

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.



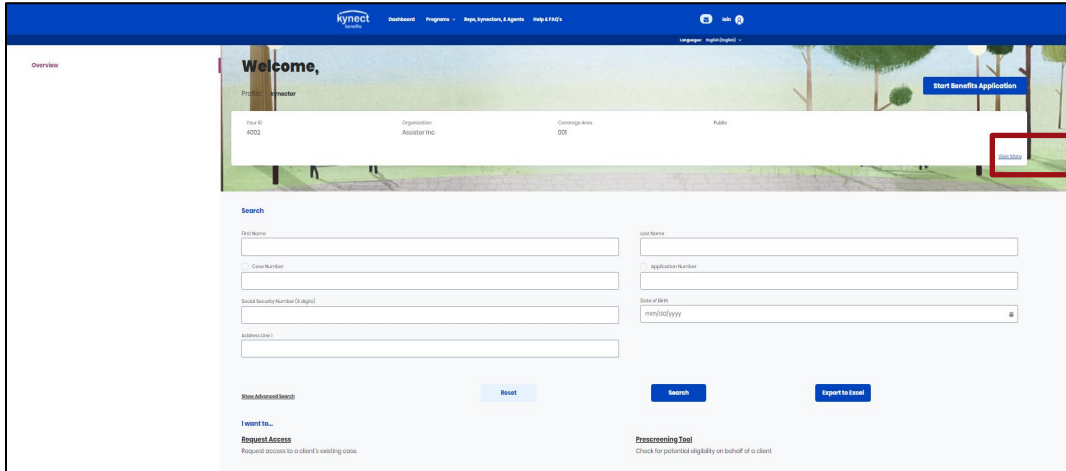
Please Note: The search feature displays up to 200 associated Residents or created applications. Exporting to Excel also displays up to 200 associated Residents or created applications.

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

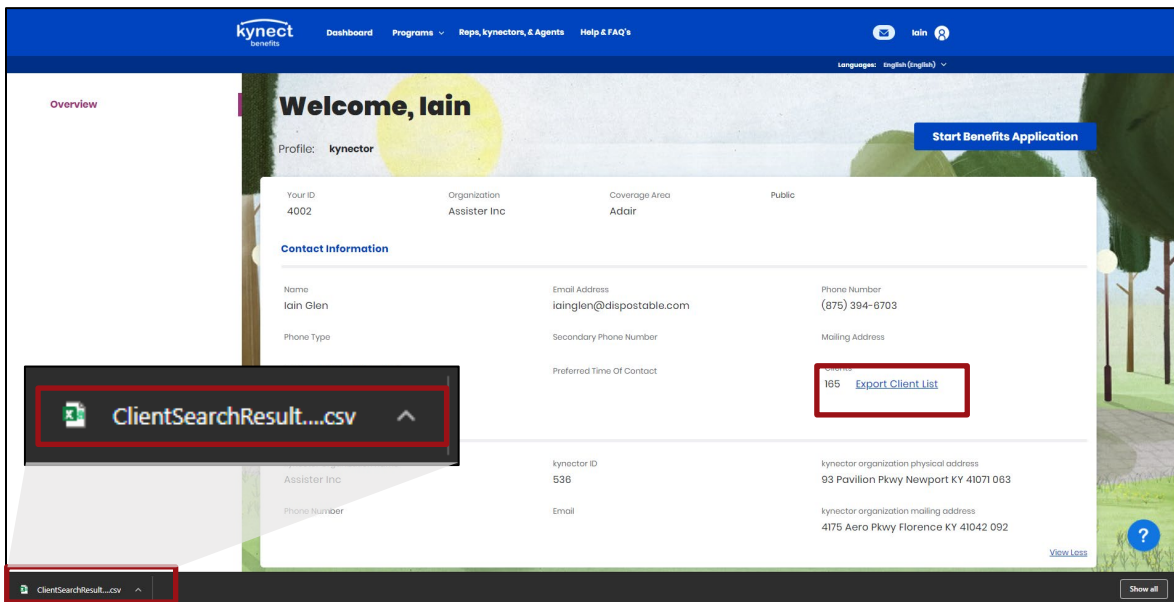
The screenshot shows the kynect benefits web application interface. At the top, there is a navigation bar with the kynect logo and menu items: Dashboard, Programs, Help, Kynectors, & Agents, and Help & FAQs. Below the navigation bar, a "Welcome" banner displays user information: Your ID (4002), Organization (Assistor Inc), Coverage Area (00), and Public. A "Start Benefits Application" button is visible in the top right corner. The main content area features a "Search" section with several input fields: First Name, Last Name, Case Number, Application Number, Social Security Number (3 digits), and Date of Birth (mm/dd/yyyy). There are also "Reset", "Search", and "Export to Excel" buttons. Below the search fields, there are links for "Request Access" and "Prescreening Tool".

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.
4. Open downloaded Excel document.



Please Note: Users with the QE Hospital or QE Pregnancy role who still need help after referencing this Quick Reference Guide can call (800) 635-2570 for additional assistance. kynectors should call the Professional Services Line at (855) 326-4650 for assistance.