for others to join** prompts may display.



7. When the worker starts the meeting, use the menu option on the screen to turn on video and audio when ready. (See the chart below for additional functions.)



Please Note: The screen display may vary based on the device used (mobile, computer, or Microsoft Teams App).

Icon	Description
	Camera button - Turns the webcam on and off.
	Microphone button - Turns the microphone on and off.
	Arrow in box icon - Opens the Share Tray; Individuals may display their Desktop/Window (i.e., screenshare).
	3 dots button - Lists additional options (e.g., meeting details, enter full screen, gallery view, etc.).
	Talking bubble icon - Opens the chat bar.
	People icon - Displays list of attendees in the meeting.
	Red box with phone icon - Ends the meeting (do not click until the Worker confirms the meeting is over).



Please Note: Meeting Control Bar icons are subject to change pending Microsoft Updates to the Teams App.

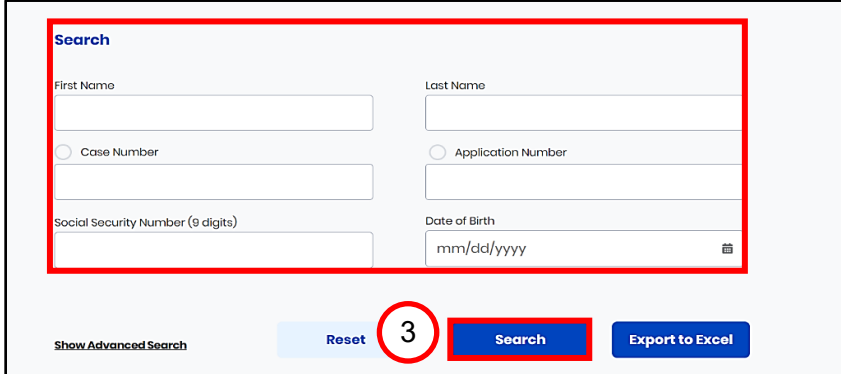
Topic	Best Practice
Video feature enabled	<ul style="list-style-type: none"> Residents are encouraged to have video on if technology permits.
Screen Share/Chat	<ul style="list-style-type: none"> Residents should not share their screen during Video Appointments. Personally Identifiable Information (PII) should <u>not</u> be shared by any party in the chat feature.
Audio/Technical Issues for Residents	<ul style="list-style-type: none"> Residents should anticipate a call to their designated phone number from DCBS Staff or SNAP E&T Provider if audio issues cannot be resolved during the Video Appointment. Residents should inform DCBS Staff or additional kynect benefits users via the chat feature if audio issues cannot be resolved. Residents should call 855-4kynect (1-855-459-6328) if they have system functionality issues with joining Video Appointments.
Appointment Time	<ul style="list-style-type: none"> Residents should remain on the call for at least 10 minutes if the kynect benefits user is late to the appointment. After 10 minutes, Residents may visit kynect benefits to reschedule the missed appointment or call DCBS.



Please Note: Residents and additional kynect benefits users can reference the Microsoft Teams **Best Practices** table for any questions related to conducting an appointment.

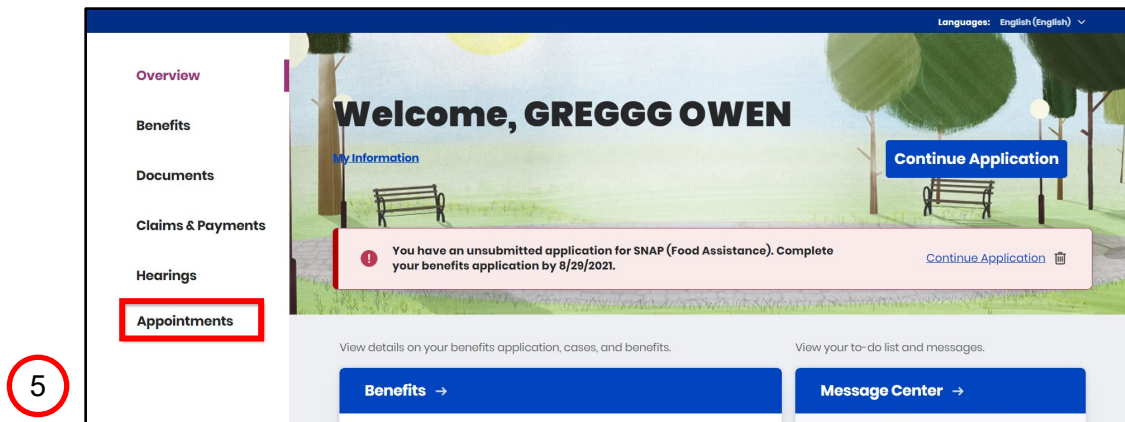
Steps for Additional kynect benefits Users to Schedule an Appointment for Residents Found in the kynect benefit System

1. Search for the Resident from the **Search** feature on the **Home Dashboard**.
2. Enter the Resident's information into each field, such as the **First Name**, **Last Name**, **Case Number**, **Application Number**, **Social Security Number**, or **Date of Birth**.
3. Click **Search**.

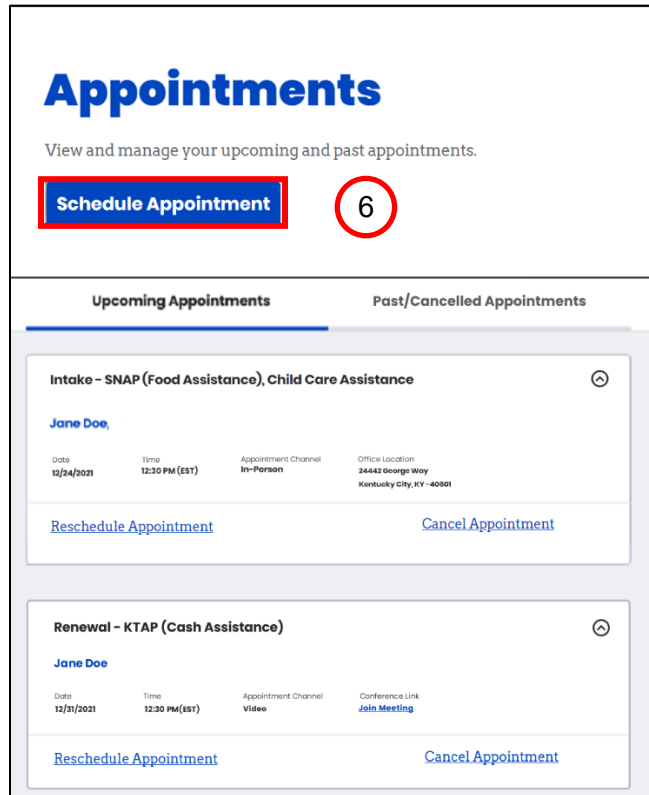


The screenshot shows a search form titled "Search" with a red border. A red circle with the number "2" is next to the form. The form contains the following fields: "First Name", "Last Name", "Case Number", "Application Number", "Social Security Number (9 digits)", and "Date of Birth" (with a calendar icon). Below the form are buttons for "Show Advanced Search", "Reset", "Search" (with a red circle and number "3" next to it), and "Export to Excel".

4. If they appear in the system click on the Resident's name to be taken to their **Resident Dashboard**.
5. Click on the **Appointments** tab in the left navigation panel.



6. Click on **Schedule Appointment** to schedule the appointment for a Resident.

A screenshot of a web application interface for managing appointments. At the top, the word "Appointments" is displayed in a large, bold, blue font. Below it, a subtitle reads "View and manage your upcoming and past appointments." A red-bordered button labeled "Schedule Appointment" is highlighted with a red box, and a red circle with the number "6" is placed to its right. The interface is divided into two tabs: "Upcoming Appointments" (which is active) and "Past/Cancelled Appointments". Under the "Upcoming Appointments" tab, there are two appointment cards. The first card is titled "Intake - SNAP (Food Assistance), Child Care Assistance" and is for "Jane Doe". It lists the date as 12/24/2021, time as 12:30 PM (EST), appointment channel as "In-Person", and office location as "24442 George Way, Kentucky City, KY - 40001". Below this card are two links: "Reschedule Appointment" and "Cancel Appointment". The second card is titled "Renewal - KTAP (Cash Assistance)" and is also for "Jane Doe". It lists the date as 12/31/2021, time as 12:30 PM (EST), appointment channel as "Video", and a "Join Meeting" link. Below this card are also two links: "Reschedule Appointment" and "Cancel Appointment".

Steps for Additional kynect benefits Users to Schedule an Appointment for Residents Not Found in the kynect benefit System

1. If the Resident does not appear in the system after clicking **Search** from the **Home Dashboard**, navigate to the **I want to...** section to view **Schedule Appointment**.
2. Click **Schedule Appointment** to display the **Appointment Summary** screen.
3. Follow Steps 2-21 in the [Steps to Schedule an Appointment](#) section of this Quick Reference Guide to begin scheduling an appointment for Residents if they are not found in the system.

1 **I want to...**

<p>Prescreening Tool Check for potential eligibility on behalf of a client</p>	<p>Agent Portal Visit the Agent Portal to search for insurance agents.</p>
<p>Schedule Appointment Schedule an Appointment for contact not already in system.</p>	<p>Reschedule/Cancel Appointment Reschedule/Cancel Appointment for contact not already in system</p>



Please Note: Residents not active in the kynect benefits system cannot have Video appointments scheduled for them or scheduled on their behalf by additional kynect benefits users.