

The Commonwealth of Kentucky



kynect

benefits

Quick Reference Guide

Resident Search Tool & Exporting Client Lists to Excel





Resident Search Tool and Exporting to Excel Overview

kynect benefits users such as those with the kynector, QE Hospital, and QE Pregnancy roles use the Resident Search Tool to search and filter for their associated Residents or created benefit applications.

Users can use the Resident Search Tool to export a detailed list of Residents to Excel with contact information, request for information (RFI) details, case and enrollment information, and important dates. A kynector's complete list of associated Residents can be exported from the kynector information section.

Searching for Residents and Exporting to Excel

1. Navigate to the middle of the **kynector Dashboard** or **QE Dashboard** to find the Resident Search Tool.



Please Note: kynectors can only use the Resident Search feature for their associated Residents. kynectors should navigate to the Request Access Module to find existing cases.

2. Enter the Resident information such as first name, last name, case number, application number, or social security number.



Please Note: The search feature displays up to 200 associated Residents or created applications. Exporting to Excel also displays up to 200 associated Residents or created applications.

3. Click **Search**.
4. Once you have your desired list of Residents, click **Export to Excel**.

The screenshot shows the user interface for the Resident Search Tool. At the top, it says "Welcome, ROBB" and "Start Benefits Application". Below that, there is a profile section for "DCBS Central Office - View & Edit" with fields for "Your ID", "Organization", and "Public". The "Your ID" field contains the value "2240a499-1971-4841-aae4-d28bd7922d0d". There is a "View More" link. Below the profile section is the "Search" section with several input fields: "First Name", "Last Name", "Case Number", "Application Number", "Social Security Number (9 digits)", and "Date of Birth" (with a dropdown menu showing "mm/dd/yyyy"). There is also a checkbox for "Search by Primary Applicant" and a "Show Advanced Search" link. At the bottom, there are three buttons: "Reset", "Search", and "Export to Excel".



Please Note: The **Search by Primary Applicant** checkbox allows Individuals to filter the search results by primary applicant only.

Exporting a Complete Client List to Excel

1. Navigate to the *kynector information* section at the top of the **kynector dashboard**.
2. Click **View More** from the **kynector dashboard**.

3. Click **Export Client List** from the expanded *kynector information* section. A message will appear that reads as: “Request is being processed!”
4. The **Export Client List** hyperlink is greyed out and reads as “Processing”.

Request is being processed!

Welcome, ANDREW

Profile: kynector [Start Benefits Application](#)

Your ID	Organization	Coverage Area	Public	Program Access
5851	FIVETWENTYTWO	Bath, Bell, Boone	Public	Medicaid/APTC/QHP, SNAP, CCAP

Contact Information

Name Andrew Anna	Email Address optim@script.com	Phone Number 8134567890
Phone Type	Secondary Phone Number 1234567890	Mailing Address 02 VFKOSU XEUU ZK WFKPJHUXVP KY 28408 101
Preferred Method Of Contact	Preferred Time Of Contact	Clients 22 Processing

Organization Information

Organization Name FIVETWENTYTWO	ID 732	organization physical address 06 AFEBEJ BTV HA KY 18401 9800 101
Phone Number 6667778888	Email fivetwentytwo@dispostable.com	organization mailing address ENKOLYM KY 18401 101

[View Less](#)

 Your client list is available for download. 04/22/2023 9:18 PM ET [Download Client List](#)



Please Note: Users with the QE Hospital or QE Pregnancy role who still need help after referencing this Quick Reference Guide can call **(855) 459-6328** for additional assistance. kynectors should call the Professional Services Line at **(855) 326-4650** for assistance.

- Once the client list is ready, there will be a banner notification at the bottom of the screen that reads “Your Client List is available for download.” Click the **Download Client List** hyperlink to download the Client List.

Request is being processed!

Welcome, ANDREW

Profile: kynector [Start Benefits Application](#)

Your ID 5651	Organization FIVETWENTYTWO	Coverage Area Bath, Bell, Boone	Public	Program Access Medicaid/APTC/QHP, SNAP, CCAP
-----------------	-------------------------------	------------------------------------	--------	---

Contact Information

Name Andrew Anna	Email Address optim@script.com	Phone Number 8134567890
Phone Type	Secondary Phone Number 1234567890	Mailing Address 02 VFKOSU XEUU ZK WFKPJHUXVP KY 28408 101
Preferred Method Of Contact	Preferred Time Of Contact	Clients 22 Processing

Organization Information

Organization Name FIVETWENTYTWO	ID 732	organization physical address 06 AFEBEJ BTV HA KY 18401 9600 101
Phone Number 6667778888	Email fivetwentytwo@dispostable.com	organization mailing address ENKOLYM KY 18401 101

[View Less](#)

 **Your client list is available for download.** 04/22/2023 9:18 PM ET [Download Client List](#)



Please Note: The banner notification disappears once the **Download Client List** hyperlink is clicked on for the first time. After that, the user can generate their client list from the **Export Client List** hyperlink under the *Clients* section within the kynect dashboard.