



Quick Look at Accessing the CMS Assessment within kynect resources

**Use this Quick Look Guide to learn how to utilize the
CMS Assessment for Hospital Users**



Important Note:

The CMS assessment is accessible to the Hospital Role organizations only. Hospital organizations must complete a Business Associate Agreement (BAA) between the hospital and CHFS to obtain the Hospital Role within **kynect resources.**

**To request the hospital role for your organization, please email
kynectresources@ky.gov**

BAA's will be sent via DocuSign to the administrative contact provided in the email.



Finding the Resident for an Assessment



To begin the CMS Assessment, click **Client Search** from the My Workspace column.

The screenshot displays the Kynect Referral Inbox interface. On the left sidebar, the 'Client Search' option is highlighted with a red box. The main content area shows the 'Referral Inbox' title and several search filters: Client (Search), Location (1 item selected), Resource (0 items selected), Status (3 items selected), Created (calendar icon), and Days Open (None). Below the filters are 'Search' and 'Reset' buttons. A table of referral records is shown below the filters.

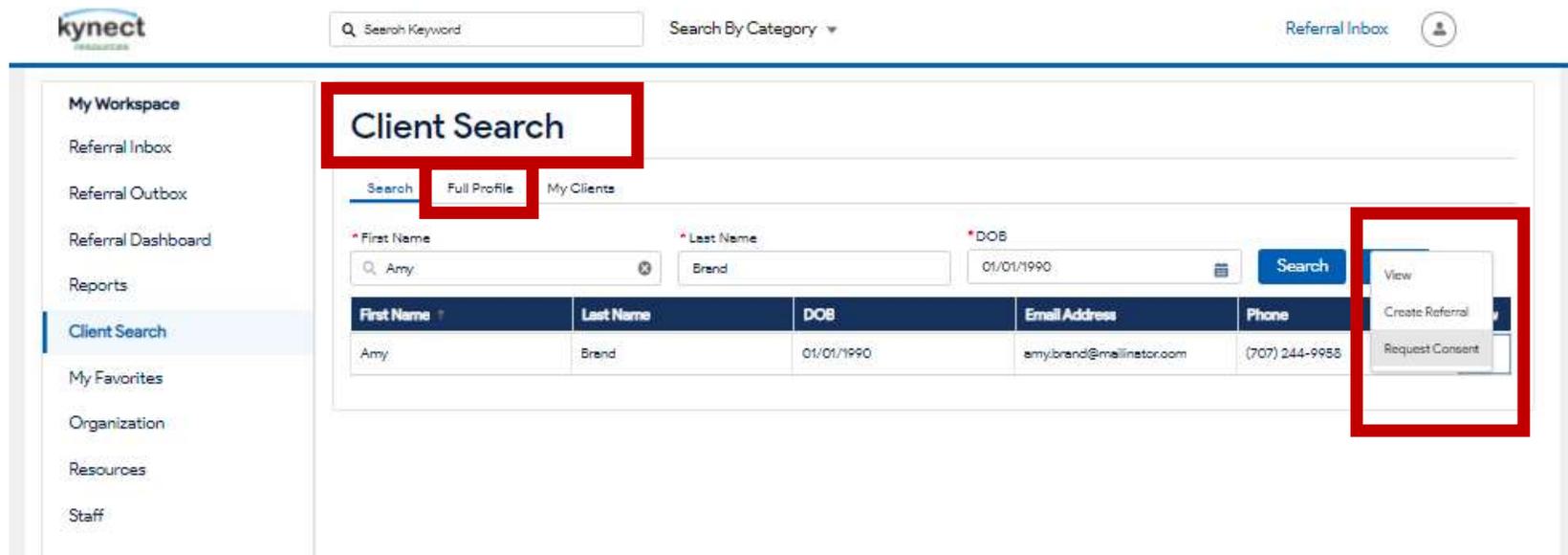
ID	First Name	Last Name	Referral Date	Created	Resource Re...	Location	Status	Edit
REF-2367	Alexis	Dele	1/4/2022	105 days ago	Animal Shelters	Albany, Tri-Count...	In Progress	▼

Finding the Resident for an Assessment

Enter the Resident's first name, last name, and date of birth then click **Search**. Click the **Edit** button to **View**, **Create Referral** or **Request Consent**.

Resident consent is needed before an assessment can be selected.

Note: Once Consent is captured, the resident record can be accessed under the **Full Profile** tab for future activity.



The screenshot shows the kynect Client Search interface. The left sidebar contains navigation options: My Workspace, Referral Inbox, Referral Outbox, Referral Dashboard, Reports, Client Search (highlighted), My Favorites, Organization, Resources, and Staff. The main content area is titled "Client Search" and has three tabs: Search, Full Profile, and My Clients. The Search tab is active, showing search fields for First Name (Amy), Last Name (Brend), and DOB (01/01/1990). A Search button is present. Below the search fields is a table with one row of results:

First Name	Last Name	DOB	Email Address	Phone
Amy	Brend	01/01/1990	amy.brend@mailinator.com	(707) 244-9955

To the right of the table is a context menu with three options: View, Create Referral, and Request Consent. Red boxes highlight the "Client Search" title, the "Full Profile" tab, and the context menu.



Gaining Consent



Residents may provide consent via Email, Text, or give Verbal Consent.

When Send Email or Send Text is selected, **kynect resources** generates an email or text message to the resident immediately. The resident simply responds with Yes or No to the message. Once a Yes reply is received, Consent is granted.

Request Access ✕

You do not have permission to view Amy Brand's full information. Please request consent via one of the options below.

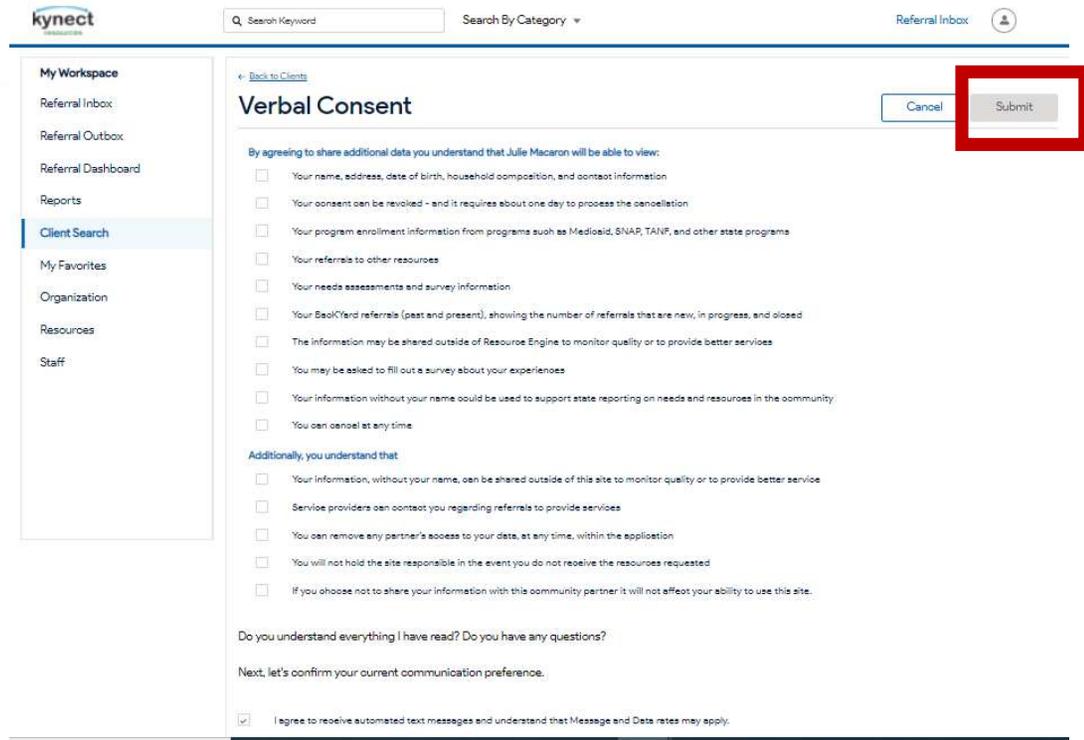
Gaining Consent



When meeting with the resident in person or via phone, the resident may provide Verbal Consent. Read the resident each attestation statement and check the box to acknowledge agreement. When completed, click Submit.

Request Access [X]

You do not have permission to view Amy Brand's full information. Please request consent via one of the options below.



Verbal Consent [Cancel] [Submit]

By agreeing to share additional data you understand that Julie Macaron will be able to view:

- Your name, address, date of birth, household composition, and contact information
- Your consent can be revoked - and it requires about one day to process the cancellation
- Your program enrollment information from programs such as Medicaid, SNAP, TANF, and other state programs
- Your referrals to other resources
- Your needs assessments and survey information
- Your BeoKferd referrals (past and present), showing the number of referrals that are new, in progress, and closed
- The information may be shared outside of Resource Engine to monitor quality or to provide better services
- You may be asked to fill out a survey about your experiences
- Your information without your name could be used to support state reporting on needs and resources in the community
- You can cancel at any time

Additionally, you understand that

- Your information, without your name, can be shared outside of this site to monitor quality or to provide better service
- Service providers can contact you regarding referrals to provide services
- You can remove any partner's access to your data, at any time, within the application
- You will not hold the site responsible in the event you do not receive the resources requested
- If you choose not to share your information with this community partner it will not affect your ability to use this site.

Do you understand everything I have read? Do you have any questions?

Next, let's confirm your current communication preference.

I agree to receive automated text messages and understand that Message and Data rates may apply.



After consent is granted, users can **Start Assessment**, view the resident's Social Determinant of Health Risk Factors, and see the date and source for previously completed Assessment(s).

← [Back to Clients](#)

Estill Powell

[Send Email](#)
[Add Note](#)
[Create Referral](#)
[Start Assessment](#)

Client Information

Client ID: 901007575 | Gender: Female

Contact

Email Address: estill@gmail.com | Preferred Contact Method: Email

DOB: 12/01/1985 | Mobile Phone: (303) 241-2679 | Address: 123 MAIN STREET NEW LANE FRANKFORT, KY 40601-

Household [View All](#)

Client	Age	Relationship
CLARK MERCER	19	Son
HAPPY BROTHER (Child)	35	Brother/ Half-Br...
RICHARDO POW...	9	Son
	59	Husband

Enrolled Programs [View All](#)

Program	Start	Renewal
KTAP	6/1/2015	4/1/2016
Medicaid	6/1/2015	4/1/2016
Qualified Health ...	6/1/2015	4/1/2016

Referrals [View My Plan](#)

New: 2 | In Progress: 0 | Closed: 0

Risk Factors [View All](#)

● Stable
 ● Vulnerable
 ● In-Crisis
 ● N/A

- Childcare
- Education
- Food
- Housing
- Access to Services
- Career Resiliency/Training
- Clothing
- Employment Stability
- English Language Skills
- Transportation

Assessments [View All](#)

Date	Name	Taken By
1/21/2020	kynect resources	Catherine Eliza

Notes [View All](#)

Subject	Created Date	Created By
Estill is expect...	1/21/2020	Catherine Eliza

Assessments inform SDOH data. This tab indicates the date of last assessment and from where it came.

SDOH Information is populated from previous assessments within **kynect resources** or from Kentucky Health Information Exchange (KHIE) data



Select the CMS Assessment



Hospital Users will have the option to select the type of assessment they want to complete. To initiate the CMS Assessment, click **Get Started next to the CMS Assessment option.**

The screenshot displays the Kynect Resources web application interface. At the top left is the Kynect Resources logo. To its right is a search bar with the placeholder text 'Search Keyword' and a 'Search By Category' dropdown menu. Further right are links for 'Referral Inbox' and a user profile icon. A left-hand navigation menu lists 'My Workspace' (with sub-items: Referral Inbox, Referral Outbox, Referral Dashboard, Reports), 'Client Search' (highlighted), 'My Favorites', and 'Organization'. The main content area is titled 'Needs Assessment' and includes a 'Back to OneView' link. Below the title is a descriptive sentence: 'These tools can help assess needs and discover resources to support residents.' Two assessment options are listed in light blue boxes: 'CMS Assessment' and 'Needs Assessment'. Each option has a blue 'Get Started' button to its right. The 'Get Started' button for the 'CMS Assessment' is highlighted with a red rectangular border.



Completing the CMS Assessment



Enter the Resident address or ZIP Code in the field, then click **Next**.

kynect resources will return suggested resources based on the Assessment results and location once the assessment is complete.

My Workspace

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

[← Back to Surveys](#)

CMS Assessment

Lets start with some basic information.
We'll use this to show resources that are closest to you.

40601.

Next

Completing the CMS Assessment



**There are 27 assessment questions withing the CMS Assessment.
Responses are required before moving forward. Use the next button to move through
each question of the assessment.**

[← Back to Surveys](#)

CMS Assessment

Question 1 of 27

1. What is your living situation today?

- I have a steady place to live
- I have a place to live today, but I am worried about losing it in the future
- I do not have a steady place to live (I am temporarily staying with others, in a hotel, in a shelter, living outside on the street, on a beach, in a car, abandoned building, bus or train station, or in a park)
- Prefer not to answer

[Previous](#) [Next](#)



When all answers have been completed, the Needs Assessment results are displayed that indicate each risk level.



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

← Back to OneView

For: Alexis Dale Taken by: Julie Mason Date Taken: 4/20/2022

Needs Assessment Results

CRITICAL 4 ITEMS High priority; Take care of these as soon as you can.	IMPORTANT 4 ITEMS Consider seeking help for these when you can.	STABLE 9 ITEMS You do not need to worry about these right now.
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Action Steps
There are thousands of resources that can help you and your family.
Help is available today. Just review the list and start with one resource at a time.

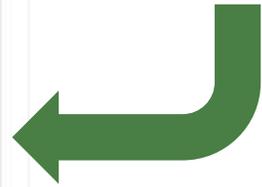
[View Responses](#) Create Referral(s)

Housing

Find housing for children with disabilities (foster care, group homes)

CEDAR LAKE HOUSING SERVICES 53.1 Miles	KENTUCKY DEPARTMENT FOR BEHAVIORAL HEALTH, DEVELOPMENTAL AND INTELLECTUAL DISABILITIES INTERMEDIATE CARE FACILITIES/INTELLECTUAL DISABILITIES (ICF/ID) 63 Miles
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Users may View Responses or navigate through the suggested resources based on the Assessment results.



Creating Referrals based on Results



My Workspace

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

Back to OneView

For: Alexis Dale Taken by: Julie Maaron Date Taken: 4/20/2022

Needs Assessment Results

CRITICAL	IMPORTANT	STABLE
4 ITEMS	4 ITEMS	9 ITEMS
High priority. Take care of these as soon as you can.	Consider seeking help for these when you can.	You do not need to worry about these right now.

Action Steps

There are thousands of resources that can help you and your family.
Help is available today. Just review the list and start with one resource at a time.

View Responses Create Referral(s)

Housing

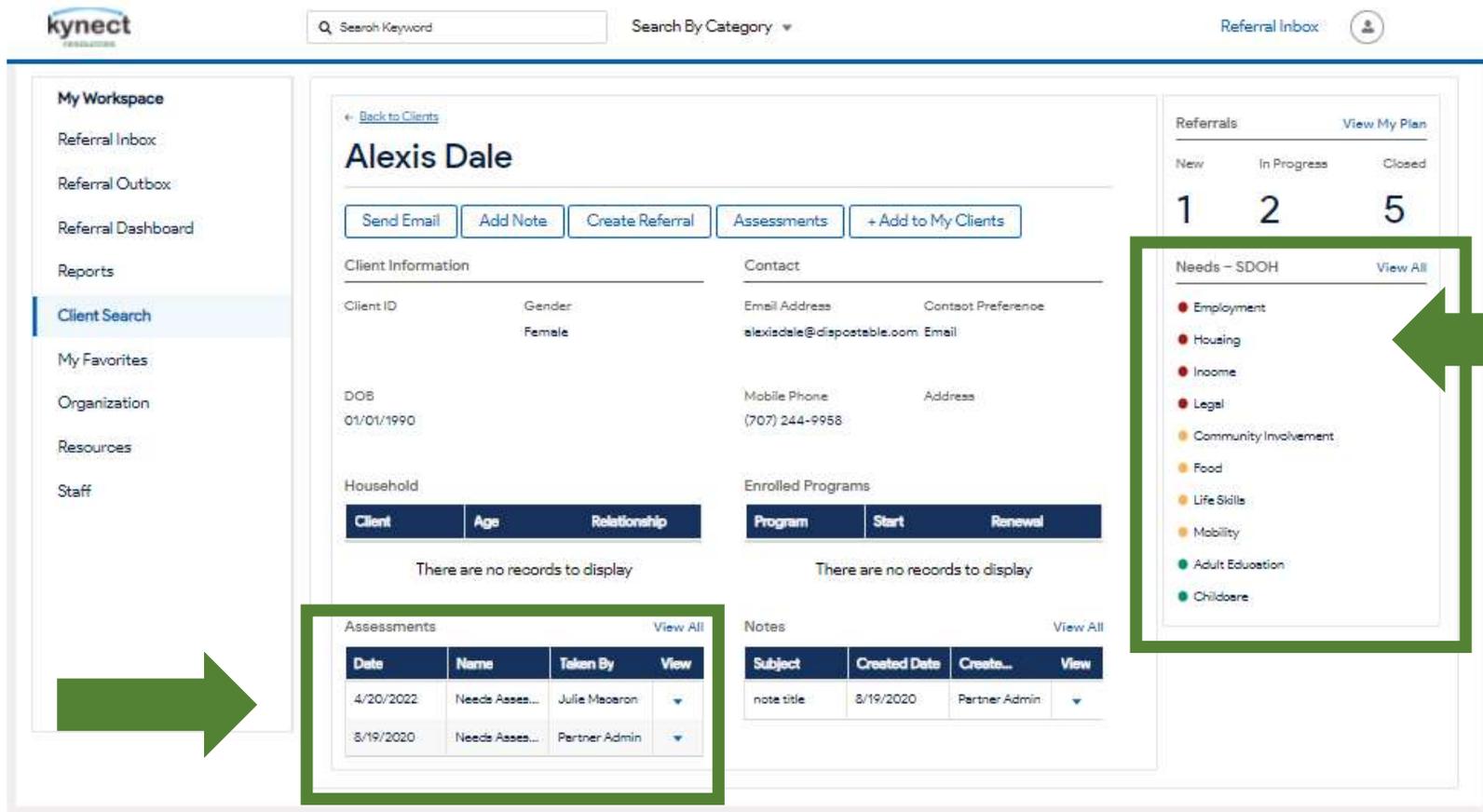
Find housing for children with disabilities (foster care, group homes)

CEDAR LAKE HOUSING SERVICES 53.1 Miles	KENTUCKY DEPARTMENT FOR BEHAVIORAL HEALTH, DEVELOPMENTAL AND INTELLECTUAL DISABILITIES INTERMEDIATE CARE FACILITIES/INTELLECTUAL DISABILITIES (ICF/ID) 63 Miles
---	--

The arrows here can help you quickly go through the categories of needs.

Referrals may be made by selecting the box next to the resource listing.

After the Assessment has been completed, the resident detail screen will update the **Needs-SDOH** risk factors. The **Assessment** field is also updated with the new date and other details.

Search Keyword Search By Category ▼ Referral Inbox 

My Workspace

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

Alexis Dale

[Send Email](#)
[Add Note](#)
[Create Referral](#)
[Assessments](#)
[+ Add to My Clients](#)

Client Information

Client ID: Gender: Female

Contact

Email Address: alexisdale@disposable.com Contact Preference: Email

DOB: 01/01/1990 Mobile Phone: (707) 244-9958 Address:

Household

Client	Age	Relationship
There are no records to display		

Enrolled Programs

Program	Start	Renewal
There are no records to display		

Assessments [View All](#)

Date	Name	Taken By	View
4/20/2022	Needs Asses...	Julie Maeron	
8/19/2020	Needs Asses...	Partner Admin	

Notes [View All](#)

Subject	Created Date	Created By	View
note title	8/19/2020	Partner Admin	

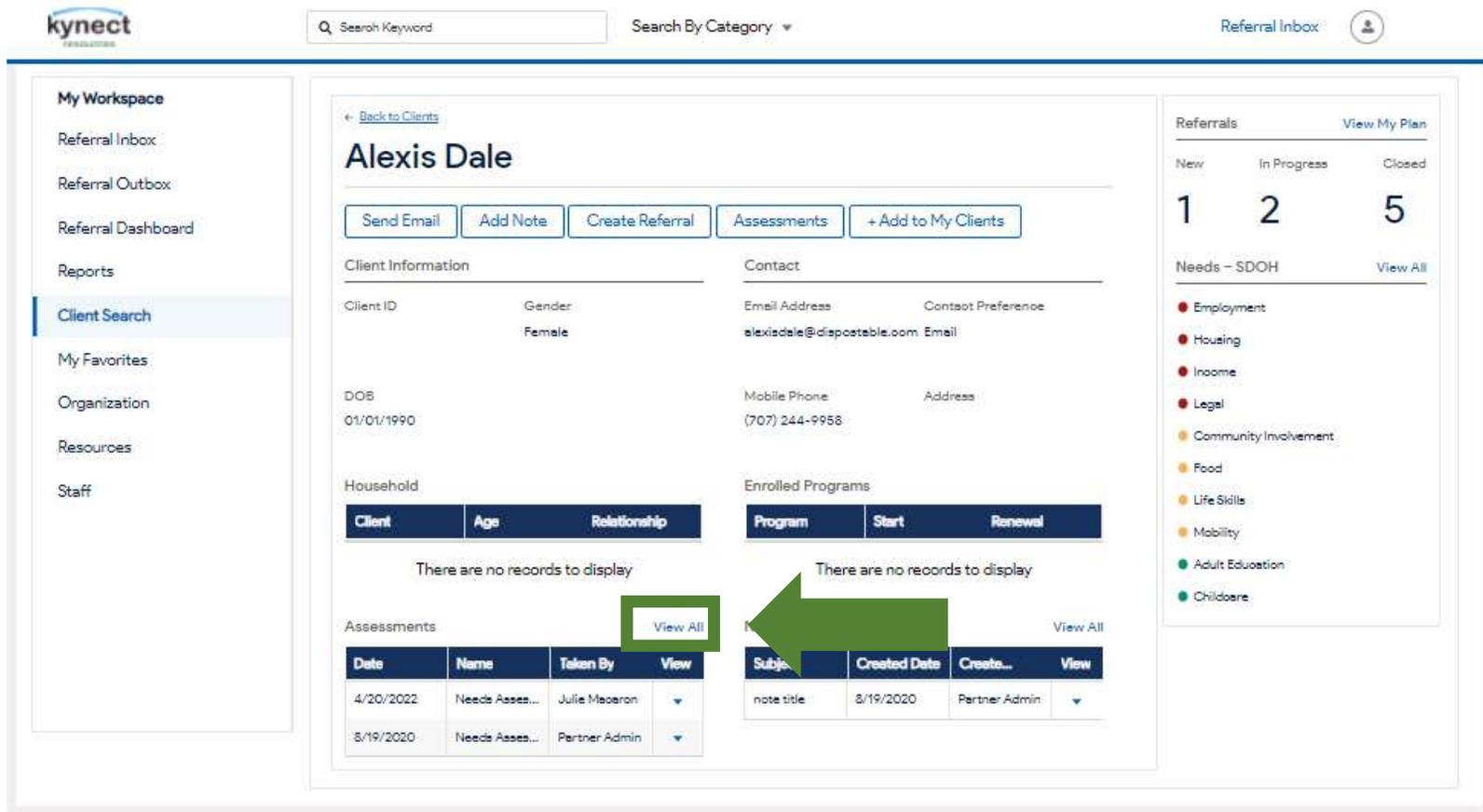
Referrals [View My Plan](#)

New	In Progress	Closed
1	2	5

Needs - SDOH [View All](#)

- Employment
- Housing
- Income
- Legal
- Community Involvement
- Food
- Life Skills
- Mobility
- Adult Education
- Childcare

To View completed Assessments, click the **View All** link Next to the Assessment header.

The screenshot shows the Kynect interface for a client named Alexis Dale. The page is divided into several sections:

- My Workspace:** A sidebar menu on the left with options like Referral Inbox, Referral Outbox, Referral Dashboard, Reports, Client Search (highlighted), My Favorites, Organization, Resources, and Staff.
- Client Profile:** The main content area for Alexis Dale, including:
 - Buttons: Send Email, Add Note, Create Referral, Assessments, + Add to My Clients.
 - Client Information: Client ID, Gender (Female).
 - Contact: Email Address (alexisdale@disposable.com), Contact Preference (Email), Mobile Phone ((707) 244-9958), Address.
 - DOB: 01/01/1990.
 - Household: A table with columns Client, Age, Relationship. Below it, it says "There are no records to display".
 - Enrolled Programs: A table with columns Program, Start, Renewal. Below it, it says "There are no records to display".
 - Assessments: A table with columns Date, Name, Taken By, View. It contains two rows:

Date	Name	Taken By	View
4/20/2022	Needs Asses...	Julie Maeron	View
8/19/2020	Needs Asses...	Partner Admin	View

 A green box highlights the "View All" link next to the "Assessments" header. A large green arrow points from this link towards the "Assessments" table.
- Referrals:** A summary section showing counts for New (1), In Progress (2), and Closed (5). It also includes a "Needs - SDOH" section with a "View All" link and a list of categories: Employment, Housing, Income, Legal, Community Involvement, Food, Life Skills, Mobility, Adult Education, and Childcare.



All previous assessments are displayed and may be viewed individually. To open a previous assessment, select the down arrow and click **View** to open that Assessment.



Q Search Keyword

Search By Category ▾

Referral Inbox



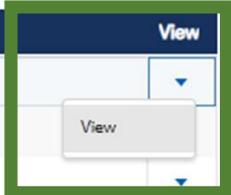
My Workspace

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

[← Back to OneView](#)

Assessments: Ten Matts

Date	Name	Taken By	View
3/13/2024	Needs Assessment	Triston CpAdmin	View
7/20/2023	Needs Assessment	Akay Chan	View
7/20/2023	Needs Assessment	Akay Chan	View
7/19/2023	Needs Assessment	jayden lowes	View
7/17/2023	Needs Assessment	Nathan Wang	View
6/26/2023	Needs Assessment	jayden lowes	View
6/17/2023	Needs Assessment	Nathan Wang	View
6/16/2023	Needs Assessment	Tad Ham	View
6/16/2023	Needs Assessment	Ten Matts	View





The Needs Assessment Results page will display.
Click **View Responses** to open the Needs Assessment selection.



My Workspace

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

Search Keyword Search By Category ▾ Referral Inbox

← [Back to OneView](#)

For: Ten Matts Taken by: Triston CpAdmin Date Taken: 3/13/2024

Needs Assessment Results

Category	Count	Description
CRITICAL	6 ITEMS	High priority: Take care of these as soon as you can.
IMPORTANT	3 ITEMS	Consider seeking help for these when you can.
STABLE	1 ITEM	You do not need to worry about these right now.

Action Steps
There are thousands of resources that can help you and your family.
Help is available today. Just review the list and start with one resource at a time.

[View Responses](#) [Create Referral\(s\)](#)



Needs Assessment Responses will show answers to each assessment question. Return to the list by using the **Back to Results** link.



My Workspace

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

Search Keyword Search By Category ▼ Referral Inbox

[← Back to Results](#)

Needs Assessment Responses

For: Ten Matts

Taken by: Triston CpAdmin

Date Taken: 3/13/2024

- 1. Lets start with some basic information.**
Kentucky, 40511,
- 2. Which best describes your housing situation?**
I do not have stable housing
- 3. Which best describes your housing utilities (water, electricity, heating) situation?**
My utilities are often shut off due to not paying
- 4. Which best describes your current employment situation?**
I have temporary, seasonal, or part-time work that does NOT meet my needs; I need more employment
- 5. Which best describes your income situation?**
My income is irregular
- 6. Which best describes your food situation?**
- 7. Which best describes your childcare situation?**



Thank you

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