



Quick Look at the **WalkMe Tutorial Guide**

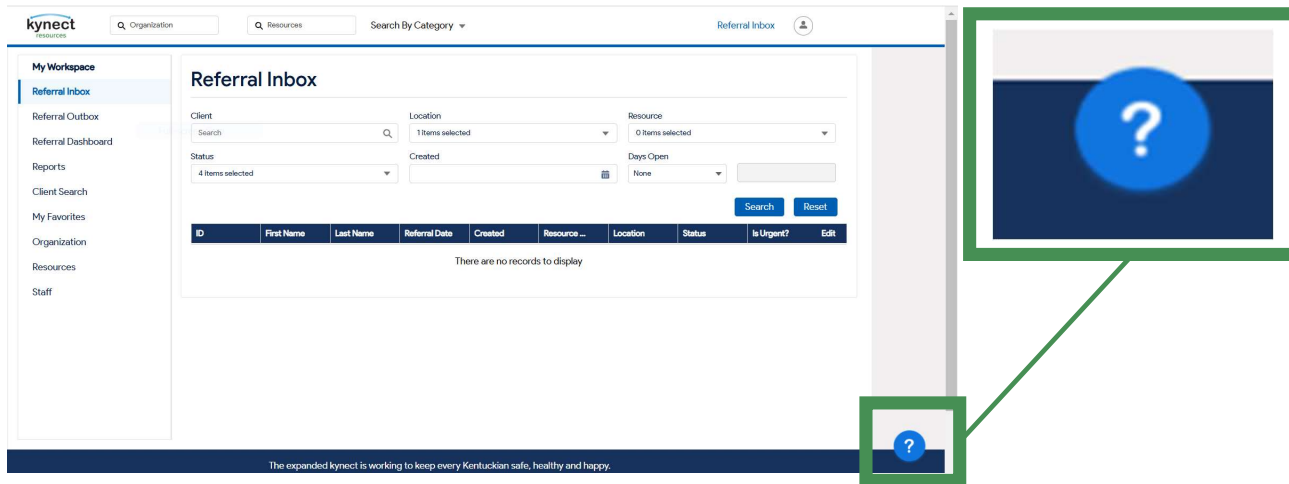
Use this Quick Look Guide to learn how the WalkMe feature functions.

Quick Look At The WalkMe Feature

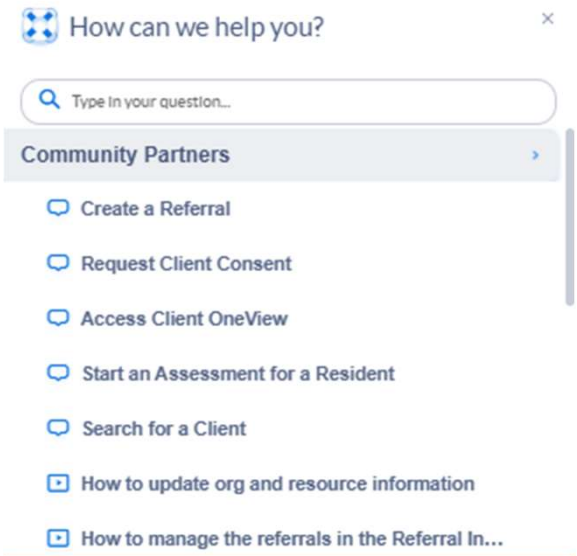


The new “WalkMe” feature has been recently added to **kynect resources** to assist with navigating the website! This new addition will walk users step-by-step through functions available to Community Partners.

To access, simply click the blue “?” symbol at the bottom right of the screen and follow the directions or select from the options provided.



The screenshot shows the 'Referral Inbox' page in the kynect resources application. The page includes a search bar, filters for Client, Location, and Resource, and a table with columns for ID, First Name, Last Name, Referral Date, Created, Resource, Location, Status, Is Urgent?, and Edit. A blue question mark icon is located in the bottom right corner of the page, and a larger green-bordered box highlights a blue question mark icon on a dark blue background, which is a tooltip or help window that appears when the icon is clicked.



How can we help you?

Type in your question...

Community Partners

- Create a Referral
- Request Client Consent
- Access Client OneView
- Start an Assessment for a Resident
- Search for a Client
- How to update org and resource information
- How to manage the referrals in the Referral In...

Quick Look At The WalkMe Feature



The following is an example of the WalkMe feature being used to search for a client.

The screenshot shows the "Referral Inbox" interface. On the left is a "My Workspace" sidebar with options like "Referral Inbox", "Referral Outbox", "Referral Dashboard", "Reports", "Client Search", "My Favorites", "Organization", "Resources", and "Staff". The main area has search filters for Client, Location, Resource, Status, Created, and Days Open. A table below shows columns for ID, First Name, Last Name, Referral Date, Created, Resource, Location, Status, Is Urgent?, and Edit. A message states "There are no records to display". A "Click Client Search" tooltip is visible. A "How can we help you?" overlay on the right lists "Community Partners" with options: "Create a Referral", "Request Client Consent", "Access Client OneView", "Start an Assessment for a Resident", "Search for a Client" (highlighted with a green box and a mouse cursor), "How to update org and resource information", and "How to manage the referrals in the Referral In...".

My Workspace

- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports
- Client Search
- My Favorites
- Organization
- Resources
- Staff

Referral Inbox

Client: Search [Q] Location: 1 items selected Resource: 0 items selected

Status: Click Client Search X Created: Days Open: None

By WalkMe

ID	First Name	Last Name	Referral Date	Created	Resource ...	Location	Status	Is Urgent?	Edit
There are no records to display									

How can we help you?

Type in your question...

Community Partners

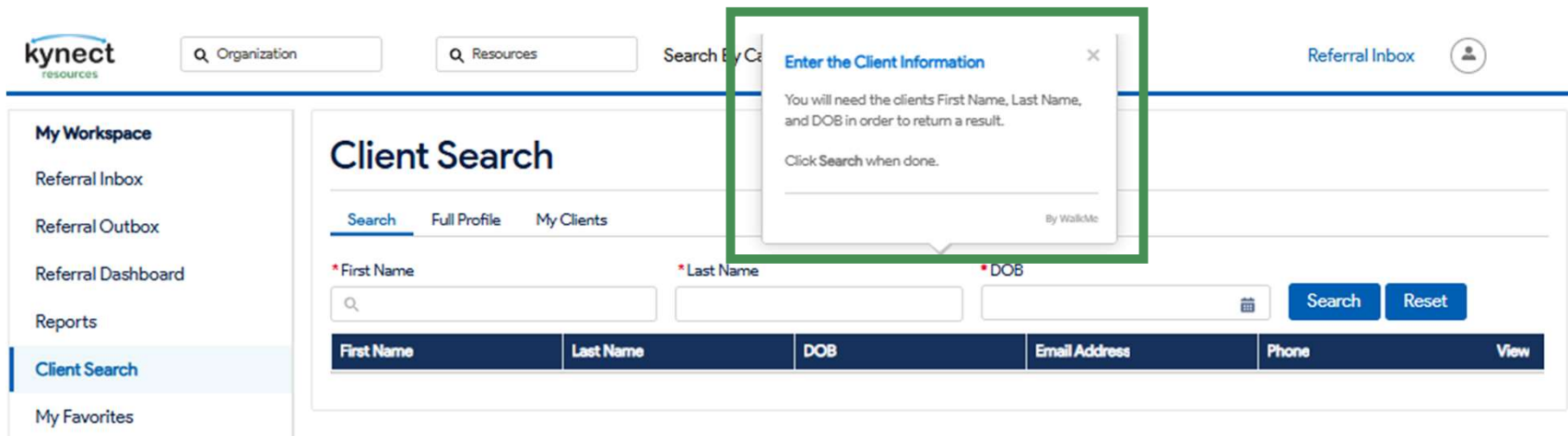
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The expanded kynect is working to keep every Kentuckian safe, healthy and happy.
Go to kynect.ky.gov to see all your options.

Quick Look At The WalkMe Feature



The WalkMe feature will guide users via text prompts on how to accomplish a desired task. Continue to follow the instructions:



The screenshot shows the 'Client Search' page in the Kynect Resources system. A WalkMe prompt box is overlaid on the search form, titled 'Enter the Client Information'. The prompt contains the following text: 'You will need the clients First Name, Last Name, and DOB in order to return a result. Click Search when done.' The prompt also includes a close button (X) and the text 'By WalkMe'.

The search form includes the following fields and buttons:

- Search Organization
- Search Resources
- Search By Category
- Referral Inbox
- My Workspace
- Referral Inbox
- Referral Outbox
- Referral Dashboard
- Reports
- Client Search (highlighted)
- My Favorites
- * First Name
- * Last Name
- * DOB
- Search
- Reset

First Name	Last Name	DOB	Email Address	Phone	View
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Quick Look At The WalkMe Feature

Once finished with the requested walk-through; WalkMe will ask the user if they require assistance with anything else and provide suggested guides for related topics.



The screenshot displays the Kynect Client Search interface. At the top, there are search filters for Organization and Resources, and a Search By Category dropdown. The main content area is titled "Client Search" and includes tabs for Search, Full Profile, and My Clients. The search form contains fields for First Name (John), Last Name (Doe), and DOB (01/01/1990), with Search and Reset buttons. Below the form is a table with the following data:

First Name	Last Name	DOB	Email Address	Phone	View
JOHN	DOE	01/01/1990			

A WalkMe notification dialog is overlaid on the table, with the following text:

You have successfully Searched for a Client

Do you need help with the following?

- Create a Referral
- Request Client Consent

Or Click Done to finish.

Done

At the bottom of the interface, there is a footer with the text: "The expanded kynect is working to keep every Kentuckian safe, healthy and happy. Go to kynect.ky.gov to see all your options." and a blue question mark icon.



Thank you

For additional support, please use the Help section in **kynect resources** or email kynectresources@ky.gov