The Commonwealth of Kentucky

kynect
benefits

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

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

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

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.
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.
Steps to Accessing a Client’s Resident Dashboard

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

2. View the Resident Dashboard in “Client View”.

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**Diagram 1:**

- **Steps to Accessing a Client’s Resident Dashboard**
- **Click on a Client’s Name** to be taken to the client’s Resident Dashboard.
- **View the Resident Dashboard in “Client View”**.

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**Table 1:**

<table>
<thead>
<tr>
<th>Client Details</th>
<th>Case Status</th>
<th>Submitted/Date</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>MICHAEL DOE</td>
<td>Approved</td>
<td>12/20/2020</td>
<td>12/20/2020</td>
</tr>
<tr>
<td>M1 Age 25</td>
<td>Approved</td>
<td>12/20/2020</td>
<td>10/10/2020</td>
</tr>
<tr>
<td>M1 Age 25</td>
<td>Approved</td>
<td>10/09/2020</td>
<td>10/09/2020</td>
</tr>
</tbody>
</table>
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”.

![Image of Kynect Interface](image-url)
5. View the Case Note in the Client Case Notes page.

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.

**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.