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.

Table of Contents

kynector/Authorized Representative Dashboard Overview 3
kynector/Authorized Representative Dashboard Details 3
View Message Center 4
Start Benefits Application 5
Navigating to the Personal Dashboard 5
Viewing Associated Resident Dashboard and Adding Case Notes 7
Searching for Resident Cases 8
Steps to Accessing a Client's Resident Dashboard 8
Steps to Add Client Case Notes 10

Please Note: Residents who still need help after referencing this Quick Reference Guide can call **(800) 635-2570** for additional assistance.

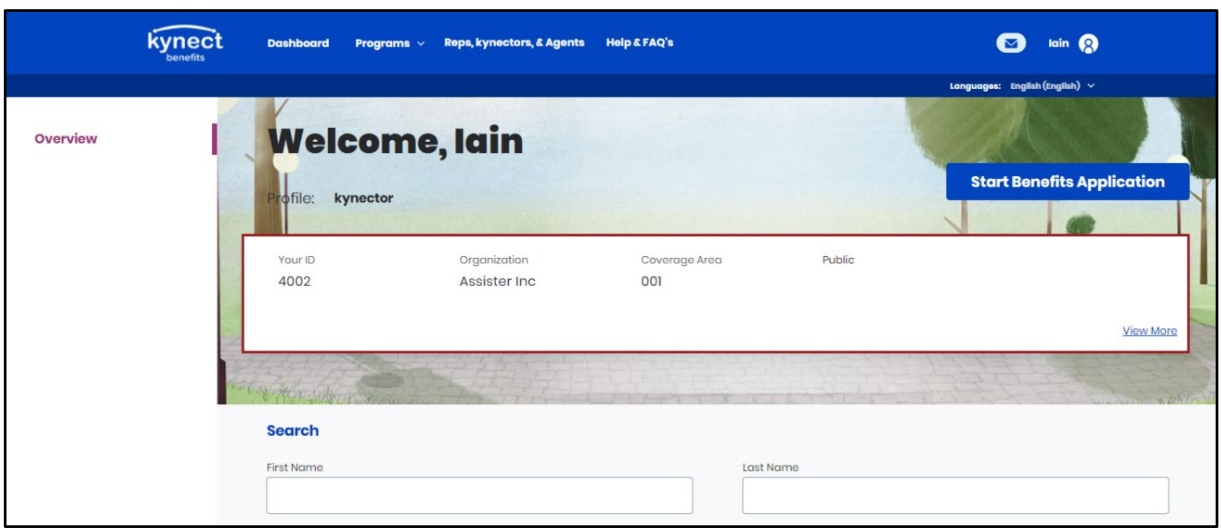
kynector/Authorized Representative Dashboard Overview

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

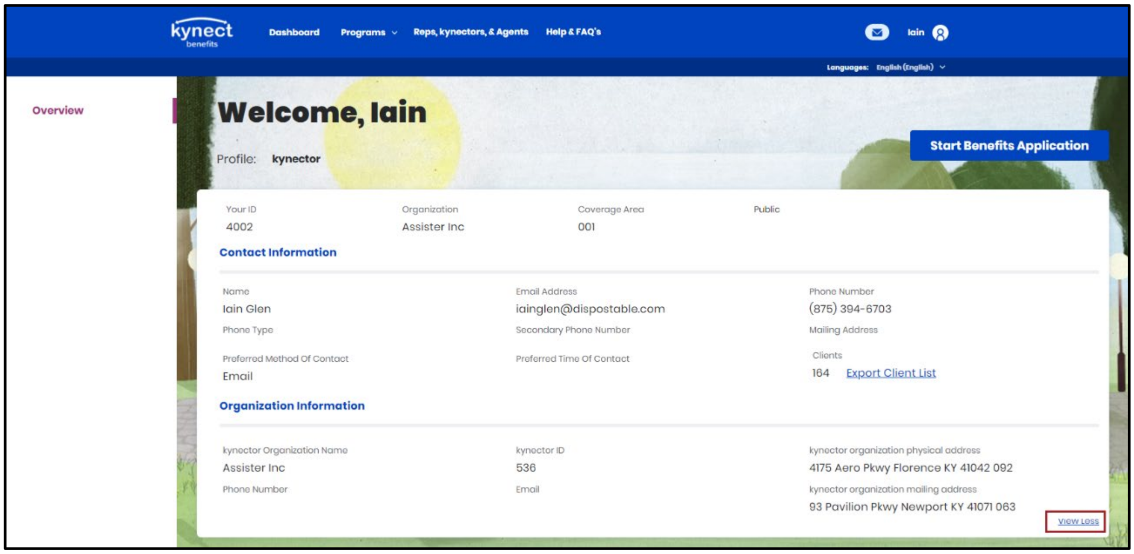
The top of the kynector/Authorized Representative dashboard includes the details below.

- ID Number
- Organization
- Coverage Area
- Public or Private Status
- Number of associated Resident cases



Please Note: The screenshot above is 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.

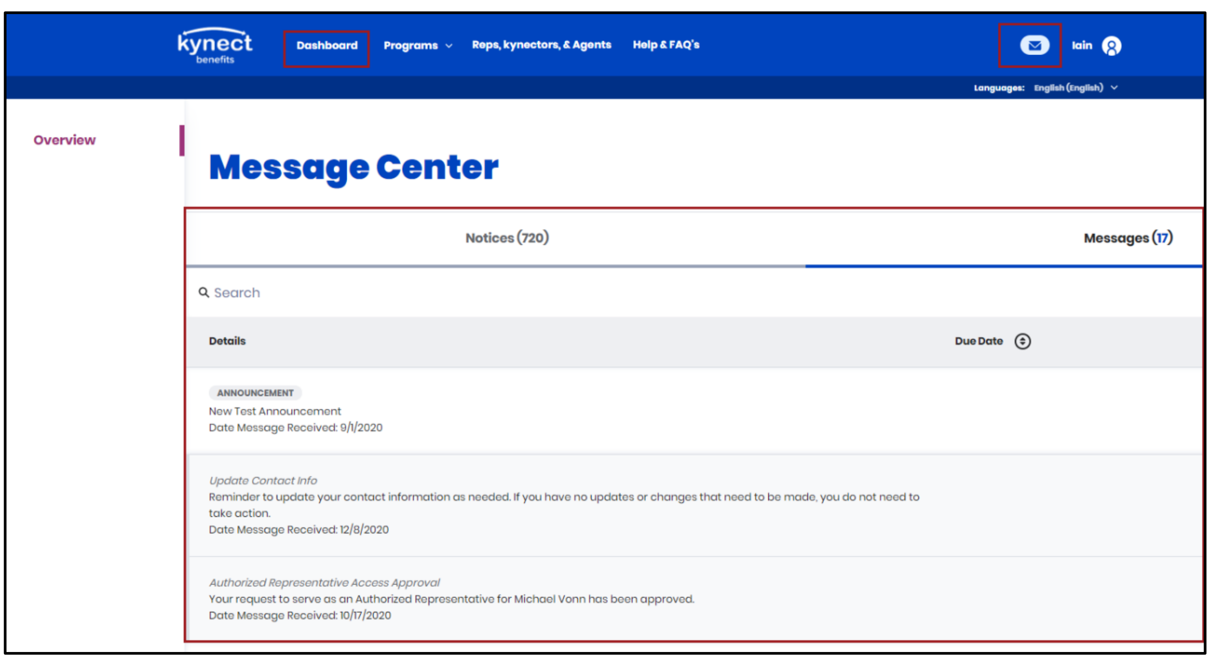


2. Click “View Less” to hide the information.

View Message Center

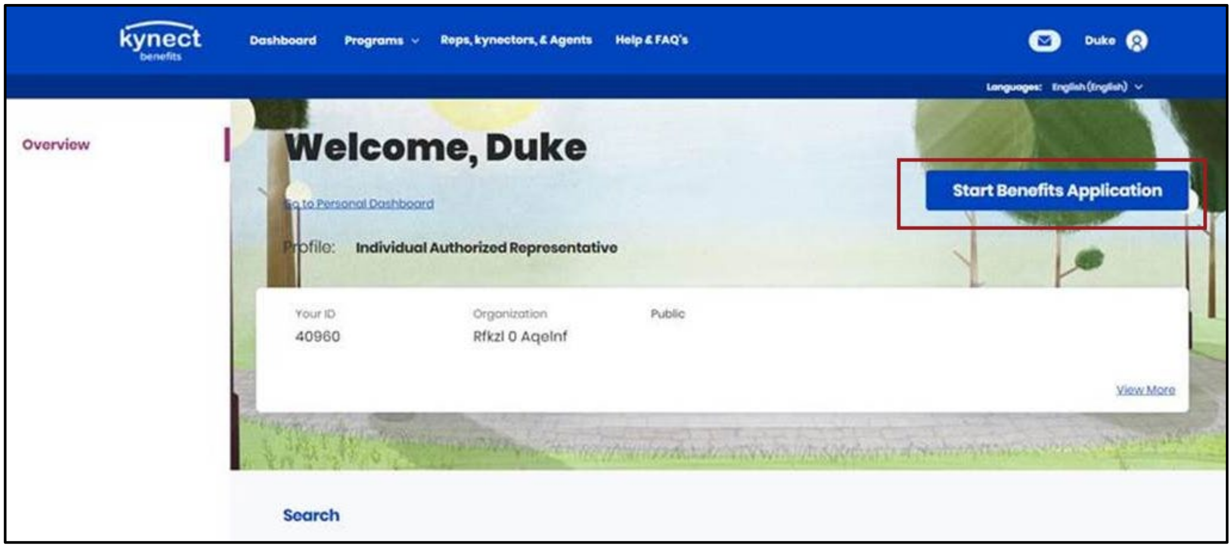
1. Click the Message Center icon to view Announcements, Messages, and Notifications for the cases for Residents. Accessibility to Notifications and To-Do’s depend on the role and associated programs.

2. Click “Dashboard” on the top menu to return to the kynector/Authorized Representative dashboard.



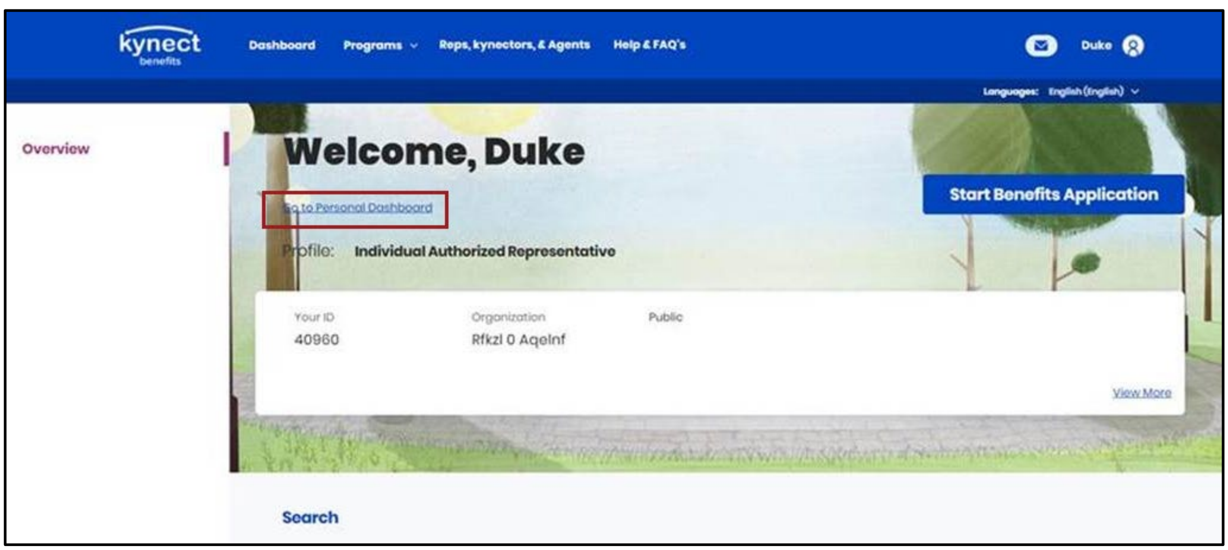
Start Benefits Application

1. Click “Start Benefits Application” to begin the process of completing a benefits application on behalf of a Resident.



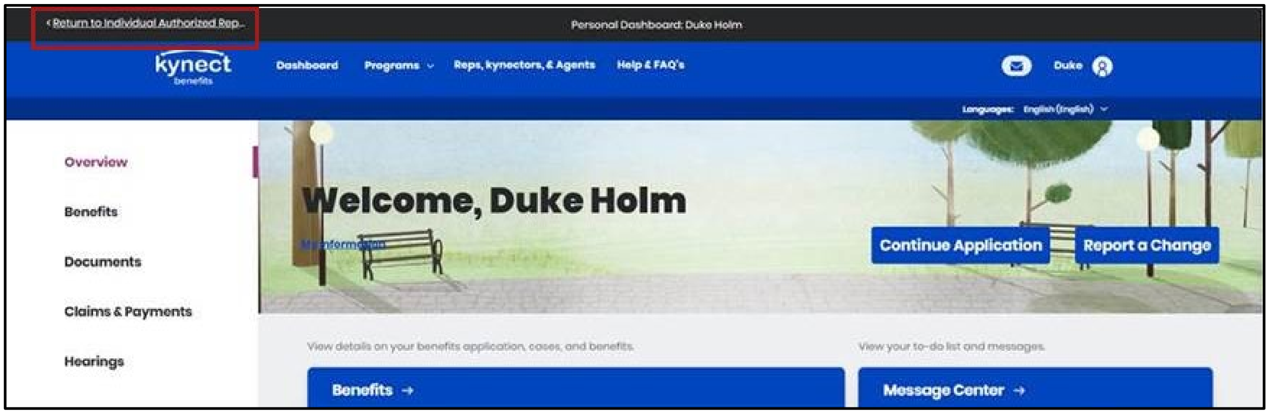
Navigating to the Personal Dashboard

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.



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

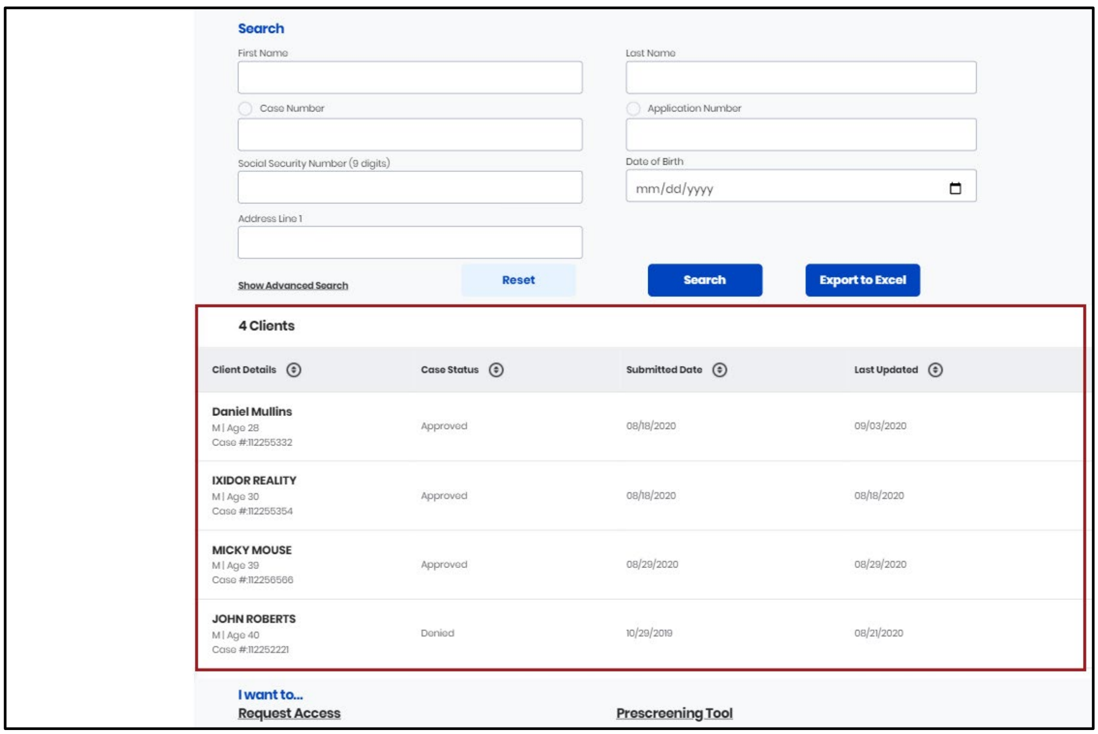
2. Click “Return to kynector Dashboard” or “Return to Individual Authorized Representative Dashboard” to return to the kynector or Authorized Representative Dashboard.



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

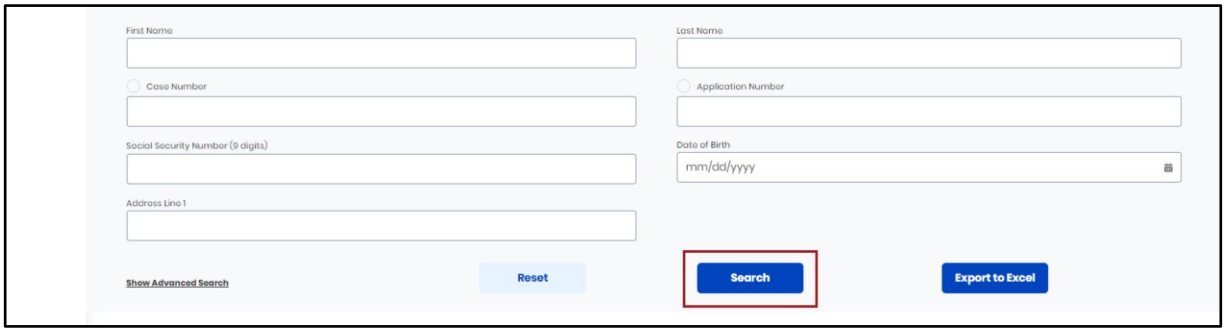


Please Note: If a Resident has multiple cases, the most recent one appears under last updated. Click "Export to Excel" to export a list of Resident cases and details. The export includes a list of Requests for Information for the Residents. kynectors can only export after searching.

Searching for Resident Cases

The Search tool is useful for kynectors and Authorized Representatives who have multiple clients. The Search tool will only return 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.

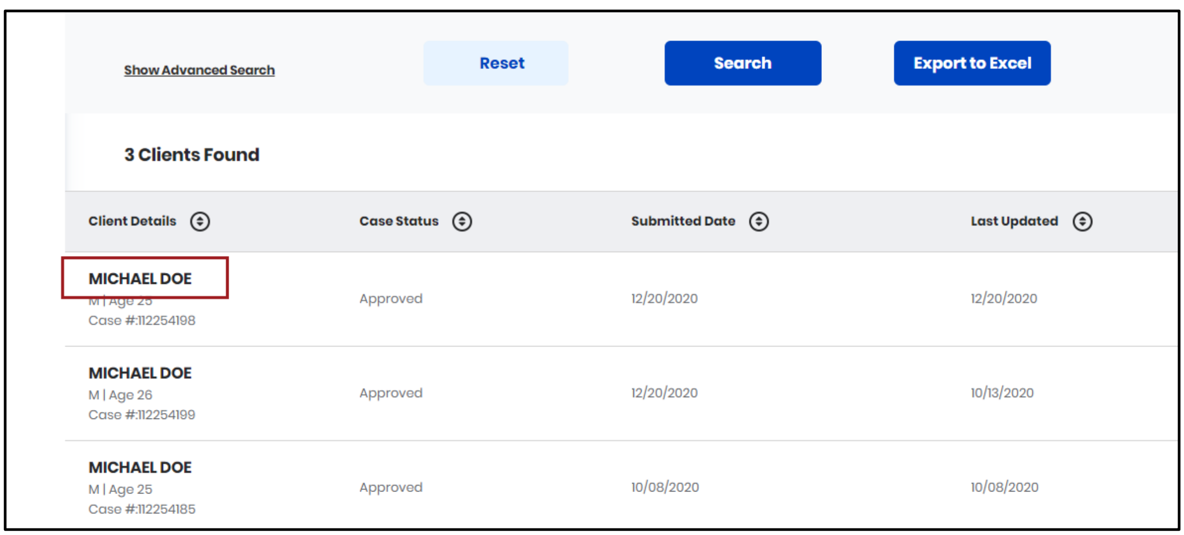
1. kynectors and Authorized Representatives can click “Search” to get a full list of Resident cases to which they are associated.



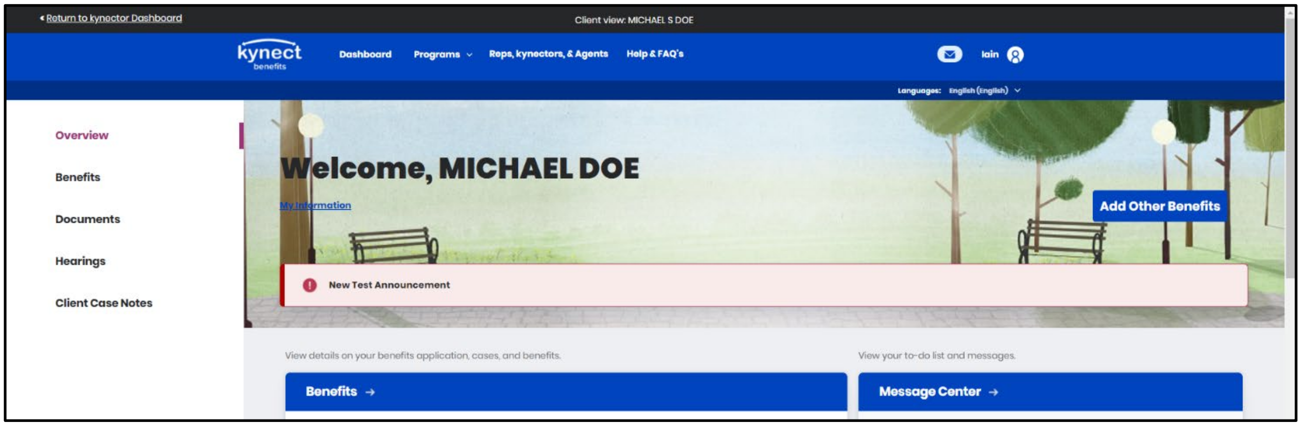
2. Search by First Name, Last Name, Case Number, Application Number, Social Security Number, Date of Birth, and Address.
3. Used the advanced search to search with additional fields if necessary.

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".



3. From the Client View, kynectors and Authorized Representatives may complete the processes below on behalf of the Resident while in Client View:

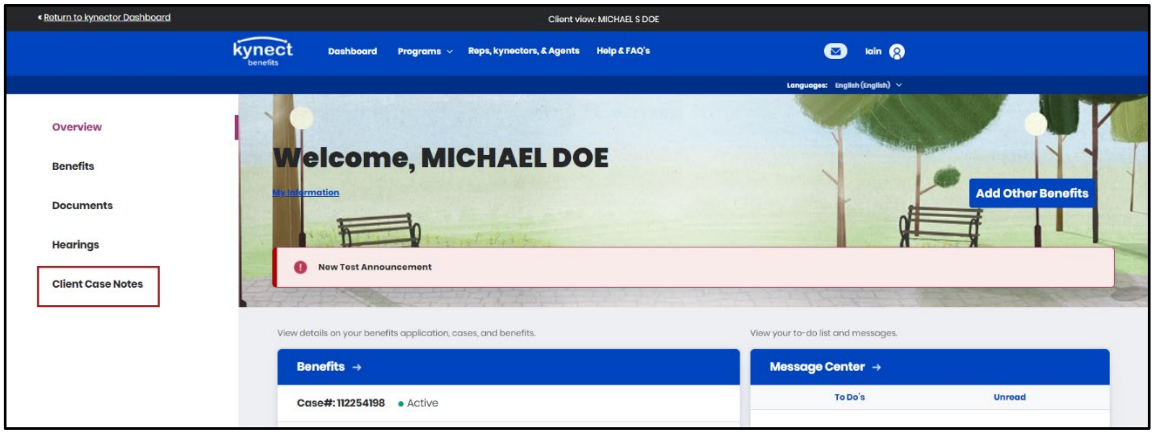
- View active Benefit Programs
- Start a Benefits Application by clicking "Add Other Benefits"
- Report a change in Resident information by clicking "Report a Change"
- View Resident To-Do's, Notifications, and Announcements in the Message Center
- Request a Medicaid Card
- Use the Prescreening Tool

Please Note: The actions that are available is dependent on the benefit programs and the permissions granted by the Resident.

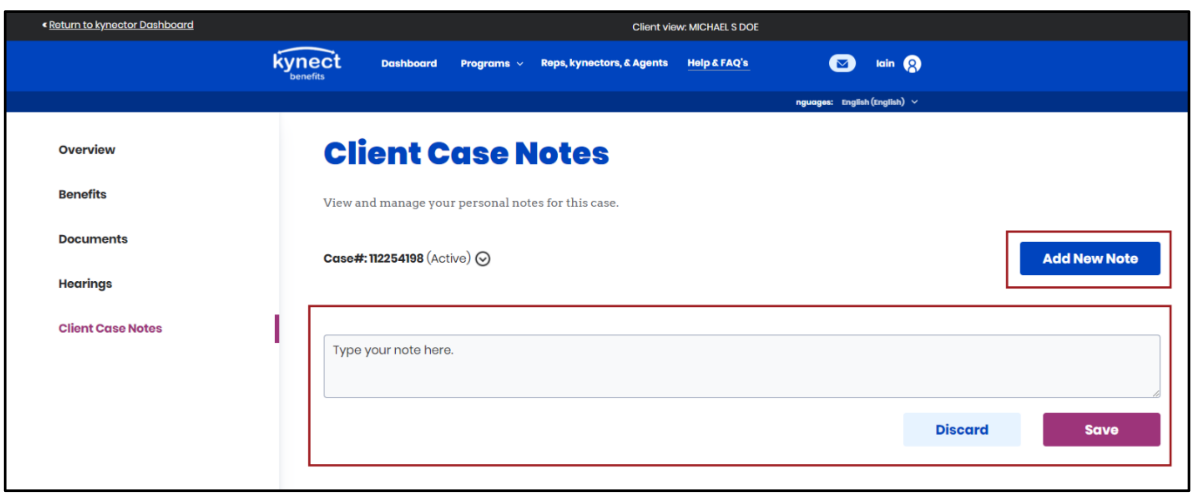
Below are the steps for kynectors and agency administrators to add Client Case Notes.

Steps to Add Client Case Notes

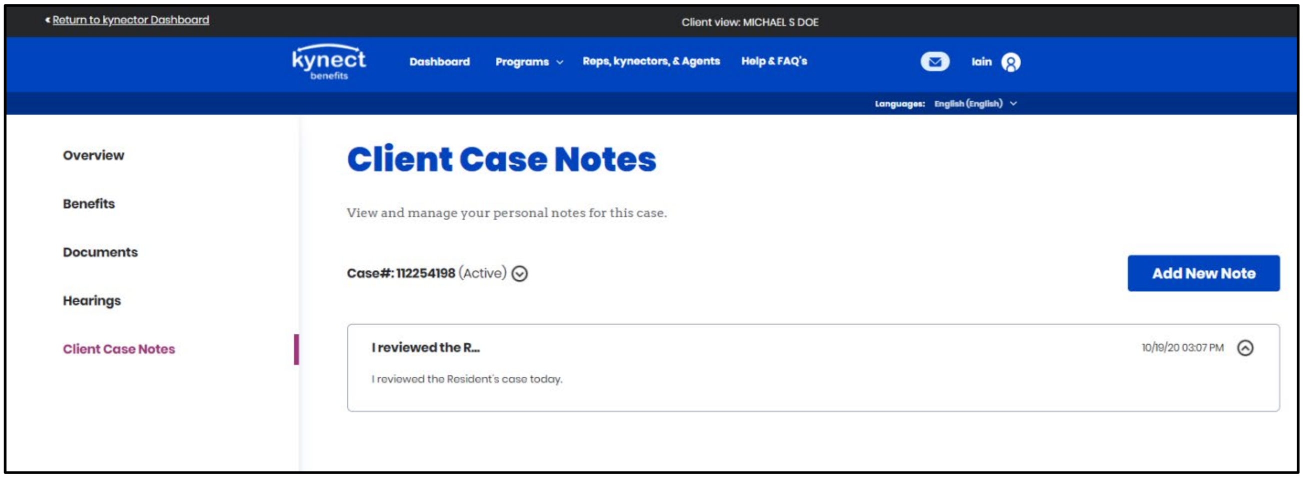
1. Click “Client Case Notes” on the side menu on a computer or the menu icon on a mobile device.



2. Click “Add New Note”.
3. Type the Case note in the note field.
4. Click “Save”.



5. View the Case Note in the Client Case Notes page.



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.

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.