



Quick Look at **Adding or Removing Staff**

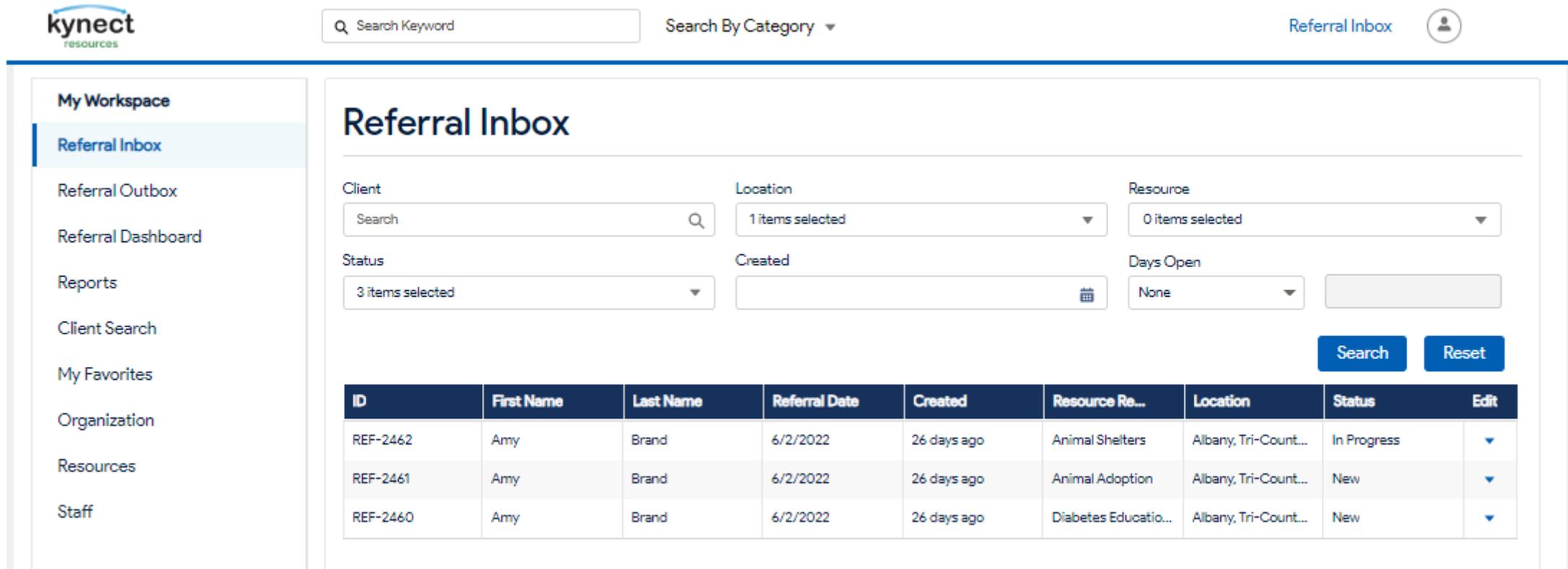
Use this Quick Look Guide to learn how to add, edit or remove staff members to **kynect resources**.

Adding Staff



In this Guide, you will learn how to add staff in **kynect resources**, as well as how to edit and maintain accounts for staff.

Begin by logging in to **kynect resources**. The Referral Inbox is the starting page upon log in.



The screenshot shows the 'Referral Inbox' page in the kynect resources application. The interface includes a search bar, filters for Client, Location, Resource, Status, Created, and Days Open, and a table of referrals.

Client Search: Search []

Location 1 items selected []

Resource 0 items selected []

Status 3 items selected []

Created []

Days Open None []

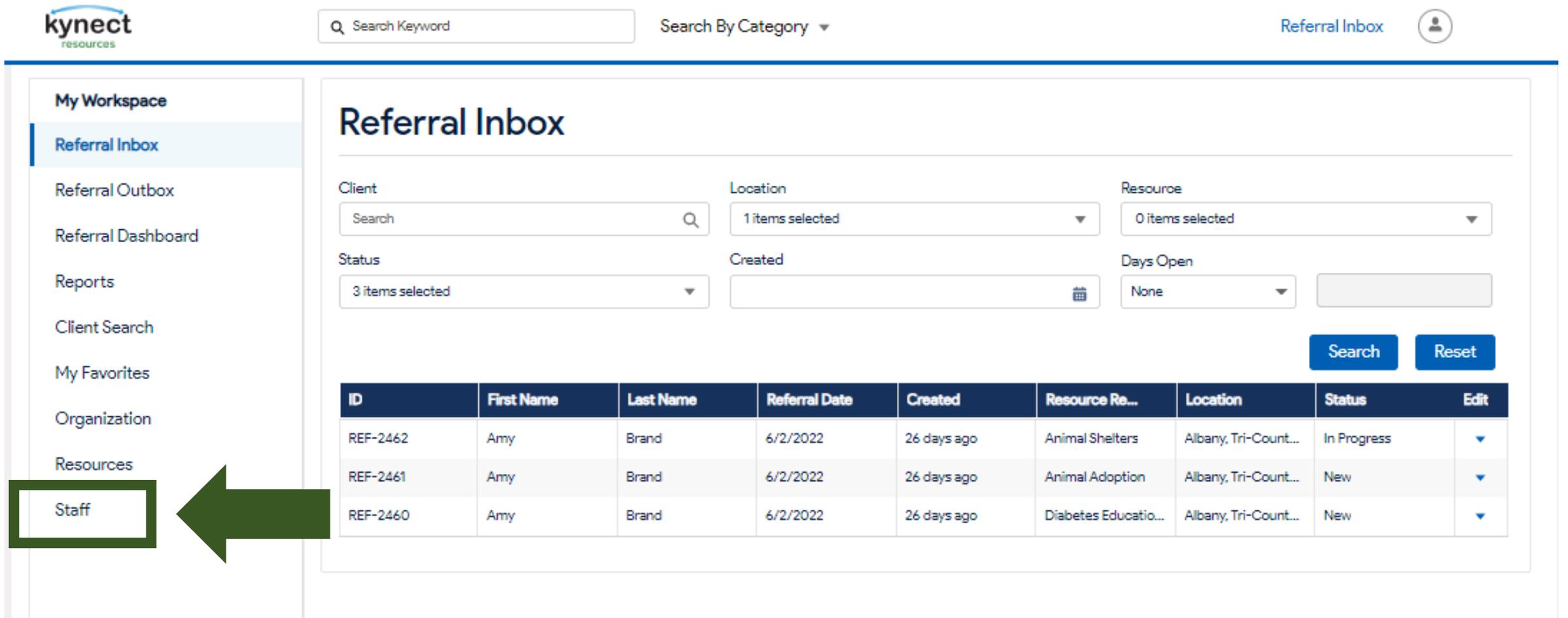
[Search] [Reset]

ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Adding Staff



To Add Staff, click the Staff link in My Workspace



The screenshot shows the Kynect Resources web application interface. On the left is a navigation sidebar with the following items: My Workspace, Referral Inbox (highlighted), Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff (highlighted with a green box and a green arrow pointing to it). The main content area is titled "Referral Inbox" and contains several filter fields: Client (Search), Location (1 items selected), Resource (0 items selected), Status (3 items selected), Created (calendar icon), and Days Open (None). There are "Search" and "Reset" buttons. Below the filters is a table with the following data:

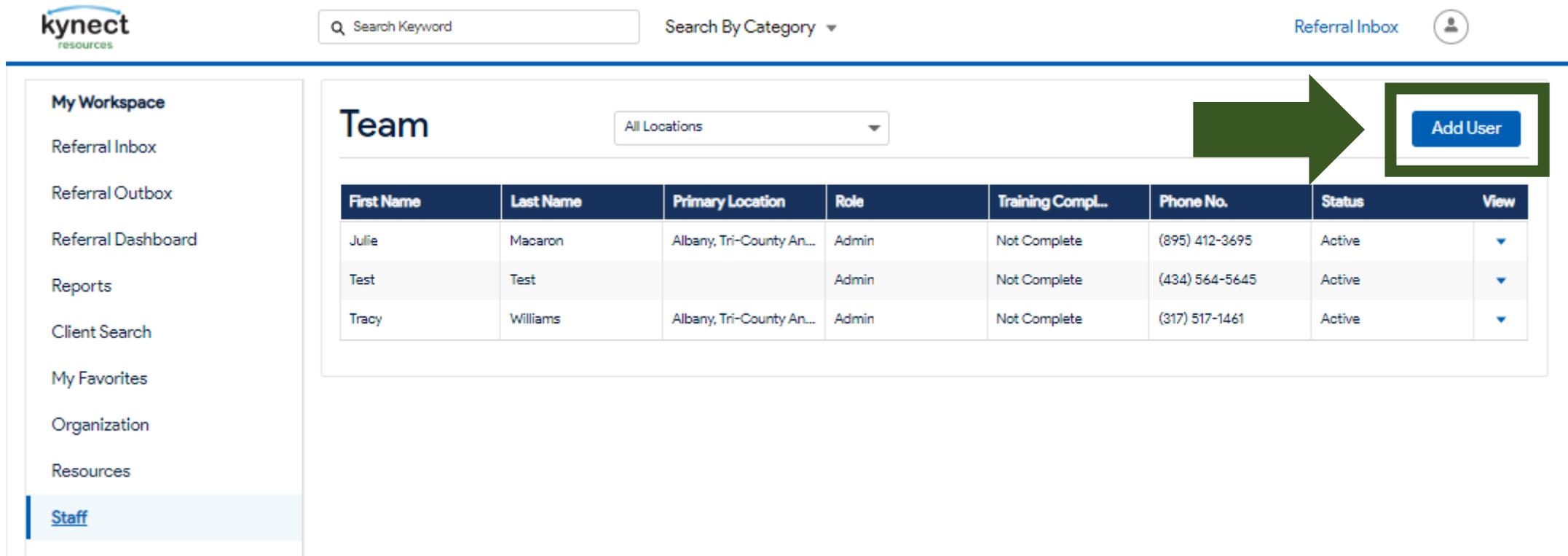
ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

Adding Staff



The **Team** screen displays the staff members, if any, who have been previous added.

To add a new staff member, click the **Add User** action button.



My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

Search Keyword

Search By Category

Referral Inbox

Team

All Locations

First Name	Last Name	Primary Location	Role	Training Compl..	Phone No.	Status	View
Julie	Macaron	Albany, Tri-County An...	Admin	Not Complete	(895) 412-3695	Active	▼
Test	Test		Admin	Not Complete	(434) 564-5645	Active	▼
Tracy	Williams	Albany, Tri-County An...	Admin	Not Complete	(317) 517-1461	Active	▼

Add User

Adding Staff



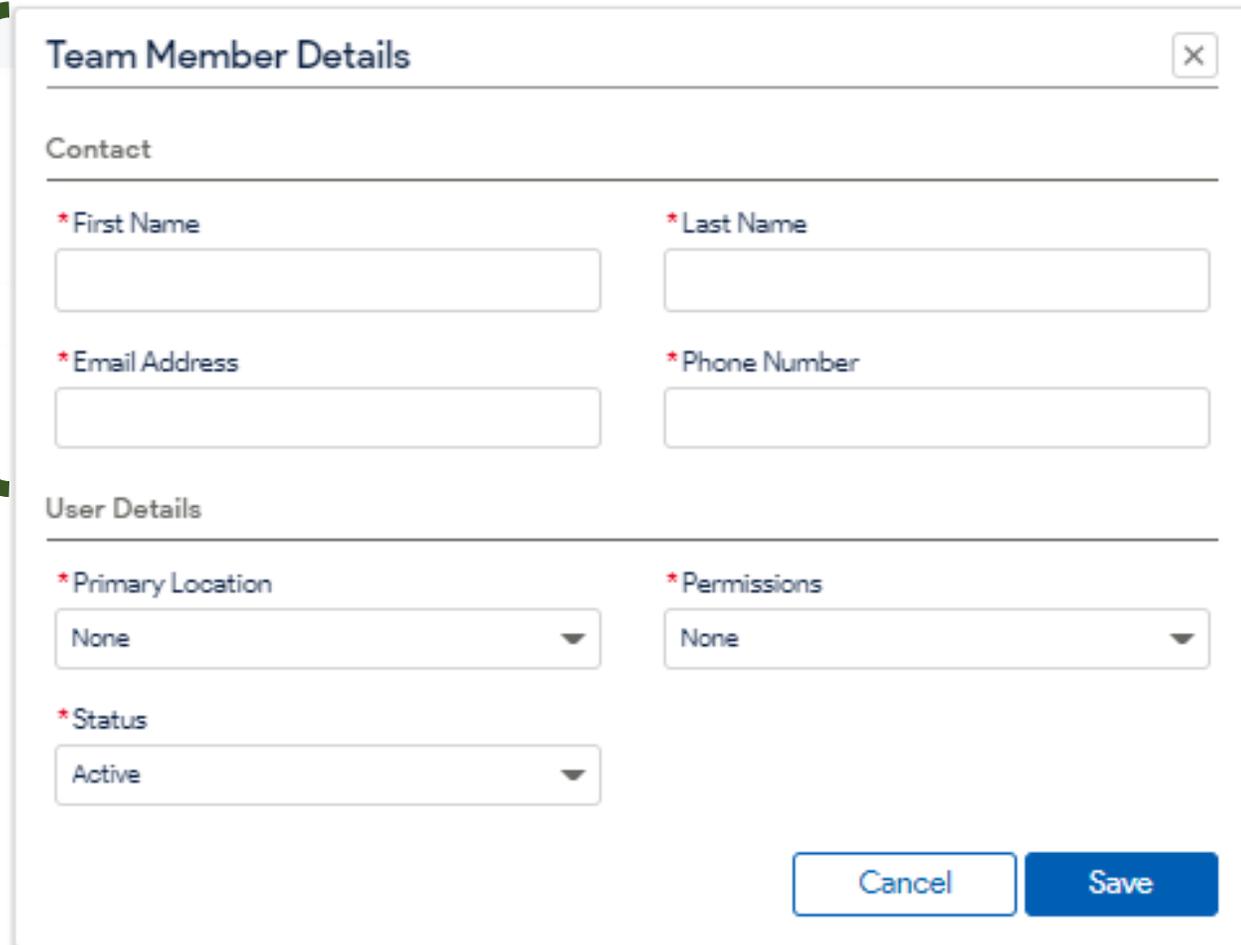
On the Team Member Details screen, enter the Contact information for the staff member.

Tips:

Use the correct spelling of Names

Use the employee's organization email

Use the best Phone Number to contact the member if needed



Team Member Details [X]

Contact

* First Name

* Last Name

* Email Address

* Phone Number

User Details

* Primary Location

* Permissions

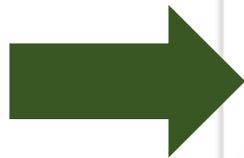
* Status

Cancel Save

Adding Staff



Next, in the **User Details** fields, select the **Primary Location** for the staff member.



Team Member Details [X]

Contact

* First Name

* Last Name

* Email Address

* Phone Number

User Details

* Primary Location
None
Lee County
Albany, Tri-County Animal Shelter

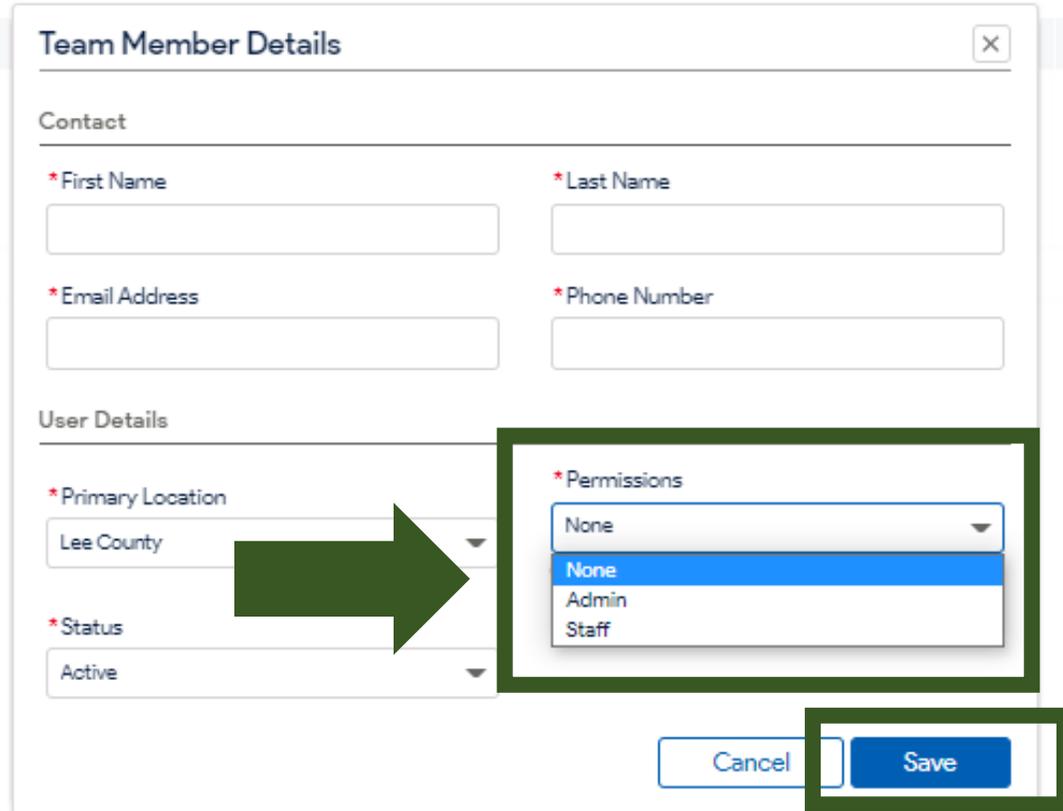
* Permissions
None

Cancel Save

Adding Staff



Select the **Permissions** level for the staff member then click **Save**.



The screenshot shows a web form titled "Team Member Details" with a close button (X) in the top right corner. The form is divided into two sections: "Contact" and "User Details".

Contact Section:

- * First Name: [Text Input Field]
- * Last Name: [Text Input Field]
- * Email Address: [Text Input Field]
- * Phone Number: [Text Input Field]

User Details Section:

- * Primary Location: [Dropdown Menu] (Current selection: Lee County)
- * Status: [Dropdown Menu] (Current selection: Active)
- * Permissions: [Dropdown Menu] (Options: None, Admin, Staff)

At the bottom of the form, there are two buttons: "Cancel" and "Save". A green arrow points from the "Primary Location" dropdown to the "Permissions" dropdown, and another green arrow points to the "Save" button.

The staff role can:

- Create referrals
- Respond to referrals
- Search for residents and view resident detail profile
- View organization Dashboard
- Create Favorites list of organizations

The admin role has access to all staff level functionality Plus:

- Admin users can add and edit staff
- Manage and edit the organizations profile
- Add and edit resources offered

Note: There is no limit for the number of staff members that may be added. It is recommended to have more than one Admin, if possible, to allow for continuity during unexpected staff changes.

Adding Staff

kynect resources will send a Welcome email to the added staff member with next steps to complete Onboarding

Important Note: Users with an existing Kentucky Online Gateway (KOG) account **MUST** use the link specified in the Welcome email message.

This assigns the correct role in **kynect resources** and adds the Resources Community Portal widget to the KOG homepage.

The link is time sensitive. New staff must complete onboarding within 24 hours of receiving this email.

Ask staff member to check their spam folder if they do not receive the email.



Hello Pat Fernandez,

Welcome to **kynect resources**! You are now able to complete the remainder of the onboarding process.

Click [here](#) to start the Kentucky Online Gateway (KOG) registration for the first time. If you already have a KOG account, please log-in to that account [here](#).

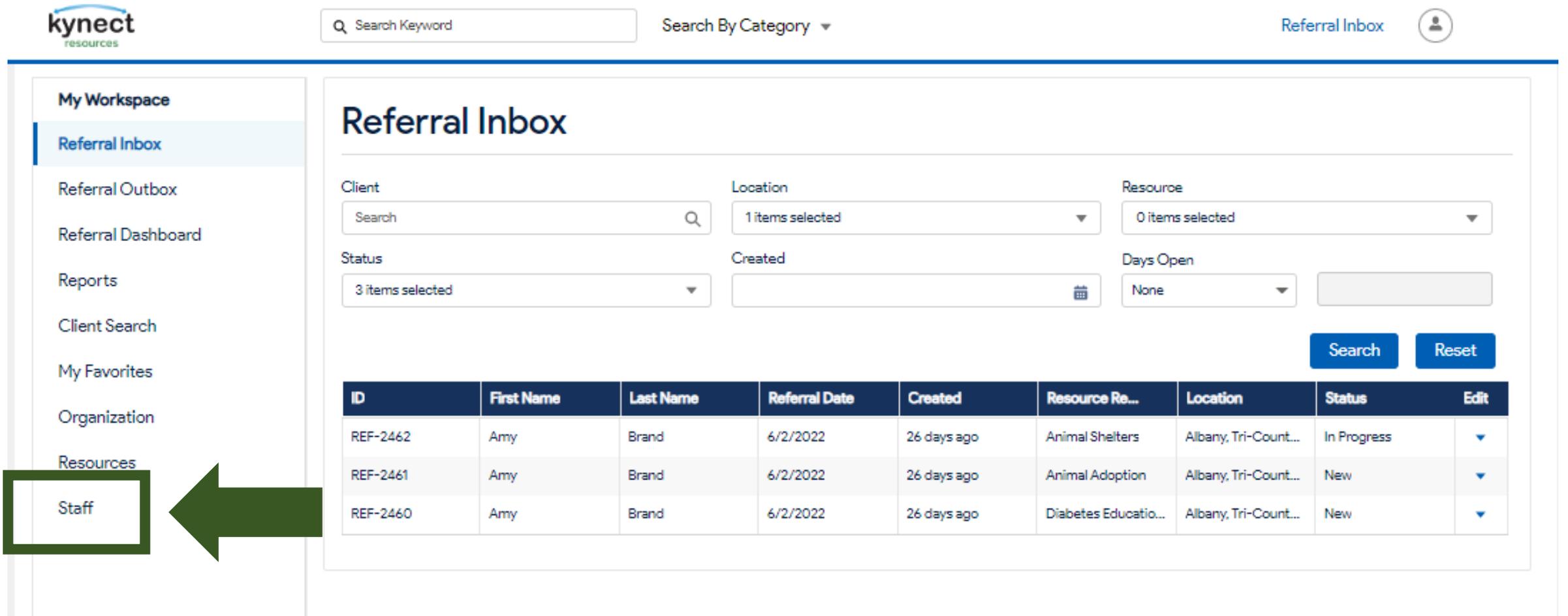
This is a time sensitive link. Please complete onboarding within 24 hours of receiving this email.

Please note that you will be asked to confirm your identity via individual specific questions generated by the system. This step ensures access security and is confidential. Verifying your identity is a required step to complete your onboarding to **kynect resources**. The information is secure and not used for any other purposes.

Edit or Remove Staff



To edit **Team Member Details** or to remove staff access, navigate to the **Staff** link in My Workspace.



The screenshot shows the Kynect Referral Inbox interface. On the left is a navigation menu with 'Staff' highlighted. The main area contains search filters and a table of referrals.

Search Keyword: Search By Category:

Referral Inbox 

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

Client: Location: 1 items selected Resource: 0 items selected
Status: 3 items selected Created: Days Open: None

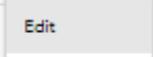
ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2462	Amy	Brand	6/2/2022	26 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼
REF-2461	Amy	Brand	6/2/2022	26 days ago	Animal Adoption	Albany, Tri-Count...	New	▼
REF-2460	Amy	Brand	6/2/2022	26 days ago	Diabetes Educatio...	Albany, Tri-Count...	New	▼

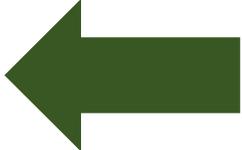
Edit or Remove Staff



Use the drop-down arrow in the **View** column for the selected Team member and click **Edit**.

Team All Locations Add User

First Name	Last Name	Primary Location	Role	Training Compl...	Phone No.	Status	View
Julie	Macaron	Albany, Tri-County An...	Admin	Not Complete	(895) 412-3695	Active	
Test	Test		Admin	Not Complete	(434) 564-5645	Active	
Tracy	Williams	Albany, Tri-County An...	Admin	Not Complete	(317) 517-1461	Active	



All staff who are added populate this list. Staff who did not complete the onboarding process will still populate; however, Admins will not be able to edit their status or assign referrals to non-onboarded staff.

It is critical to have all added Staff complete the onboarding steps in order to view referrals and other functions of the My Workplace dashboard.

My Workspace

Referral Inbox

Referral Outbox

Referral Dashboard

Reports

Client Search

My Favorites

Organization

Resources

Staff

Edit or Remove Staff



In the **User Details** section, use the drop-down arrows to assign a different **Primary Location**, change **Permissions** level, or **Status**.

Team Member Details ✕

Contact

* First Name: Julie
* Last Name: Macaron
* Email Address: juliemacaron@dispostable.com
* Phone Number: (895) 412-3695

User Details

* Primary Location: Albany, Tri-County Animal Shelter
* Permissions: Admin
* Status: Active
 Training Complete

Cancel Save

A large green arrow points from the right side of the form towards the 'Permissions' dropdown menu in the 'User Details' section.

Edit or Remove Staff



When a Staff member with existing Staff Permissions needs to be changed to Admin Permissions, the member must first be deactivated by the Admin using the Status field.

The Admin may then Add User and assigned the Admin Permissions.

Team Member Details ✕

Contact

* First Name

* Last Name

* Email Address

* Phone Number

User Details

* Primary Location

* Permissions

* Status
Active
Inactive

Team Member Details ✕

Contact

* First Name

* Last Name

* Email Address

* Phone Number

User Details

* Primary Location

* Status

* Permissions
None
Admin
Staff

Edit or Remove Staff



Click Save to apply the changes or edits.

Team Member Details

Contact

* First Name: Julie

* Last Name: Macaron

* Email Address: juliemacaron@dispostable.com

* Phone Number: (895) 412-3695

User Details

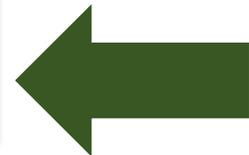
* Primary Location: Albany, Tri-County Animal Shelter

* Permissions: Admin

* Status: Active

Training Complete

Cancel Save





Thank you

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