User Handbook

For Community Partners

kynect resources

Together for a better Kentucky

This handbook was created to help Community Partners (CPs) use the **kynect resources** website (www.kynect.ky.gov/resources) and to explain its functions and capabilities.

Please note that all example screenshots used in reference materials for **kynect resources** do not contain any real user or organizational data.

This manual will be periodically updated as new system features are released. This is Handbook Version 01, released on 09/15/2026. Please check for new versions on our info page (https://chfs.ky.gov/agencies/ohda/Pages/kynectresources.aspx), housed on the Cabinet for Health and Family Services website. Any other referenced materials will be linked throughout this handbook.

Thank you for using **kynect resources** and being a Community Partner. We are grateful to work alongside our partners towards improved support for Kentuckians across the Commonwealth.

For any questions or assistance, please contact the team at kynectresources@ky.gov.

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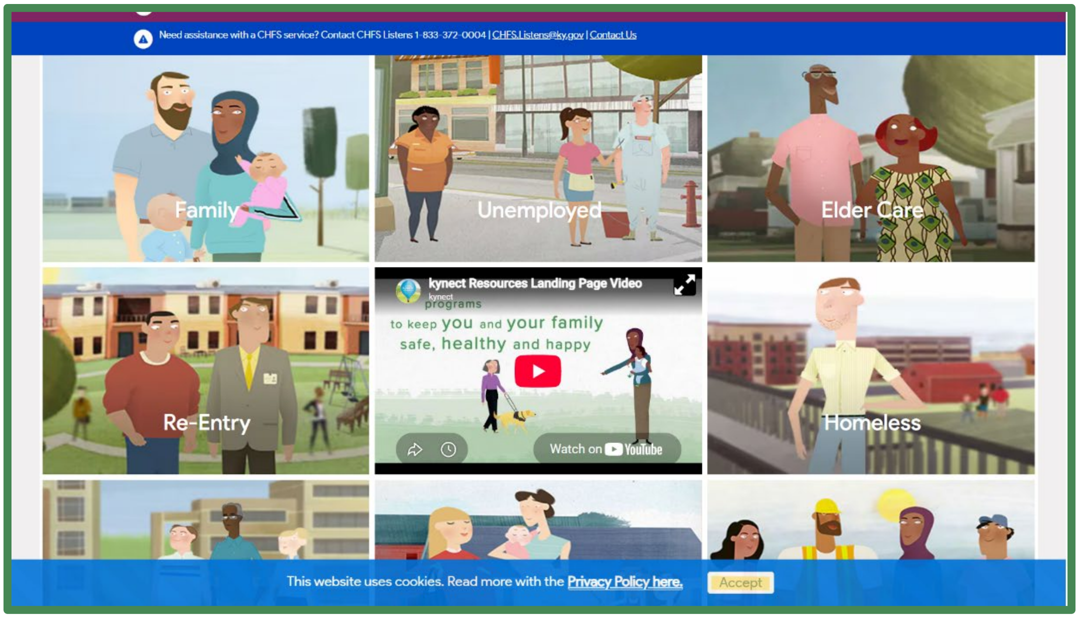
Onboarding

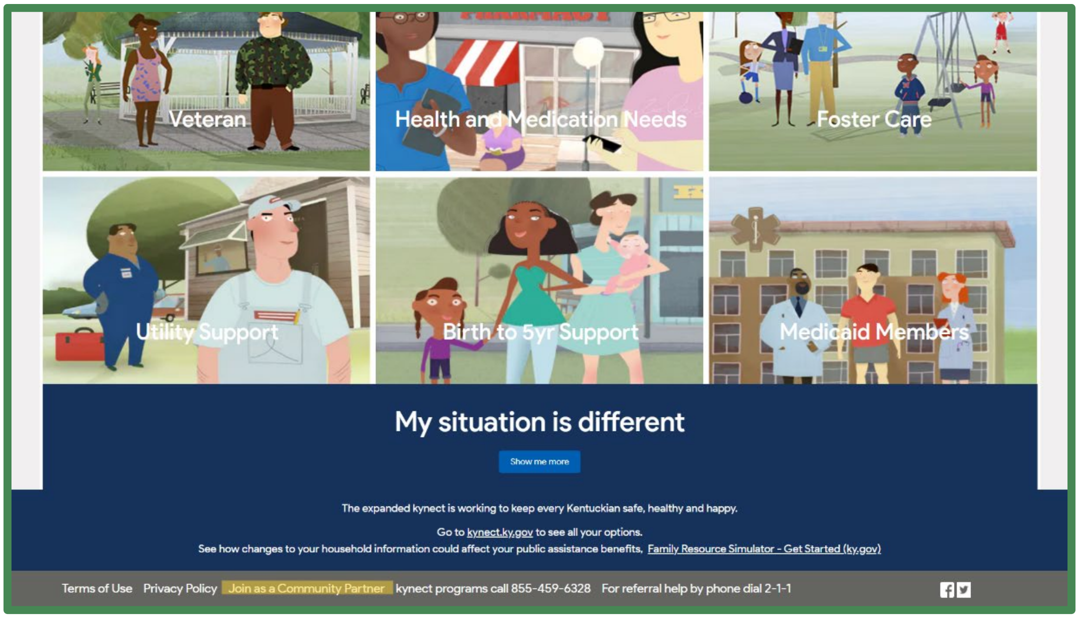
Claiming

The first step in the onboarding process is to claim your organization's site.

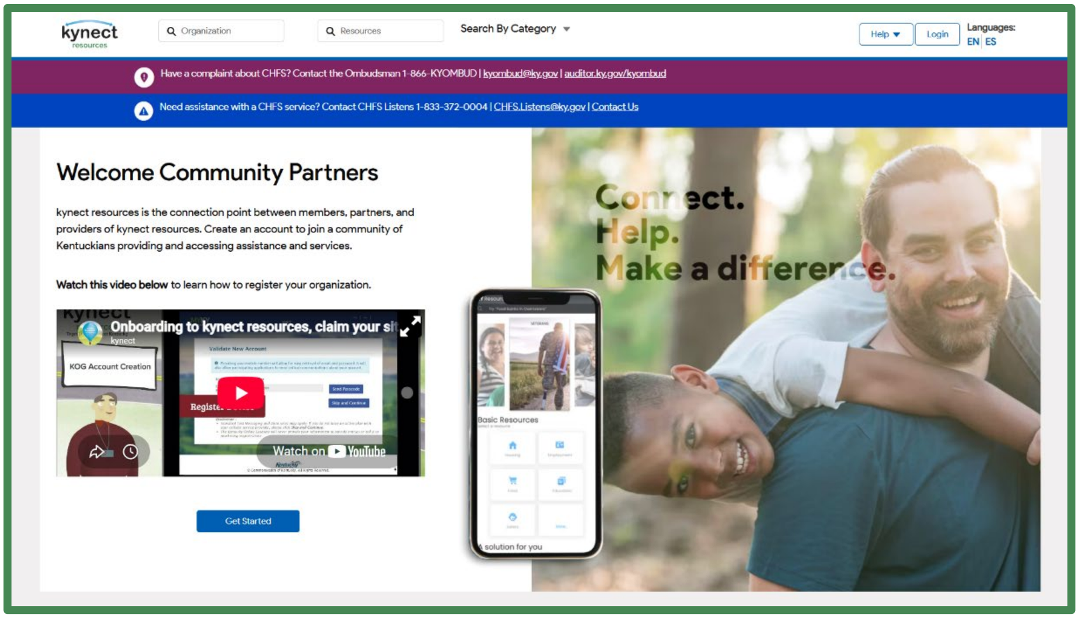
1. Using Google Chrome as the preferred browser, navigate to the landing page at kynect.ky.gov/resources. Click "Accept" on the bottom pop-up bar to accept the site's cookies.



2. Scroll to the bottom of the home page and click "Join as a Community Partner."

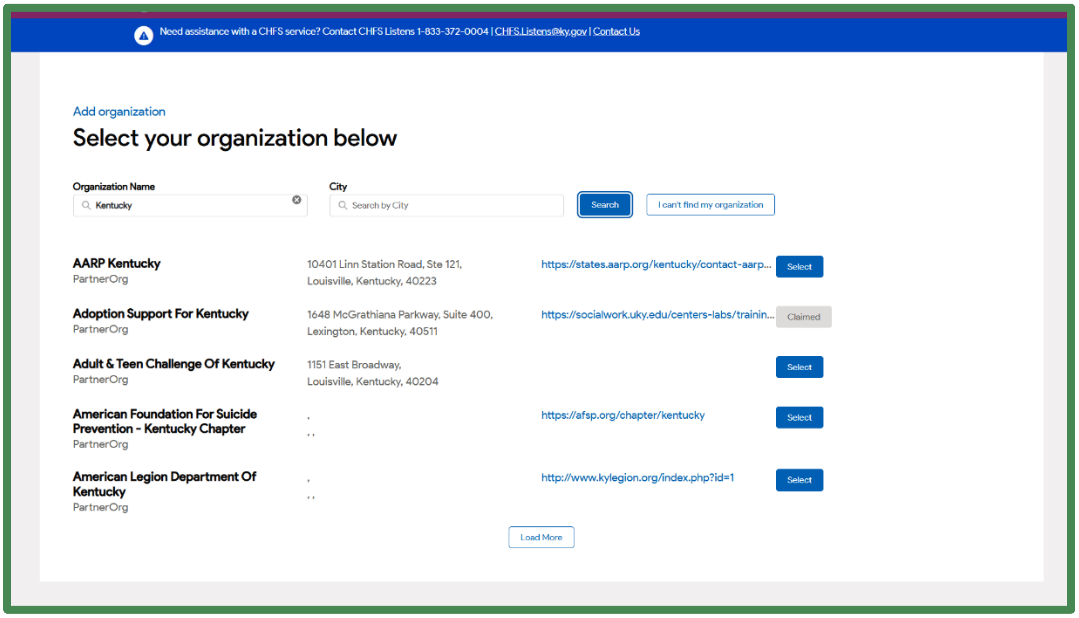


3. On the next screen, click “Get Started.”



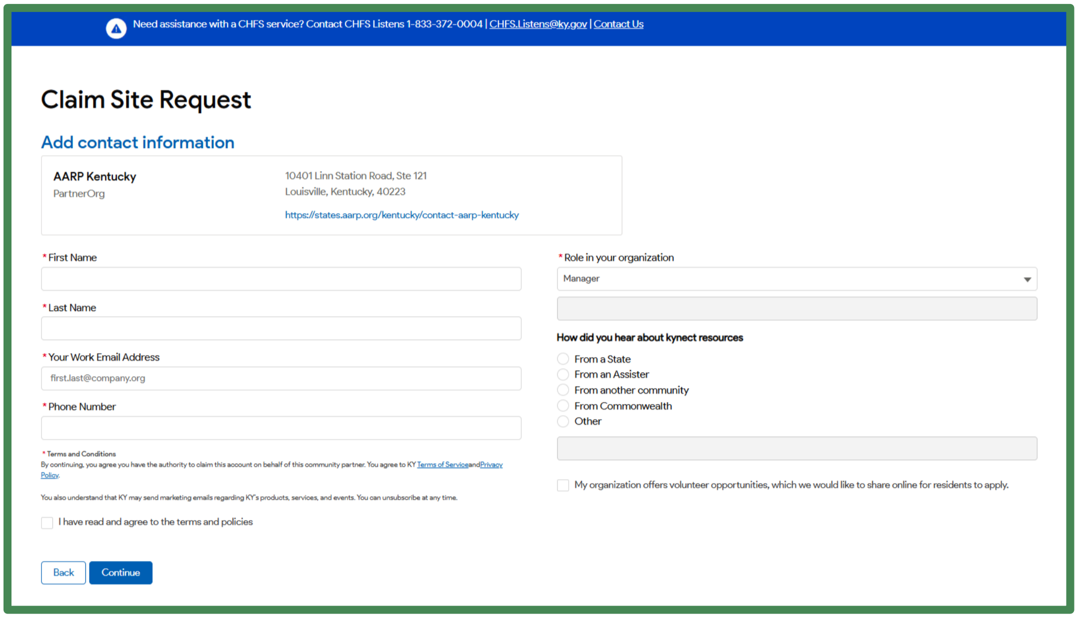
Please Note: The Onboarding Video on this page walks through the entire onboarding process if you need extra help.

4. Find your organization by typing in your organization’s name and/or city in the search bars, and then click “Search.” Once you find your organization, click “Select.”

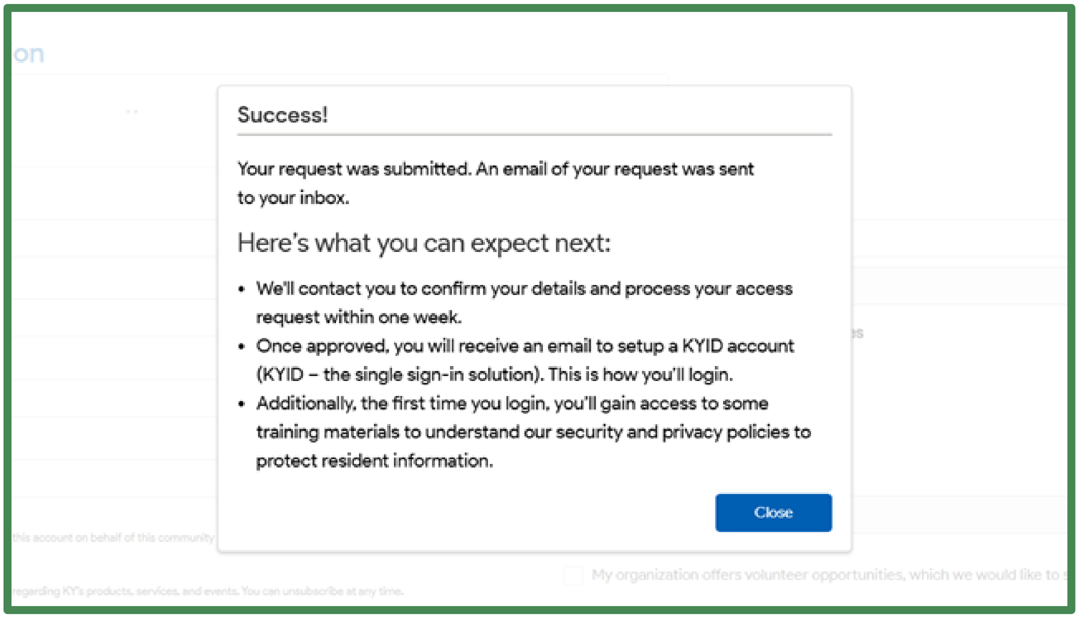


Please Note: If you cannot find your organization or if your organization has already been claimed, please call 2-1-1 or email kynectresources@ky.gov for help.

5. Fill in your contact information for all *required fields* and then click "Continue." For email, please use your individual work email address, rather than a role-based address such as "info@", "admin@", or "support@".



6. Upon successful completion, you will see the screen below, click "Close."



7. You will receive an initial email confirming your claim request, then a **kynect resources** United Way Specialist will reach out to continue with onboarding. After your claim request is approved, you will receive a second email with instructions to set up your KYID (formerly the Kentucky Online Gateway, or KOG) account.

Account Creation

To access a variety of state programs and systems including **kynect resources**, a user must complete a one-time registration as a KYID user. To complete the second step of the onboarding process, follow the steps below. Due to the security requirements of the site, steps in this process **may time out** if no action is taken.

Each user must have a unique email address to complete the verification process. If you use your organizational/work email to access KYID applications for personal use, you will experience a disruption to your access if you make a Community Partner account. Personal KYID accounts should be accessed with a personal email account, not a work email account.

If you need to adjust your KYID emails before continuing, please contact the KYID Helpdesk via the methods below and explain that you will need to reset the email for your personal KYID account.

KYID Helpdesk Contact Information:
502-564-0104 Extension: 2
Sunday – Saturday 9:00 AM - 5:00 PM EST
KYIDhelpdesk@ky.gov
https://kyid.ky.gov/HelpCenter

As stated above, you will receive a second email with the KYID instructions. This email will contain two links, one for if you have an existing KYID or KOG account, and the other if you do not.

Please Note: The links in this email expire after **24 hours** as a security precaution. If the links expire, you will have to request a new link through your United Way Specialist. Additionally, please double check all spam, junk, or other folders if you do not see this email in your inbox.

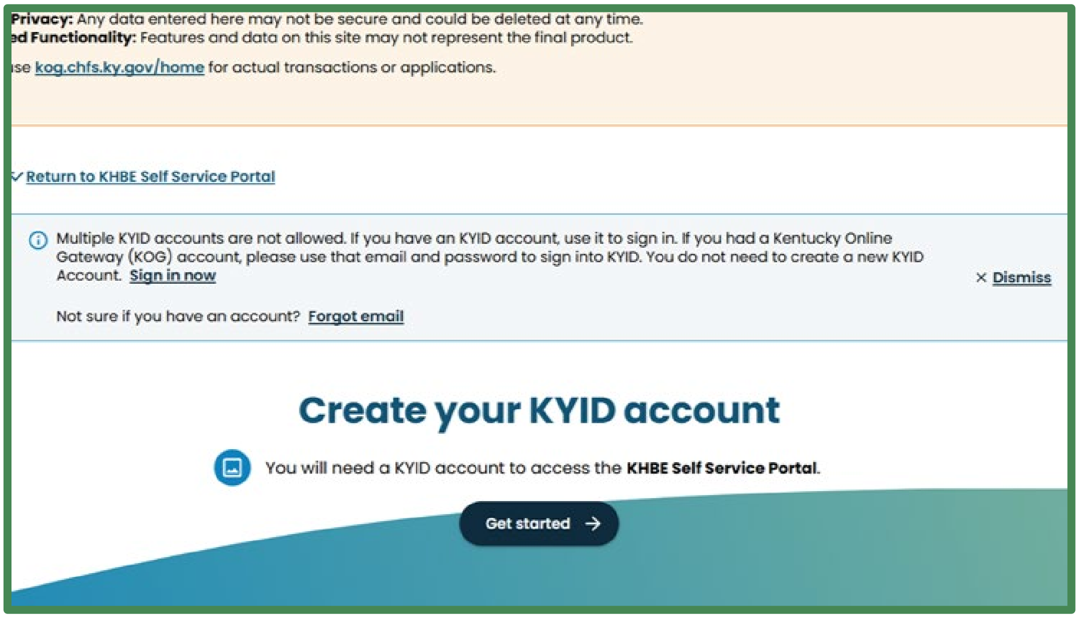
Existing Account

If you have an existing KYID (or KOG) Account with your organization email address, you **MUST** use the link for those with an existing account in the email. This link will prompt you to login on the KYID site and will add the **kynect resources** portal to your account.

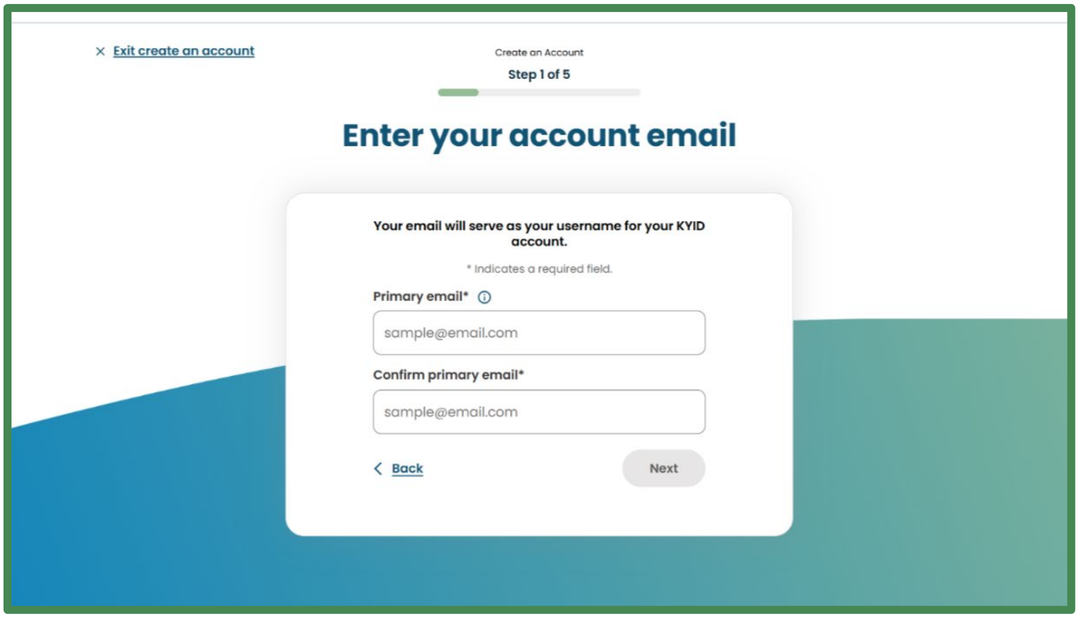
If you have not logged into your account since the KYID transition, the login process will have some additional questions to complete the set-up for your account. You will then be navigated to complete the **kynect resources** first-time login and training.

Creating a New Account

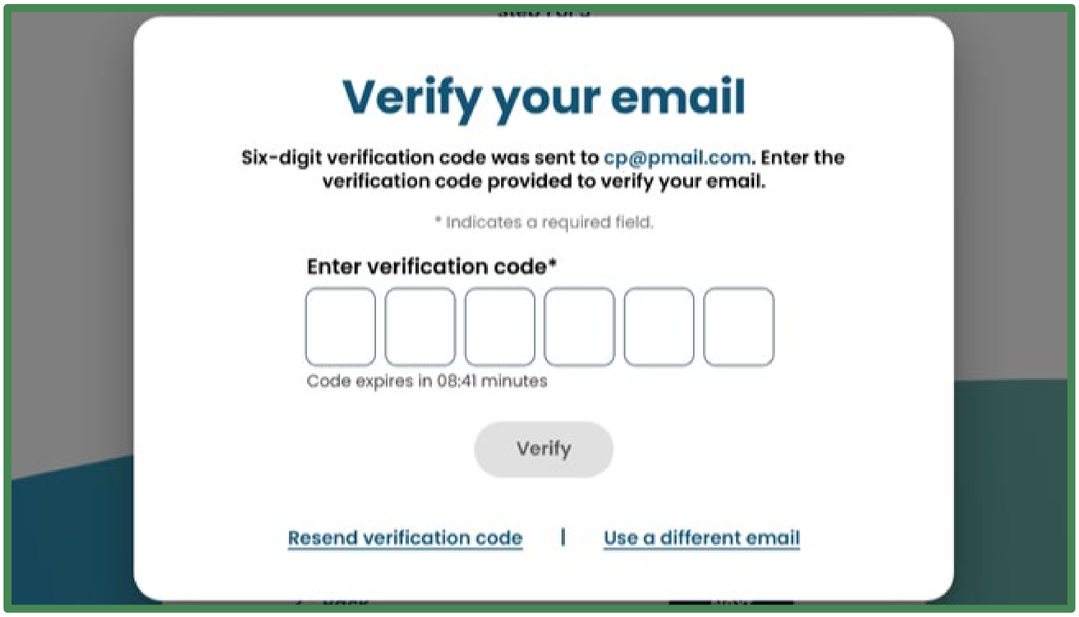
1. New users: Click "Create New Account" to begin the KYID account creation process.



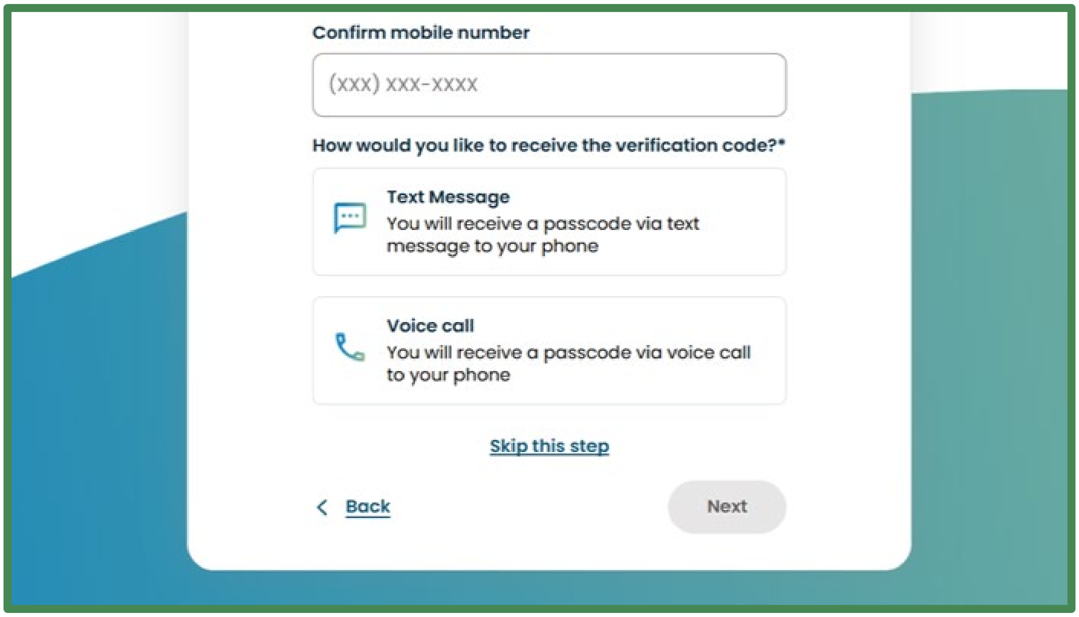
2. For a CP account, you should use your business email address rather than a personal email when creating your account for **kynect resources**. If you submitted the initial claim for your organization, this should also be the same email you used when submitting your claim.



3. A confirmation screen will appear, and an email code is sent to verify the KYID account. Check your spam or junk folders if you do not receive the email within a few minutes.

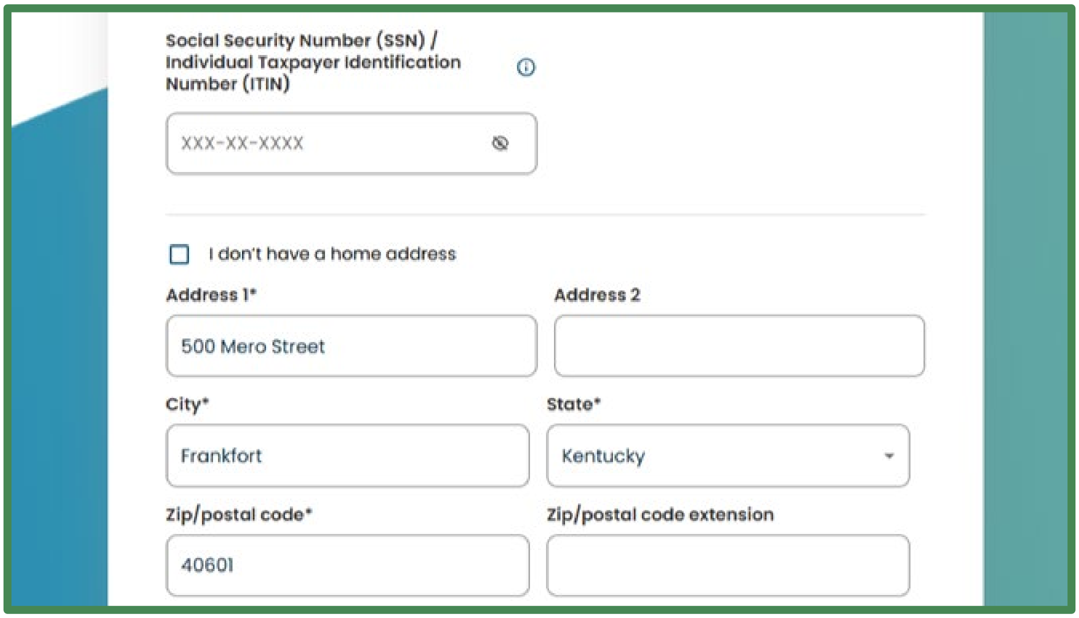


4. After inputting the verification code, the Validate New Account screen will open. Click “Continue to Sign-in.”
5. You will be given the option to add a mobile phone number to your account as a back-up authentication method. Either input and verify your phone number or click “Skip this step.”



6. The User Verification screen will open for you to verify your identity. This is an important standard across state programs and satisfies the privacy and security standards the state programs must meet. It allows the state to verify your identity and maintain a record of who has access to state data.

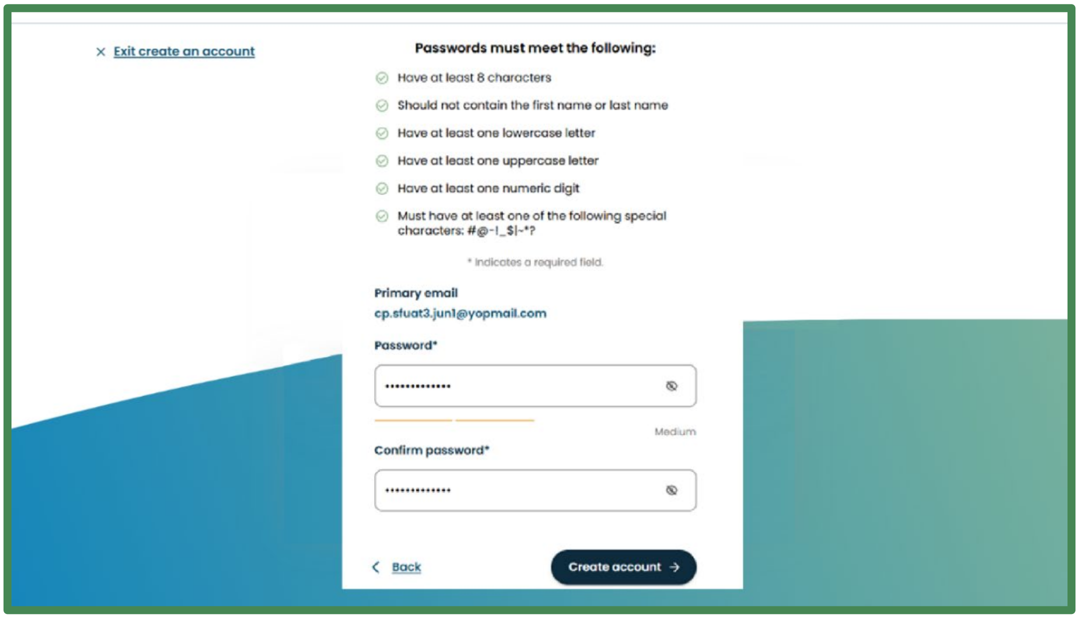
   To facilitate the success of ID Verification, it is **important to use your personal information**, as opposed to your business information. This means using your home address instead of your work address, your personal phone number instead of your work number, etc. While including a Social Security number is NOT required, adding this field may help the system confirm your identity faster.



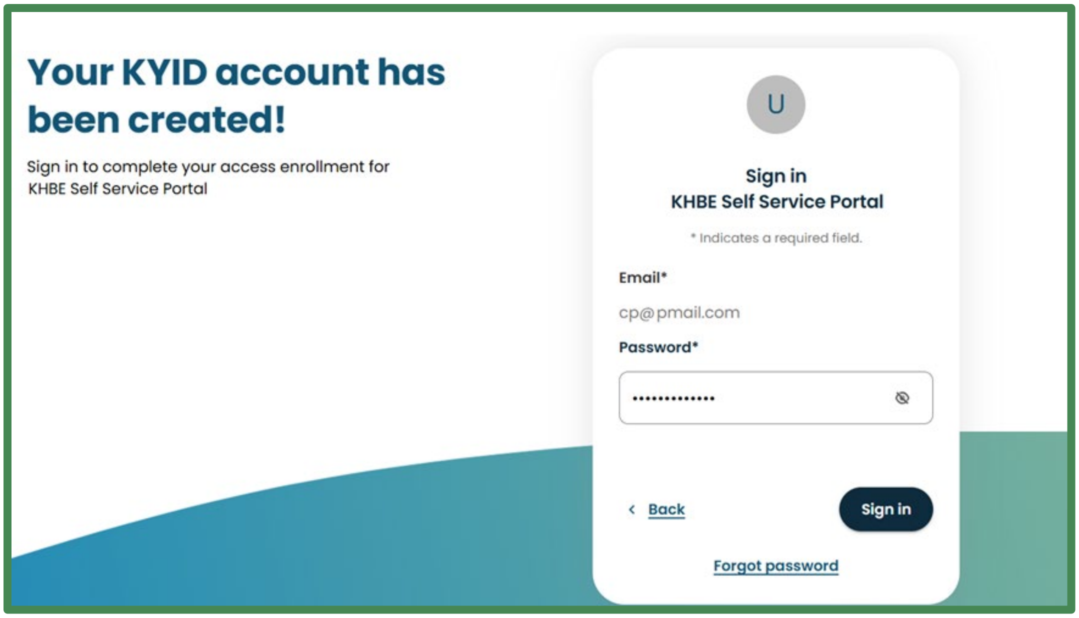
Experian is a third-party vendor who confirms identity in this process. No CHFS program, including kynect resources, has access to your personal information or details of your verification, and it is not used for any other purpose than verifying identity. Experian communicates the confirmation result to our system to allow access.

Some users do not pass automatic ID Verification and are provided with the phone number to Experian along with a reference code for manual verification. This call typically takes only a few moments, and the user can then proceed with next steps. If a user is unable to complete ID Verification over the phone, they must be verified in person with identity documentation.

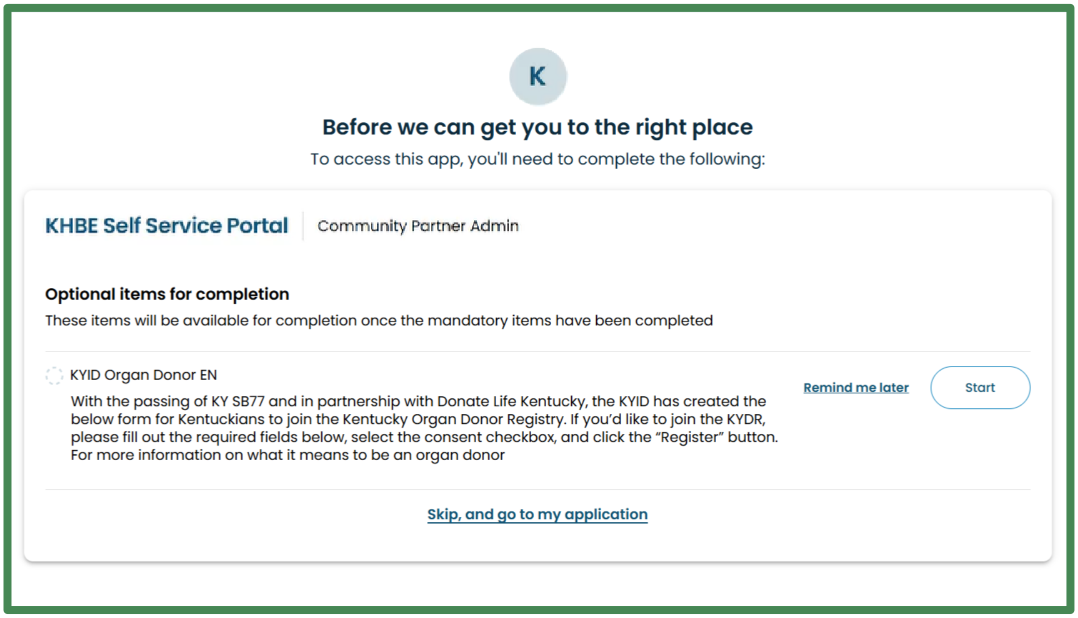
7. Once you have successfully verified your identity, the next screen will ask you to create a password for your new KYID account, meeting the system's password requirements.



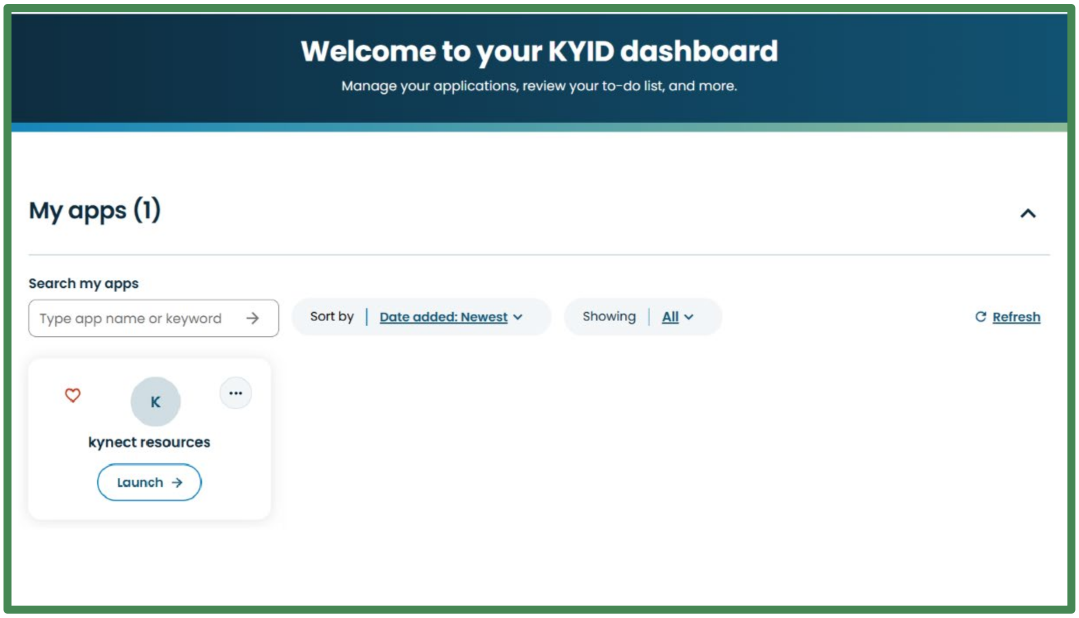
8. After completing account creation, you will be taken back to the KYID login screen to login for the first time. Enter your login information associated with your new KYID account and click "Next."



9. After logging in, you will be redirected to the optional items page, which offers quick access to register as a Kentucky Organ Donor. If you are interested, click "Yes, Register Now" to register as an organ donor or "Remind me later" to come back to the registration another time. To be redirected to the KYID dashboard and continue on to **kynect resources**, click "Skip, and go to my application."

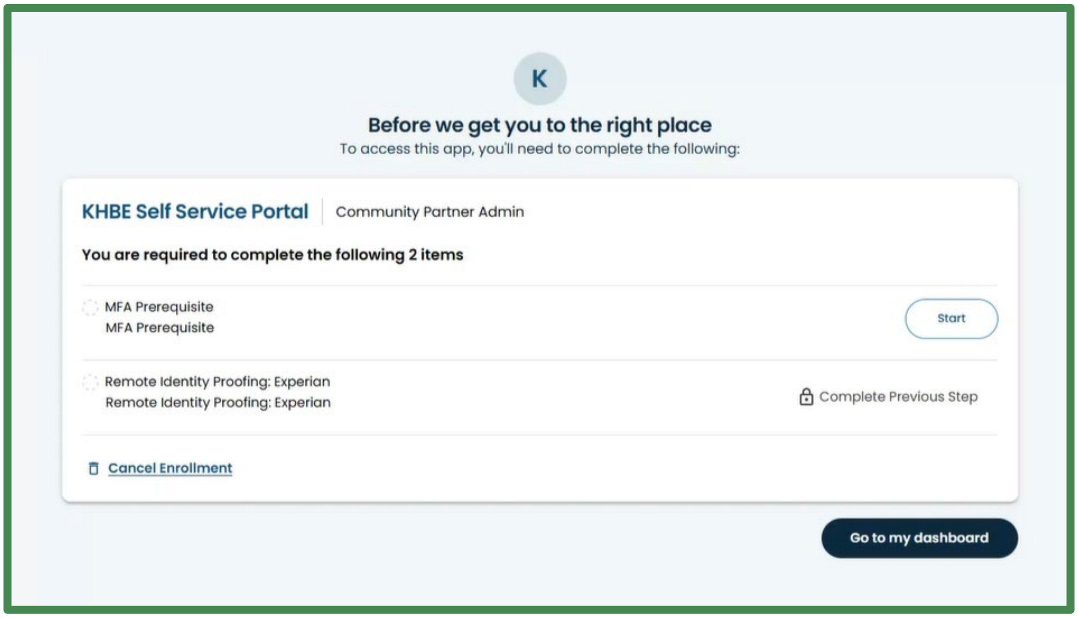


10. Upon successful completion of KYID registration, you will see the **kynect resources** Tile. Click "Launch."



Please Note: Portals within KYID can be favorited and pulled to the top of your window using the “heart” icon. This may be especially useful if you use KYID to access multiple state systems.

11. The first time you launch the **kynect resources** Tile, you will be prompted to add a multi-factor authentication (MFA) tool to your account as a security procedure and finalize your identity proofing.



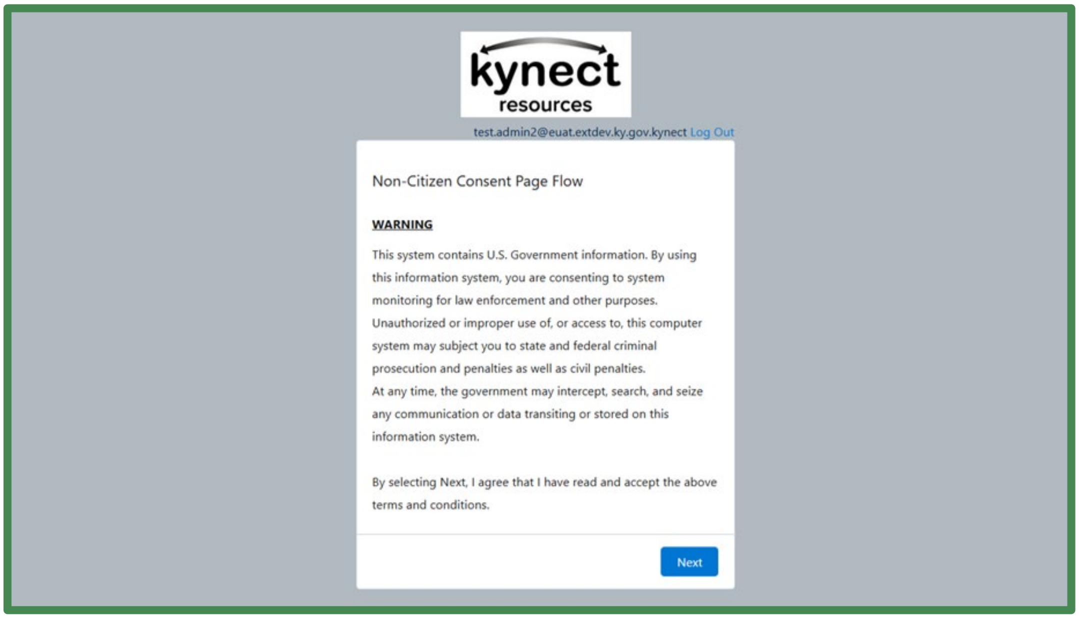
Community Partners have four MFA options for their KYID account, one set-up through a computer (Symantec VIP) and three through your mobile device (ForgeRock Authenticator, Microsoft Authenticator, and Google Authenticator). Please select any of the four options and follow the instructions for that MFA software.

The final step of Remote Identity Proofing may ask you to re-confirm the information you input on Step 6, but with some additional questions to match your user account to Experian's records.

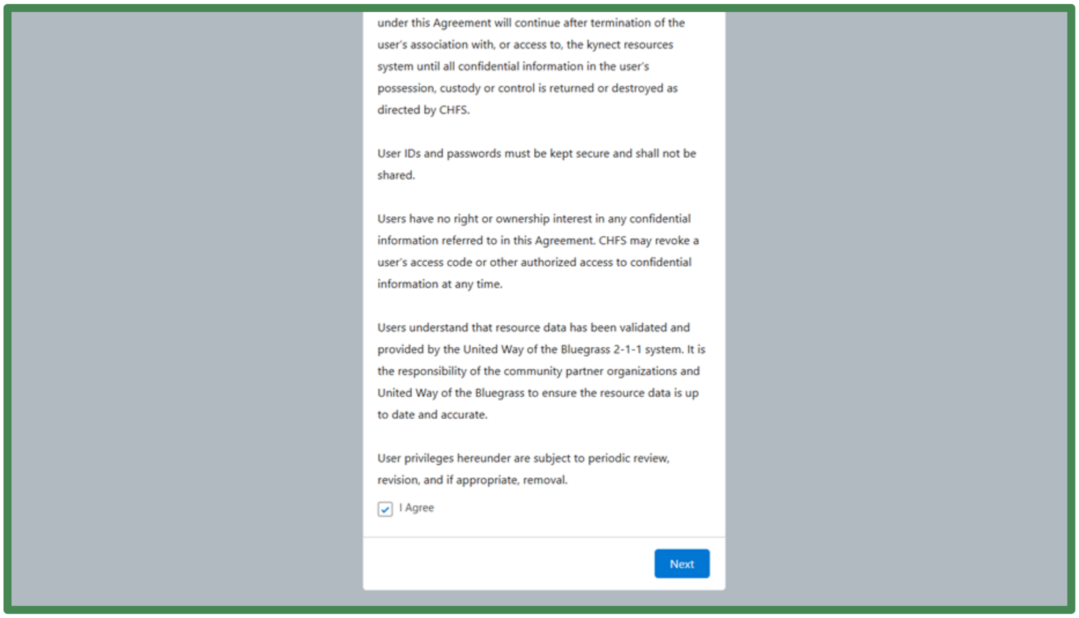
First-Time Login & Training

The final step of the onboarding process is to complete the **kynect resources** required training and the first-time user login information.

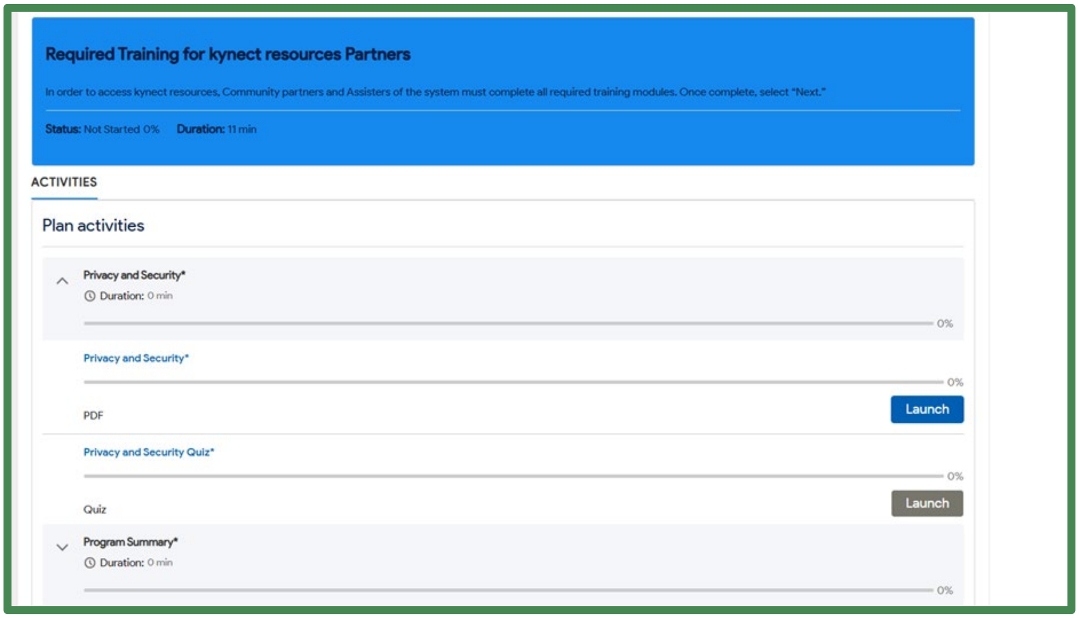
1. After launching the Resources Community Portal for the first time, there will be a warning reminder page that opens and must be confirmed each time **kynect resources** is opened. Review and click "Next."



2. Next, the full system terms and conditions will show only the first time you have launched the Resources Community Portal. Read through the terms, click "I Agree" at the bottom, and then click "Next."

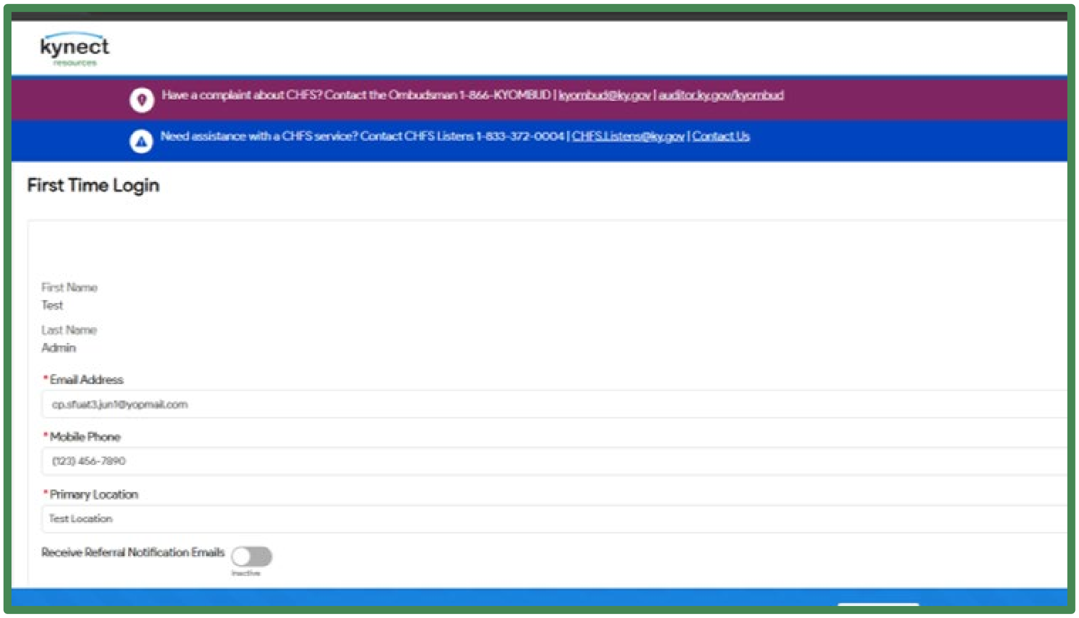


3. The required training page will then open, with 11 minutes' worth of training content. View the documents and complete the quizzes by opening the drop-down arrows and clicking "Launch." There is one quiz for the Privacy and Security section, and one for the Program Summary section. The System Trainings section is a series of short videos. Click "Next" when finished with all sections.



4. For the final First Time Login screen, confirm your email and phone number, set your primary location within the organization, and confirm whether you would

like to receive notification emails for referrals. Click “Save.” Any details set on this screen can be updated at any time in the user’s Account Settings.



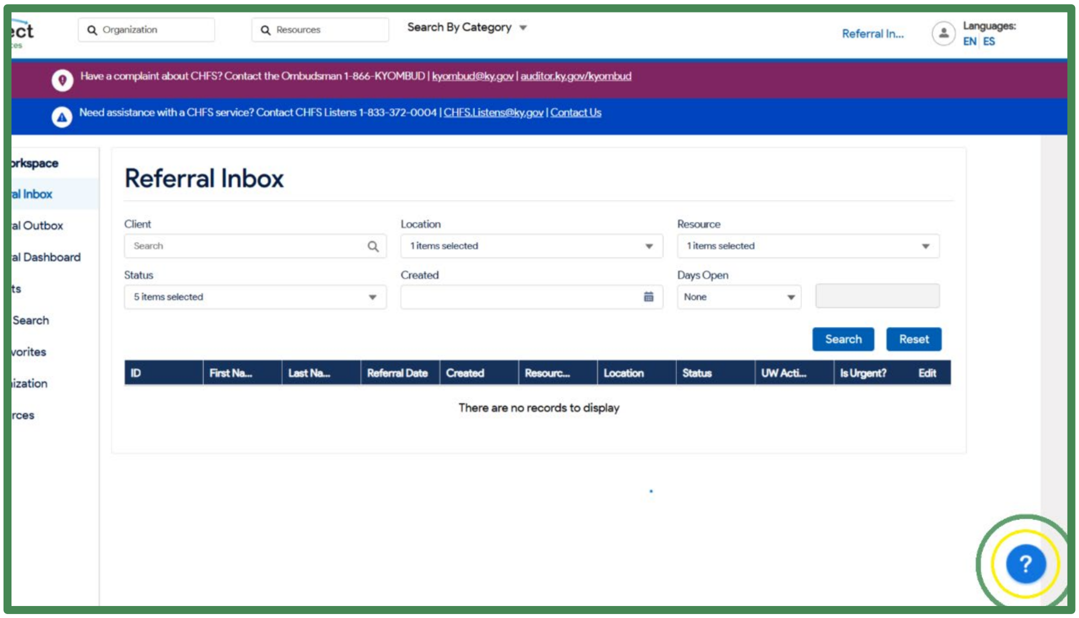
You are now successfully onboarded to kynect resources!

The starting point to launch **kynect resources** is the KYID Dashboard (kyid.ky.gov).

Navigation

WalkMe Tutorial

The **kynect resources** site has a tutorial feature that demonstrates how to use the system, known as the WalkMe tool. The WalkMe feature will guide users via step-by-step text prompts on how to accomplish various functions available to Community Partners. Some of the features with tutorials include creating referrals, requesting consent, starting assessments, and more. It also includes links to video tutorials for additional features. To access, simply click the blue "?" symbol at the bottom right of the screen, as shown below, and follow the directions or select from the options provided. 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.

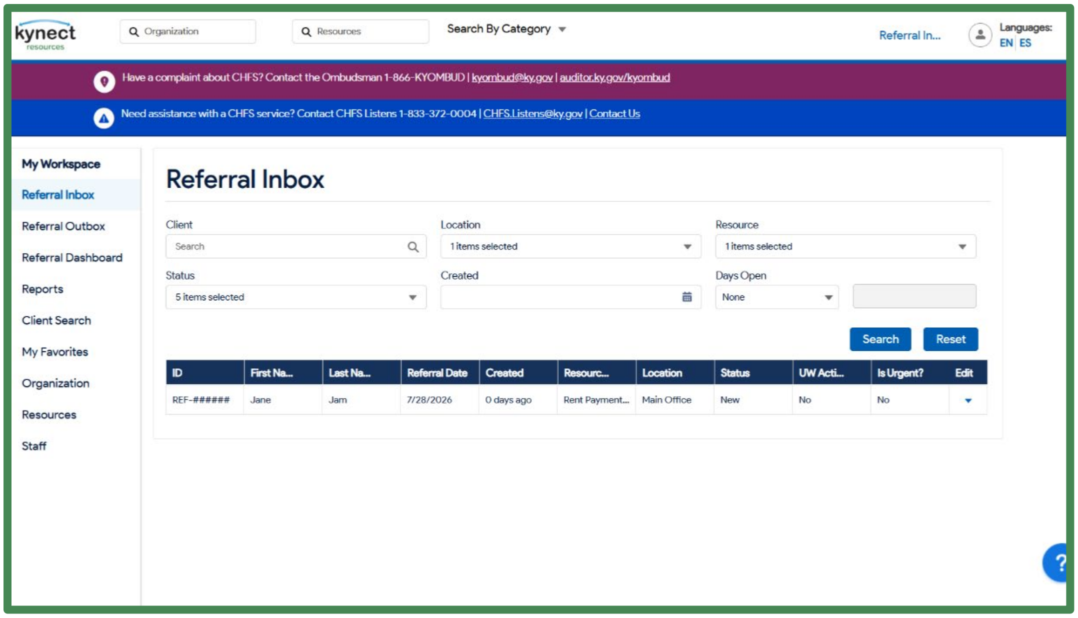


Referral Inbox & Outbox

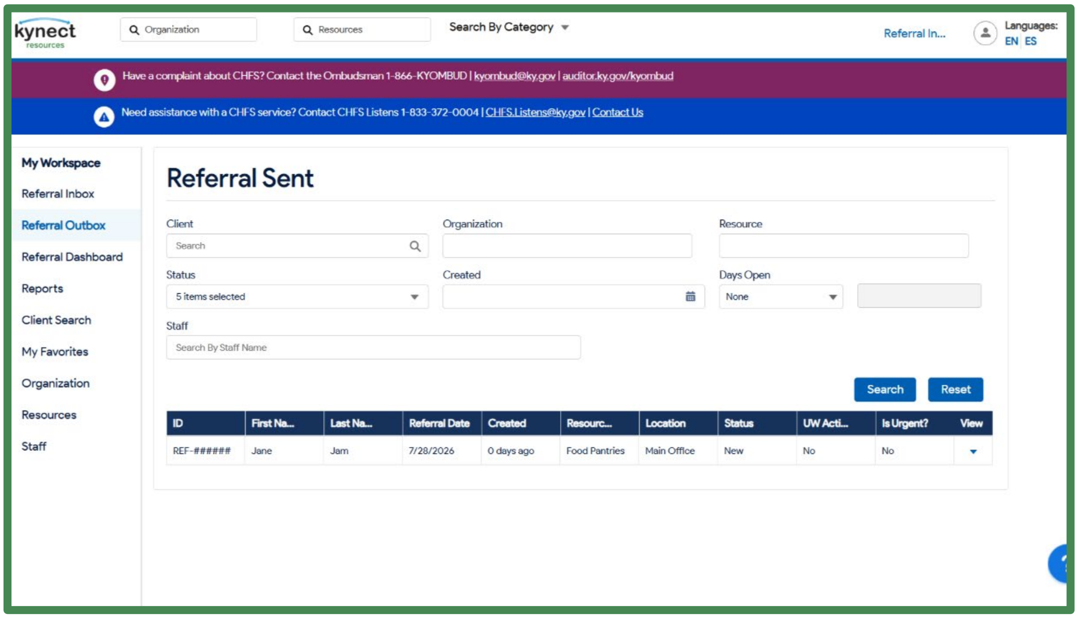
Upon login, **kynect resources** opens to the Referral Inbox tab, with the My Workspace sidebar on the left of each screen for navigation to other tabs. You can also click the "Referral Inbox" link at the top right of each page to return to this tab.

The Referral Inbox displays referrals made to the Community Partner's organization. The table on this screen displays some preliminary information about each referral, including the resident's name, the date of the referral, the resource requested, the location requested and the referral status. At the end of each row, the

“View” column has an arrow that can be clicked for the user to view the referral details pages. Above the table, there are several search functions that allow users to quickly filter through referrals, including searching by client name and filtering by location or resource requested, status, date of referral or days open.



The Referral Outbox mirrors the Referral Inbox and shows all referrals created by the organization. This allows the organization to track and keep up with referrals sent out on behalf of their clients. The filters on this tab are slightly adjusted, allowing the user to search by what organization or resource the referrals were for, as well as searching by the name of the staff member who created the referral.

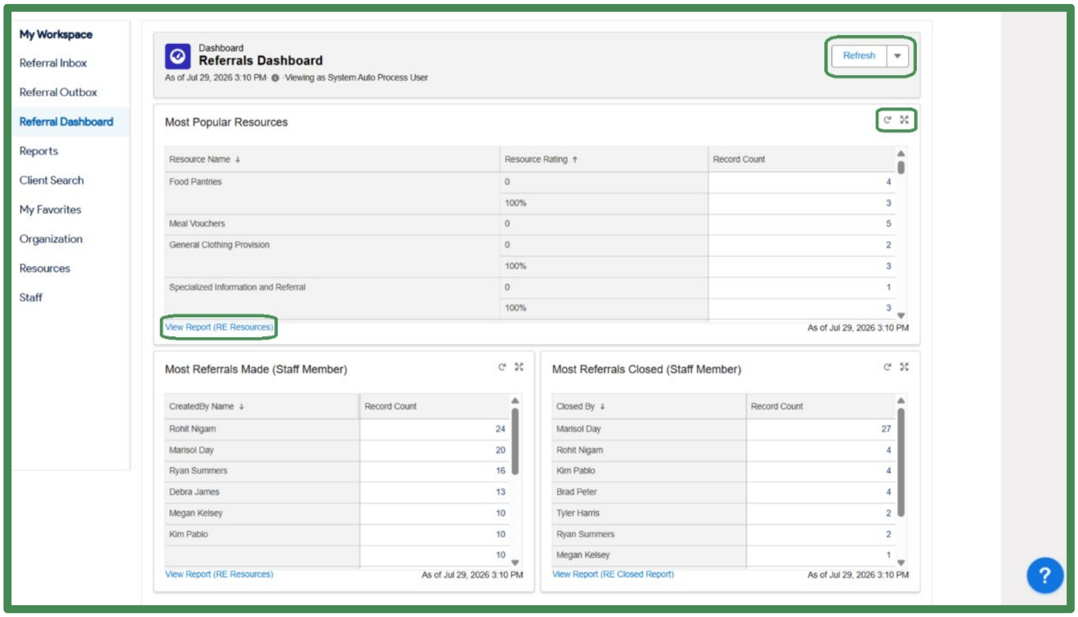


Referral Dashboard & Reports

The kynect resources system houses various reporting mechanisms for organizational users to track metrics within the system. These statistics can be useful to the organization for monitoring activity, supervising staff, or even as documentation to be included in applications for funding. There are two tabs available to users to access this data.

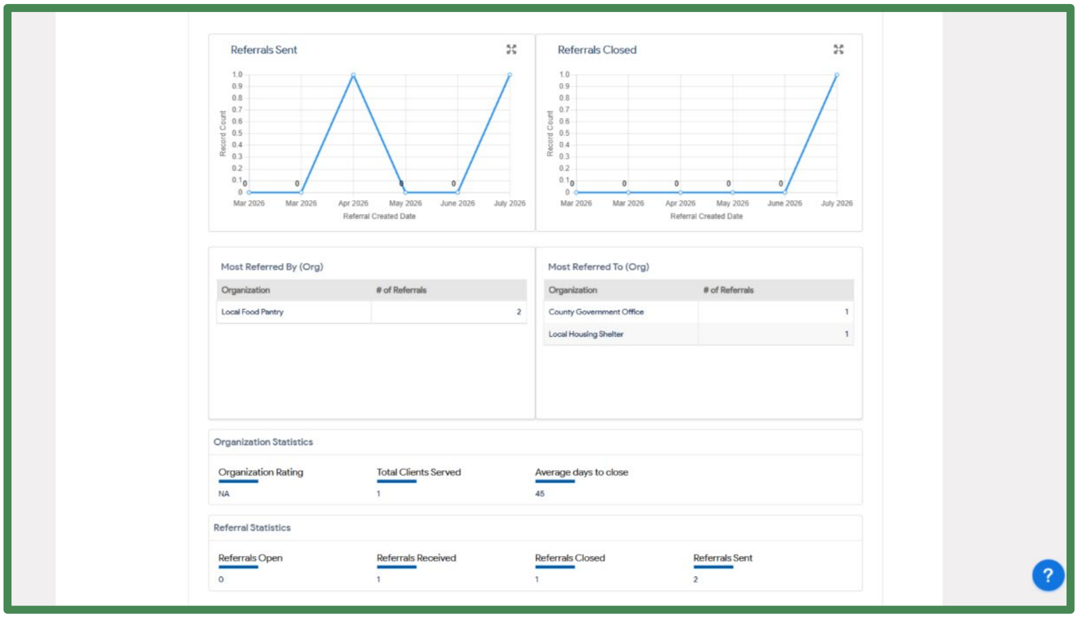
Referral Dashboard

The Referral Dashboard tab is meant to function as an overview of the organization's kynect resources data. The top half of the page is an interactable dashboard with three expandable reports. Clicking the "Refresh" button at the top right will update the report counts, and clicking the drop-down arrow next to "Refresh" allows you to download the three reports view as an image.



In each individual report block, you can refresh or expand the table in the top right corner. You are also able to view the report in its own page and access additional tools by clicking "View Report" in the bottom left corner.

The bottom half of the Dashboard tab shows some static numbers of recent and all-time activity. This includes referrals sent and closed in recent months, number of clients served, and organizations most referred to and from. With this, you can see your most frequent collaborators in your community and your organization's reach.

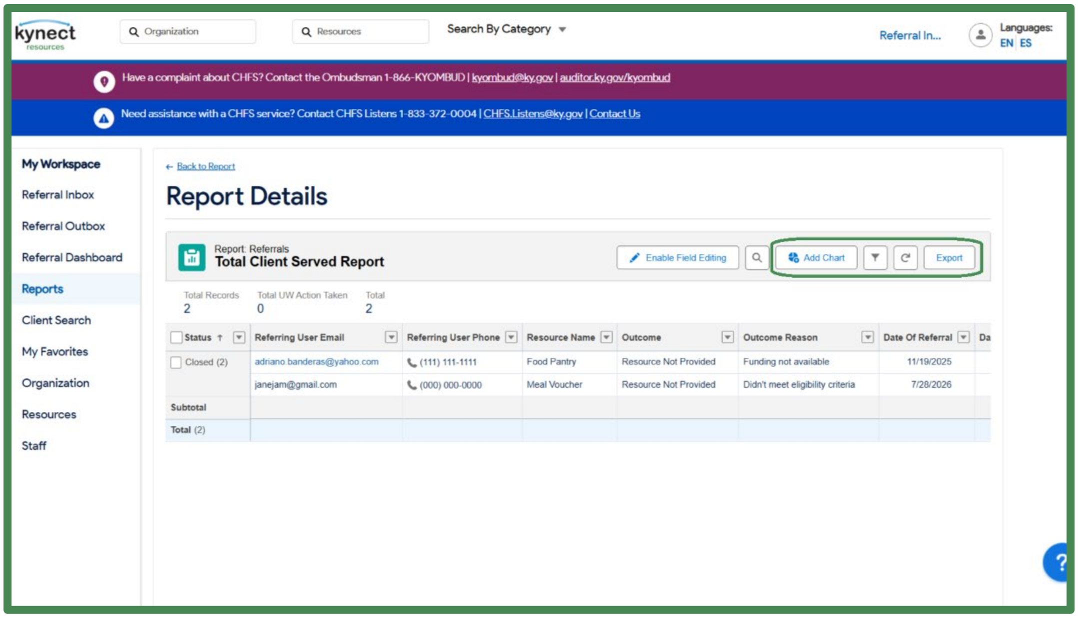


Reports

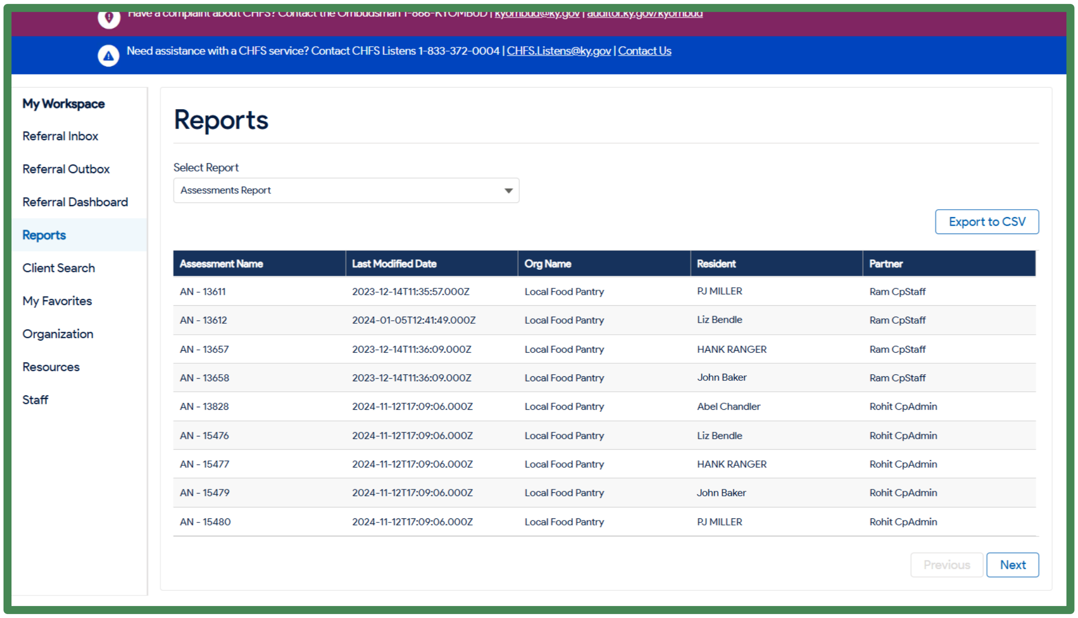
The Reports tab houses three full reports on various activity in the system: Total Clients Served, Assessments, and Staff Data.

The Total Clients Served Report shows historical record of all referrals made to your organization. When viewing the Total Clients Served Report, or reports opened from the Dashboard, you can use the tools on the top bar to add a chart visualizer, adjust the filters, and export to Excel. Any filter or chart adjustments will reset when closing the page. When adding a chart, you have the option to select between various graph styles and variables. There are two main filters that can be adjusted on reports. The Date filter allows you to adjust for a specific date range of results and specify based on the Date of Referral, Date Closed or Last Modified Date. The Show Me filter allows you to adjust the scope based on assignments, and includes a few pre-set options:

- My referrals: Referrals assigned to you
- My team's referrals: Referrals assigned to others in your organization
- User owned: Referrals assigned to anyone in your organization
- Queue owned: Unassigned referrals
- All: Assigned and unassigned referrals



The Assessments and Staff Data reports are static tables that allow for sorting by columns but not filtering or additional tools. On the Assessment report, you can view historical record of all assessments conducted by your organization's users.



The Staff Data report details user-specific activity for managerial staff. Please note that the Staff Data report is only visible to CP Admin users.

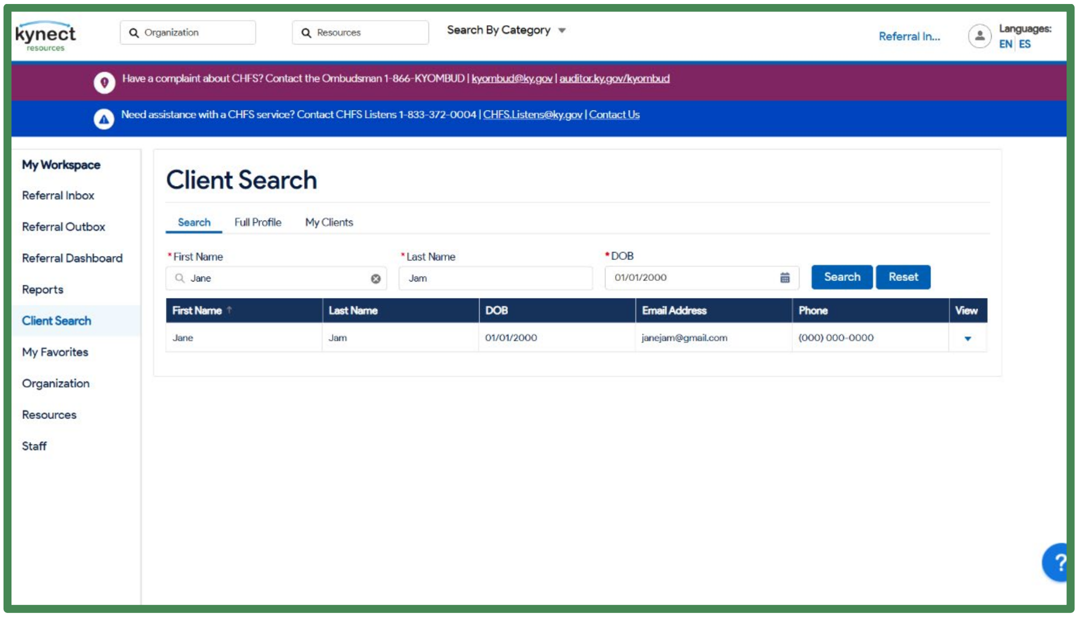
Client Search

The Client Search tab allows users to look up residents in the **kynect resources** system to make referrals, conduct assessments, and access their OneView. There are three sections within the Client Search tab to identify different levels of access.

Residents with a **kynect resources** account and residents that have applied for state assistance programs will appear in these search results. If you are attempting to search for a resident who is not appearing in search results or does not have a **kynect** account, please see the Adding a Resident Record section.

Search Tool

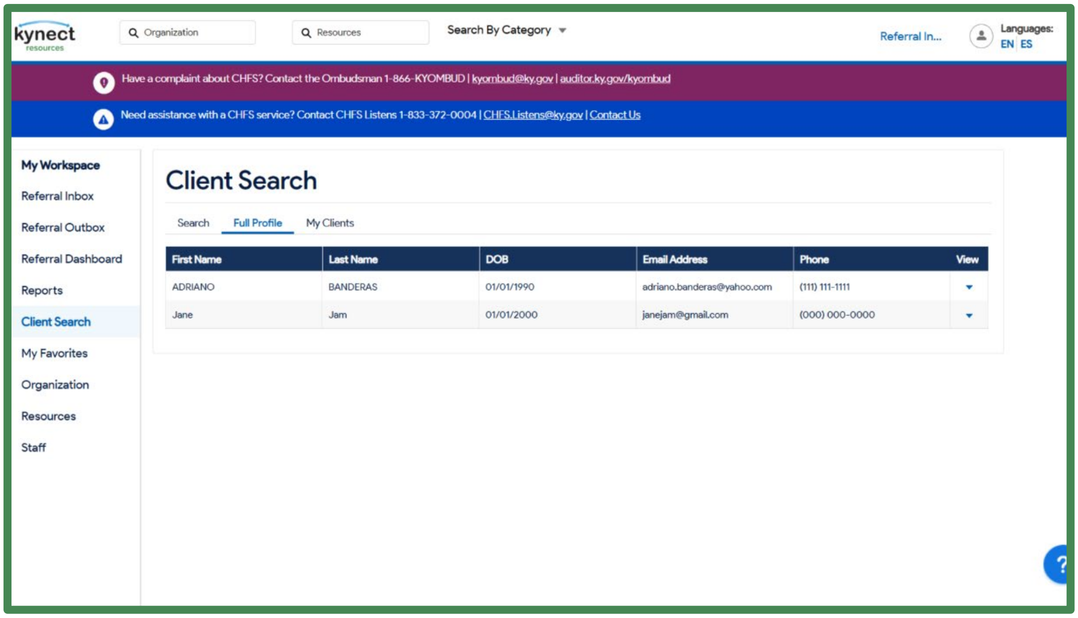
To search for a resident within the **kynect resources** system, enter the resident's first name, last name, and date of birth. All three search criteria must match to populate a result, so be aware of any recent name changes, first or middle name usage, or special characters in a first or last name that could affect search results. After clicking "Search," matching residents and their contact information will display. Selecting the down arrow in the "View" column will allow you to open the resident's OneView, create a referral for them, or request their consent.



Full Profile List

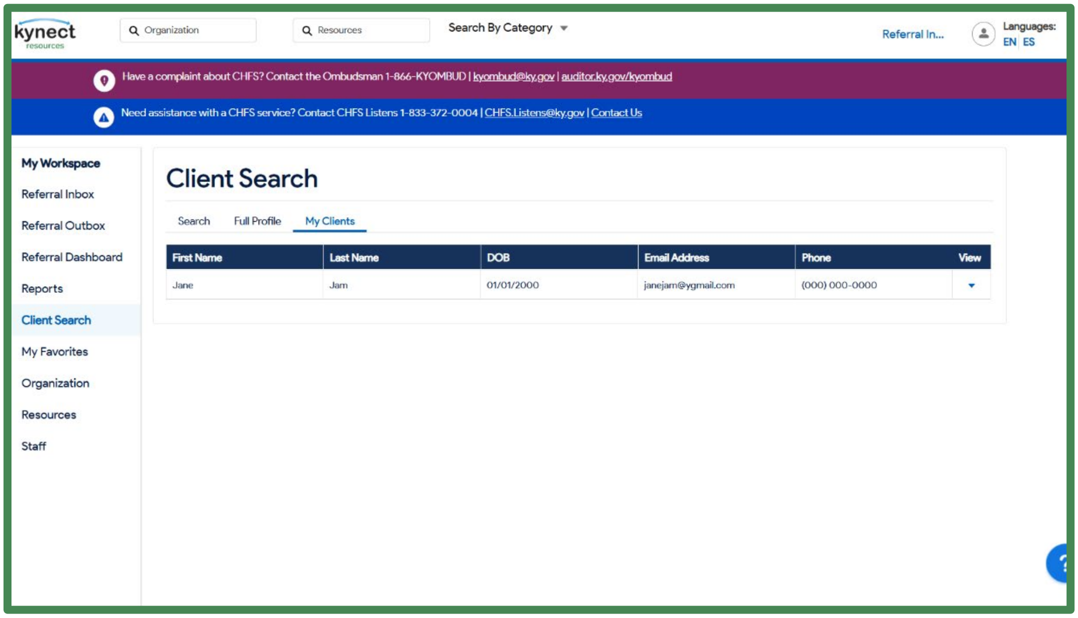
The Full Profile section shows all residents that have granted your organization consent to view their extended profile information. If a resident revokes their consent from your organization, they will no longer appear on the Full Profile list.

By selecting the header of any column, you are able to sort by that column either in ascending or descending order to help you find specific residents faster.



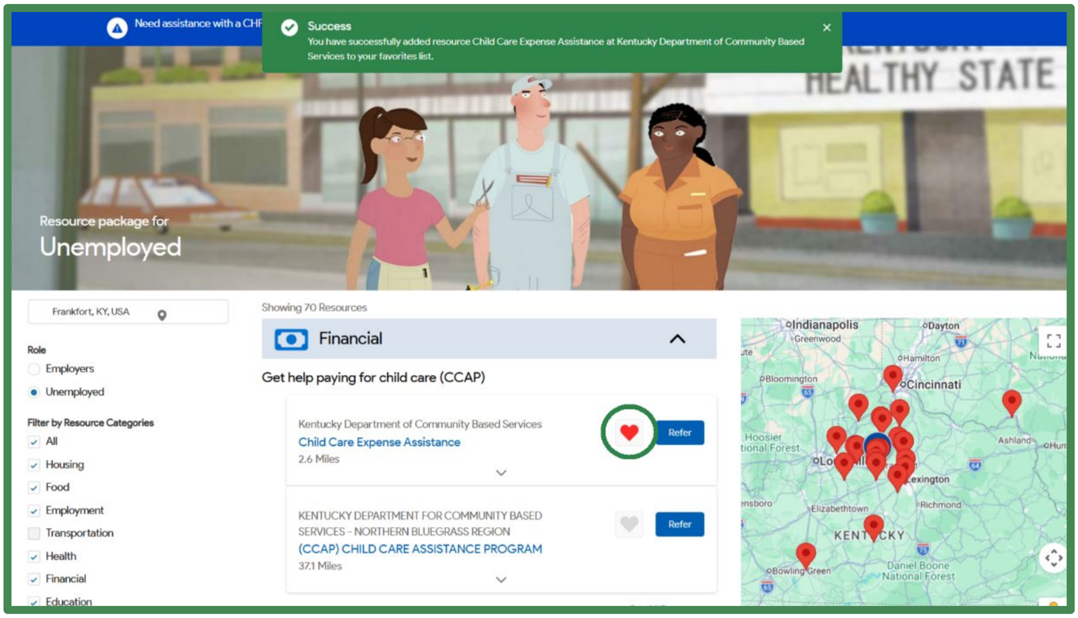
My Clients List

The My Clients section displays residents that you have manually saved. When viewing the Resident OneView, you can add residents by clicking "+ Add to My Clients," or "Remove from My Clients" to take them off the list. The My Clients list is individual to each user and also allows for sorting by each column.

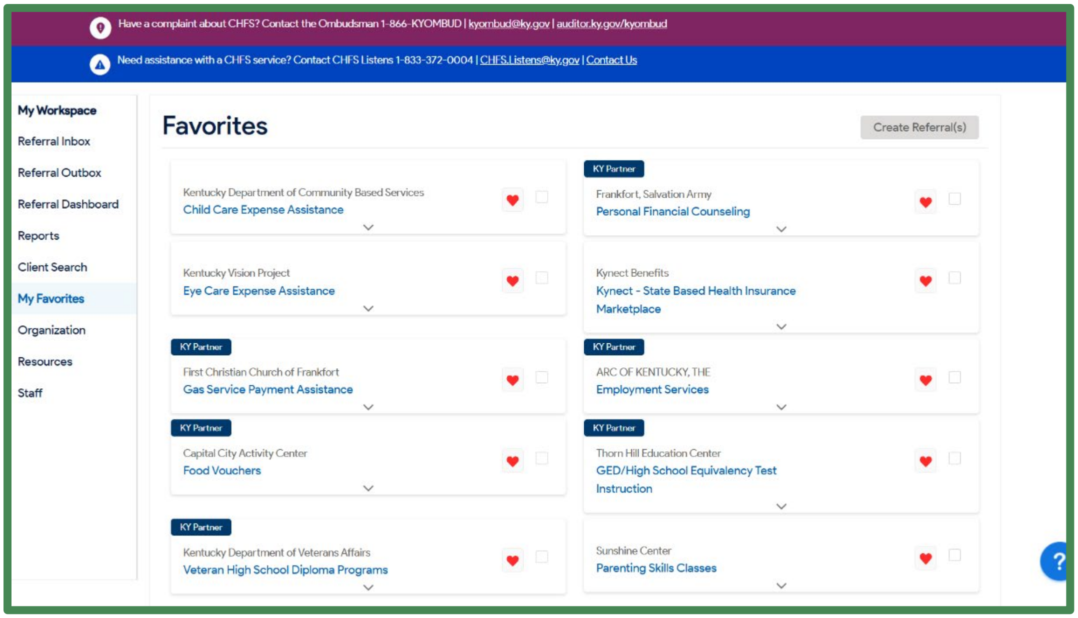


My Favorites

Using the My Favorites list is an excellent way to save your favorite community resources for future reference and referrals. When searching the directory for a resource, click the Heart icon next to the listed resource to add as a favorite. You can also click the heart again to remove it.



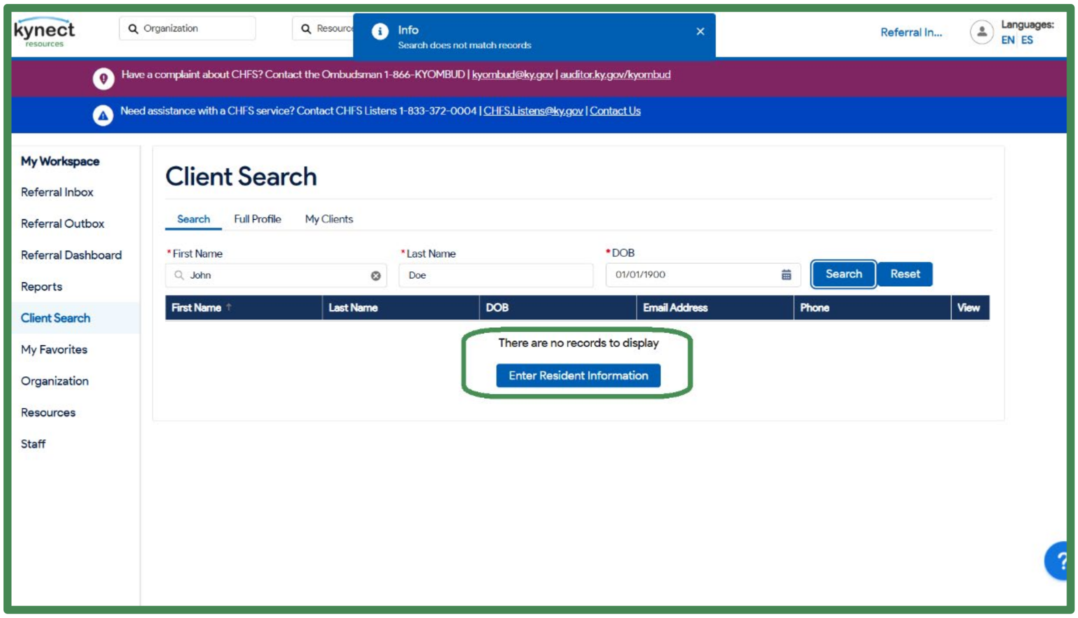
There is no limit to how many resources can be added, and the My Favorites tab is unique to each user. Additionally, favorited resources can be selected on this page for [individual or bulk referrals].



Resident Records

Adding a Resident Record

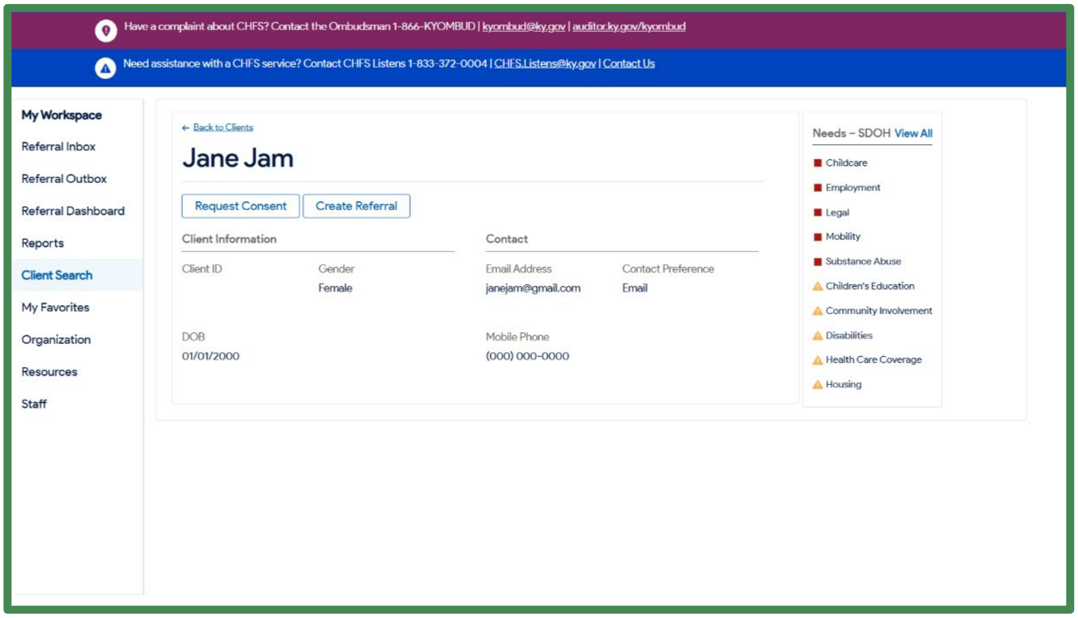
When searching for a resident, you may get no results if the individual has never made a kynect account. If no record is found when searching, there will be an option to click "Enter Resident Information." Then, on the Resident Information screen, enter the Resident's name, date of birth, and contact information, and click "Save." This will prompt an email to the resident to create an account within the system.



Please note that the resident will need to complete the account creation process before you are able to interact with them within the system.

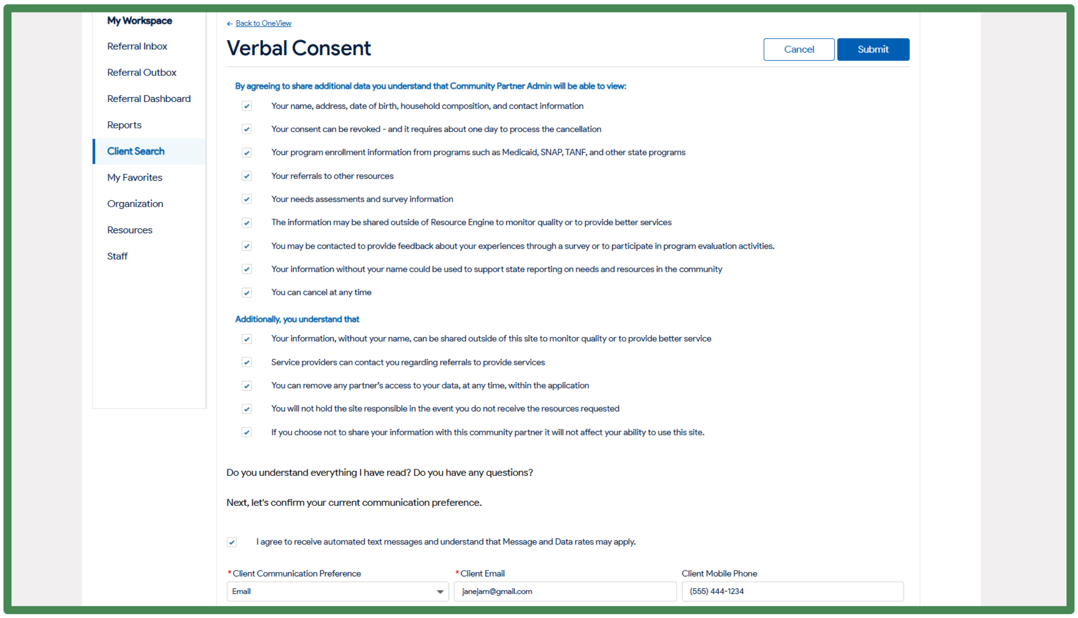
Resident Consent

Within the kynect resources system, there are two levels of access to resident data for Community Partners: a simplified contact access view, and full profile access. When first looking up a resident, the Resident Detail screen has minimal information, primarily their provided contact information, and the option to create a referral. It also displays their most recent Needs Assessment results, if they have taken one previously. This is meant to be the minimum required information to support the resident through the referral process.



When viewing the simplified profile, Community Partner users have the option to Request Consent from the resident to gain access to their expanded profile information, or their OneView. Requesting consent is a key part of the **kynect resources** system, and the privacy of the residents and their information is critical to maintaining a safe, secure, and trustable system.

There are three methods to Request Consent from the resident. When meeting with a resident in person or speaking via phone, the resident may provide Verbal Consent. Click the “Verbal Consent” option and read aloud each statement word for word, while checking the box for each line. When completed, click “Submit.”

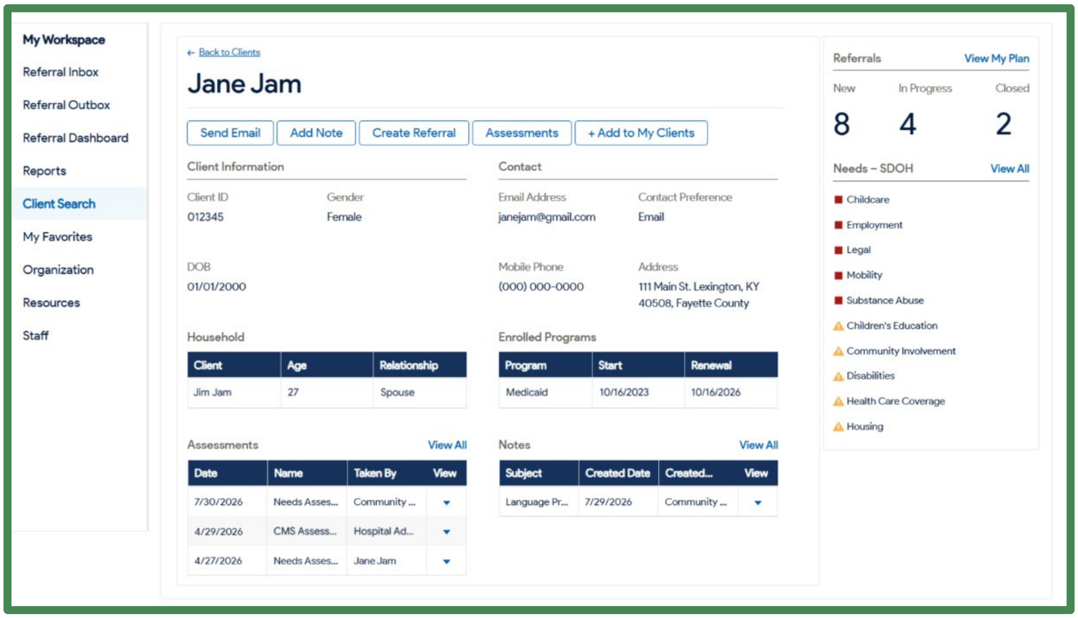


The other two options, “Send Email” or “Send Text,” will only appear if the resident has included those contact methods in their profile information. Selecting either of these options will generate a consent request that is sent directly to the resident for them to approve access to their profile.

When consent is approved by a resident, all users within that organization will be able to view that resident’s OneView. Consent can be revoked by the resident for each unique organization within their Privacy Settings at any time, and their profile will return to the simplified view for all users in that organization. As a Community Partner, you are able to re-request consent using the same process.

Resident OneView

After consent has been approved, the Resident OneView contains additional information including their address, household composition, program enrollments, full assessment history and more. It also allows access to various tools such as Needs Assessments, creating notes, and viewing the resident’s My Plan.



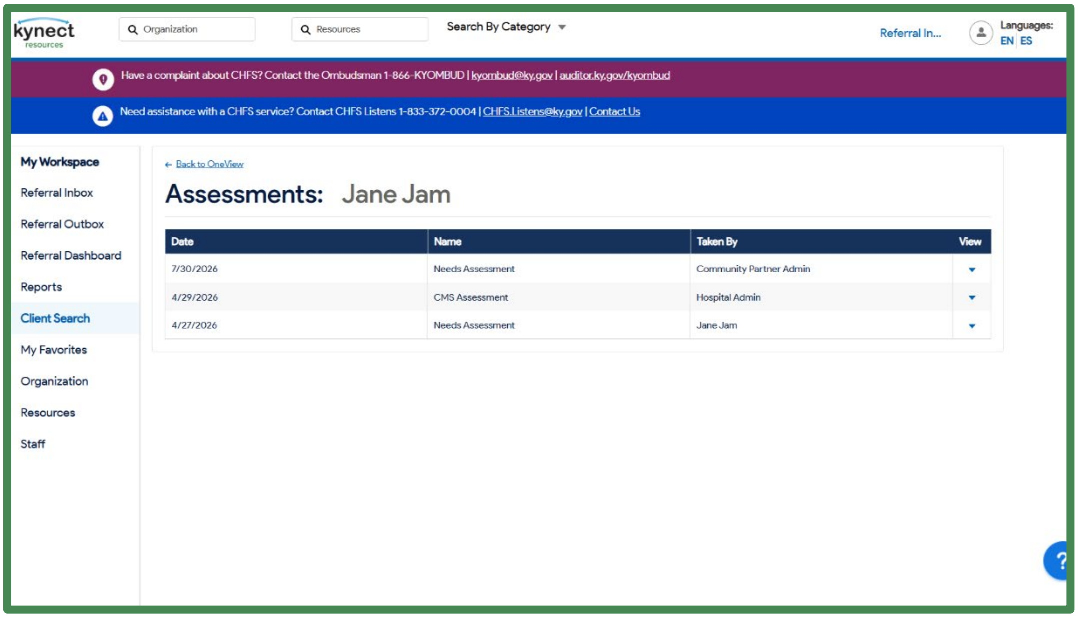
Household & Enrolled Programs

Two additional data sections that are available to view on the resident’s OneView are the resident’s household composition and their enrolled programs. This section displays the other members of the resident’s immediate family and lists their names, ages, and relationship to the resident. For privacy purposes, children under age 18 will not be named in the system and will instead appear only as “(Child).”

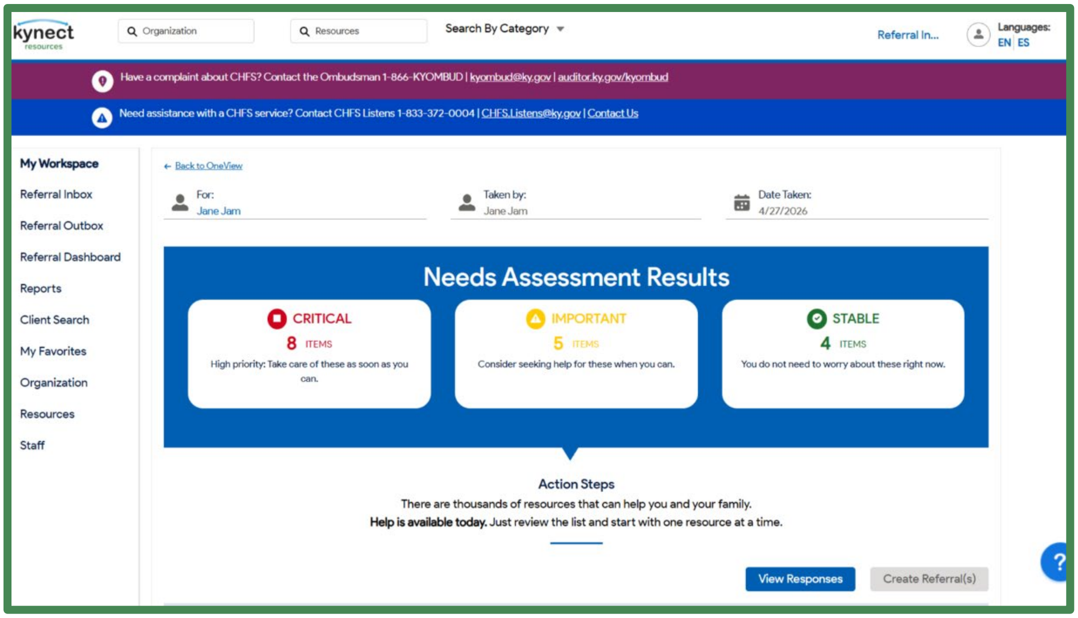
This information can be useful for Community Partners in making referrals that will benefit both the resident and their family members. The Enrolled Programs section will show if the resident is currently enrolled in state benefits, including Medicaid, KCHIP, or a Qualified Health Plan. For each program, it will display the start date of their enrollment and their next renewal date. For organizations that offer services that are only eligible for residents concurrently enrolled in certain programs, they can use this section to confirm a resident's enrollment. Additionally, Community Partners can alert residents about an upcoming renewal date. As the resident's OneView is directly connected to the larger Integrated Enrollment and Eligibility System, all enrollment data is attached to their user profile and up to date across all kynect sites.

Assessment History

Access to a resident's OneView is required to conduct an assessment and to view their full assessment history. This can be accessed by clicking "View All" next to the Assessments table, where a table will display the date, type of assessment, and who it was conducted by.

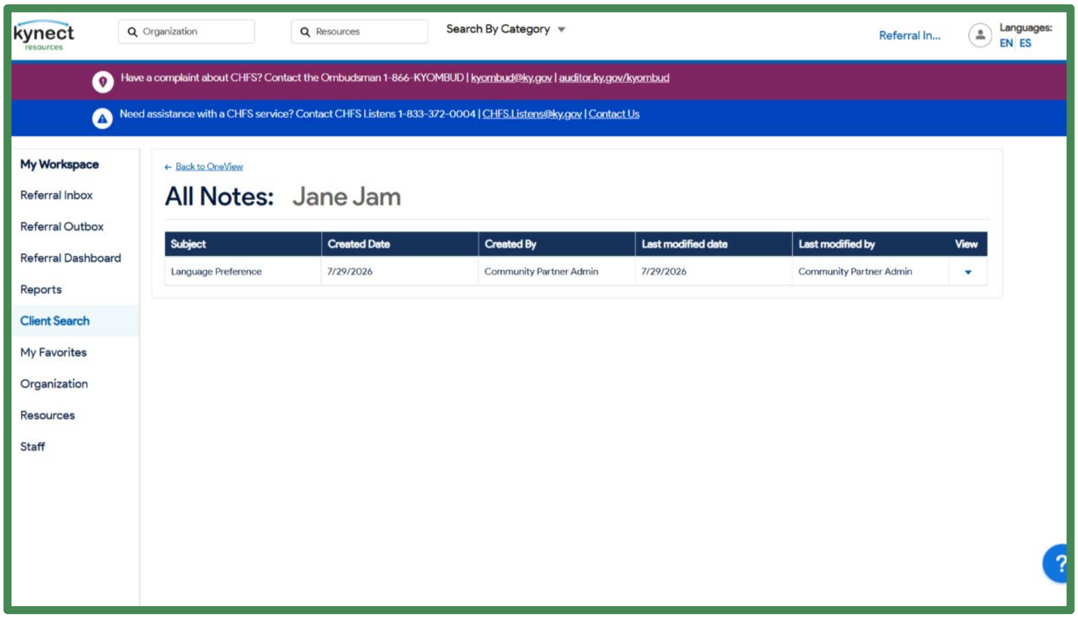


Assessments can be taken by the resident themselves on kynect resources, during a kynect benefits application, or administered by a Community Partner. By clicking the drop-down arrow in the "View" column, you can expand each assessment to see the full results, regardless of the assessment's source.



Resident Notes

On the Resident's OneView, Community Partners can attach Notes to the resident's profile. These Notes can help with inter-organizational collaboration and should be details that are relevant to assisting that specific resident. Examples of this include a note alerting other users that this resident needs a translator, or a note stating the resident does not have ample access to transportation for in-person assistance. Be sure not to include Personally Identifiable Information (PII) or any health information protected under HIPAA within a Note. Resident Notes will be accessible to any users with the resident's consent to view their OneView detail screen.

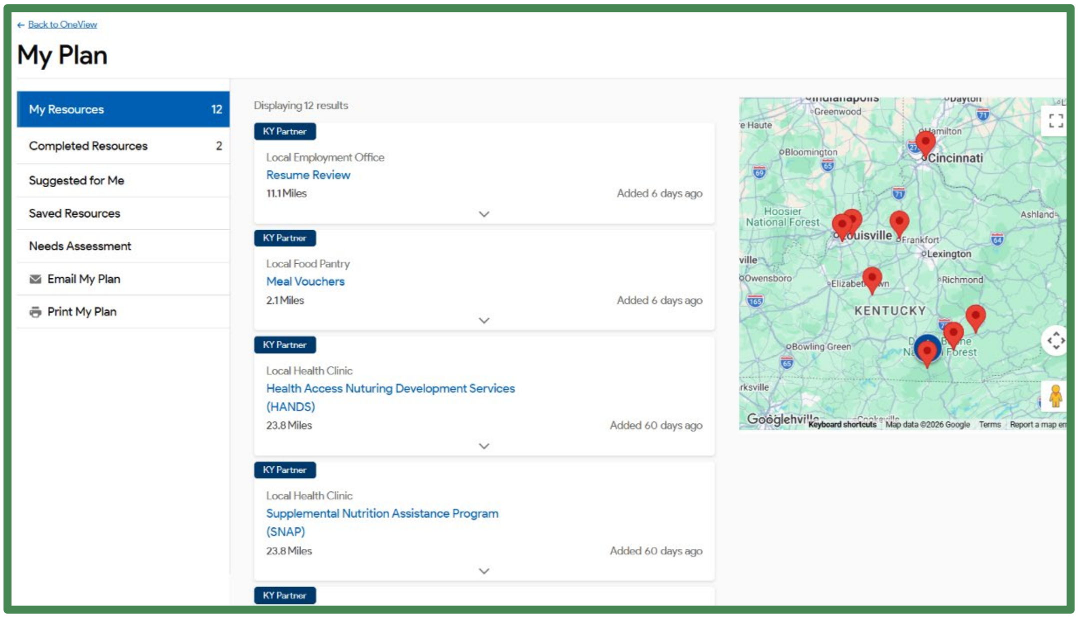


Resident's My Plan

Lastly, within the Resident's OneView, Community Partners have the ability to view a resident's referral history and open up their view of the platform, called the Resident My Plan. The OneView detail page shows a snapshot of the resident's referral history, where referral counts by status – "New," "In Progress," and "Closed – are shown.

To view the full details of the resident's referral history, click "View My Plan." This view is the same view residents have when they log into the **kynect resources** system themselves. Through this view, you can see details about the resident's open and completed referrals, as well as any resources they have saved to their account.

Additionally, Community Partners can print or email the resident's My Plan on their behalf. Selecting either of these options will generate a document version of all their referrals, saved resources, and the attached directory information like addresses and phone numbers.



Referral Management

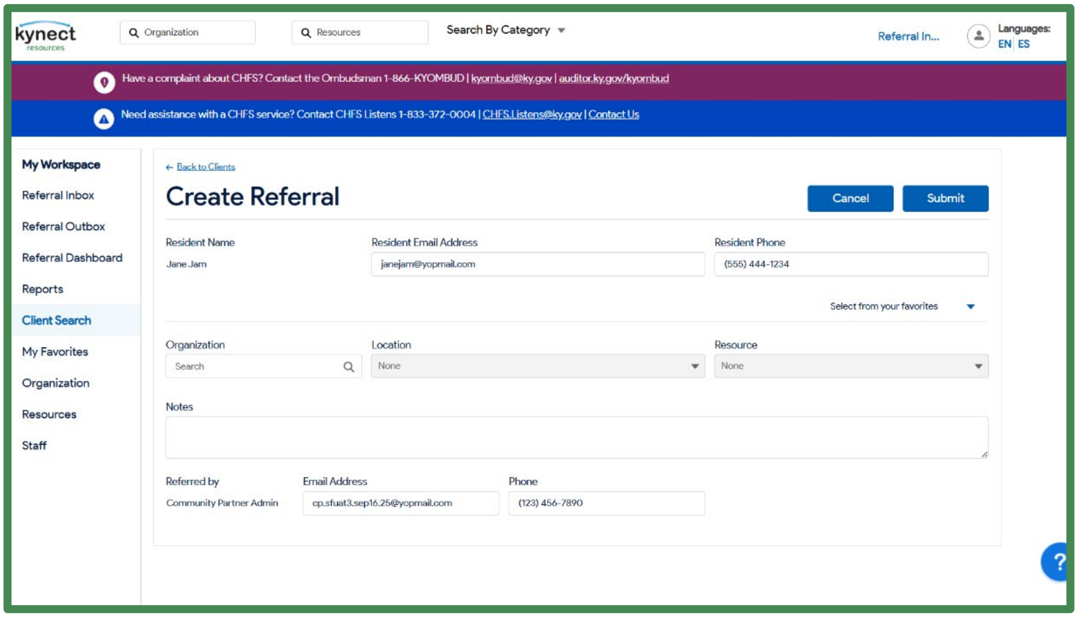
Creating Referrals

Referrals are asks for help that are sent to an organization to request their resources. Consent is not required to create a referral in **kynect resources**.

Referral via Client Search

The Client Search method is best when you know exactly what organization and resource you want to refer a resident for. To begin, search for a resident within the Client Search tab or find a resident on your Full Profile or My Clients lists. Click the drop-down arrow in the "View" column and select "Create Referral."

First, a prompt will appear asking if this referral needs to be marked as urgent. After selecting "Yes" or "No," the Create Referral screen will load with the resident's name and contact information prefilled. Enter the name of the intended organization in the Organization field and select the correct organization from the dynamic search results. Then, select which Location is preferential for the resident. Please note that some organizations will only have one location, while others have many throughout the state. Lastly, select the desired Resource that the organization offers. You also have the option to select from your My Favorites list, which will fill the organization, location, and resource fields. If desired, add a Referral Note that may be helpful for the receiving organization. Click "Submit" and confirm the included contact information for the referral to be sent.



Referral via Resident Detail Screen

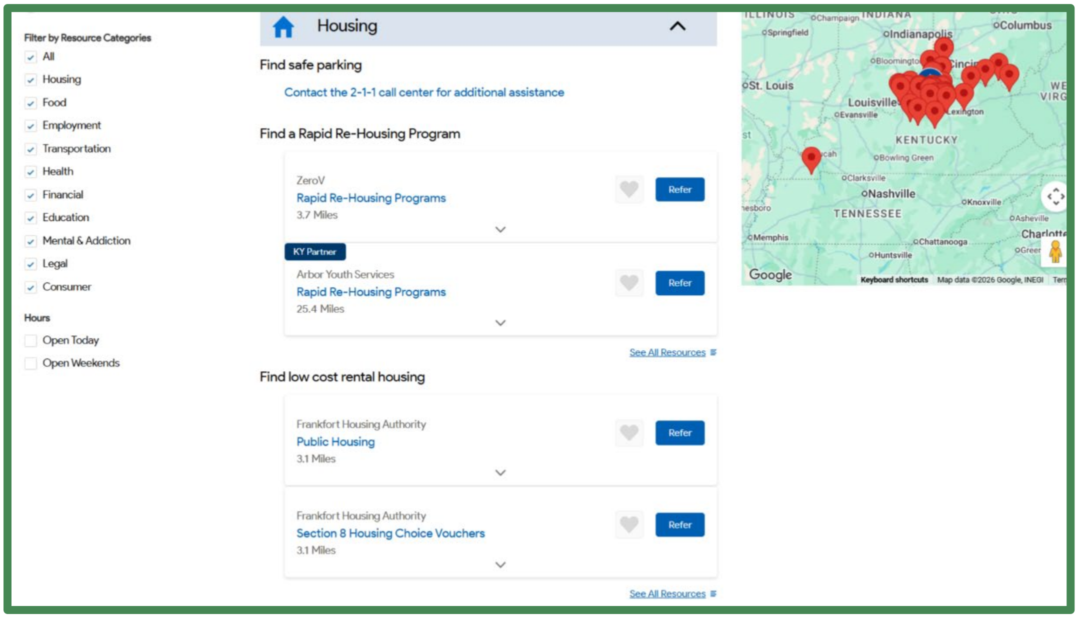
Similar to the Client Search method, making a referral from the Resident Detail Screen is best when you are already working with a specific resident and know which resource you would like to refer them to. This is especially helpful when you are on the Resident Detail screen after responding to a previous referral and want to make a follow-up referral. The “Create Referral” option is visible on both the simplified Resident Detail screen and the expanded OneView.

After clicking the “Create Referral” button, a prompt will appear asking if this referral needs to be marked as urgent. Then, with the resident’s information prefilled, select the organization, location, and resource you want to refer to, or select an option from your My Favorites list. Add a Referral Note if needed, click “Submit,” and confirm the resident’s contact information to complete the referral.

Referral via Directory

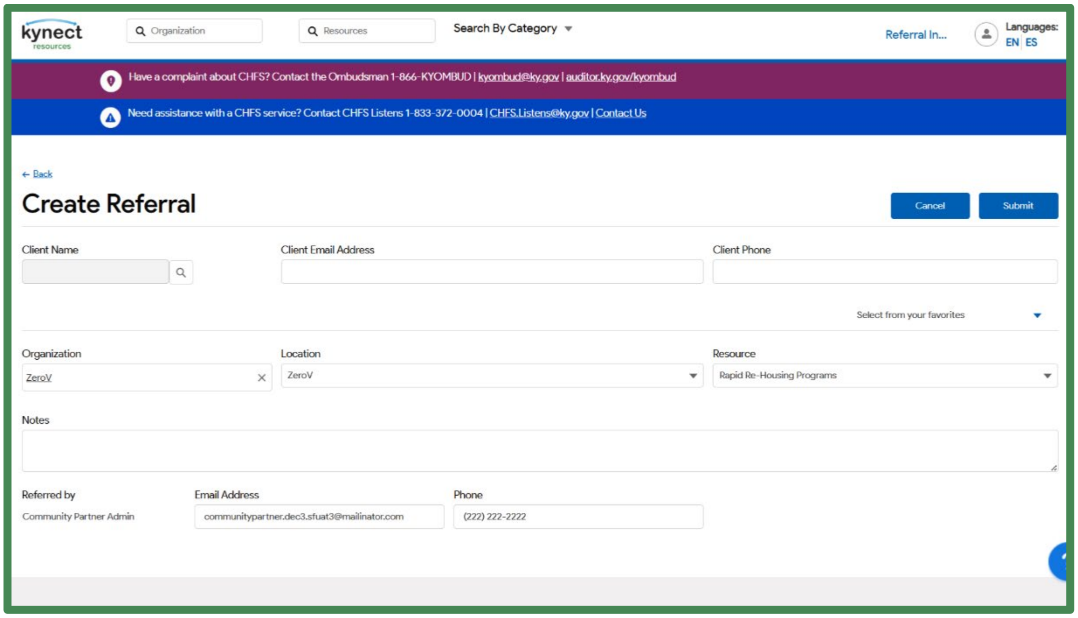
The Directory method is best for when you need to search and discover an appropriate resource before creating a referral for the resident.

Start by clicking the **kynect resources** logo in the top left corner to navigate to the directory. Then, search the directory, either by tile, category, resource name or organization name, to find a resource that matches the resident’s needs.



Consider reviewing the full resource listing by clicking the resource title to ensure that the resident matches any eligibility restrictions listed for that organization. If you use this resource frequently, you can also add it to your My Favorites list from this page. When you have found an appropriate resource, select the "Refer" button.

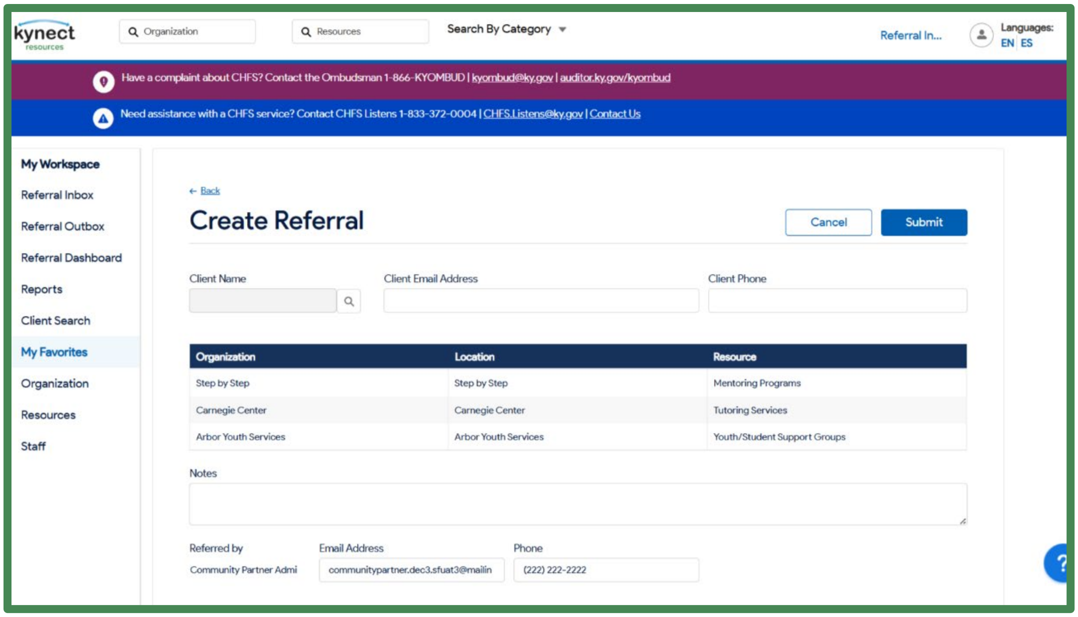
First, a prompt will appear asking if this referral needs to be marked as urgent. After selecting "Yes" or "No," the Create Referral screen will load with the organization, location, and resource fields prefilled. Click the search icon next to the Client Name field to pull up the Client Search window. Enter the first name, last name, and date of birth of the intended resident and click "Select" next to the correct resident. Add a Referral Note if wanted and click "Submit." Confirm the resident's contact information and the referral will be sent.



Referral via My Favorites

The My Favorites method is best for users who have built up their My Favorites list and have a resident in need of one or more resources on their list. The My Favorites tab allows multiple referrals to be made for a single resident at the same time.

Navigate to the My Favorites tab, check the box for each desired resource, and click "Create Referral(s)." The Create Referral screen will show each resource selected. Click the search icon next to the Client Name field to pull up the Client Search window. Search for the intended resident and click "Select." Add a Referral Note if needed, and that note will be sent to each selected organization. If a note needs to only go to one agency, complete that referral separately. Confirm the resident's contact information and the referral(s) will be sent.

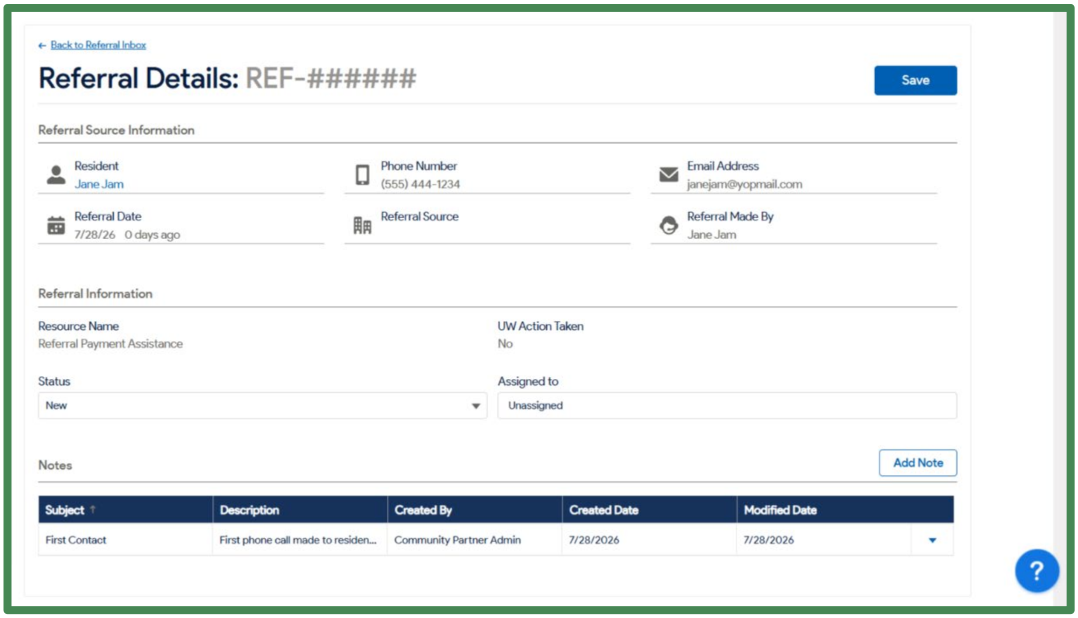


Managing & Closing Referrals

When opening a received referral from the Referral Inbox tab, there is various information and multiple tools provided to assist with the referral closure process.

Referral Detail Screen

In the Referral Inbox, select the drop-down arrow in the “View” column next to a referral to open and view the Referral Details screen. Community Partners may use the listed phone number or email address to conduct outreach and respond to the referral to serve the resident’s needs.



Changing Referral Statuses & Assigning Referrals

Updating the referral status on the Referral Details screen is an important part of the referral closure process. When editing a referral status, there are three statuses available to choose from: “New,” “In Progress,” or “Closed.”

All referrals have the “New” status when they are first sent, and once an organization has begun working on a referral, the status should be moved to the “In Progress” status. “In Progress” means the Community Partner is taking steps to contact the resident and provide services. Marking the referral as “In Progress” also lets United Way Referral Specialists know that your organization has begun assisting the resident for that referral.

Additionally, when starting to work a referral, use the “Assigned To” field to assign the referral to a specific user. It is good practice to assign all referrals, even to yourself, so that all reports and metrics are correctly linked.

Changing the status to “Closed” begins the final Referral Closure steps. Be sure to hit “Save” in the top right corner after making any changes on the Referral Detail screen.

United Way Referral Assistance

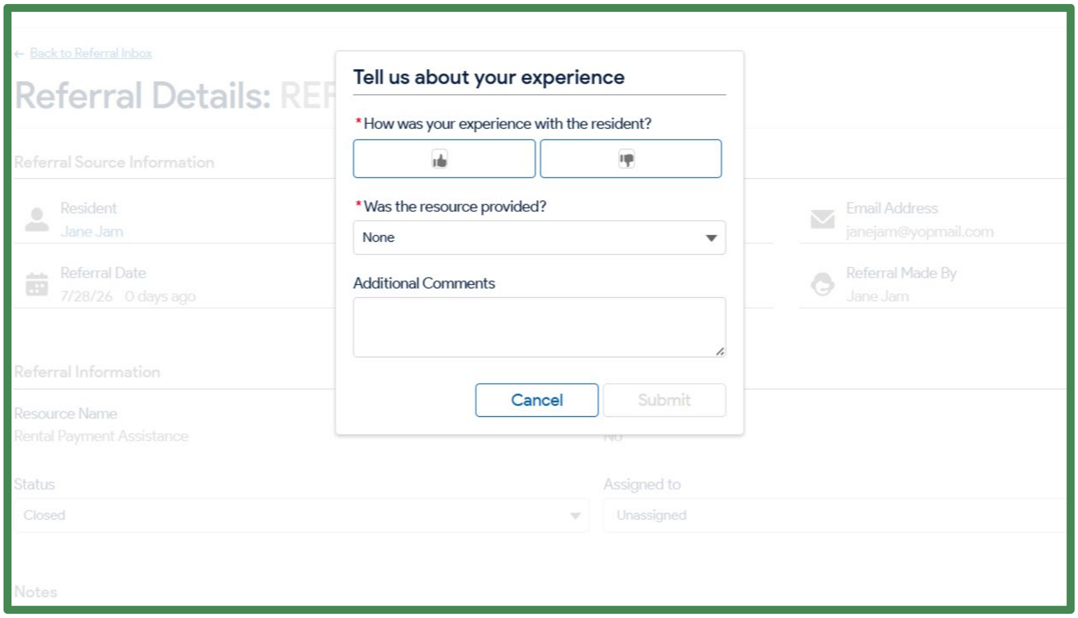
The “UW Action Taken” indicator lets you know if United Way Referral Specialists have attempted to reach out to the resident yet for this referral. If this indicator is “Yes” and the referral status is still “In Progress,” that may mean the UW Specialists were unsuccessful in reaching or helping the resident, and you can still reach out to the resident to close the referral. Alternatively, if a referral was over 14 days old and no users in your organization had changed the status to “In Progress,” you may see this indicator marked as “Yes” and the referral status marked as “Closed by UW.”

Referral Notes

Notes can be attached to a referral when the referral is created, being worked on, or closed out. Referral Notes can help record-keeping, like leaving a note each time a contact attempt has been made. Be sure not to include Personally Identifiable Information (PII) or any health information protected under HIPAA within a Note. Notes attached to a referral are solely related to that specific referral and not the Resident’s profile, unlike Resident Notes.

Referral Closure

The “Closed” status indicates the referral has been completed and no further outreach needs to be done. After changing a referral status to “Closed,” click the “Save” button in the top right corner of the Referral Detail screen. This will prompt a few follow-up questions about the outcome of the referral.



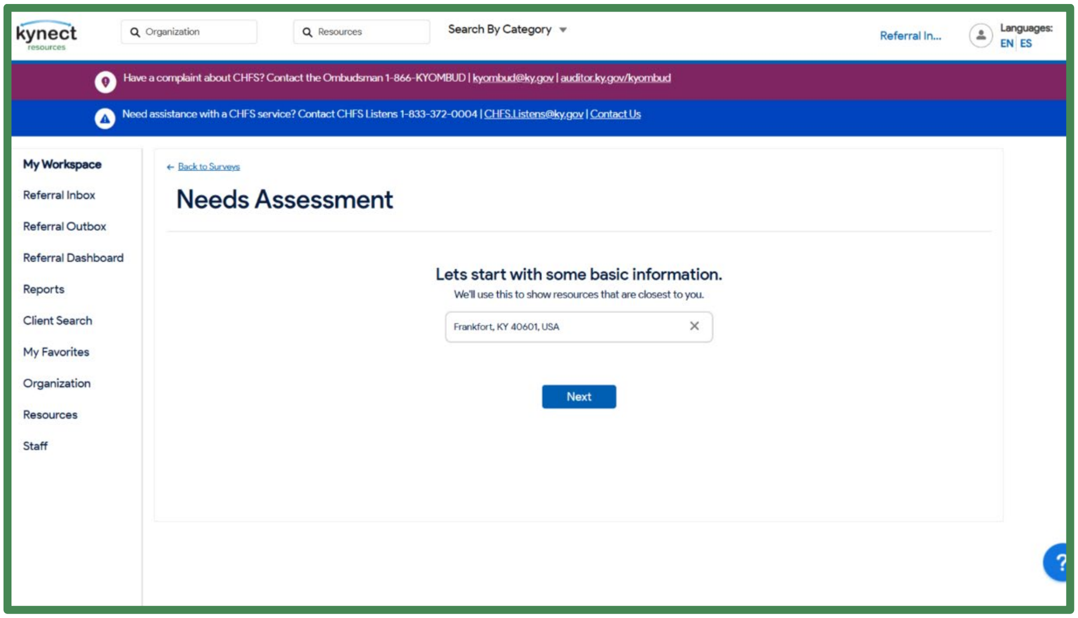
First, select whether your experience with the resident was positive or negative, then select whether the resource was provided or not. If the resource was not provided, a second field will appear and ask for you to select the reason why the referral was not provided, with options like “Unable to Reach Resident,” “No Funding Available,” and more. Please note that marking a referral as “Resource Not Provided” does not negatively impact the organization or remove the referral’s eligibility from the [Incentive Initiative](). Lastly, leave any Additional Comments regarding the closure of the referral and hit “Submit.”

Assessments

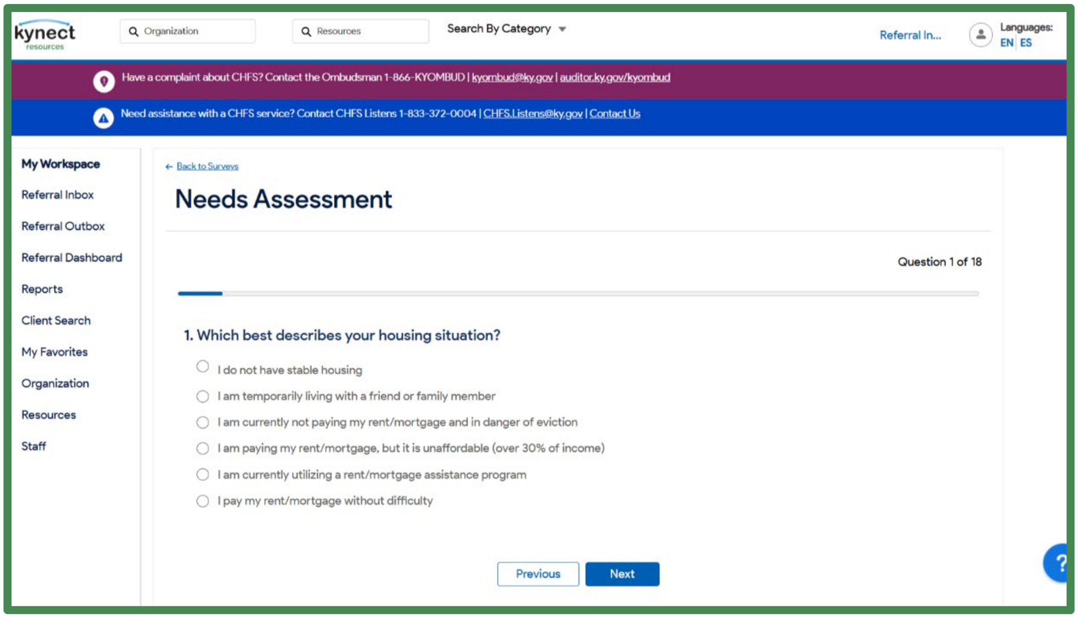
Conducting the Needs Assessment

In the **kynect resources** system, Community Partners can conduct a Needs Assessment for residents, based on the Social Determinants of Health (SDOH) framework. Consent is required to conduct an assessment or to view the resident's Assessment History. The OneView page will also display a pop-up message if it has been longer than six months since the resident has last taken the Needs Assessment.

From the Resident OneView Screen, users can click "Assessments," and then click the "Get Started" action button to begin the Needs Assessment. Start by entering the resident's city or zip code so that the assessment results will populate relevant resources close to the resident, and the select "Next" to begin.

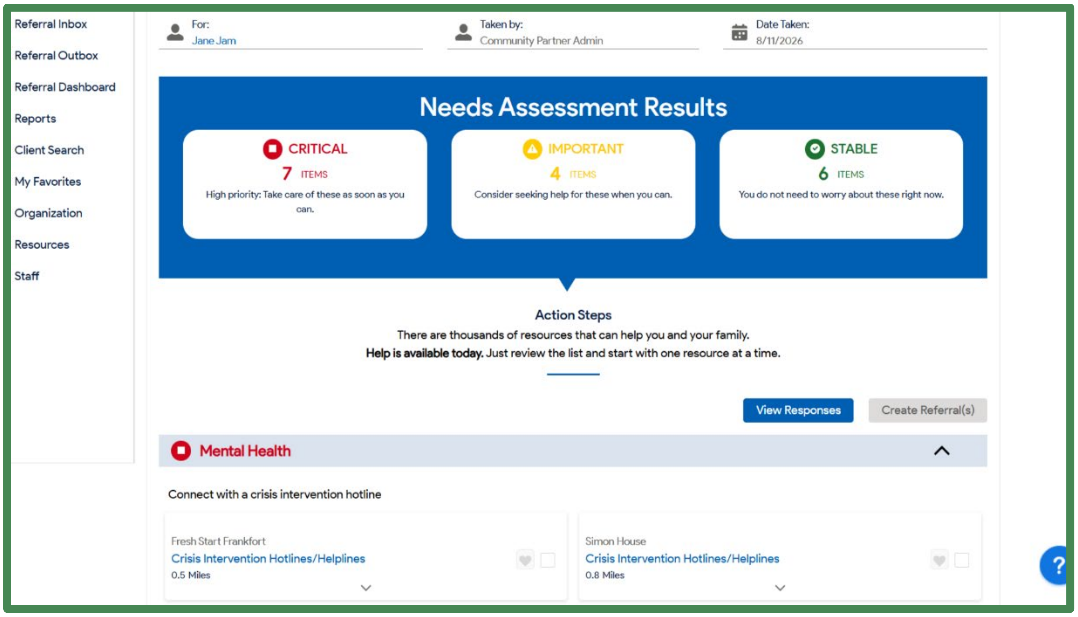


There are currently 18 Social Determinant of Health Questions in the Needs Assessment. Most questions have multiple detailed answers, but some questions only ask whether or not the resident is looking for assistance as to avoid collecting sensitive information. Any question can be skipped if the resident does not feel comfortable answering by selecting "Next" with no selection made. At least 10 out of the 18 questions must have an answer for the assessment to be completed. Click "Submit" on the last question screen to finish the assessment.



Assessment results are displayed to indicate the risk level:

- "Stable" with a green checkmark
- "Important" with a yellow caution sign
- "Critical" with a red square

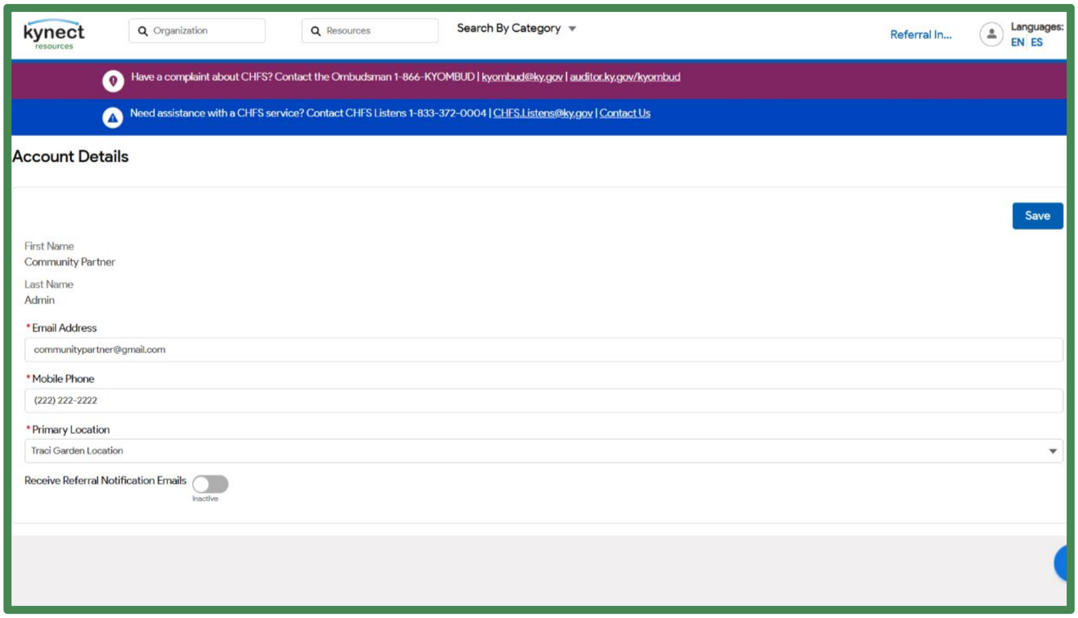


On the Assessment Results screen, users can review the resident's individual responses and navigate through the suggested resources based on the Assessment results. You can select one or multiple resources on this page and click "Create Referral(s)" to immediately make a bulk referral for the resident's needs.

Account & Organization Settings

User Account Settings

When a user needs to update their account settings, they can navigate to the Account Details page by clicking the user icon at the top right corner of any screen and selecting "Account." On this screen, the user can update their email, phone number, and Primary Location.



Referral Notification Emails

By default, organizational users who have completed onboarding receive emails when a referral has been sent to the organization's inbox. Alerts are encouraged to be kept on, when possible, but there may be times when a user finds it necessary to turn off referral alerts. Each user can individually toggle referral emails on and off in their account settings.

To toggle referral alerts, navigate to the Account Details page by Click the toggle for Referral Notification Emails on or off, as desired, and click "Save" in the top right corner.

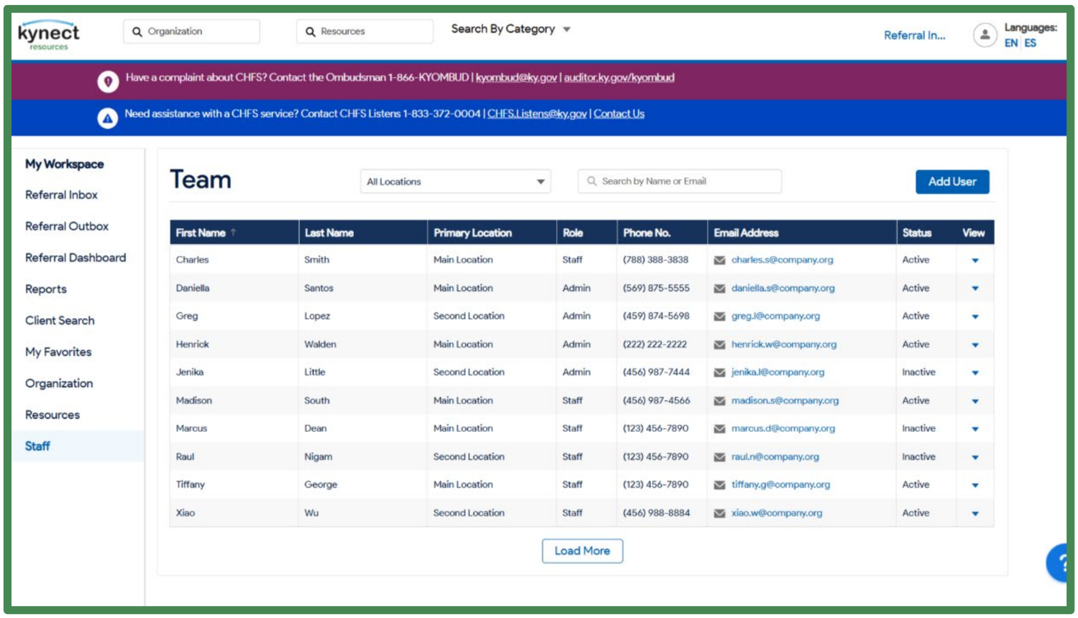
If you are not receiving emails and have the referral alerts turned on, check your junk and spam emails for messages from kynectresources@chfsmail.ky.gov. Some organizational firewalls may also block unknown emails, so please check with your organization's IT department to ensure that the emails can be received.

User Agreement

Users can review the Community Partner User Agreement or the Individual User Terms for using **kynect resources** at any time under account settings. Click the user icon at the top right corner of any screen and select “User Agreement.” Please note that no changes can be made on this page and these terms are what is agreed upon when creating a **kynect resources** account.

Adding, Editing & Removing Staff

Community Partner Admins have the ability to add, update, and remove users from their organizational account within **kynect resources** on the Staff tab. The Staff tab is only accessible to Admin users and contains a table will all users associated with the organization.

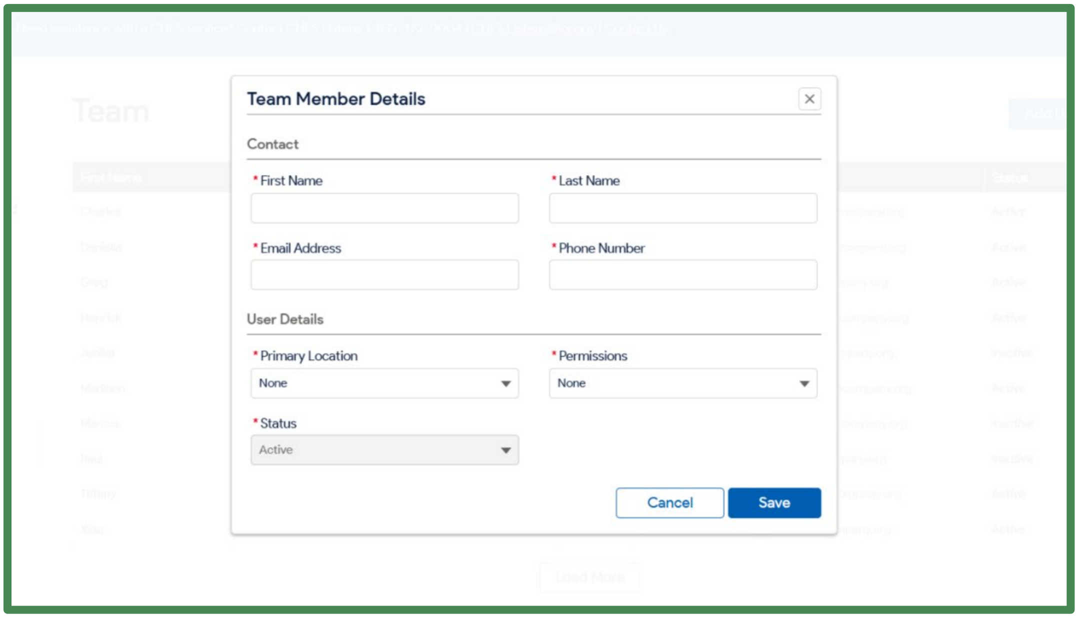


Add Staff

To add a new user, click the “Add User” button on the top right corner of the Staff tab. On the Team Member Details screen, enter the contact information for the user, preferably using the individual’s work email address and phone number. Next, select the Primary Location for the team member out of your organization’s listed Locations. Then, choose a Permissions level for the user.

- Both Staff and Admin users: Create, manage, and close referrals; search for and view resident profiles; request resident consent; conduct assessments

- Only Admin users: Add, edit and remove staff; edit organizational settings; toggle resource visibility



Please note that there is no limit for the number of users that may be added to the account, and it is recommended to have more than one Admin in case of unexpected staff changes.

After clicking "Save," the added user will receive a Welcome email with the next steps to complete the Account Creation process. This link is time sensitive and must be acted upon within 24 hours. If the added user does not create their account in time, Admins have the ability to retrigger the Welcome email up to two more times, by clicking the drop-down arrow in the "View" column for the user and selecting "Retrigger Email."

Editing & Removing Staff

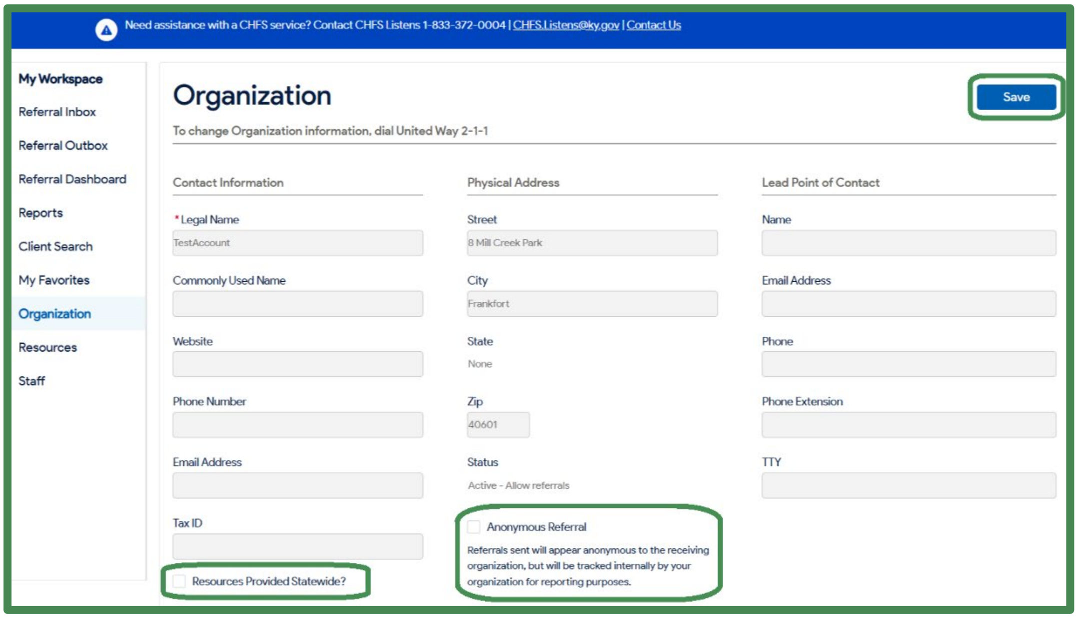
To edit user details or to remove access, use the drop-down arrow in the "View" column for the selected user and click "Edit." On the Team Member Details screen, edit the contact fields as needed and use the drop-down arrows to assign a different Primary Location, change Permissions level, or Status. Click Save to apply the changes or edits.

To remove staff from access to the organization's **kynect resources** account, simply change the user's Status to "Inactive." Inactivating users who are no longer with the organization or team is important for security and Admins will receive email notifications when a user on their team has not been active in the last six months. Please note that users who did not complete the account creation process will still populate on the Staff list, but Admins will not be able to edit their status or inactivate them.

When a user with Staff Permissions needs to be changed to Admin Permissions, the member must first be temporarily deactivated by the Admin using the Status field. The Admin may then re-Add User and assign the Admin Permissions.

Updating Organization & Location Information

Community Partner Admins have access to the "Organization" tab, which displays all current information in the directory about the organization and its locations. All displayed information is based on the United Way directory, as it is the shared basis for the **kynect resources** system. To make changes to any greyed out organizational details, please contact United Way by calling 2-1-1 or emailing your assigned UW Referral Specialist.



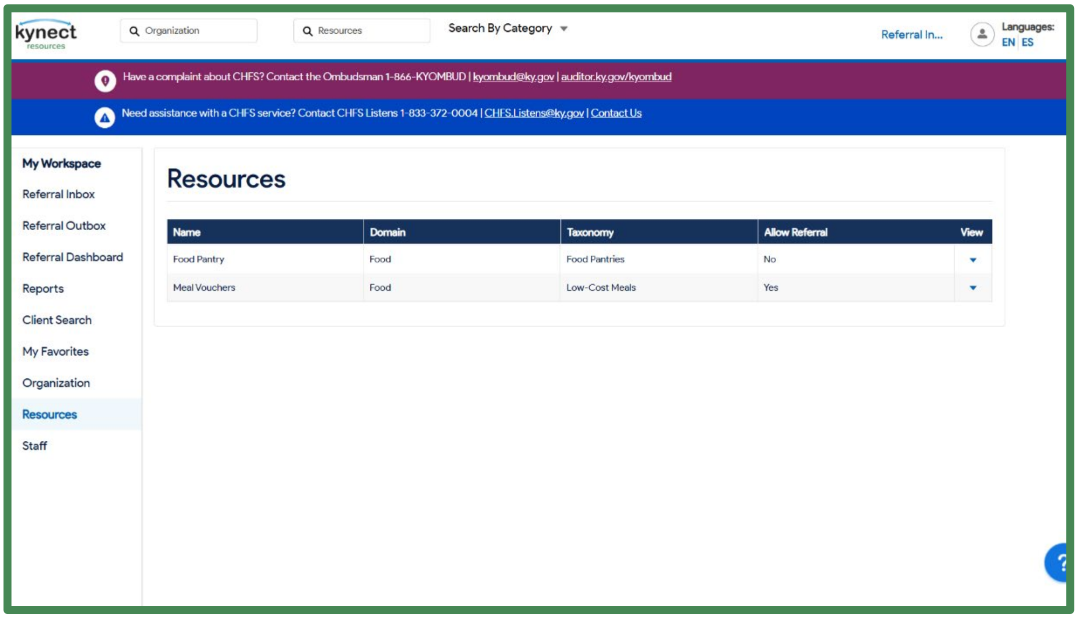
There are two organizational settings that are specific to **kynect resources** and can be changed on the Organization tab. Firstly, there is a toggle to mark your organization as offering its services Statewide. Checking the "Statewide" indicator will make your organization's resources populate in search results regardless of the zip code or city that a resident inputs with their search.

Secondly, the "Anonymous Referrals" indicator allows organizations to send referrals without their organization name attached to the referral. This is particularly useful for organizations related to sensitive issues such as domestic violence or substance abuse, where sending a referral with the organization's name attached could indirectly expose the residents' need for assistance with these issues.

After adjusting either of these settings, be sure to click the "Save" button on the top right of the Organization tab.

Toggling Resource Visibility

The final tab that Community Partner Admins have access to is the Resources tab. On this page, Admins can view all resources that their organization has within the directory and each resource can be individually toggled to receive referrals or not. Click the drop-down arrow in the "View" column and click "Allow/Disallow Referral" to toggle the referrals on or off.



If the toggle is switched to disallow referrals, the resource will remain visible in the directory for awareness but will feature a "Save" button instead of a "Create Referral" button, allowing residents to save the resource for future reference in their account. These toggles can be flipped as the organization's capacity changes or left indefinitely.

If a resource needs to be completely removed from the directory, please contact United Way by calling 2-1-1 or emailing your assigned UW Referral Specialist.

Incentive Initiative

The Incentive Initiative is a program that provides funding for onboarded, not-for-profit organizations for activity they complete in the kynect resources system.

Participating organizations must be confirmed as non-profits by both United Way and the kynect resources team and must be actively providing support services and programs within the Commonwealth of Kentucky. This information is pre-identified, and organizations do not need to register to participate. Organizations also do not need to report any activity for participation, as monthly activity monitoring is conducted via kynect resources system reports and payments are distributed by United Way of Kentucky monthly, either by check or direct deposit. Regular system monitoring is also conducted to identify suspected fraudulent activity, and organizations or users with suspicious activity may have their access limited or revoked.

Current Incentive Initiative guidelines were established in June 2023 and may be modified or ended at any time.

Onboarding

Organizations with at least one onboarded individual receive a one-time payment of $100. An organization can only receive one Onboarding incentive, and additional added staff do not receive additional payments.

Referral Closure

Organizations receive $10 for each referral closed by their staff in the kynect resources system. Referrals must be closed within a reasonable time to serve the resident. Referrals that expire or are closed by United Way Referral Specialists will not receive the incentive.

Assessments

Organizations also receive $10 for each Needs Assessment conducted. At least 10 out of the 18 total questions must be completed for the assessment to be considered complete. Assessments should be administered if a resident has no previous assessment history, when a resident has experienced a major life change since previous assessment, or if it has been more than six months since the previous assessment was conducted.