The Commonwealth of Kentucky

kynect
ability
Together for a better Kentucky

kynect Appointments Module

Quick Reference Guide for E&T Appointment Scheduling, Rescheduling, and Cancelling
This Quick Reference Guide is designed to help Kentucky Employment and Training (E&T) Providers to schedule, reschedule, and cancel SNAP E&T Appointments in kynect ability for E&T Participants.

**Table of Contents**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling, Rescheduling, and Cancelling Appointments in kynect ability</td>
<td>3</td>
</tr>
<tr>
<td>Steps to Schedule an Appointment</td>
<td>3</td>
</tr>
<tr>
<td>Steps to Managing the My Appointments and Unassigned Appointments Widgets</td>
<td>12</td>
</tr>
<tr>
<td>Steps to Starting an Appointment</td>
<td>15</td>
</tr>
<tr>
<td>Steps to Join a Scheduled Video Appointment via Microsoft Teams</td>
<td>16</td>
</tr>
<tr>
<td>Steps to Reschedule an Appointment</td>
<td>23</td>
</tr>
<tr>
<td>Steps to Cancel an Appointment</td>
<td>29</td>
</tr>
</tbody>
</table>
Scheduling, Rescheduling, and Cancelling Appointments in kynect ability

In-Person, Video, and Telephone SNAP Employment and Training (E&T) Appointments may be scheduled, rescheduled, or canceled through kynect ability. Appointments are scheduled from the new Schedule Appointments tab located on an E&T Participant’s Individual Details screen. Clicking on the Schedule Appointments tab opens the E&T Participant’s appointment details. The kynect ability users with access to schedule appointments include:

- SNAP E&T Providers
- SNAP E&T Provider Supervisors

SNAP E&T Providers can begin scheduling an appointment by navigating to the Individual Dashboard in kynect ability. This dashboard can be accessed by searching for an E&T Participant from the kynect ability Search Menu or by clicking on the E&T Participant’s Individual hyperlink from the My Appointments widget if they have a previously scheduled appointment. Scheduling an appointment can also begin with a task.

Follow the steps below to schedule an appointment in kynect ability.

**Steps to Schedule an Appointment**

1. E&T Providers schedule an appointment for E&T Participants by navigating to the Home screen. Enter the E&T Participant’s name into the Search field.
2. Click Search.
3. On the **Individual Details** screen, click the **Schedule Appointment** tab.

4. The **Appointments Summary** screen displays the **Schedule Appointment** button and an E&T Participant’s appointment information, including appointment **Name**, **Appointment Type**, **Date**, **Time**, **Appointment Channel**, **Conference Link**, and **Status**. Click **Schedule Appointment** to begin scheduling an E&T Appointment.

---

Please Note: If an E&T Participant does not have previously scheduled or cancelled appointments, the **Appointments Summary** screen displays as blank. Click the **Schedule Appointment** button to proceed to scheduling an appointment.

---

Please Note: To access the Microsoft Teams conference link, E&T Providers must click the **Join Meeting** hyperlink. The conference link is visible when the Video Appointment status is marked as **Scheduled** or **Show**.

If the **Appointment Channel** selected is **Telephone** or **In-Person** during the scheduling appointment process, the **Conference Link** column is blank.

---

Please Note: If the Schedule Appointment tab does not display on the Individual Details screen, click the **More** button to display the Documents, Notes, and Schedule Appointment tab options from the drop-down.
5. The E&T Participant’s information is prepopulated, including the First Name, Middle Initial (if applicable) Last Name, Suffix (if applicable), Email, Primary Phone Number, Address, and Preferred Contact Method.

6. Click Next.

Please Note: Depending on if Email, Mail, or SMS is selected as a Preferred Contact Method, a Video Conference link is emailed to the listed email address with instructions to join via Microsoft Teams, mailed to the E&T Participant’s Address with manual instructions to join via Microsoft Teams, or sent via SMS and the meeting may be joined by clicking the link.

The link is also sent in a reminder Email or SMS message the day before the appointment if either of those were selected as the Preferred Contact Method.
7. Select the applicable reason(s) for scheduling the appointment.
8. Click **Next**.

9. The **Appointment Location** screen displays the E&T Office nearest to the E&T Participant’s zip code. Click **Next** at the bottom of the screen to continue.
10. On the **Preferred Date** screen, click the **Calendar** icon to search for and select the preferred date. Selecting a date populates the **Select your preferred date for Appointment** field.

11. Click **Next**.

**Please Note:** The **Select your preferred date for Appointment** field does not display available appointment dates on the same day or within the next 24 hours of scheduling an appointment. The field displays the dates up to **15 business days** from the current date.
12. Select an applicable appointment timeslot on the Select Timeslot screen. Available timeslots displayed on this screen reflect available times for the next 15 business days. However, only five (5) dates are displayed at a time.

13. Click the View More Slots button to view more timeslots.

14. Click Next.

Please Note: The View More Slots button does not display if there are no more timeslots.
15. The **Appointment Channel** list displays channels in which an E&T Participant conducts their appointment. **In-Person**, **Telephone**, and **Video** are options that may be selected. Select the preferred appointment channel from the **Appointment Channel** list.

16. Select a **Special Accommodation**, if applicable, from the **Special Accommodations** list.

17. Click the **Schedule Appointment** button to schedule the appointment.
18. Review and confirm the appointment details displayed on the Appointment Details screen.
19. Click **Confirm Appointment**.
20. Once the appointment is confirmed, the **Appointment Successfully Scheduled** pop-up displays the confirmed appointment details.

**Please Note:** The **Video Appointment** link is available from the appointment record after the Video Appointment is successfully scheduled. E&T Participants cannot join a meeting through the link until one hour before and one hour after the scheduled Video Appointment.

**Please Note:** If In-Person is selected as the **Appointment Channel** the **Office Address** displays in the **Appointment Details** pop-up.
Steps to Managing the My Appointments and Unassigned Appointments Widgets

Follow the steps below to manage a SNAP E&T Appointment in kynect ability.

1. From the E&T Provider’s **Home** screen, navigate to the **My Appointments** widget. This widget displays the current day’s scheduled, rescheduled, and cancelled appointments assigned to an E&T Provider.

2. E&T Providers may also navigate to the **Unassigned Appointments** widget from the **Home** screen directly below the **My Appointments** widget. This widget displays the current day’s unassigned scheduled, rescheduled, and cancelled appointments.

3. Click the **Filter Appointments** link at the top of the **Unassigned Appointments** widget’s tab to filter the unassigned appointments. E&T Providers can use this feature to look for appointments on days other than the current day.
4. Upon clicking the **Filter Appointments** link, the **Appointment Filter** pop-up displays searchable **Appointment Details** such as the **Individual ID** (a unique ID number given to E&T Participants), **Appointment Channel**, **Office**, **Date**, **Begin Time**, and **End Time**. Populate each applicable field to filter the **Unassigned Appointments**.

5. Click **Apply**.

![Appointment Filter](image)

**Please Note**: The **Office** filter only displays E&T Offices the specific E&T Provider is affiliated with.

6. After filtering Unassigned Appointments, navigate to the **Unassigned Appointments** widget where the filtered appointments are now displayed.

7. E&T Provider Supervisors can assign an E&T Participant’s unassigned appointment to an E&T Provider or Supervisor by clicking the **Assign** link on an E&T Participant’s **Appointment Record**. E&T Providers assign appointments to themselves when the Assign link is clicked.

![Unassigned Appointments](image)
8. On the **Assigned To** pop-up, click the **Search User** drop-down to begin searching for an E&T Provider, Supervisor, or Staff to assign the appointment to.

9. Click **Save**.

---

**Please Note:** The **Assign To** pop-up is only available for E&T Provider Supervisors once the **Assign** link is clicked from the **Unassigned Appointments** widget.

E&T Provider Supervisors can only search for E&T Provider Supervisors or Staff affiliated with the specific E&T Office listed in an E&T Participant’s **Individual Details**.

---

**Please Note:** If an appointment assigned to E&T Staff is **rescheduled** the appointment releases and displays, again, in the **Unassigned Appointments** widget with the status of **Rescheduled** displayed on the **Appointment Record**.

However, if an appointment assigned to E&T Staff is **cancelled** the appointment remains in the **My Appointments** widget with the status of **Cancelled** displayed on the **Appointment Record**.
Steps to Starting an Appointment

1. Once an appointment is assigned correctly, navigate to the My Appointments widget on the Home screen.
2. Click the Start hyperlink on an E&T Participant’s Appointment Record to be navigated to the Appointment Details screen.

**Please Note:** The Appointment Status on the Appointment Details screen is updated to Show once the Start hyperlink is clicked.

3. Begin the SNAP E&T Appointment with the E&T Participant.
Steps to Join a Scheduled Video Appointment via Microsoft Teams

Follow the steps below to join a meeting in Microsoft Teams.

1. From the E&T Provider’s **Home** screen, navigate to the **My Appointments** widget. This widget displays scheduled, rescheduled, and cancelled appointments assigned to an E&T Provider.

2. Click the **Start** hyperlink on an E&T Participant’s **Appointment Record** to be navigated to the **Appointment Details** screen.

3. On the **Appointment Details** screen click the Join Meeting hyperlink under the **Location** tab to join the meeting.
4. A new browser window pop-up asks how the E&T Provider would like to join the meeting. If the Microsoft Teams application is installed on the device, the E&T Provider can select **Open your Teams app**. Otherwise, select **Continue on this browser** to open the meeting.

**Please Note:** To access the Microsoft Teams conference link, E&T Providers must click the **Join Meeting** hyperlink. The conference link is visible when the Video Appointment status is marked as **Scheduled** or **Show**. The hyperlink is active one hour before and one hour after the scheduled appointment.

**Please Note:** If **Email** or **SMS** is chosen as the **Preferred Contact Method** a reminder Email or SMS is sent to the E&T Participant the day before with the brief link to join 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 preferred web browser, it is **not** required to download the Microsoft Teams App. If using a non-preferred browser (e.g., Firefox), certain functionality may not work. It is recommended to use the Microsoft Teams App. Select the **Open Teams App** option or click **Open Microsoft Teams** in the initial pop-up to join the meeting.
5. Enter your **Name** (First and Last) and check that the camera and microphone are toggled on.
6. 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 E&T Participant may keep their audio/video on or off while waiting to join a meeting. E&T Participants and E&T Providers can join a meeting one hour before and one hour after of their scheduled Video Appointment time.
7. Once the E&T Participant joins the meeting, “When the meeting starts, we’ll let people know you’re waiting” or “Waiting for others to join” may display.

8. Admit the E&T Participant from the Waiting Room once they join to begin the Video Appointment.

9. 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).
**Description**

<table>
<thead>
<tr>
<th>Camera button</th>
<th>Turns the webcam on and off.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microphone button</td>
<td>Turns the microphone on and off.</td>
</tr>
<tr>
<td>Arrow in box icon</td>
<td>Opens the Share Tray; Individuals may display their Desktop/Window (i.e., screenshare).</td>
</tr>
<tr>
<td>3 dots button</td>
<td>List additional options (e.g., meeting details, enter full screen, gallery view, etc.)</td>
</tr>
<tr>
<td>Talking bubble icon</td>
<td>Opens the chat bar.</td>
</tr>
<tr>
<td>People icon</td>
<td>Displays list of users in the meeting.</td>
</tr>
<tr>
<td>Red box with phone icon</td>
<td>Ends the meeting (do not click until the meeting is over).</td>
</tr>
</tbody>
</table>

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

10. If the appointment was started and the E&T Participant does not Show, navigate to the E&T Participant’s Individual Details screen.

11. Click the drop-down on an Appointment Record and click View.
12. On the Appointment Details screen, double-click the Appointment Status field
and select No Show from the drop-down.

Please Note: The Appointment Status on the Appointment Details screen
is updated to Show once the Start hyperlink is clicked.
<table>
<thead>
<tr>
<th>Topic</th>
<th>Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video feature enabled</td>
<td>• E&amp;T Providers are encouraged to have video on if technology permits.</td>
</tr>
</tbody>
</table>
| Screen Share/Chat                         | • E&T Providers should not share their screen during video appointments.  
• Personal information should not be shared by any party in the chat feature.                                                                                                                               |
| Audio/Technical Issues                    | • E&T Providers may:  
  o Call the E&T Participant at their designated phone number if audio in Teams is not working.  
  o End the video appointment and follow up by rescheduling the appointment if audio issues cannot be resolved quickly.  
• E&T Providers should reach out to their respective Help Desk/IT support if they experience network issues while connecting to their video appointment.  
• E&T Providers should follow up with Department of Community Based Services (DCBS) if they have system functionality issues with joining video appointments. |
| Appointment Time                          | • E&T Providers should remain on the call for at least 10 minutes if an E&T Participant is late to the appointment.                                                                                           
• E&T Participants should remain on the call for at least 10 minutes if an E&T Provider is late to the appointment.                                                                                       
• After 10 minutes, the E&T Provider can reschedule the appointment, or the E&T Participant may visit kynect benefits to reschedule the missed appointment.                                             |
| Admitting Residents/E&T Participants/Others | • E&T Providers should only admit the scheduled E&T Participant they recognize to the meeting.                                                                                                               
• If a second name appears for entrance to the meeting, admit the scheduled E&T Participant first. Ask if they are expecting another person, for example an Authorized Representative, and get their permission before admitting the second person. |
| Etiquette                                 | • E&T Providers should refer to their organization’s procedures and protocols for inappropriate, dangerous, or suspicious activity.                                                                        |

**Please Note:** E&T Providers can reference the Microsoft Teams **Best Practices** table for any questions related to conducting an appointment.
Steps to Reschedule an Appointment

Follow the steps below to begin the Appointment Rescheduling process.

1. From the Home screen, navigate to the Search field at the top of the screen. Click the Search field and enter the E&T Participant’s name into the Search field.
2. Click Search.

Please Note: If an E&T Participant already has an appointment scheduled and is assigned to an E&T Provider, their name displays within the My Appointments widget and is listed. Click on their hyperlinked Name from the Individual column to be taken to their Individual Details screen.
3. From the E&T Participant’s **Individual Details** screen, click the **Schedule Appointment** tab.

4. Click the drop-down icon on an **Appointment Record** and click **View**.

5. Clicking **View** drop-down icon navigates E&T Providers to the **Member Details** screen. At the top of the screen, click **Reschedule Appointment**.
6. Like the Appointment Scheduling process, the Member Details screen is view-only during the Appointment Rescheduling process. Click Next.

7. The Appointment Type Selection screen is also view-only during the Appointment Rescheduling process. Click Next.
8. The **Appointment Location** screen is view-only during the Appointment Rescheduling process.

9. Click **Next**.

10. Click the **Calendar** icon to search for and select a date from the **Search available timeslots from** the field and click **Next**.
11. Search an available appointment timeslot. Click the View More Slots button under the last available appointment date listing to view more timeslots.

12. Click Next.

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.
13. Select the **Preferred Channel** from the **Appointment Channel** list.
14. Select any applicable **Special Accommodation** from the **Special Accommodations** list if required by the Resident.
15. Click **Schedule Appointment** to confirm the rescheduled appointment.
16. E&T Participants receive an email or text notification based on their preferred contact method selected in kynect to confirm the rescheduled appointment.
Steps to Cancel an Appointment

Follow the steps below to begin the Cancel Appointment process.

1. From the **Home** screen, navigate to the **Search** field at the top of the screen. Click the **Search** field and enter the E&T Participant’s name into the **Search** field.
2. Click **Search**.

**Please Note**: If an E&T Participant already has an appointment scheduled and is assigned to an E&T Provider, their name displays within the **My Appointments** widget and is listed. Click on their hyperlinked **Name** from the **Individual** column to be taken to their **Individual Details** screen.

3. Click the drop-down icon on an **Appointment Record** on the E&T Participant’s **Appointments Summary** screen.
4. On the **Appointment Details** screen, click the **Cancel Appointment** button.

5. Click **Confirm** on the **Appointment Cancellation Confirmation** pop-up to cancel the appointment.