# The Commonwealth of Kentucky

# kynect
## ability
### Together for a better Kentucky

## kynect Appointments Module

# Quick Reference Guide for E&T Appointment Scheduling, Rescheduling, and Cancelling

**This Quick Reference Guide is designed to help Kentucky Employment and Training (E&T) Providers to schedule, reschedule, and cancel SNAP E&T Appointments in kynect ability for E&T Participants.**

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# Scheduling, Rescheduling, and Cancelling Appointments in kynect ability

In-Person, Video, and Telephone SNAP Employment and Training (E&T) Appointments may be scheduled, rescheduled, or canceled through kynect ability. Appointments are scheduled from the new **Schedule Appointments** tab located on an E&T Participant's **Individual Details** screen. Clicking on the **Schedule Appointments** tab opens the E&T Participant's appointment details. The kynect ability users with access to schedule appointments include:

- SNAP E&T Providers
- SNAP E&T Provider Supervisors

SNAP E&T Providers can begin scheduling an appointment by navigating to the **Individual Dashboard** in kynect ability. This dashboard can be accessed by searching for an E&T Participant from the kynect ability **Search Menu** or by clicking on the E&T Participant's **Individual** hyperlink from the **My Appointments** widget if they have a previously scheduled appointment. Scheduling an appointment can also begin with a task.

Follow the steps below to schedule an appointment in kynect ability.

## Steps to Schedule an Appointment

1. E&T Providers schedule an appointment for E&T Participants by navigating to the **Home** screen. Enter the E&T Participant's name into the **Search** field.
2. Click **Search**.

3. On the **Individual Details** screen, click the **Schedule Appointment** tab.

4. The **Appointments Summary** screen displays the **Schedule Appointment** button and an E&T Participant's appointment information, including appointment **Name**, **Appointment Type**, **Date**, **Time**, **Appointment Channel**, **Conference Link**, and **Status**. Click **Schedule Appointment** to begin scheduling an E&T Appointment.



**Please Note**: If an E&T Participant does not have previously scheduled or cancelled appointments, the **Appointments Summary** screen displays as blank. Click the **Schedule Appointment** button to proceed to scheduling an appointment.

**Please Note**: To access the Microsoft Teams conference link, E&T Providers must click the **Join Meeting** hyperlink. The conference link is visible when the Video Appointment status is marked as **Scheduled** or **Show**.

If the **Appointment Channel** selected is **Telephone** or **In-Person** during the scheduling appointment process, the **Conference Link** column is blank.

**Please Note**: If the Schedule Appointment tab does not display on the Individual Details screen, click the **More** button to display the Documents, Notes, and Schedule Appointment tab options from the drop-down.

5. The E&T Participant's information is prepopulated, including the **First Name**, **Middle Initial** (if applicable) **Last Name**, **Suffix** (if applicable), **Email**, **Primary Phone Number**, **Address**, and **Preferred Contact Method**.

6. Click **Next**.



**Please Note**: Depending on if **Email**, **Mail**, or **SMS** is selected as a **Preferred Contact Method,** a **Video Conference** link is emailed to the listed email address with instructions to join via Microsoft Teams, mailed to the E&T Participant's **Address** with manual instructions to join via Microsoft Teams, or sent via SMS and the meeting may be joined by clicking the link.

The link is also sent in a reminder Email or SMS message the day before the appointment if either of those were selected as the **Preferred Contact Method**.

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7. Select the applicable reason(s) for scheduling the appointment.
8. Click **Next**.

**Schedule Appointment**

Step 2 of 6

**Select Appointment Type**

⑦

✓  **SNAP E&T Assessment**
Meet with an E&T provider to complete your SNAP E&T Assessment

**SNAP E&T Program - General Appointment**
Request a meeting with my E&T coach about transportation, follow-up, goals,or another E&T related question

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9. The **Appointment Location** screen displays the E&T Office nearest to the E&T Participant's zip code. Click **Next** at the bottom of the screen to continue.

**Schedule Appointment**

Step 3 of 6

**Address**

500 PUBLIC SQUARE, COLUMBIA, KY, 42728

Office mapped for Appointment based on contact's address

1 Results

**Clark County Community Center**    7.94 miles

30 Taylor Avenue
Winchester, KY
40391                  Wednesday : 7:00 AM-4:00 PM EST
                       Thursday : 7:00 AM-4:00 PM EST
(123) 456-7890         Friday : 7:00 AM-4:30 PM EST

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10. On the **Preferred Date** screen, click the **Calendar** icon to search for and select the preferred date**.** Selecting a date populates the **Select your preferred date for Appointment** field.

11. Click **Next**.

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**Schedule Appointment**

Step 4 of 6

**Preferred Date**

Appointments cannot be scheduled for the same day or within the next 24 hours
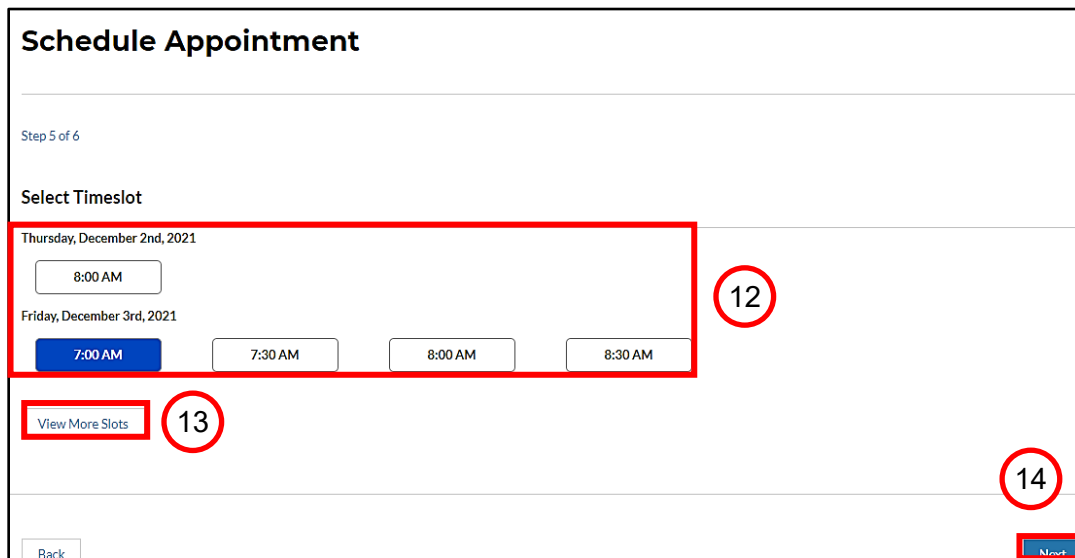
Select your preferred date for Appointment

| 11/29/2021 | 📅 | (10) |

(11)   Next

Back

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**Please Note**: The **Select your preferred date for Appointment** field does not display available appointment dates on the same day or within the next 24 hours of scheduling an appointment. The field displays the dates up to 15 business days from the current date.

12. Select an applicable appointment timeslot on the **Select Timeslot** screen. Available timeslots displayed on this screen reflect available times for the next 15 business days. However, only five (5) dates are displayed at a time.

13. Click the **View More Slots** button to view more timeslots.

14. Click **Next**.

**Schedule Appointment**

Step 5 of 6

**Select Timeslot**

Thursday, December 2nd, 2021

| 8:00 AM |

Friday, December 3rd, 2021

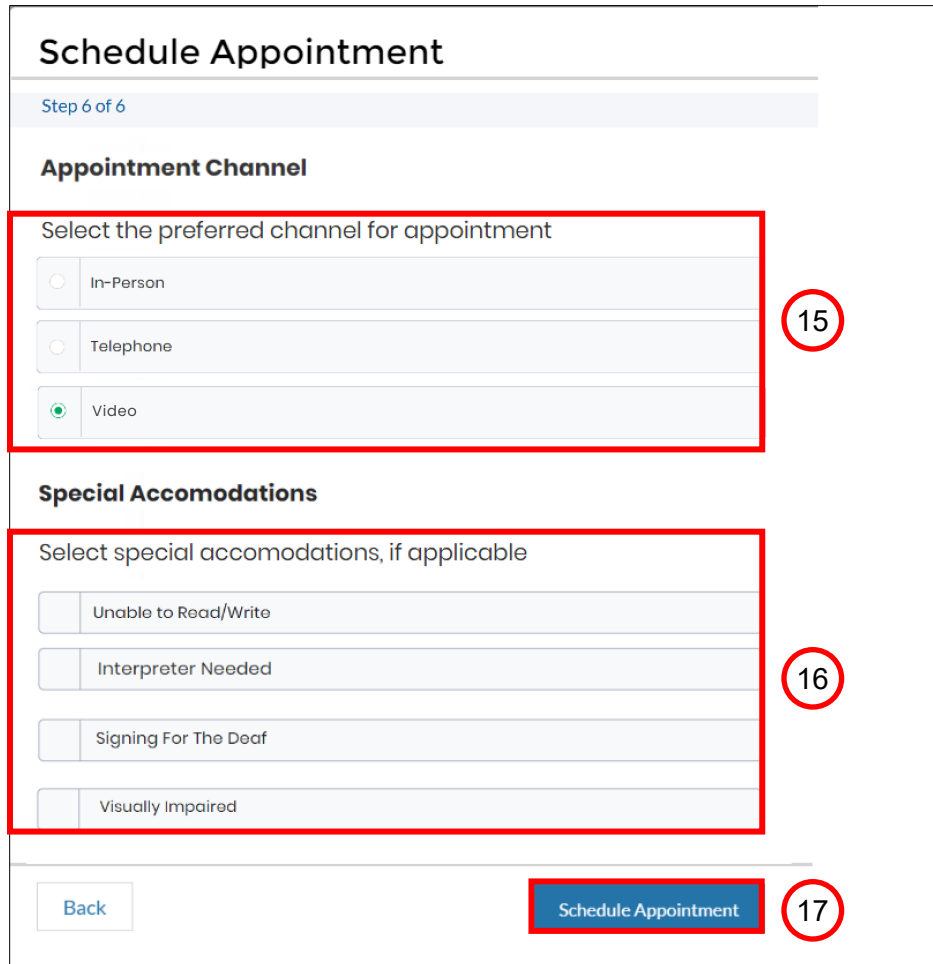| 7:00 AM | 7:30 AM | 8:00 AM | 8:30 AM |

View More Slots

Back          Next

**Please Note**: The **View More Slots** button does not display if there are no more timeslots.

15. The **Appointment Channel** list displays channels in which an E&T Participant conducts their appointment. **In-Person**, **Telephone**, and **Video** are options that may be selected. Select the preferred appointment channel from the **Appointment Channel** list.

16. Select a **Special Accommodation**, if applicable, from the **Special Accommodations** list.

17. Click the **Schedule Appointment** button to schedule the appointment.

18. Review and confirm the appointment details displayed on the **Appointment Details** screen.

19. Click **Confirm Appointment**.

## Appointment Details

**Jane Doe**

**SNAP E&T Assessment**

Thursday, September 9th, 2021

4:00 PM - 5:00 PM EST

**Video**

Link will be available on the appointment record

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**Confirm Appointment**

20. Once the appointment is confirmed, the **Appointment Successfully Scheduled** pop-up displays the confirmed appointment details.

**Appointment Successfully Scheduled**                                    ✕

The appointment has been successfully scheduled. Details will be provided via the preferred notification type method shortly to the individual.

**Appointment Details**

**Jane Doe**
SNAP E&T Assessment                          Video
Thursday, September 9th, 2021                 Link will be available on the appointment record
4:00 PM - 5:00 PM EST
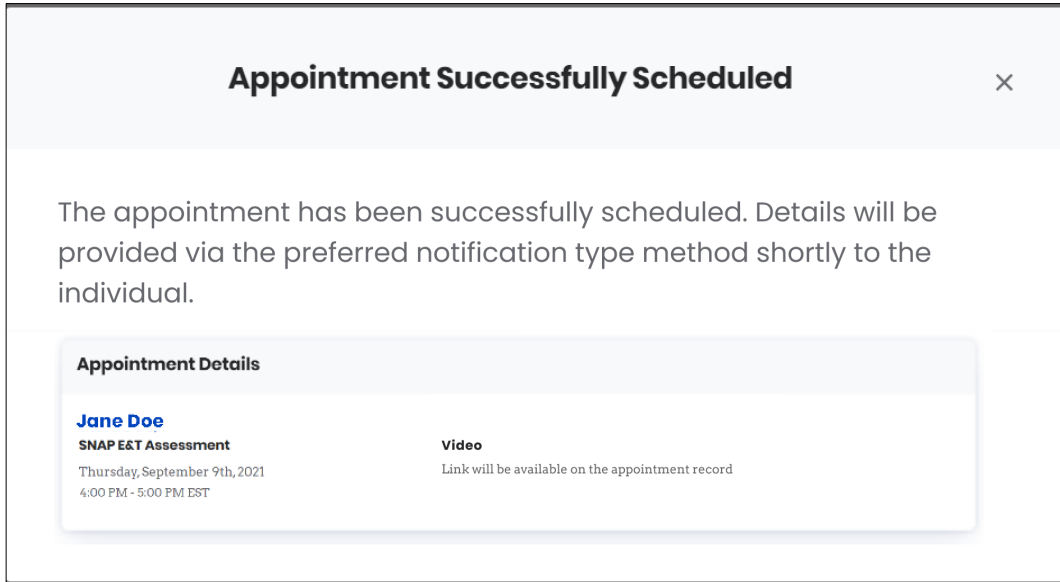
**Please Note**: The **Video Appointment** link is available from the appointment record after the Video Appointment is successfully scheduled. E&T Participants cannot join a meeting through the link until one hour before and one hour after the scheduled Video Appointment.

**Please Note**: If In-Person is selected as the **Appointment Channel** the **Office Address** displays in the **Appointment Details** pop-up.

## Steps to Managing the My Appointments and Unassigned Appointments Widgets

Follow the steps below to manage a SNAP E&T Appointment in kynect ability.

1. From the E&T Provider's **Home** screen, navigate to the **My Appointments** widget. This widget displays the current day's scheduled, rescheduled, and cancelled appointments assigned to an E&T Provider.



2. E&T Providers may also navigate to the **Unassigned Appointments** widget from the **Home** screen directly below the **My Appointments** widget. This widget displays the current day's unassigned scheduled, rescheduled, and cancelled appointments.
3. Click the **Filter Appointments** link at the top of the **Unassigned Appointments** widget's tab to filter the unassigned appointments. E&T Providers can use this feature to look for appointments on days other than the current day.

4. Upon clicking the **Filter Appointments** link, the **Appointment Filter** pop-up displays searchable **Appointment Details** such as the **Individual ID** (a unique ID number given to E&T Participants), **Appointment Channel**, **Office**, **Date**, **Begin Time**, and **End Time**. Populate each applicable field to filter the **Unassigned Appointments**.

5. Click **Apply**.

**Appointment Filter**

④

| Individual ID | Date |
|---|---|
| 🔍 | 📅 |
| Channel | Begin Time |
| --None-- ▼ | 10:00 AM CT ▼ |
| Office | End Time |
| Clark County Community Center ▼ | 10:30 AM CT ▼ |

Reset    **Apply**  ⑤

💡 **Please Note**: The **Office** filter only displays E&T Offices the specific E&T Provider is affiliated with.

6. After filtering Unassigned Appointments, navigate to the **Unassigned Appointments** widget where the filtered appointments are now displayed.

7. E&T Provider Supervisors can assign an E&T Participant's unassigned appointment to an E&T Provider or Supervisor by clicking the **Assign** link on an E&T Participant's **Appointment Record**. E&T Providers assign appointments to themselves when the Assign link is clicked.

**Unassigned Appointments** ▼                                         Filter Appointments ↻

| START TIME | DURATION | INDIVIDUAL | APPOINTMENT TYPE | APPOINTMENT CHANNEL | ASSIGNED TO | STATUS | ACTION |
|---|---|---|---|---|---|---|---|
| 04:00 PM EST | 1 hour | MERENA MORGAN | SNAP E&T Assessment | Telephone | UNASSIGNED | Rescheduled | Assign |
| 04:00 PM EST | 1 hour | BERTHA BRICK | SNAP E&T Assessment | Video | UNASSIGNED | Scheduled | Assign |

Showing 1-2 of 2 Appointment Schedules

⑦

8. On the **Assigned To** pop-up, click the **Search User** drop-down to begin searching for an E&T Provider, Supervisor, or Staff to assign the appointment to.
9. Click **Save**.

Assigned To

Staff

* Name

Search User ⑧

Cancel  Save ⑨

**Please Note**: The **Assign To** pop-up is only available for E&T Provider Supervisors once the **Assign** link is clicked from the **Unassigned Appointments widget**.

E&T Provider Supervisors can only search for E&T Provider Supervisors or Staff affiliated with the specific E&T Office listed in an E&T Participant's **Individual Details**.

**Please Note**: If an appointment assigned to E&T Staff is <u>rescheduled</u> the appointment releases and displays, again, in the **Unassigned Appointments** widget with the status of **Rescheduled** displayed on the **Appointment Record**.

However, if an appointment assigned to E&T Staff is <u>cancelled</u> the appointment remains in the **My Appointments** widget with the status of **Cancelled** displayed on the **Appointment Record**.

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## Steps to Starting an Appointment

1. Once an appointment is assigned correctly, navigate to the **My Appointments** widget on the **Home** screen.
2. Click the **Start** hyperlink on an E&T Participant's **Appointment Record** to be navigated to the **Appointment Details** screen.





💡 **Please Note**: The Appoinment Status on the **Appointment Details** screen is updated to **Show** once the **Start** hyperlink is clicked.

3. Begin the SNAP E&T Appointment with the E&T Participant.

## Steps to Join a Scheduled Video Appointment via Microsoft Teams

Follow the steps below to join a meeting in Microsoft Teams.

1. From the E&T Provider's **Home** screen, navigate to the **My Appointments** widget. This widget displays scheduled, rescheduled, and cancelled appointments assigned to an E&T Provider.

2. Click the **Start** hyperlink on an E&T Participant's **Appointment Record** to be navigated to the **Appointment Details** screen.



3. On the **Appointment Details** screen click the Join Meeting hyperlink under the Location tab to join the meeting.

**Please Note**: To access the Microsoft Teams conference link, E&T Providers must click the **Join Meeting** hyperlink. The conference link is visible when the Video Appointment status is marked as **Scheduled** or **Show**. The hyperlink is active one hour before and one hour after the scheduled appointment.

**Please Note**: If **Email** or **SMS** is chosen as the **Preferred Contact Method** a reminder Email or SMS is sent to the E&T Participant the day before with the brief link to join the meeting.
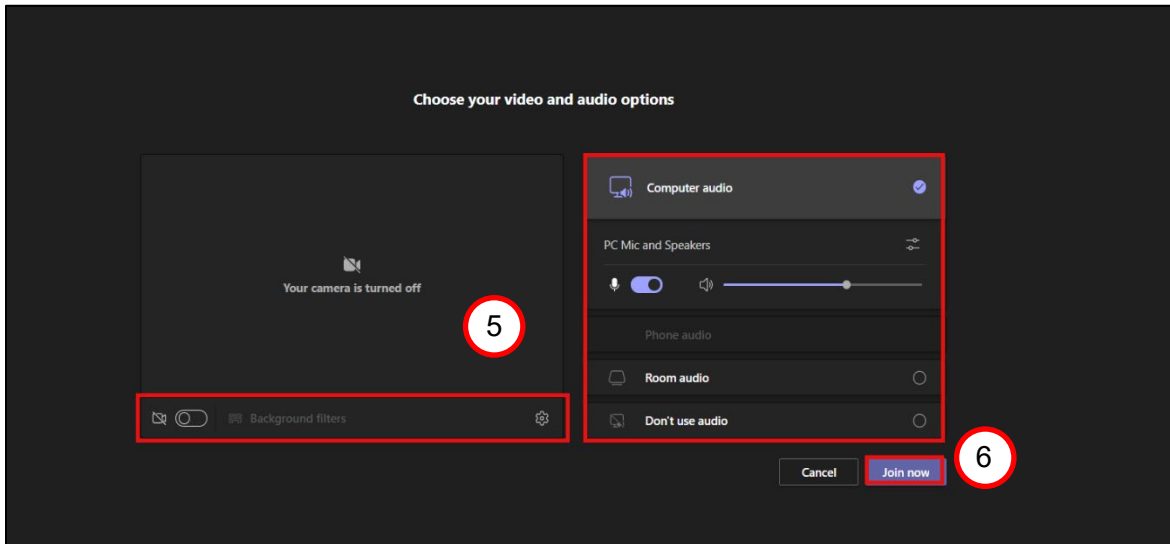
4. A new browser window pop-up asks how the E&T Provider would like to join the meeting. If the Microsoft Teams application is installed on the device, the E&T Provider can select **Open your Teams** app. Otherwise, select **Continue on this browser** to open the meeting.
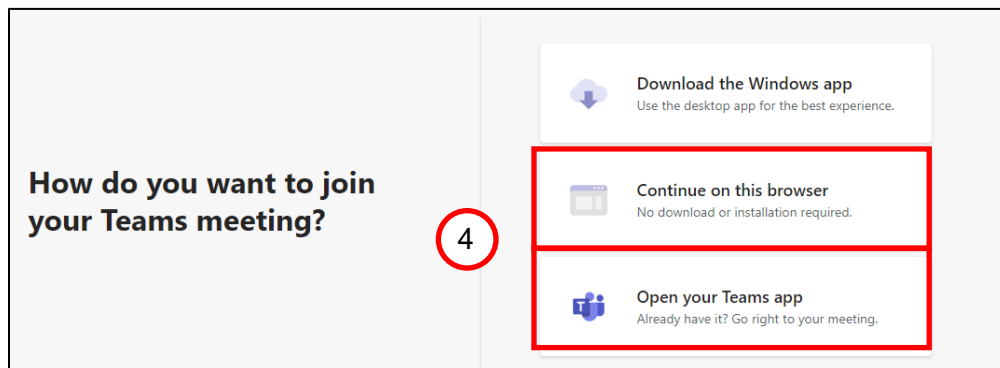


**Please Note:** For best results, use one of the following preferred web browsers: Google Chrome, Microsoft Edge, or Safari (version 11.6 and above).

If using a preferred web browser, it is <u>not</u> required to download the Microsoft Teams App. If using a non-preferred browser (e.g., Firefox), certain functionality may not work. It is recommended to use the Microsoft Teams App. Select the **Open Teams App** option or click **Open Microsoft Teams** in the initial pop-up to join the meeting.

5. Enter your **Name** (First and Last) and check that the camera and microphone are toggled on.
6. Click **Join now**.



Choose your video and audio options

Your camera is turned off

🔲 Background filters

Computer audio

PC Mic and Speakers

Phone audio

Room audio

Don't use audio

Cancel   Join now

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💡 **Please Note:** If using the Microsoft Teams App, the username automatically integrates with the App.

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💡 **Please Note:** Audio and video are turned off by default. The E&T Participant may keep their audio/video on or off while waiting to join a meeting. E&T Participants and E&T Providers can join a meeting one hour before and one hour after of their scheduled Video Appointment time.

7. Once the E&T Participant joins the meeting, **"When the meeting starts, we'll let people know you're waiting"** or **"Waiting for others to join"** may display.
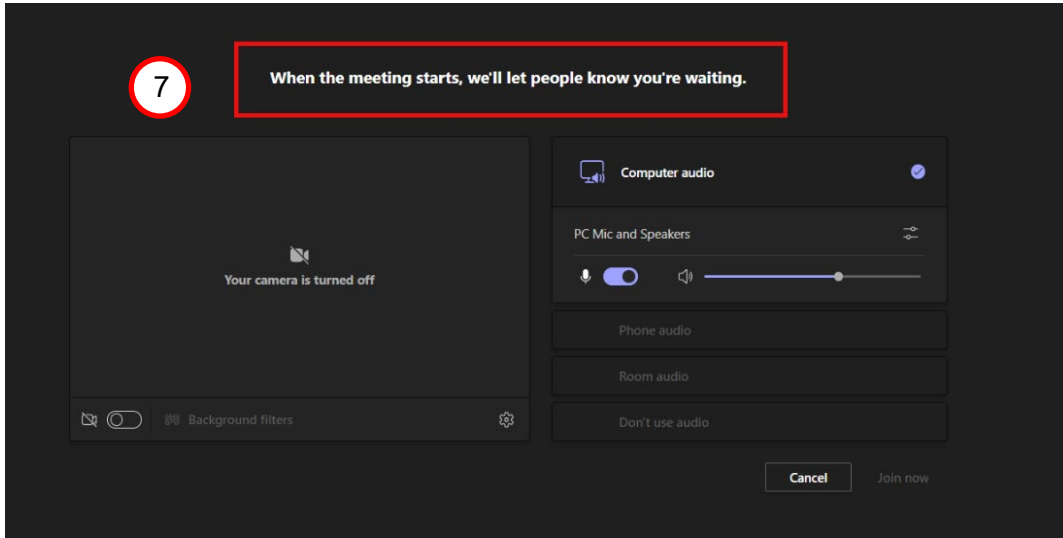


8. Admit the E&T Participant from the **Waiting Room** once they join to begin the Video Appointment.
9. Use the menu option on the screen to turn on video and audio when ready. (See the chart below for additional functions.)
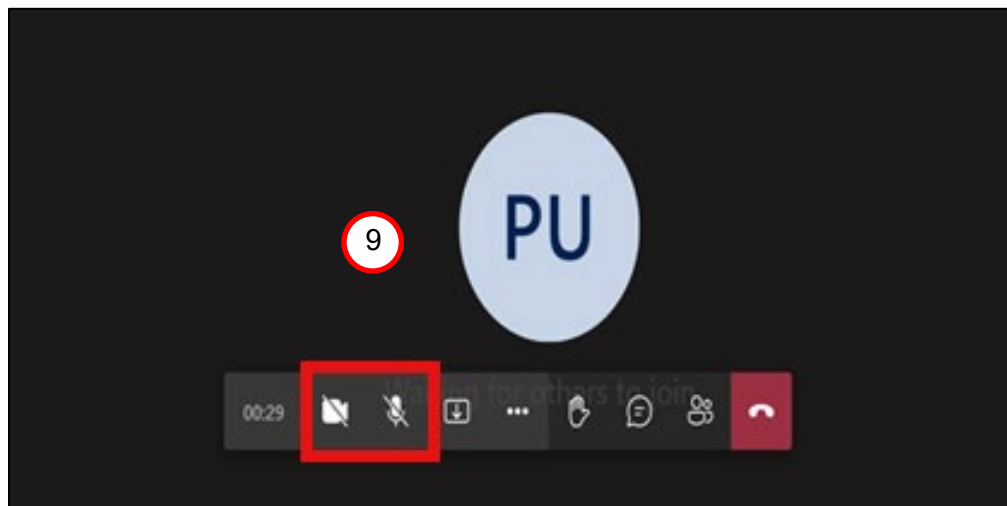


**Please Note:** The screen display may vary based on the device used (mobile, computer, or Microsoft Teams App).

| | Description |
|---|---|
| 📹 | **Camera button** - Turns the webcam on and off. |
| 🎤 | **Microphone button** - Turns the microphone on and off. |
| ⬆️ | **Arrow in box icon** - Opens the Share Tray; Individuals may display their Desktop/Window (i.e., screenshare). |
| ••• | **3 dots button** - List additional options (e.g., meeting details, enter full screen, gallery view, etc.) |
| 💬 | **Talking bubble icon** - Opens the chat bar. |
| 👥 | **People icon** - Displays list of users in the meeting. |
| 📞 | **Red box with phone icon** - Ends the meeting (<u>do not</u> click until the meeting is over). |

**Please Note:** Meeting Control Bar icons are subject to change pending Microsoft Updates to the Teams App.

10. If the appointment was started and the E&T Participant does not **Show**, navigate to the E&T Participant's **Individual Details** screen.

11. Click the drop-down on an **Appointment Record** and click **View**.

Contact
**ONEIDA BURGESS**

LOCAL PRINT FORM    NEW NOTE

| IndividualId | Date of Birth | Gender | mail |
|---|---|---|---|
| 330068812 | 4/11/1998 | | neida.burgess@mailinator.com |

DETAILS    BENEFITS/HOUSEHOLD    ASSESSMENTS    WORK PARTICIPATION    CORRESPONDENCES    DOCUMENTS    NOTES    **SCHEDULE APPOINTMENT**
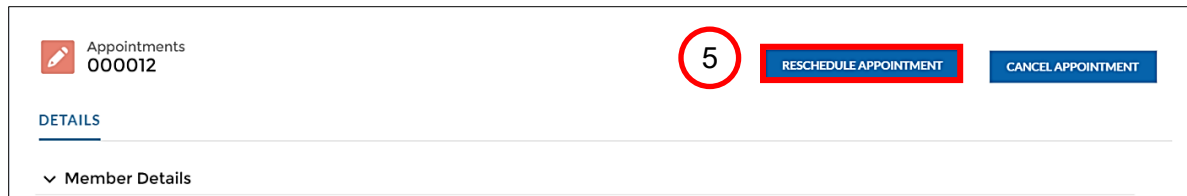
Schedule Appointment

Appointments (3)

| Name | Appointment Type | Start Time | End Time | Appointment Channel | Conference Link | Status | |
|---|---|---|---|---|---|---|---|
| APS-0000135 | SNAP E&T Assessment | 12/21/2021, 8:00:00 AM | 12/21/2021, 9:00:00 AM | Video | Join Meeting | Show | ▾ |
| APS-0000151 | SNAP E&T Assessment | 12/29/2021, 8:00:00 AM | 12/29/2021, 9:00:00 AM | Video | Join Meeting | Scheduled | ▾ |
| APS-0000154 | SNAP E&T Assessment | 1/10/2022, 11:00:00 AM | 1/10/2022, 12:00:00 PM | Video | | Cancelled | ▾ |

View All

12. On the **Appointment Details** screen, double-click the **Appointment Status** field and select **No Show** from the drop-down.



Appointment Type

Appointment Status
Show ⑫

Appointment Type
SNAP E&T Assessment

Location

Appointment Channel
Video

Conference Link
Join Meeting

💡 **Please Note**: The Appointment Status on the **Appointment Details** screen is updated to **Show** once the **Start** hyperlink is clicked.

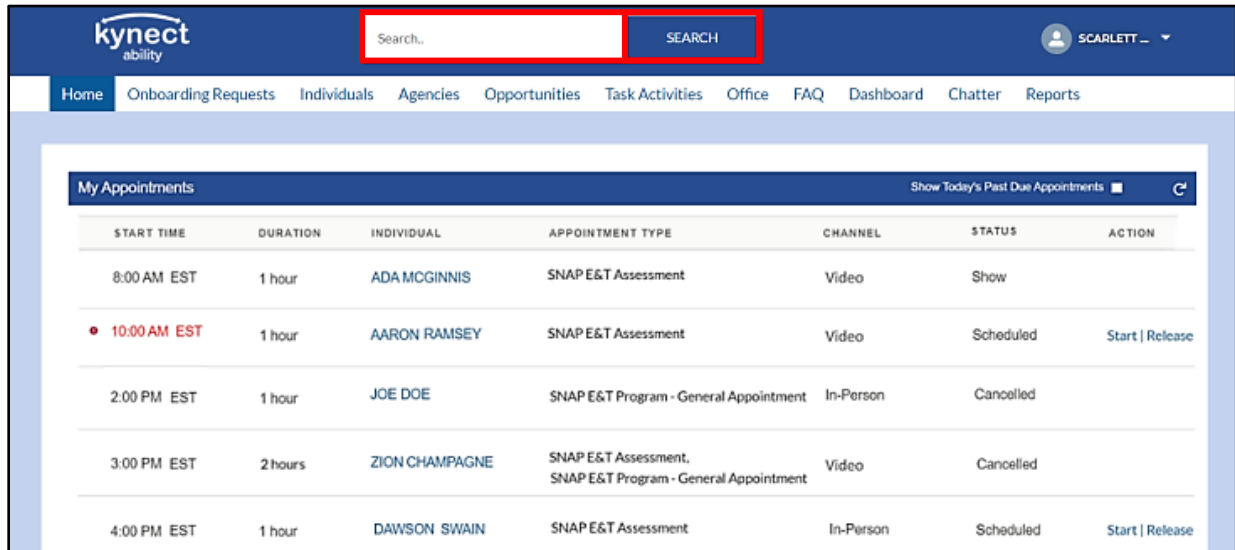| Topic | Best Practice |
|---|---|
| **Video feature enabled** | • E&T Providers are encouraged to have video on if technology permits. |
| **Screen Share/Chat** | • E&T Providers should not share their screen during video appointments.<br>• Personal information should not be shared by any party in the chat feature. |
| **Audio/Technical Issues** | • E&T Providers may:<br>  ○ Call the E&T Participant at their designated phone number if audio in Teams is not working.<br>  ○ End the video appointment and follow up by rescheduling the appointment if audio issues cannot be resolved quickly.<br>• E&T Providers should reach out to their respective Help Desk/IT support if they experience network issues while connecting to their video appointment.<br>• E&T Providers should follow up with Department of Community Based Services (DCBS) if they have system functionality issues with joining video appointments. |
| **Appointment Time** | • E&T Providers should remain on the call for at least 10 minutes if an E&T Participant is late to the appointment.<br>• E&T Participants should remain on the call for at least 10 minutes if an E&T Provider is late to the appointment.<br>• After 10 minutes, the E&T Provider can reschedule the appointment, or the E&T Participant may visit kynect benefits to reschedule the missed appointment. |
| **Admitting Residents/E&T Participants/Others** | • E&T Providers should only admit the scheduled E&T Participant they recognize to the meeting.<br>• If a second name appears for entrance to the meeting, admit the scheduled E&T Participant first. Ask if they are expecting another person, for example an Authorized Representative, and get their permission before admitting the second person. |
| **Etiquette** | • E&T Providers should refer to their organization's procedures and protocols for inappropriate, dangerous, or suspicious activity. |

**Please Note**: E&T Providers can reference the Microsoft Teams **Best Practices** table for any questions related to conducting an appointment.

## Steps to Reschedule an Appointment

Follow the steps below to begin the Appointment Rescheduling process.

1. From the **Home** screen, navigate to the **Search** field at the top of the screen. Click the **Search** field and enter the E&T Participant's name into the **Search** field.
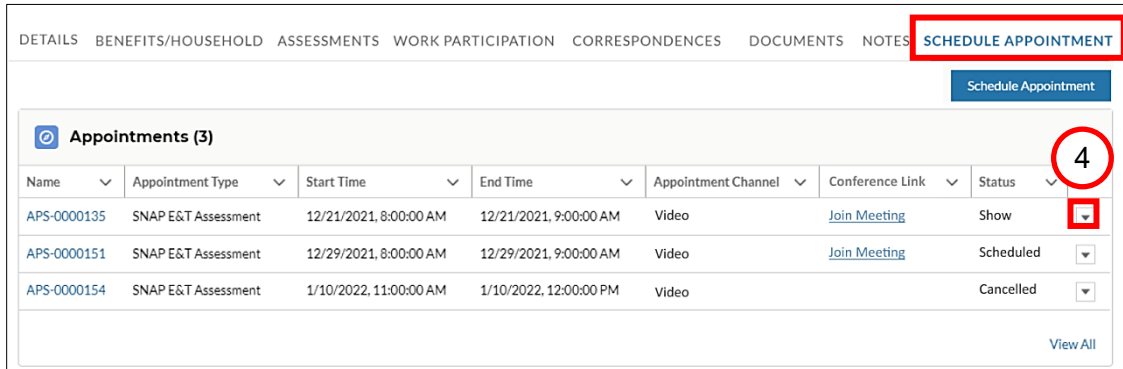2. Click **Search**.



**Please Note**: If an E&T Participant already has an appointment scheduled and is assigned to an E&T Provider, their name displays within the **My Appointments** widget and is listed. Click on their hyperlinked **Name** from the **Individual** column to be taken to their **Individual Details** screen.

3. From the E&T Participant's **Individual Details** screen, click the **Schedule Appointment** tab.

4. Click the drop-down icon on an **Appointment Record** and click **View**.



5. Clicking **View** drop-down icon navigates E&T Providers to the **Member Details** screen. At the top of the screen, click **Reschedule Appointment**.

6. Like the **Appointment Scheduling** process, the **Member Details** screen is view-only during the **Appointment Rescheduling** process. Click **Next**.

**Reschedule Appointment**

Step 1 of 6

**Member Details**

Individual
ROBERT SKY ▾

First Name
ROBERT

M.I.

Last Name
SKY

Suffix

Email
robertsky76@mailinator.com

Primary Phone Number
762-726-3643

Address
500 PUBLIC SQUARE, COLUMBIA, KY, 42728

Address Line 2

Select your preferred contact method for appointments
Electronic - Email and Text Message ▾

Back    Cancel Appointment                                6    Next

7. The **Appointment Type Selection** screen is also view-only during the Appointment Rescheduling process. Click **Next**.

**Reschedule Appointment**

Step 2 of 6

**Select Appointment Type**

✓  **SNAP E&T Assessment**
Meet with an E&T Provider to complete your SNAP E&T Assessment

**SNAP E&T Program – General Appointment**
Request a meeting with my E&T coach about transportation, follow-up, goals, or another E&T related question

Back                                7    Next

8. The **Appointment Location** screen is view-only during the Appointment Rescheduling process.

9. Click **Next**.



10. Click the **Calendar** icon to search for and select a date from the **Search available timeslots from** the field and click **Next**.

11. Search an available appointment timeslot. Click the **View More Slots** button under the last available appointment date listing to view more timeslots.

12. Click **Next**.

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**Reschedule Appointment**

Step 5 of 6

**Select Timeslot**

Thursday, December 2nd, 2021

| 8:00 AM |

Friday, December 3rd, 2021

| 7:00 AM | **7:30 AM** | 8:00 AM | 8:30 AM |

⑪

View More Slots    ⑪

Back                                                                    ⑫  Next

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💡 **Please Note**: The **View More Slots** button does not display if there are no more timeslots. The **Select Timeslot** screen does not display appointments in the next 24 hours.

13. Select the **Preferred Channel** from the **Appointment Channel** list.
14. Select any applicable **Special Accommodation** from the **Special Accommodations** list if required by the Resident.
15. Click **Schedule Appointment** to confirm the rescheduled appointment.
16. E&T Participants receive an email or text notification based on their preferred contact method selected in kynect to confirm the rescheduled appointment.

## Schedule Appointment

Step 6 of 6

**Appointment Channel**

Select the preferred channel for appointment

| In-Person |
| Telephone |
| ● Video |

**13**

**Special Accomodations**

Select special accomodations, if applicable

| Unable to Read/Write |
| Interpreter Needed |
| Signing For The Deaf |
| Visually Impaired |

**14**

Back          Schedule Appointment          **15**

## Steps to Cancel an Appointment

Follow the steps below to begin the Cancel Appointment process.

1. From the **Home** screen, navigate to the **Search** field at the top of the screen. Click the **Search** field and enter the E&T Participant's name into the **Search** field.
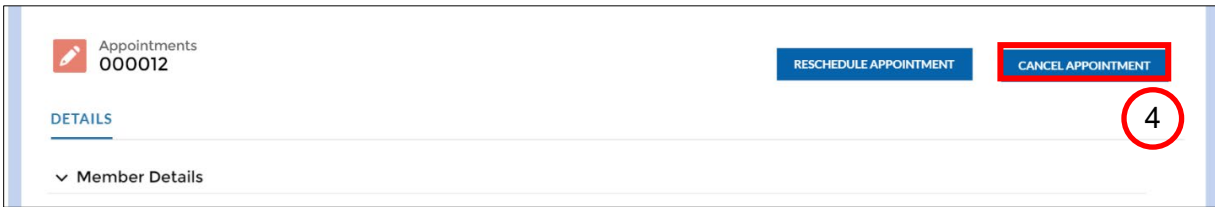2. Click **Search**.





**Please Note**: If an E&T Participant already has an appointment scheduled and is assigned to an E&T Provider, their name displays within the **My Appointments** widget and is listed. Click on their hyperlinked **Name** from the **Individual** column to be taken to their **Individual Details** screen.

3. Click the drop-down icon on an **Appointment Record** on the E&T Participant's **Appointments Summary** screen.

4.  On the **Appointment Details** screen, click the **Cancel Appointment** button.



5.  Click **Confirm** on the **Appointment Cancellation Confirmation** pop-up to cancel the appointment.