The Commonwealth of Kentucky



kynector/Authorized Representative Dashboard Quick Reference Guide





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.



kynector/Authorized Representative Dashboard Overview

The kynector/Authorized Representative Dashboard helps kynectors and Authorized Representatives search and find the cases for their associated Residents. From the dashboard, kynectors and Agency Administration can also see the cases in their caseload that require urgent action. 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

The menu on the side includes Reports, where kynectors and Authorized Administration users can access reports to Export to Excel.

Please Note: For more information and guidance for exporting reports, please refer to the **How to Export Reports Quick Reference Guide**.



Please Note: The **Case Summary** link appears on the left side for active cases that currently or previously had Medicaid (MA) or Qualified Health Plan (QHP) present, where the individual is the Head of Household. If the case is not active, or the individual is not the Head of Household, the link is not available.



- 1. Click **View More** to reveal **Contact Information** and **Organization Information**.
- 2. To update **Contact Information** or **Organization Information**, click your **name** in the upper right-hand corner to access the **My Information** screen.

	kynect	Dashboard Prog	jrams 🗸 Get Local Help (Child Care Provider Search	Help & FAQs	NEWJAY 8	
						Languages: English (English) V	
Overview	1	Welco	me, NEW.	YAY			
Reports		Profilo: kunaci	tor			Start Benefits Application	
		Fighte. Kynee					
		Your ID 2762	Organization NewAssisterC	Coverage Area rg7897 Allen	Public	Program Access Medicaid/APTC/QHP	
						View Mor	
	10.00	V. Without and			and the state		IN THE REAL PROPERTY.
		Cases Rea	uiring Actior	recent 100 cases which req	uire that action in the near fut	ure.	
		Cases Requirin	g Action				
		RFIs Exp	iring (0)	Renewals (0)	Pending Cases (2)	Unsubmitted Application	ns (1)
				No res	ults found.		?

Please Note: The screenshot above displays the kynectors/Authorized Representative ID number. kynectors use the kynector ID when they call the Professional Services Line.

Please Note: kynectors will also have Agency Management and kynect On Demand options listed along the left side.



- 3. The **My Information** screen displays Contact Information and Additional Preferences.
- 4. The **Contact Information** tile displays the Agent's name and Email (if provided).
- 5. The **Additional Preferences** tile displays the Agent's Preferred language(s) and Availability.
- 6. If applicable, click the **Edit** hyperlink next to **Preferred language(s)**.

kynect benefits	Dashboard Programs 🗸 Get Local Help	Child Care Provider Search Help & FAQs	🗹 JANE 🚷
			Languages: English (English) ∨
	My Informat	ion	
	Contract Information	Additional Proforances	
	Name Jane Smith	Preferred language(s) Edit English	
	Email	Availability <u>Edit</u> Weekday - Morning (Before 9am),	
		Weekday - Daytime (9am-5pm), Weekday - Evening (After 5pm)	

- 7. On the **Change Preferred Language(s)** pop-up, select all the languages that apply.
- 8. Click Save.

Chan	ge Preferred Language(s)		×
Pref	erred language(s)		^
	English		
	Spanish		
	Albanian		
	Amharic		
	Arabic		
	Armenian		
	Bengali		
	Bosnian		
	Burmese		Ţ
	Cancel	Save	



9. If applicable, on the **My Information** screen, click the **Edit** hyperlink next to **Availability**.



- 10. On the **Change Availability** pop-up, select all applicable date/time options.
- 11. Click **Save**.

Cho	inge Availability	×
Pref	erred availability	
	Weekday - Morning (Before 9am)	
	Weekday - Daytime (9am-5pm)	
	Weekday - Evening (After 5pm)	
	Weekends	
	Cancel Save	



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. Click **Dashboard** on the top menu to return to the kynector/Authorized Representative dashboard.

	benefits Dashboard Programs v Reps, kynectors, & Agents Heip & FAQ's	Languages: English (English) V
Overview	Message Center	
	Notices (720)	Messages (17)
	Q Search	
	Details	Due Date 💿
	ANNOUNCEMENT New Test Announcement Date Message Received: 9//2020	
	Update Contact Info Reminder to update your contact information as needed. If you have no updates or changes that need to be made, you do not need to take action. Date Message Received: 12/8/2020	
	Autharized Representative Access Approval Your request to serve as an Authorized Representative for Michael Vonn has been approved. Date Message Received: 10/17/2020	

Please Note: If the Individual is Head of Household (HOH), the Message Center displays notices regarding cases in which they are HOH, provided the case is currently active or made inactive/closed within the previous 90 days. For non-citizen user roles like Authorized Representatives, Agents, and kynectors, only notices for cases where a relevant association exists are displayed. If the Individual is not HOH, notices display for cases where they are active and associated only to the Individual. If the Individual is out of household, then notices are not displayed for that Individual. Notices generated for out of household Individuals do display for the HOH.



Filter Message Center Notices

The Message Center Notices table is sorted by the most recent Date Generated to the oldest Date Generated. The table displays 10 records per page– Residents can use the pagination at the bottom of the table and select a new page number or Next to see more Notices. Residents can filter *Notices* by *Notice Type*, *Name*, *Case/Application Number*, *Action Due by Date*, and *Date Generated*.

Please Note: The Message Center Notices tab displays the 100 most recent notices by default. To view more, Residents can select the "here" hyperlink.

Below are the steps to select and apply filters on the Notices table, if desired.

- 1. Click **Notices** to view **Notices**.
- 2. Click **Filter** to view **Filter** options. Select from the following Filter options to narrow down the results.

Message Center	
Notices (75)	Messages (0)
Q. Search You have 75 notices from 2/1/2023. Currently leaded 50 notices from 4/3/2022 - to see mem, click <u>here</u>	Filter (1)

a. Under **Notice Type**, select one or more options: **Request for Information**, **Notice of Eligibility**, **1095 Tax Form**, **Claims Establishment**, **Disqualification Notice**, **Hearings**, or **Other**.

Please Note: The following Hearing types will be filtered if the user selects hearings: Recommended Order, Final Order, Notice of Hearings. The Other notice type filters all other types of notices that do not fall under the above categories in the current record set.

b. Under Action Due By Date,

- i. Enter the **Start Date** or click the calendar icon and select a **Start Date**.
- ii. Enter the **End Date** or click the calendar icon and select an **End Date**.

c. Under Date Generated,

- i. Enter the **Start Date** or click the calendar icon and select a **Start Date**.
- ii. Enter the **End Date** or click the calendar icon and select an **End Date**.

				engueges: English (English) 🗸	
		Filter	×		
Overview		Loaded notices from 5/3/2023.			
Case Summary	Messaç	Notice Type	^		
		Request for Information	1		
Benefits				Messages (0)	
		Notice of Eligibility	_		
Health Plans	9, Search	1005 Tax Form			Filter (1)
Documents 0	Loaded notices from 5/3,		available	L	
•	Notice Type (1)	Claims Establishment		Action Due By Date (1)	Date Generated (1)
Claims & Payments					
and the second sec	Notice of Privacy Practi	Disqualification Notice		2/1/2020	1/1/2020
Hearings		Hearings			
Appointments	Notice of Eligibility (KIP-			2/1/2020	1/1/2020
		Other			
		Action Due By Date			
		nam latel and			
		mm/dd/yyyy			
		End Date			
		mm/dd/yyyy 🗰			
		Date Generated			
		Start Date			
		mm/dd/yyyy 🛱			
		End Date			
		mm/dd/yyyy 📋			
		View Results			
		Poset Filter			
		Noor Film			

Please Note: Click **View Results** to view the Notices associated with the selected filters. Click **Reset Filter** to remove all selected filters.



View Cases Requiring Action (for kynectors)

kynectors and Agency Administration users can easily view their most recent 100 cases that require action in the near future from the *Cases Requiring Action* section of their dashboard.

- 1. Scroll down to the *Cases Requiring Action* section of the kynector or Agency Administration dashboard.
- 2. The kynector or Agency Administration users can view the total number of cases in their caseload per each urgent action tab at the top of the header columns of the table.
- 3. Click the **Export to Excel** button to export the first 100 results on each tab to a CSV file type.

kyne	ect Dashboard fits	Programs 🗸 🛛 Get Local Help	Child Care Provider Search	Help & FAQs	
view	We	elcome, NI	WJAY		Eanguages: English (Inglish) V
	Profile:	kynector			
	Your ID 2762	Organiza NewAss	tion Coverage Ar sisterOrg7897 Allen	ea Public	Program Access Medicaid/APTC/QHP
					View More
	and a the second	Peter Sugar Contractor		The states	
	Cases Req	uiring Action	cont 100 cases which require	that action in the near futu	ra.
	Cases Req Select the type of cas Cases Requiring RFIS Expl	e action to view the most re Action	ncent 100 cases which require Renewals (0)	that action in the near futu Pending Cases (2)	ra. Unsubmitted Applications ()
	Cases Requiring Cases Requiring RFIs Expl # Case Num	e action to view the most re Action tring(2) nber HoH Name	ncont 100 cases which roquira Renewals (0) RFI Type	that action in the near futur Pending Cases (2) Earliest RFI Due Date	ra. Unsubmitted Applications (1)
	Cases Requiring Cases Requiring RFIs Expi Cases Num 1 1000984	e action to view the most re Action tring(2) nber HeH Name	Renewals (o) Rel Type Multiple	e that action in the near futu Pending Cases (2) Earliest RFI Due Date 08/m/2023	ra. Unsubmitted Applications (1) View Case Document Center
	Cases Requiring Select the type of cas Cases Requiring # Case Nur 1 1000984	ee action to view the most re action to view the most re action (2)	Renewals (o) Rel Type Multiple Residency Verification	e that action in the near futu Pending Cases (2) Earliest B1 Due Date 08/rs/2023	ra. Unsubmitted Applications (1) View Case Document Center View Case Document Center
	Cases Requiring Select the type of cas Cases Requiring # Case Num 1 1000864 2 1000984	Wiring Action se action to view the most response to the most resp	Renewats (0) Renewats (0) Multiple Residency Verification	Pending Cases (2) Earliest RFI Due Date 08/19/2023 08/22/2023 0 Excol	ra. Unsubmitted Applications (i) View Case Document Center View Case Document Center
	Cases Requiring Select the type of cas Cases Requiring # Case Num 1 1000884 2 1000884	uiring Action se action to view the most re Action ining(2) nber MeH Neme 180 DUFF OOLD 180 DUFF OOLD	Renewals (o) Renewals (o) RFI Type Multiple Residency Verification	e that action in the near futu Pending Cases (2) Earliest EFI Due Date 08/rs/2023 08/23/2023 0 Excel	ra. Unsubmitted Applications (1) View Case Document Center View Case Document Center



- 4. Select the **RFIs Expiring** tab to view details for cases with urgent actions that will occur in the near future (within 30 days).
 - a. The kynector or Agency Administration users see the *Case Number*, *HoH Name*, *RFI Type*, and *Earliest RFI Due Date* on this tab.
 - b. Cases are ordered by Earliest open RFI Due Date, earliest to latest.
 - c. Click the **View Case Document Center** button to navigate to the given case's Document Center.

1801	s Requiring Action	n			
	RFIs Expiring (2)		Renewals (0)	Pending Cases (2)	Unsubmitted Applications (1)
¥	Case Number	HoH Name	RFIType	Earliest RFI Due Date	
t	100086460	DUFF GOLD	Multipla	08/19/2023	View Case Document Center
2	100086460	DUFF GOLD	Residency Verification	08/23/2023	View Case Document Center

- 5. Select the **Renewals** tab to view details for SNAP and Medicaid and QHP cases which are eligible for renewal within the next 30 days and for which a renewal has not yet been initiated.
 - a. The kynector or Agency Administration users see the *Case Number*, *HoH Name*, *Program*(*s*), and *Earliest Renewal Due Date* on this tab.
 - b. Cases are ordered by Earliest Renewal Due Date, earliest to latest.
 - c. Click the **View Case Dashboard** button to navigate to the given case's dashboard.

Case	es Requirir	ng Action	recent 100 cases which requi	re that action in the near future.	
Cases	RFIs Expiring (0)	Hol Name	Renewals (2)	Pending Cases (2)	Unsubmitted Applications (1)
1	100088462	DUFF GOLD	Medicaid/KCHIP/APTC	08/19/2023	View Case Dashboard
2	100086460	DUFF GOLD	Medicaid/KCHIP/APTC	11/28/2023	View Case Dashboard
			Export	to Excel	



- 6. Select the **Pending Cases** tab to view details for cases that have moved into a Pending Verification, Pending Review, Pending Plan Selection, or Pending Interview status within the last 30 days.
 - a. If a case falls into more than one of the following statuses, only the first status (in order of precedence) would be displayed: Pending Interview, Pending Verification, Pending Plan Selection, Pending Review.
 - b. The kynector or Agency Administration users see the *Case Number*, *HoH Name*, and *Status* on this tab.
 - c. Cases are ordered by the date they were moved into the pending status, with the oldest date showing first.
 - d. Click the **View Benefits Page** button to navigate to the given case's Benefits page.

ases Requiring Action Not the type of case action to view the most recent 100 cases which require that action in the near future.						
equiring Action						
FIs Expiring (0)	Renewals (0)		Pending Cases (2)	Unsubmitted Applications (1)		
Case Number	HoH Name		Status			
100394164	GERRY BRADFORD	Pend	ling Plan Selection	View Benefits Page		
100394198	TITUS MATA	Pend	ling Plan Selection	View Benefits Page		
	l	Export	to Excel			
F	Requiring of case action to vi equiring Action (0) Case Number 100394184 100394198	Requiring Action Depuiring Action TIS Expiring (0) Case Number HoH Name 100394184 Cerry BRADFORD 100394198	Requiring Action pquiring Action Tis Expiring (0) Renewals (0) Case Number HoH Name 100394184 GERRY BRADFORD Pend 100394198 TITUS MATA Pend	Requiring Action opuiring Action Tas Expiring (o) Renewals (o) Pending Cases (2) Case Number HoH Name Status 100394184 GERRY BRADFORD Pending Plan Selection 100394198 TITUS MATA Pending Plan Selection Export to Excel Export to Excel		



- 7. Select the **Unsubmitted Applications** tab to view unsubmitted applications associated to the kynector or Agency Administration user.
 - a. The kynector or Agency Administration users see the *Case Number*, *HoH Name*, *Program*(*s*), and *Application Withdraw Date* on this tab.
 - b. Cases are ordered by the earliest Application Removal Date, with the earliest date showing first.
 - c. Click the **View Dashboard** button to navigate to the given case's Dashboard.

Cases Requiring Action							
	RFIs Expiring ()	Renewals (0)	Pending Cases (2)	Unsubmitted Applications (1)		
#	Application Number	HoH Name	Program(s)	Application Removal Date			
1	601433100	a2c3S000006uU9a	сс	2/8/2024	View Dashboard		

Start Benefits Application

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

	kynect Dashboard	Programs 🗸 Røps, kynectors, & Agent	s Child Care Provider Search	Help & FAQs	товіля 🕅
Overview		ne <mark>, TOBIAS</mark>			Start Benefits Application
	Your ID 5645	Organization Assistor Inc	Caverage Area	Public	Program Access Modicaid/APTC/QHP, SNAP, CCAP
	The second se	30			

Please Note: The following screen appears if an Authorized Representative tries to complete a benefits application for themselves:

Household Member Details



Please Note: If another user is currently completing an application for the Individual, then the following message displays: "You cannot access this Application since another user is currently editing this application." If the user already in the application is inactive for 10 minutes or longer, then they are kicked out of the system.

-`@

Please Note: If a kynector is associated with more than one organization, they will receive the following screen after clicking **Start Benefits Application**.

Sele	ct kynector Organization	3
elect	the organization you would like to create the application on behalf of	
	Westchester Hospital	
	Eastchester Clinic	
	Continue	
	Cancel	

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Please Note: If a partial match occurs when the Individual information entered matches with an existing Individual on kynect, a notification is sent to the Message Center in Agent Portal for agents, and the Message Center in kynect for kynectors, with the following message displayed: "The application you have submitted for <Name> with <ApplicationID> has resulted in a Partial Match and requires additional verification from our end. Our team has begun investigating the Partial Match Task and is working to find a solution. We'll keep you updated on the outcome of the Partial Match Task within 2-3 business days. We appreciate your patience while we wait, and we advise against submitting multiple applications. If you have any inquiries regarding this, please contact the professional services line at 1-855-326-4650."

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.

			Languages: English (English) 🗸
view	Welcor	me. Duke	
	Eq to Personal Dashba	ard	Start Benefits Application
	Profile: Individue	al Authorized Representative	
	Your ID 40960	Orgonization Public Rfkzl 0 AqoInf	
	10		View Mee

Please Note: If the user has additional roles, this option may read differently. Anexample 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.

< Return to Individual Authorized Rep.	Personal Dashboard: Duke Holm					
kynect	Dashboard Programs v Reps, kynectors, & Agents Help & FAQ's	🖸 Duke 👰				
		Languages: English(English) ~				
Overview	Welcome, GNELRDUNN GSLLL	The second secon				
Bonofits	View My Information Case	Add Other Benefits Add for sther benefits or solutions				
Documents	The second designed	Report a Change Update your household information to tyrnet based on the changes				
Claims & Payments	AND ALLEY AND					
Hearings	View details on your benefits application, cases, and benefits.	View your to-do list and messages.				
	Bonofits →	Message Center →				



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 *Client Details* section includes the following details:

- > Resident Details (Name, Gender, Age, as or Case Number)
- ➢ Case Status
- Submitted Date
- Last Updated

Programs Applicable						
Medicaid	SNAP/CCAP					
First Name		Last Name				
Case Number		Application Number				
Social Socurity Number (9 digits)		Date of Birth				
		mm/dd/yyyy	茴			
Addross Lino 1						
Search by Primary Applicant						
Show Advanced Search	Reset	Search	Export to Excel			
31 Clients Found						
31 Clients Found	Case Status	(5) Submitted Date (5)) Last Updated	6		
31 Clients Found Slient Details ③	Case Status	(c) Submitted Date (c)) Last Updated	€		
31 Clients Found Nent Details ③ SFIUWHRU IWUEFHIF Age 30 Gase #1131/5115	Case Status Approved	Submitted Date (10/20/2023) Last Updated	0		
31 Clients Found	Case Status Approved	Submitted Date) Last Updated	•		
	Case Status Approved Approved	Submitted Date (10/20/2023) Lost Updoted 10/23/2023 10/23/2023	0		
31 Clients Found Stient Details • STUWHRU IWUEFHIF • Jage 30 • Steffenuth WEFUHIU • Verhout WEFUHIU • Ald age 47 • Steffenuth WEFUHIU •	Case Status Approvod Approvod	Submitted Date (10/20/2023) Last Updated 10/23/2023 10/23/2023	0		
31 Clients Found Stient Details ③ Stifut MRU IWUEFHIF [Ago 30 Cases #103/10115 XEFHOUH WEFUHIU (Ago 47 Cases #103/2012 AXINE SMITH Lago 29	Case Status Approved Approved	Submitted Date) Lost Updated 10/23/2023 10/23/2023	•		
31 Clients Found Stient Details (2) FIJUWHRU IWUEFHIF [Ago 30 cose #/132/15115 (2) AEFHOUH WEFUHIU (4 Ago 47 cose #/132/1512) (2) MAXINE SMITH [Ago 28 cose #/132/208946 (2)	Case Status Approved Approved Approved	Submitted Date G 10/20/2023 10/20/2023 10/20/2023 00/08/2023) Lost Updated 10/23/2023 10/23/2023 10/20/2023	•		
31 Clients Found Elient Details (*) FILUWHRU IWUEFHIF [Age 30 Gase #133215335 KEFHOUH WEFUHIU Alage 47 Gase #13221523 AXINE SMITH Lage 29 Gase #132208946 KKELOAS	Case Status Approved Approved Approved	Submitted Date G 10/20/2023 10/20/2023 00/08/2023 00/08/2023) Last Updated 10/23/2023 10/23/2023 10/20/2023	3		

-@

Please Note: The **Search by Primary Applicant** checkbox allows Individuals to filter the search results by primary applicant only.





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.

Search			
Programs Applicable]	
Medicaid	SNAP/CCAP		
First Name		Last Name	
Case Number		Application Number	
Social Security Number (9 digits)		Date of Birth	
		mm/dd/yyyy	ä
Address Line 1			
Search by Primary Applicant			
Show Advanced Search	Reset	Search	Export to Excel



- 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.

Overview	Profile: kyne	ome, XQAI	.SC			
	Your ID 4130	Organization Kynector Group	Coverage Area	Private	Program Access	View More
	Catherine 5	the second	SUT GALDAZ STADWA W	intersitytynen d	Willing Course WARD	AN A LA
	You are no fully set-up	t yet configured with any prog before logging back into kyne	ram access, please read ct benefits.	ch out to your man	tager to ensure your profi	e is



Steps to Accessing a Client's Resident Dashboard

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

Show Advanced Search	Reset	Search	Export to Excel
3 Clients Found			
Client Details	Case Status 🗇	Submitted Date (🤤	Last Updated (🤤
MICHAEL DOE MI Ago 25 Case #:112254198	Approved	12/20/2020	12/20/2020
MICHAEL DOE M Age 26 Case #:112254199	Approved	12/20/2020	10/13/2020
MICHAEL DOE M Age 25 Case #:112254185	Approved	10/08/2020	10/08/2020

2. View the Resident Dashboard in "Client View".

< Return to kynactor Dashboard	Client view: MICHAEL S DOE	
	Kynect Dashboard Programs V Raps, kynectors, & Agents Help & FAQ's	🖸 kin 🔞
		Longuogee: English (English) V
Overview	Welcome, MICHAEL DOE	
Documents	View My Information View ord change key contact information for your case	Add Other Benefits Add Other Benefits Prove that have benefits and the second of the s
Hearings	New Test Announcement	
Client Case Notes		Sand and the state of the second seco
	View details on your benefits application, cases, and benefits.	View your to-do list and messages.
	Benefits →	Message Center →

- 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.

< Roturn to kynector Dashboard	Client view: MICHAEL S DOE	
	kynect Dashboard Programs v Reps, kynectors, & Agents Help & FAQ's	Co kain 🤉
		Languages: English (English) V
Overview		
Benefits	Welcome, MICHAEL DOE	
Documents	View My Information View and change key contact information for your cose	Add Other Benefits Add other Benefits provides by types to make so reasonance or construction or household may be slightle.
Hearings	a state of the second state to the second	
Client Case Notes	New Test Announcement	
		and the state of t
	View details on your benefits application, cases, and benefits.	View your to-do list and messages.
	Benefits →	Message Center →
	Case#: 112254198 • Active	To Do's Unread

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

< Return to kynector Dashboard				Client vi	W: MICHAEL S DOE			
	kynect	Dashboard	Programs 🗸	Reps, kynectors, & Agents	Help & FAQ's		tain 🔗	
						nguages: Englisi	h (English) 🗸	
Overview	C	lient C	ase N	lotes				
Benefits	View	and manage you	ır personal not	tes for this case.				
Documents	Case	#: 112254198 (Ac	tive) 😡					Add New Note
Hearings								
Client Case Notes	Тур	ee your note here).					
							Discard	Save



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

< <u>Return to kynector Dashboard</u>	Client view: MICHAELS DOE	
	Kynect Dashbaard Programs v Reps, kynectors, & Agents Help & FAQ's 💿 Iain 🤉	
	Languages: English(English) v	
Overview	Client Case Notes	
Benefits	View and manage your personal notes for this case.	
Documents	Case#: 112254198 (Active) 📀	Add New Note
Hearings		
Client Case Notes	I reviewed the R	10/19/20 03:07 PM
	i reviewed the kesident's case today.	

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.