

# User Handbook

## For Community Partners



This handbook was created to help Community Partners (CPs) use the **kynect resources website** ([www.kynect.ky.gov/resources](http://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) (<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](mailto:kynectresources@ky.gov).



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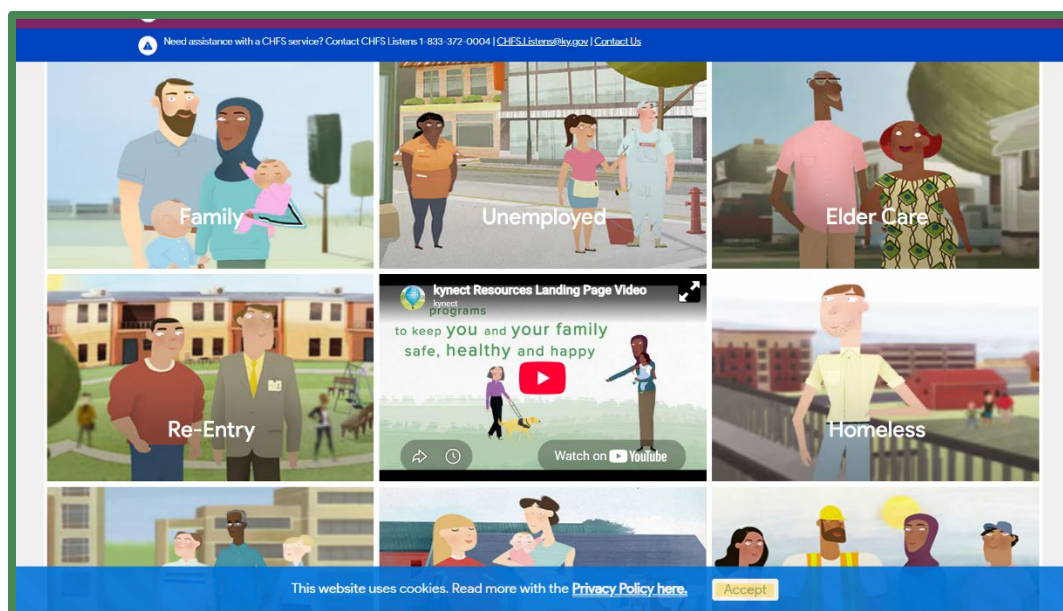
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## Onboarding

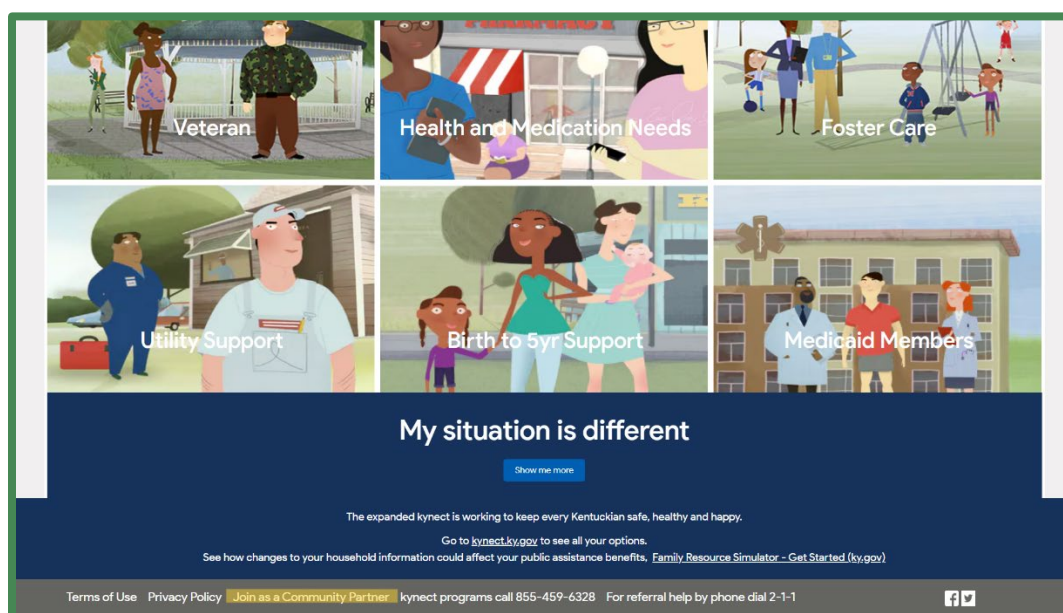
### Claiming

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

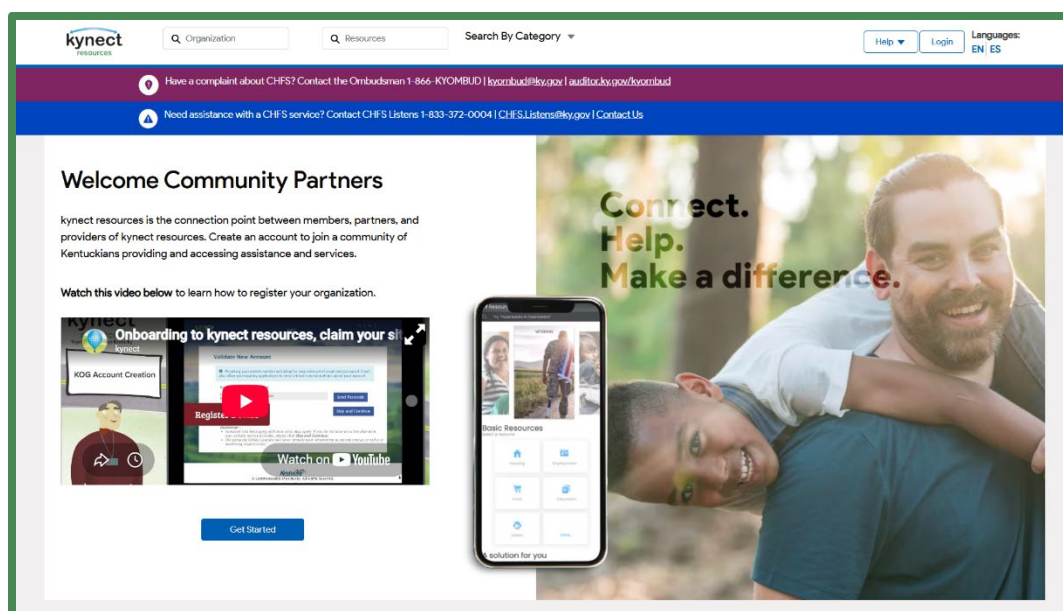
1. Using Google Chrome as the preferred browser, navigate to the landing page at [kynect.ky.gov/resources](https://kynect.ky.gov/resources). Click "Accept" on the bottom pop-up bar to accept the site's cookies.



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

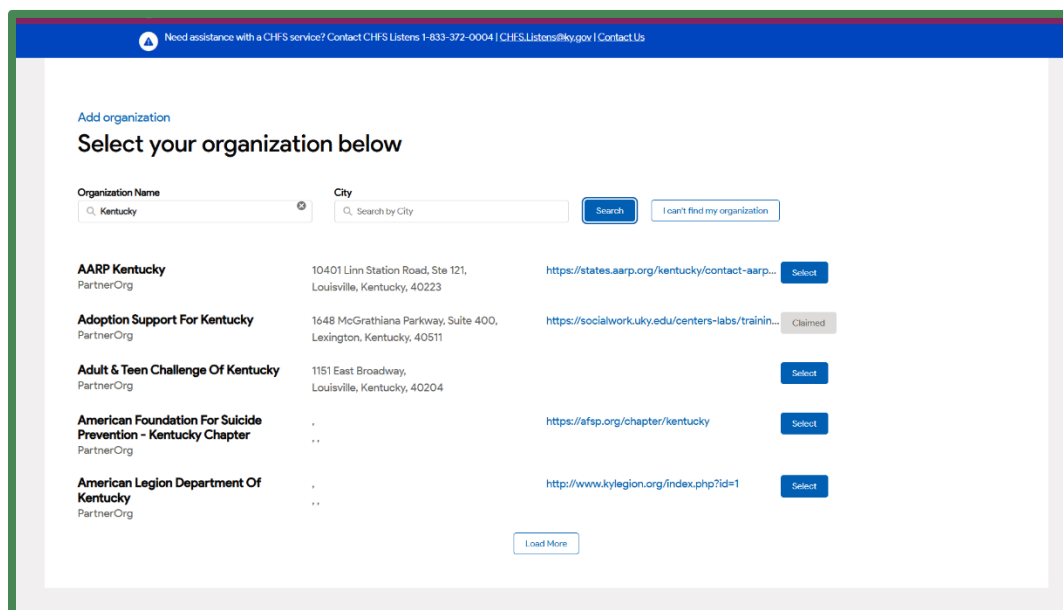


### 3. On the next screen, click “Get Started.”



**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](mailto: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](mailto: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.

**Privacy:** Any data entered here may not be secure and could be deleted at any time.  
**Reduced Functionality:** Features and data on this site may not represent the final product.  
 Use [kog.chfs.ky.gov/home](https://kog.chfs.ky.gov/home) for actual transactions or applications.

[Return to KHBE Self Service Portal](#)

Multiple KYID accounts are not allowed. If you have an KYID account, use it to sign in. If you had a Kentucky Online Gateway (KOG) account, please use that email and password to sign into KYID. You do not need to create a new KYID Account. [Sign in now](#) × Dismiss

Not sure if you have an account? [Forgot email](#)

## Create your KYID account

You will need a KYID account to access the KHBE Self Service Portal.

[Get started →](#)

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.

This screenshot shows the 'Enter your account email' step of a five-step account creation process. At the top, there is a link to 'Exit create an account' and a progress indicator for 'Step 1 of 5'. The main heading is 'Enter your account email'. Below this, a message states: 'Your email will serve as your username for your KYID account.' A note indicates that an asterisk (\*) denotes a required field. There are two input fields: 'Primary email\*' and 'Confirm primary email\*', both containing the placeholder text 'sample@email.com'. At the bottom left is a '< Back' link, and at the bottom right is a 'Next' button.

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.

This screenshot shows the 'Verify your email' screen. The heading is 'Verify your email'. Below it, a message says: 'Six-digit verification code was sent to cp@mail.com. Enter the verification code provided to verify your email.' A note indicates that an asterisk (\*) denotes a required field. The main instruction is 'Enter verification code\*', followed by six empty input boxes for the code. Below the boxes, it says 'Code expires in 08:41 minutes'. At the bottom center is a 'Verify' button. At the bottom left is a link 'Resend verification code', and at the bottom right is a link 'Use a different email'.

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."

Confirm mobile number

(XXX) XXX-XXXX

How would you like to receive the verification code?\*

**Text Message**  
You will receive a passcode via text message to your phone

**Voice call**  
You will receive a passcode via voice call to your phone

[Skip this step](#)

< [Back](#) [Next](#)

- 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.

Social Security Number (SSN) / Individual Taxpayer Identification Number (ITIN) ⓘ

XXX-XX-XXXX

☐ I don't have a home address

Address 1\* Address 2

500 Mero Street

City\* State\*

Frankfort Kentucky

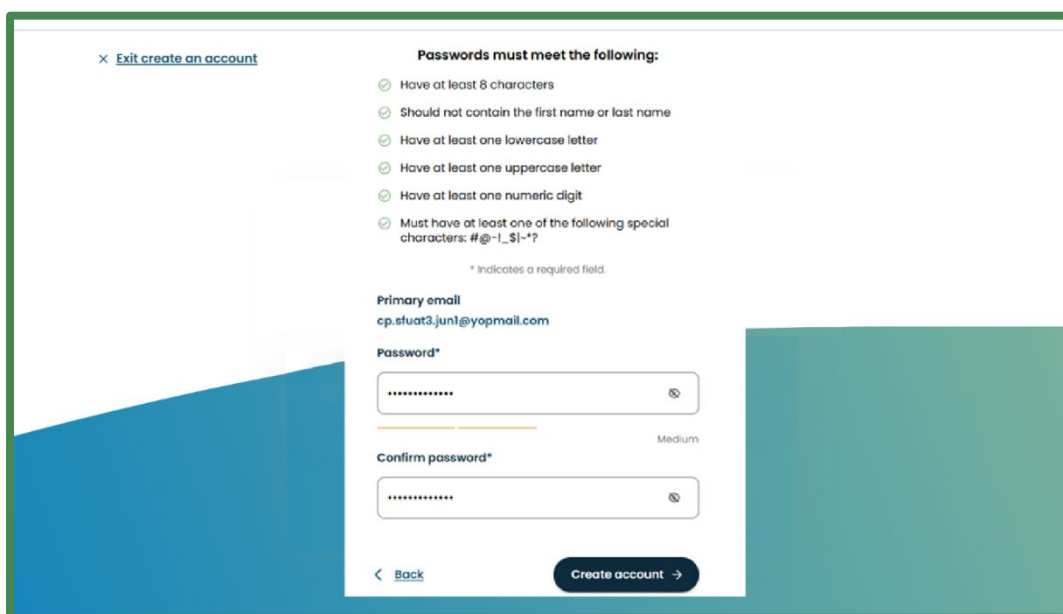
Zip/postal code\* Zip/postal code extension

40601

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.

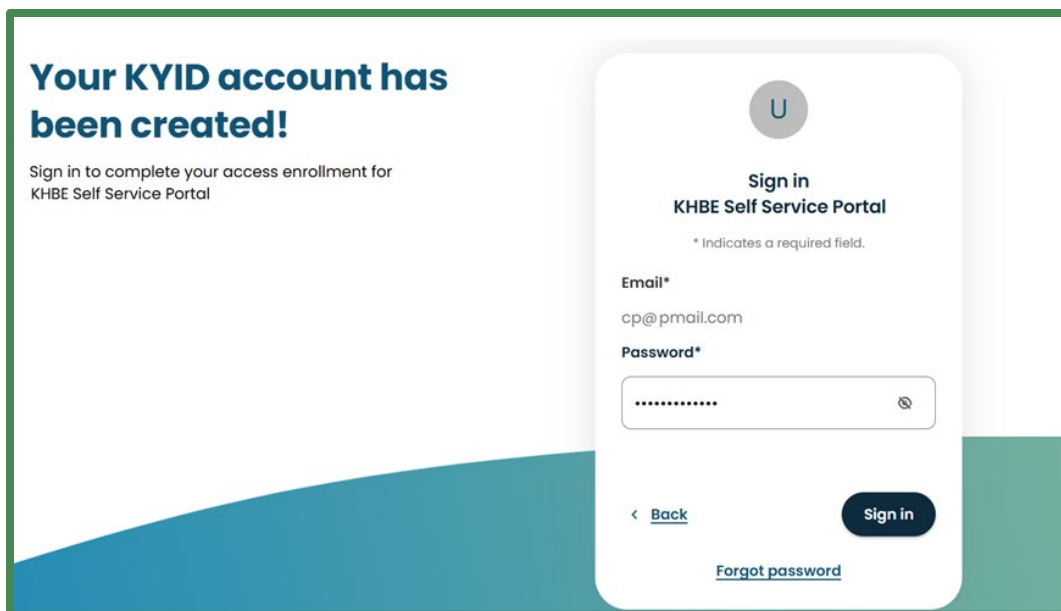
Some users do not pass automatic ID Verification and are provided with the phone number to Experian along with a reference code for manual verification. This call typically takes only a few moments, and the user can then proceed with next steps. If a user is unable to complete ID Verification over the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

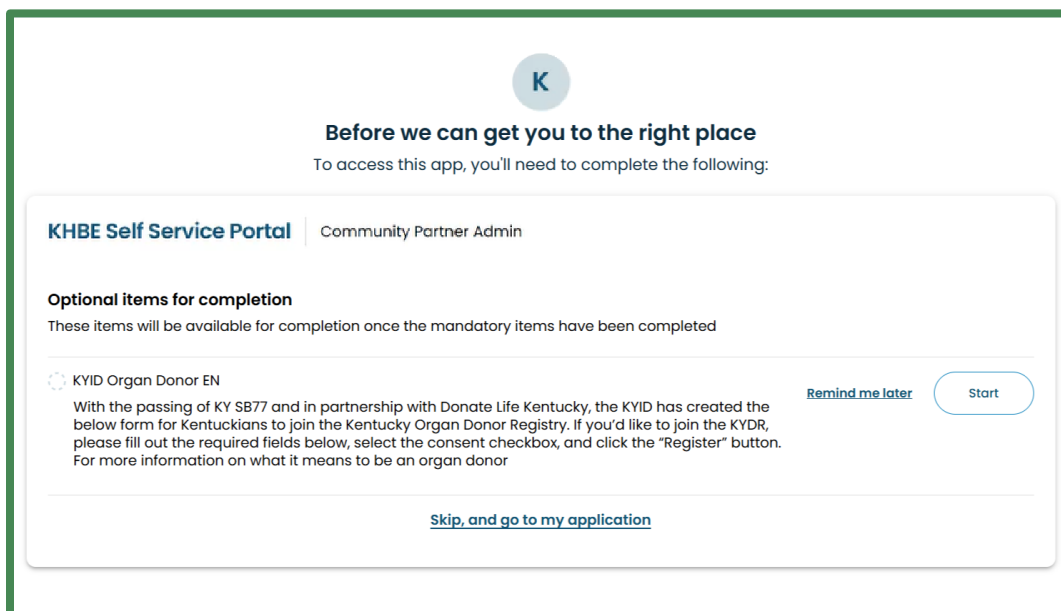


The screenshot shows a web form for creating a KYID account. At the top left, there is a link to 'Exit create an account'. The main heading is 'Passwords must meet the following:'. Below this, there are six checklist items, each with a green checkmark icon: 'Have at least 8 characters', 'Should not contain the first name or last name', 'Have at least one lowercase letter', 'Have at least one uppercase letter', 'Have at least one numeric digit', and 'Must have at least one of the following special characters: #@-!\_.\$!-~?'. A small note below the list states '\* Indicates a required field.' The form includes a 'Primary email' field with the value 'cp.stuat3.jun1@yopmail.com'. Below the email is a 'Password\*' field with a strength indicator showing 'Medium'. Below the password field is a 'Confirm password\*' field. At the bottom left is a '< Back' link, and at the bottom right is a 'Create account ->' button.

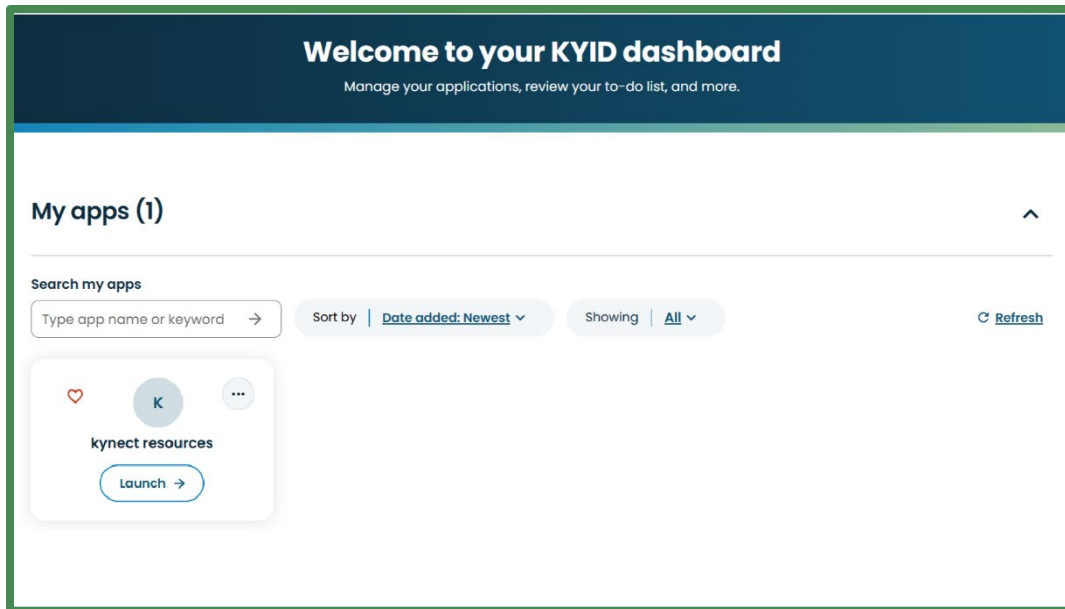
8. After completing account creation, you will be taken back to the KYID login screen to login for the first time. Enter your login information associated with your new KYID account and click "Next."



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.”

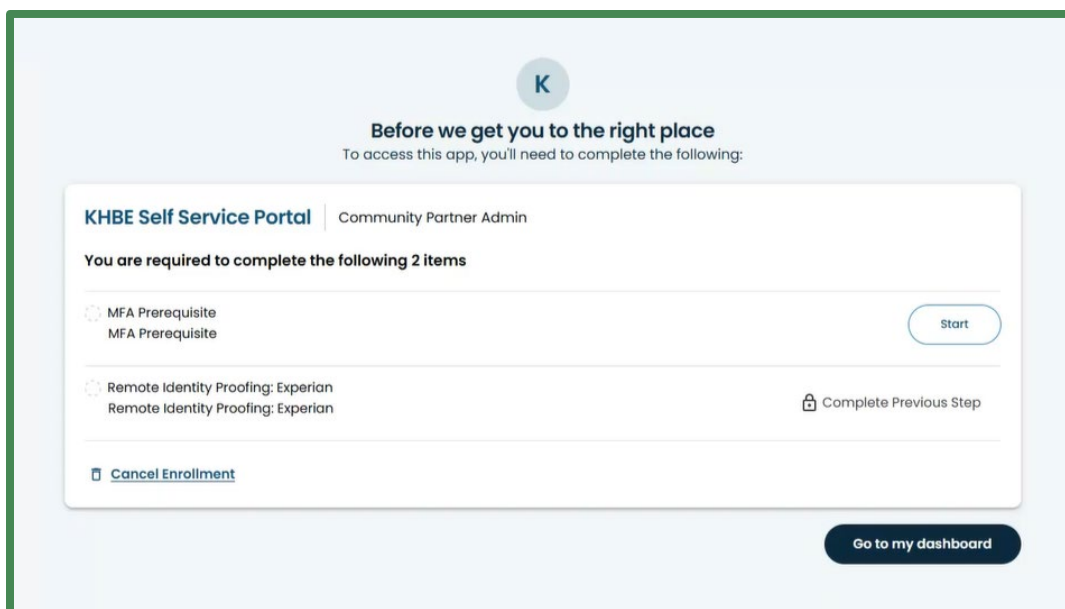


10. Upon successful completion of KYID registration, you will see the **kynect resources** Tile. Click “Launch.”



**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.

- 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.



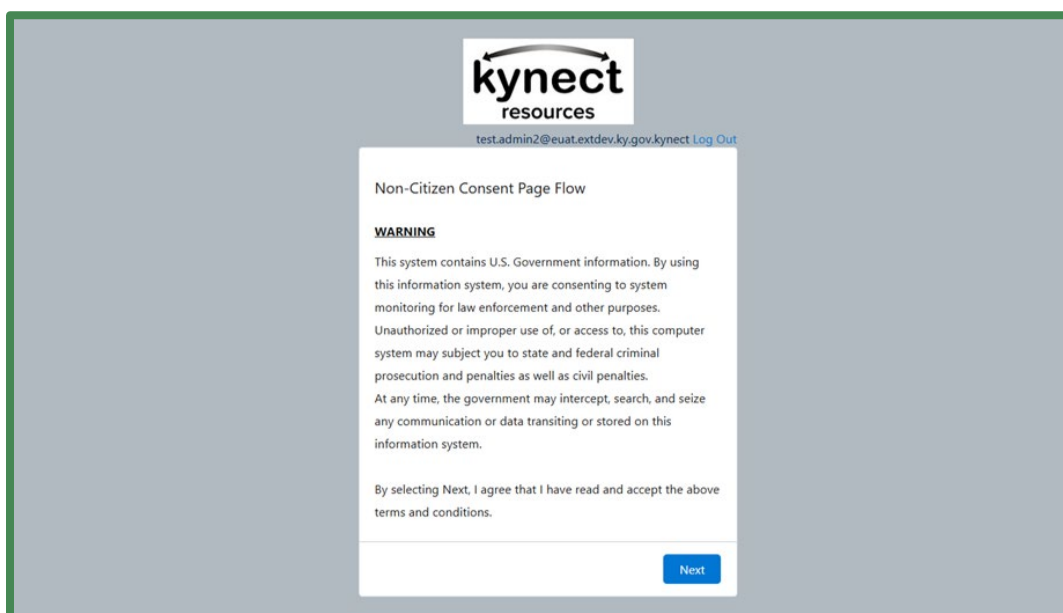
Community Partners have four MFA options for their KYID account, one set-up through a computer (Symantec VIP) and three through your mobile device (ForgeRock Authenticator, Microsoft Authenticator, and Google Authenticator). Please select any of the four options and follow the instructions for that MFA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

under this Agreement will continue after termination of the user's association with, or access to, the kynect resources system until all confidential information in the user's possession, custody or control is returned or destroyed as directed by CHFS.

User IDs and passwords must be kept secure and shall not be shared.

Users have no right or ownership interest in any confidential information referred to in this Agreement. CHFS may revoke a user's access code or other authorized access to confidential information at any time.

Users understand that resource data has been validated and provided by the United Way of the Bluegrass 2-1-1 system. It is the responsibility of the community partner organizations and United Way of the Bluegrass to ensure the resource data is up to date and accurate.

User privileges hereunder are subject to periodic review, revision, and if appropriate, removal.

☒ I Agree

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.

**Required Training for kynect resources Partners**

In order to access kynect resources, Community partners and Assistants of the system must complete all required training modules. Once complete, select "Next."

Status: Not Started 0%    Duration: 11 min

**ACTIVITIES**

Plan activities

Privacy and Security\*

⌚ Duration: 0 min

0%

Privacy and Security\*

0%

PDF

Launch

Privacy and Security Quiz\*

0%

Quiz

Launch

Program Summary\*

⌚ Duration: 0 min

0%

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](#).

The screenshot shows the 'First Time Login' page for 'kynect resources'. At the top, there are two informational banners: one for filing a complaint with the Ombudsman and another for contacting CHFS Listens. The main form area is titled 'First Time Login' and contains the following fields:

- First Name: Test
- Last Name: Admin
- \*Email Address: cp.stuat3,jun1@yahoo.com
- \*Mobile Phone: (223) 456-7890
- \*Primary Location: Test Location

At the bottom of the form, there is a toggle switch for 'Receive Referral Notification Emails', which is currently turned off (inactive).

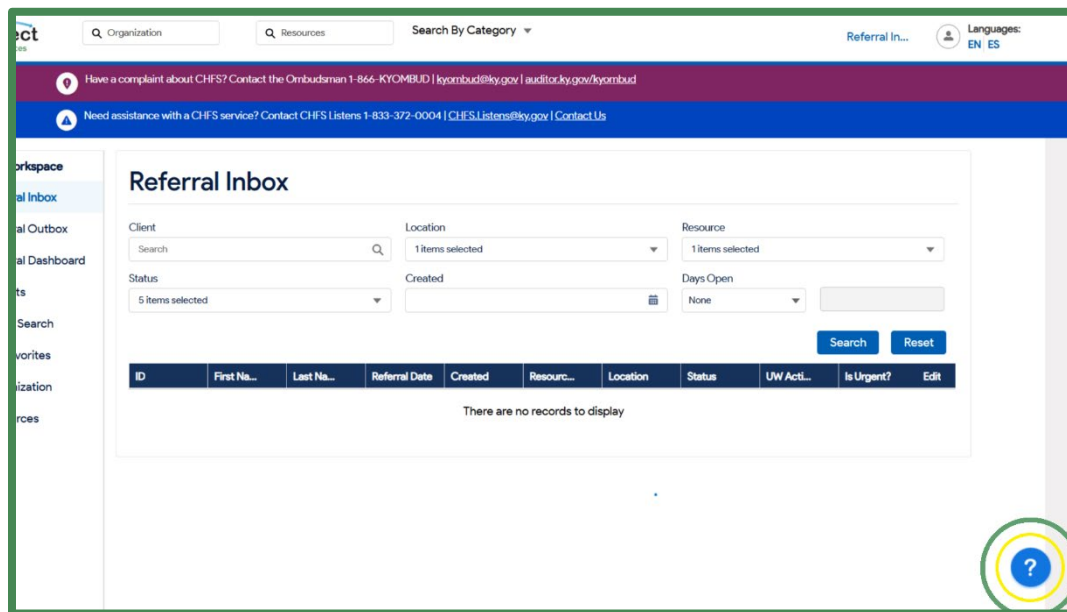
**You are now successfully onboarded to kynect resources!**

The starting point to launch **kynect resources** is the [KYID Dashboard](#) ([kyid.ky.gov](http://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 screenshot shows the 'Referral Inbox' page in the Kynect Resources system. The left sidebar contains a 'My Workspace' menu with options: Referral Inbox (selected), Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff. The main content area has a header with the Kynect Resources logo and navigation links. Below the header, there are two informational banners. The main section is titled 'Referral Inbox' and contains a search filter area with dropdowns for Client, Location, Resource, Status, Created, and Days Open. A table below the filters displays a list of referrals with columns: ID, First Name, Last Name, Referral Date, Created, Resource, Location, Status, UW Act..., Is Urgent?, and Edit. The table shows one referral with ID 'REF-#####', Client 'Jane Jam', Referral Date '7/28/2026', and Status 'New'.

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.

The screenshot shows the 'Referral Sent' page in the Kynect Resources system. The left sidebar is identical to the previous screenshot, with 'Referral Outbox' selected. The main content area is titled 'Referral Sent' and contains a search filter area with dropdowns for Client, Organization, Resource, Status, Created, and Days Open. A table below the filters displays a list of referrals with columns: ID, First Name, Last Name, Referral Date, Created, Resource, Location, Status, UW Act..., Is Urgent?, and View. The table shows one referral with ID 'REF-#####', Client 'Jane Jam', Referral Date '7/28/2026', and Status 'New'.

## 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.

**Dashboard: Referrals Dashboard**  
As of Jul 29, 2026 3:10 PM @ Viewing as System Auto Process User

**Most Popular Resources**

| Resource Name                        | Resource Rating | Record Count |
|--------------------------------------|-----------------|--------------|
| Food Pantries                        | 0               | 4            |
|                                      | 100%            | 3            |
| Meal Vouchers                        | 0               | 5            |
| General Clothing Provision           | 0               | 2            |
|                                      | 100%            | 3            |
| Specialized Information and Referral | 0               | 1            |
|                                      | 100%            | 3            |

[View Report \(RE Resources\)](#) As of Jul 29, 2026 3:10 PM

**Most Referrals Made (Staff Member)**

| CreatedBy Name | Record Count |
|----------------|--------------|
| Rohit Nigam    | 24           |
| Mariel Day     | 20           |
| Ryan Summers   | 16           |
| Debra James    | 13           |
| Megan Kelsey   | 10           |
| Kim Pablo      | 10           |

[View Report \(RE Resources\)](#) As of Jul 29, 2026 3:10 PM

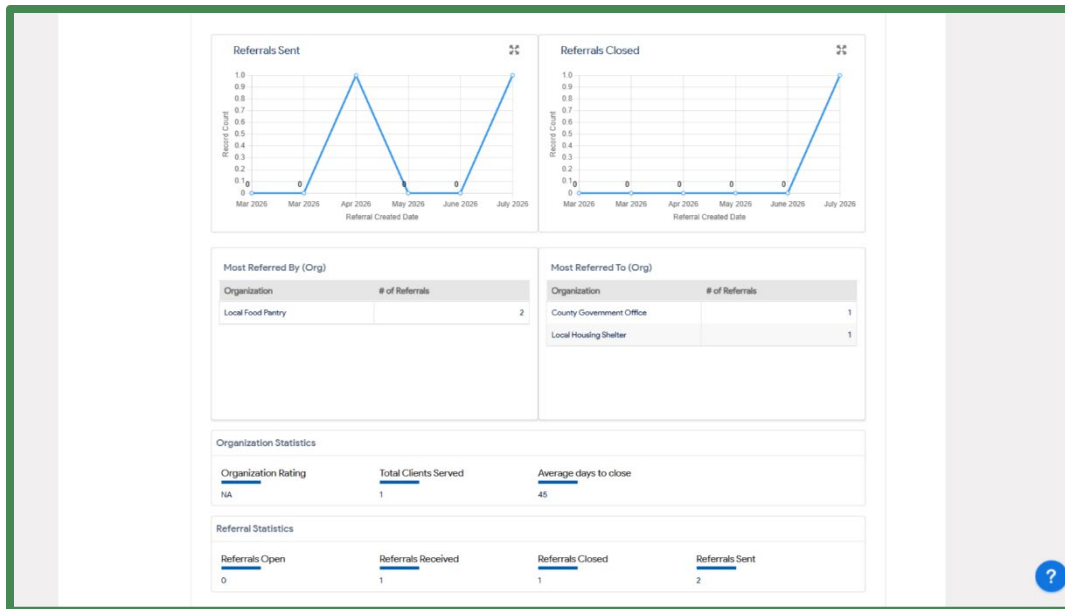
**Most Referrals Closed (Staff Member)**

| Closed By    | Record Count |
|--------------|--------------|
| Mariel Day   | 27           |
| Rohit Nigam  | 4            |
| Kim Pablo    | 4            |
| Brad Peter   | 4            |
| Tyler Harris | 2            |
| Ryan Summers | 2            |
| Megan Kelsey | 1            |

[View Report \(RE Closed Report\)](#) As of Jul 29, 2026 3:10 PM

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 screenshot shows the 'Report Details' page for the 'Total Client Served Report'. The left sidebar contains navigation links: My Workspace, Referral Inbox, Referral Outbox, Referral Dashboard, Reports (highlighted), Client Search, My Favorites, Organization, Resources, and Staff. The main content area has a 'Back to Report' link and a 'Report Details' header. Below this is a summary section with 'Total Records: 2', 'Total U/W Action Taken: 0', and 'Total: 2'. A table lists the records with columns: Status, Referring User Email, Referring User Phone, Resource Name, Outcome, Outcome Reason, and Date Of Referral. The table shows two records: one for 'adriano.banderas@yahoo.com' and another for 'janejam@gmail.com'. Below the table are 'Subtotal' and 'Total (2)' rows. At the top right of the table area, there are buttons for 'Enable Field Editing', 'Add Chart', and 'Export'.

| Status     | Referring User Email       | Referring User Phone | Resource Name | Outcome               | Outcome Reason                   | Date Of Referral |
|------------|----------------------------|----------------------|---------------|-----------------------|----------------------------------|------------------|
| Closed (2) | adriano.banderas@yahoo.com | (111) 111-1111       | Food Pantry   | Resource Not Provided | Funding not available            | 11/19/2025       |
|            | janejam@gmail.com          | (000) 000-0000       | Meal Voucher  | Resource Not Provided | Didn't meet eligibility criteria | 7/28/2026        |
| Subtotal   |                            |                      |               |                       |                                  |                  |
| Total (2)  |                            |                      |               |                       |                                  |                  |

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 screenshot shows the 'Reports' page with a 'Select Report' dropdown menu set to 'Assessments Report'. An 'Export to CSV' button is located at the top right. Below the dropdown is a table with columns: Assessment Name, Last Modified Date, Org Name, Resident, and Partner. The table lists ten assessment records. At the bottom right, there are 'Previous' and 'Next' buttons.

| Assessment Name | Last Modified Date       | Org Name          | Resident      | Partner       |
|-----------------|--------------------------|-------------------|---------------|---------------|
| AN - 13611      | 2023-12-14T11:35:57.000Z | Local Food Pantry | RJ MILLER     | Ram CpStaff   |
| AN - 13612      | 2024-01-05T12:41:49.000Z | Local Food Pantry | Liz Bendle    | Ram CpStaff   |
| AN - 13657      | 2023-12-14T11:36:09.000Z | Local Food Pantry | HANK RANGER   | Ram CpStaff   |
| AN - 13658      | 2023-12-14T11:36:09.000Z | Local Food Pantry | John Baker    | Ram CpStaff   |
| AN - 13828      | 2024-11-12T17:09:06.000Z | Local Food Pantry | Abel Chandler | Rohit CpAdmin |
| AN - 15476      | 2024-11-12T17:09:06.000Z | Local Food Pantry | Liz Bendle    | Rohit CpAdmin |
| AN - 15477      | 2024-11-12T17:09:06.000Z | Local Food Pantry | HANK RANGER   | Rohit CpAdmin |
| AN - 15479      | 2024-11-12T17:09:06.000Z | Local Food Pantry | John Baker    | Rohit CpAdmin |
| AN - 15480      | 2024-11-12T17:09:06.000Z | Local Food Pantry | RJ MILLER     | Rohit CpAdmin |

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.

**Client Search**

Search Full Profile My Clients

\* First Name: Jane \* Last Name: Jam \* DOB: 01/01/2000 [Search] [Reset]

| First Name | Last Name | DOB        | Email Address     | Phone          | View |
|------------|-----------|------------|-------------------|----------------|------|
| Jane       | Jam       | 01/01/2000 | janejam@gmail.com | (000) 000-0000 | ▼    |

### 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.

The screenshot shows the Kynect Resources web application. The top navigation bar includes the Kynect Resources logo, search bars for Organization and Resources, a Search By Category dropdown, and a Referral In... button. Below the navigation bar are two informational banners. The left sidebar lists the My Workspace menu items: 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 (selected), and My Clients. Below the tabs is a table with the following data:

| First Name | Last Name | DOB        | Email Address              | Phone          | View |
|------------|-----------|------------|----------------------------|----------------|------|
| ADRIANO    | BANDERAS  | 01/01/1990 | adriano.banderas@yahoo.com | (111) 111-1111 | ▼    |
| Jane       | Jam       | 01/01/2000 | janejam@gmail.com          | (000) 000-0000 | ▼    |

### My Clients List

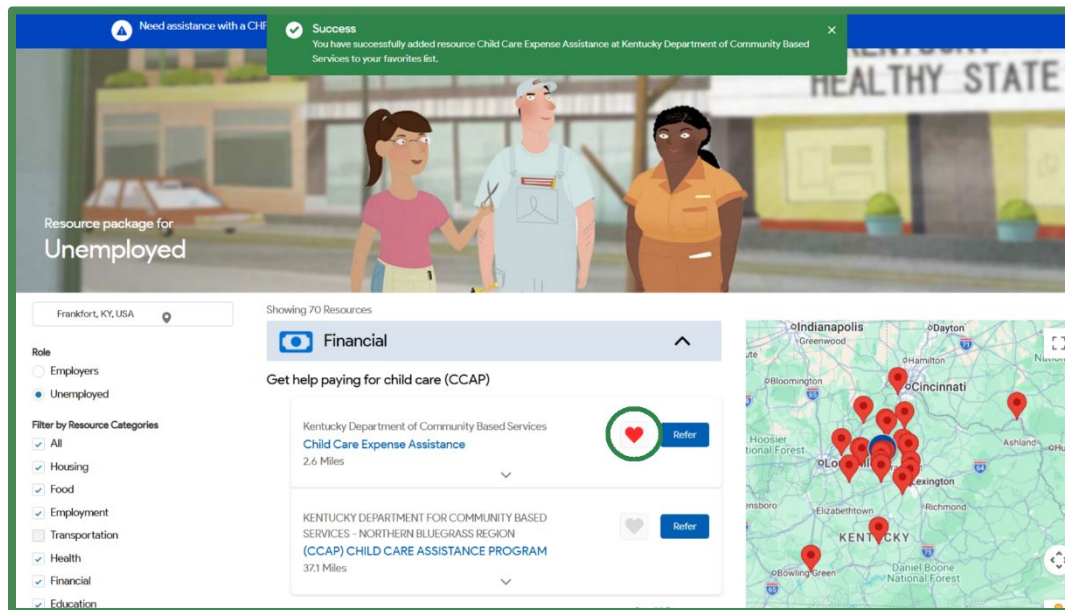
The My Clients section displays residents that you have manually saved. When viewing the [Resident OneView](#), you can add residents by clicking “+ Add to My Clients,” or “Remove from My Clients” to take them off the list. The My Clients list is individual to each user and also allows for sorting by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

The screenshot shows the Kynect Resources web application with the 'My Clients' tab selected. The layout is identical to the previous screenshot, but the table now only contains one entry:

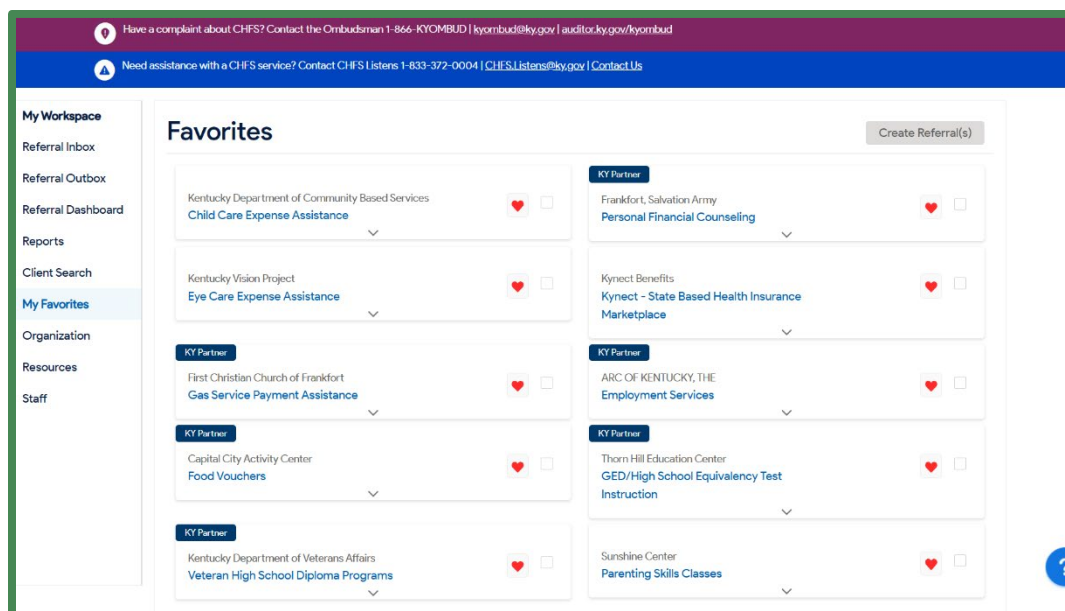
| First Name | Last Name | DOB        | Email Address     | Phone          | View |
|------------|-----------|------------|-------------------|----------------|------|
| Jane       | Jam       | 01/01/2000 | janejam@gmail.com | (000) 000-0000 | ▼    |

## 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.

The screenshot shows the 'kynect resources' web application. At the top, there's a navigation bar with 'Organization' and 'Resource' search fields, an 'Info' tab, and a 'Referral In...' button. Below this is a purple banner with contact information for CHFS. The main content area is titled 'Client Search' and has tabs for 'Search', 'Full Profile', and 'My Clients'. The 'Search' tab is active, showing search fields for 'First Name' (with a dropdown arrow), 'Last Name' (with a dropdown arrow), and 'DOB' (with a calendar icon). The search results table has columns for 'First Name', 'Last Name', 'DOB', 'Email Address', 'Phone', and 'View'. A message box states 'There are no records to display' with a button labeled 'Enter Resident Information'.

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.

Have a complaint about CHFS? Contact the Ombudsman 1-866-KYOMBUD | [kyombud@ky.gov](mailto:kyombud@ky.gov) | [auditor.ky.gov/kyombud](http://auditor.ky.gov/kyombud)

Need assistance with a CHFS service? Contact CHFS Listens 1-833-372-0004 | [CHFS.Listens@ky.gov](mailto:CHFS.Listens@ky.gov) | [Contact Us](#)

**My Workspace**

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

[← Back to Clients](#)

## Jane Jam

[Request Consent](#) [Create Referral](#)

| Client Information |        | Contact           |                    |
|--------------------|--------|-------------------|--------------------|
| Client ID          | Gender | Email Address     | Contact Preference |
|                    | Female | janejam@gmail.com | Email              |
| DOB                |        | Mobile Phone      |                    |
| 01/01/2000         |        | (000) 000-0000    |                    |

**Needs - SDOH View All**

- Childcare
- Employment
- Legal
- Mobility
- Substance Abuse
- Children's Education
- Community Involvement
- Disabilities
- Health Care Coverage
- Housing

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.”

[← Back to OneView](#)

## Verbal Consent

[Cancel](#) [Submit](#)

By agreeing to share additional data you understand that Community Partner Admin 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
- ☒ The information may be shared outside of Resource Engine to monitor quality or to provide better services
- ☒ You may be contacted to provide feedback about your experiences through a survey or to participate in program evaluation activities.
- ☒ 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.

\* Client Communication Preference:  \* Client Email:  Client Mobile Phone:

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.

**My Workspace**

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

[← Back to Clients](#)

## Jane Jam

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

**Client Information**

Client ID: 012345 Gender: Female

DOB: 01/01/2000

**Contact**

Email Address: janejam@gmail.com Contact Preference: Email

Mobile Phone: (000) 000-0000 Address: 111 Main St. Lexington, KY 40508, Fayette County

**Household**

| Client  | Age | Relationship |
|---------|-----|--------------|
| Jim Jam | 27  | Spouse       |

**Enrolled Programs**

| Program  | Start      | Renewal    |
|----------|------------|------------|
| Medicaid | 10/16/2023 | 10/16/2026 |

**Assessments** [View All](#)

| Date      | Name           | Taken By       | View |
|-----------|----------------|----------------|------|
| 7/30/2026 | Needs Asses... | Community ...  | ▼    |
| 4/29/2026 | CMS Asses...   | Hospital Ad... | ▼    |
| 4/27/2026 | Needs Asses... | Jane Jam       | ▼    |

**Notes** [View All](#)

| Subject        | Created Date | Created...    | View |
|----------------|--------------|---------------|------|
| Language Pr... | 7/29/2026    | Community ... | ▼    |

**Referrals** [View My Plan](#)

| New | In Progress | Closed |
|-----|-------------|--------|
| 8   | 4           | 2      |

**Needs - SDOH** [View All](#)

- Childcare
- Employment
- Legal
- Mobility
- Substance Abuse
- Children's Education
- Community Involvement
- Disabilities
- Health Care Coverage
- Housing

### 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.

The screenshot shows the 'Assessments' section for a user named Jane Jam. The table below is a representation of the data shown in the image.

| Date      | Name             | Taken By                | View |
|-----------|------------------|-------------------------|------|
| 7/30/2026 | Needs Assessment | Community Partner Admin | ▼    |
| 4/29/2026 | CMS Assessment   | Hospital Admin          | ▼    |
| 4/27/2026 | Needs Assessment | Jane Jam                | ▼    |

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.

The screenshot shows the 'Needs Assessment Results' dashboard for a resident named Jane Jam. The dashboard is divided into three main sections: CRITICAL, IMPORTANT, and STABLE. The CRITICAL section has 8 items, the IMPORTANT section has 5 items, and the STABLE section has 4 items. Below these sections is an 'Action Steps' section with a message: '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.' At the bottom right, there are buttons for 'View Responses' and 'Create Referral(s)'.

| Category  | Count   | Description                                           |
|-----------|---------|-------------------------------------------------------|
| CRITICAL  | 8 ITEMS | High priority: Take care of these as soon as you can. |
| IMPORTANT | 5 ITEMS | Consider seeking help for these when you can.         |
| STABLE    | 4 ITEMS | You do not need to worry about these right now.       |

## 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.

The screenshot shows the 'All Notes' table for a resident named Jane Jam. The table has columns for Subject, Created Date, Created By, Last modified date, Last modified by, and View. There is one note listed with the subject 'Language Preference'.

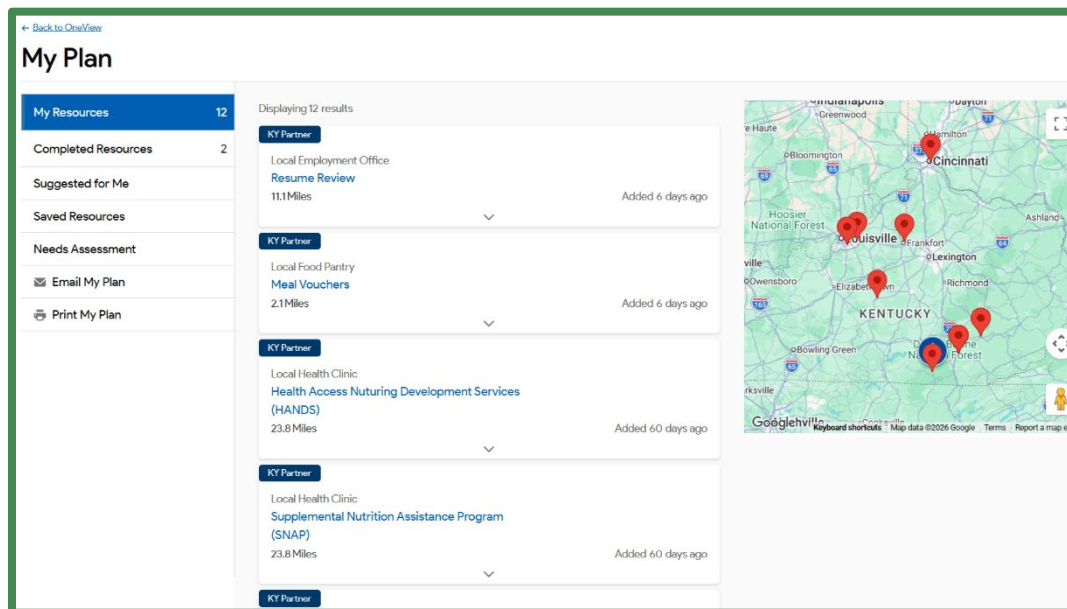
| Subject             | Created Date | Created By              | Last modified date | Last modified by        | View                 |
|---------------------|--------------|-------------------------|--------------------|-------------------------|----------------------|
| Language Preference | 7/29/2026    | Community Partner Admin | 7/29/2026          | Community Partner Admin | <a href="#">View</a> |

## 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.

The screenshot shows the 'Create Referral' form in the Kynect Resources application. The form is titled 'Create Referral' and has a 'Back to Clients' link. It includes fields for Resident Name (Jane Jam), Resident Email Address (janejam@yopmail.com), and Resident Phone ((555) 444-1234). Below these are fields for Organization (Search), Location (None), and Resource (None). There is a 'Select from your favorites' dropdown. A 'Notes' field is also present. At the bottom, there are fields for Referred by (Community Partner Admin), Email Address (cp.stuat3.sept6.25@yopmail.com), and Phone ((123) 456-7890). The sidebar on the left shows 'My Workspace' with links to Referral Inbox, Referral Outbox, Referral Dashboard, Reports, Client Search, My Favorites, Organization, Resources, and Staff. The top navigation bar includes search filters for Organization, Resources, and Search By Category. A blue banner at the top contains contact information for CHFS and the Ombudsman.

## Referral via Resident Detail Screen

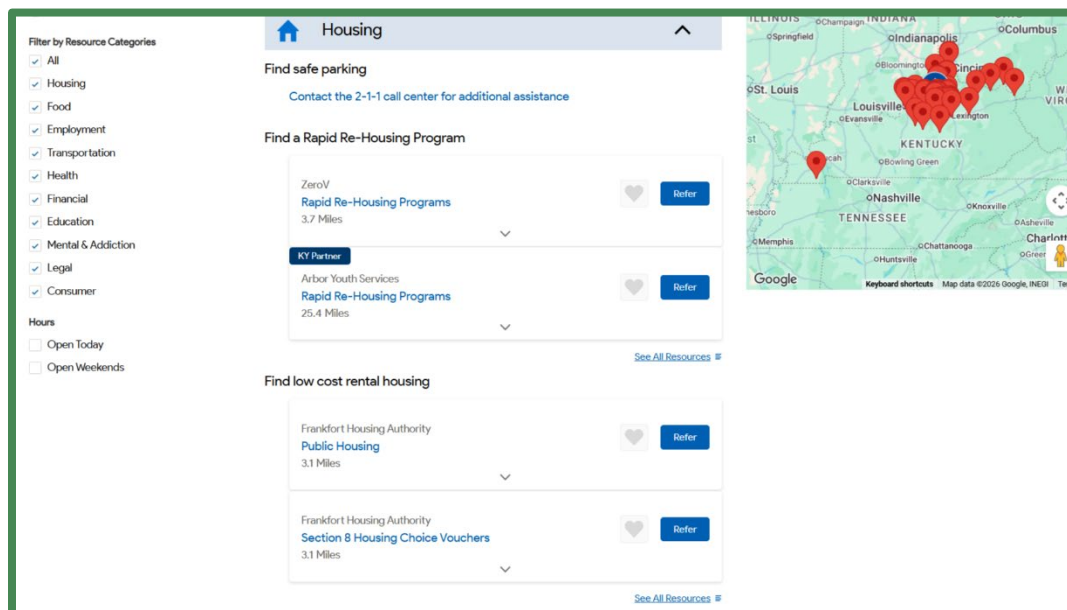
Similar to the Client Search method, making a referral from the Resident Detail Screen is best when you are already working with a specific resident and know which resource you would like to refer them to. This is especially helpful when you are on the Resident Detail screen after responding to a previous 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.

The screenshot shows the 'Create Referral' form in the Kynect Resources system. At the top, there are search bars for Organization and Resources, and a 'Search By Category' dropdown. Below these are two informational banners: one for CHFS complaints and another for CHFS assistance. The main form area is titled 'Create Referral' and includes a 'Back' link and 'Cancel' and 'Submit' buttons. The form fields are: Client Name (with a search icon), Client Email Address, Client Phone, Organization (ZeroV), Location (ZeroV), and Resource (Rapid Re-Housing Programs). There is a 'Select from your favorites' dropdown next to the Resource field. Below these is a 'Notes' section. At the bottom, there is a 'Referred by' section with fields for Email Address (communitypartnerdec3.stust3@mailinator.com) and Phone ((222) 222-2222).

### 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.

**kynect resources**

Search Organization Resources Search By Category

Referral In... Languages: EN ES

Have a complaint about CHFS? Contact the Ombudsmen 1-866-KYOMBUD | kyombud@ky.gov | auditor.ky.gov/kyombud

Need assistance with a CHFS service? Contact CHFS Listens 1-833-372-0004 | CHFSListens@ky.gov | Contact Us

**My Workspace**

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

[← Back](#)

## Create Referral

[Cancel](#) [Submit](#)

Client Name  Client Email Address  Client Phone

| Organization         | Location             | Resource                     |
|----------------------|----------------------|------------------------------|
| Step by Step         | Step by Step         | Mentoring Programs           |
| Carnegie Center      | Carnegie Center      | Tutoring Services            |
| Arbor Youth Services | Arbor Youth Services | Youth/Student Support Groups |

Notes

Referred by: Community Partner Admin Email Address: communitypartner.dec3.suat3@mailin Phone: (222) 222-2222

## 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.

[← Back to Referral Inbox](#)

## Referral Details: REF-#####

[Save](#)

**Referral Source Information**

Resident: Jane Jam Phone Number: (555) 444-1234 Email Address: janecjam@yopmail.com

Referral Date: 7/28/26 0 days ago Referral Source: Referral Made By: Jane Jam

**Referral Information**

Resource Name: Referral Payment Assistance UW Action Taken: No

Status: New Assigned to: Unassigned

Notes [Add Note](#)

| Subject       | Description                         | Created By              | Created Date | Modified Date |
|---------------|-------------------------------------|-------------------------|--------------|---------------|
| First Contact | First phone call made to residen... | Community Partner Admin | 7/28/2026    | 7/28/2026     |

## 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.

The screenshot shows the 'Referral Details: REF' screen. A modal form titled 'Tell us about your experience' is overlaid on the screen. The modal contains the following fields:

- \*How was your experience with the resident? (Two buttons: thumbs up and thumbs down)
- \*Was the resource provided? (A dropdown menu with 'None' selected)
- Additional Comments (A text input field)
- Buttons: Cancel and Submit

The background form shows the following information:

- Referral Source Information: Resident (Jane Jam), Referral Date (7/28/26, 0 days ago)
- Referral Information: Resource Name (Rental Payment Assistance), Status (Closed), Assigned to (Unassigned)
- Notes (Empty text area)
- Metadata: Email Address (janejam@yopmail.com), Referral Made By (Jane Jam)

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 then select “Next” to begin.

The screenshot shows the 'Needs Assessment' form in the 'kynect resources' system. The form is titled 'Needs Assessment' and includes a 'Back to Survey' link. Below the title, it says 'Let's start with some basic information. We'll use this to show resources that are closest to you.' There is a text input field containing 'Frankfort, KY 40601, USA' and a 'Next' button. The left sidebar shows 'My Workspace' with links to 'Referral Inbox', 'Referral Outbox', 'Referral Dashboard', 'Reports', 'Client Search', 'My Favorites', 'Organization', 'Resources', and 'Staff'. The top navigation bar includes search fields for 'Organization' and 'Resources', a 'Search By Category' dropdown, and a 'Referral In...' link. The bottom right corner has a blue question mark icon.

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.

**Needs Assessment**

Question 1 of 18

1. Which best describes your housing situation?

- ☐ I do not have stable housing
- ☐ I am temporarily living with a friend or family member
- ☐ I am currently not paying my rent/mortgage and in danger of eviction
- ☐ I am paying my rent/mortgage, but it is unaffordable (over 30% of income)
- ☐ I am currently utilizing a rent/mortgage assistance program
- ☐ I pay my rent/mortgage without difficulty

Previous Next

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

**Needs Assessment Results**

**CRITICAL**  
7 ITEMS  
High priority: Take care of these as soon as you can.

**IMPORTANT**  
4 ITEMS  
Consider seeking help for these when you can.

**STABLE**  
6 ITEMS  
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\(s\)](#)

**Mental Health**

Connect with a crisis intervention hotline

Fresh Start Frankfort  
Crisis Intervention Hotlines/Helpines  
0.5 Miles

Simon House  
Crisis Intervention Hotlines/Helpines  
0.8 Miles

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.

The screenshot displays the 'Account Details' page in the Kynect Resources system. At the top, there are navigation links for 'Organization' and 'Resources', and a 'Search By Category' dropdown. Below this, there are two informational banners: one for filing a complaint with the Ombudsman and another for CHFS service assistance. The main section is titled 'Account Details' and contains several input fields: 'First Name' (with a dropdown for 'Community Partner'), 'Last Name' (with a dropdown for 'Admin'), 'Email Address' (containing 'communitypartner@gmail.com'), 'Mobile Phone' (with a placeholder '(222) 222-2222'), and 'Primary Location' (with a dropdown for 'Traci Garden Location'). At the bottom of this section is a toggle switch for 'Receive Referral Notification Emails', which is currently set to 'Inactive'. A blue 'Save' button is located in the top right corner of the form area.

### 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](mailto: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 with all users associated with the organization.

| First Name | Last Name | Primary Location | Role  | Phone No.      | Email Address          | Status   | View |
|------------|-----------|------------------|-------|----------------|------------------------|----------|------|
| Charles    | Smith     | Main Location    | Staff | (788) 388-3838 | charles.s@company.org  | Active   |      |
| Daniella   | Santos    | Main Location    | Admin | (569) 875-5555 | daniella.s@company.org | Active   |      |
| Greg       | Lopez     | Second Location  | Admin | (459) 874-5698 | greg.l@company.org     | Active   |      |
| Henrick    | Walden    | Main Location    | Admin | (222) 222-2222 | henrick.w@company.org  | Active   |      |
| Jenika     | Little    | Second Location  | Admin | (456) 987-7444 | jenika.l@company.org   | Inactive |      |
| Madison    | South     | Main Location    | Staff | (456) 987-4566 | madison.s@company.org  | Active   |      |
| Marcus     | Dean      | Main Location    | Staff | (123) 456-7890 | marcus.d@company.org   | Inactive |      |
| Raul       | Nigam     | Second Location  | Staff | (123) 456-7890 | raul.n@company.org     | Inactive |      |
| Tiffany    | George    | Main Location    | Staff | (123) 456-7890 | tiffany.g@company.org  | Active   |      |
| Xiao       | Wu        | Second Location  | Staff | (456) 988-8884 | xiao.w@company.org     | Active   |      |

## 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.

Need assistance with a CHFS service? Contact CHFS Listers 1-833-372-0004 | CHFSListers@ky.gov | Contact Us

**My Workspace**

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

## Organization

To change Organization information, dial United Way 2-1-1

**Contact Information**

\* Legal Name  
TestAccount

Commonly Used Name

Website

Phone Number

Email Address

Tax ID

**Physical Address**

Street  
8 Mill Creek Park

City  
Frankfort

State  
None

Zip  
40601

Status  
Active - Allow referrals

☐ Anonymous Referral  
Referrals sent will appear anonymous to the receiving organization, but will be tracked internally by your organization for reporting purposes.

**Lead Point of Contact**

Name

Email Address

Phone

Phone Extension

TTY

☐ Resources Provided Statewide?

**Save**

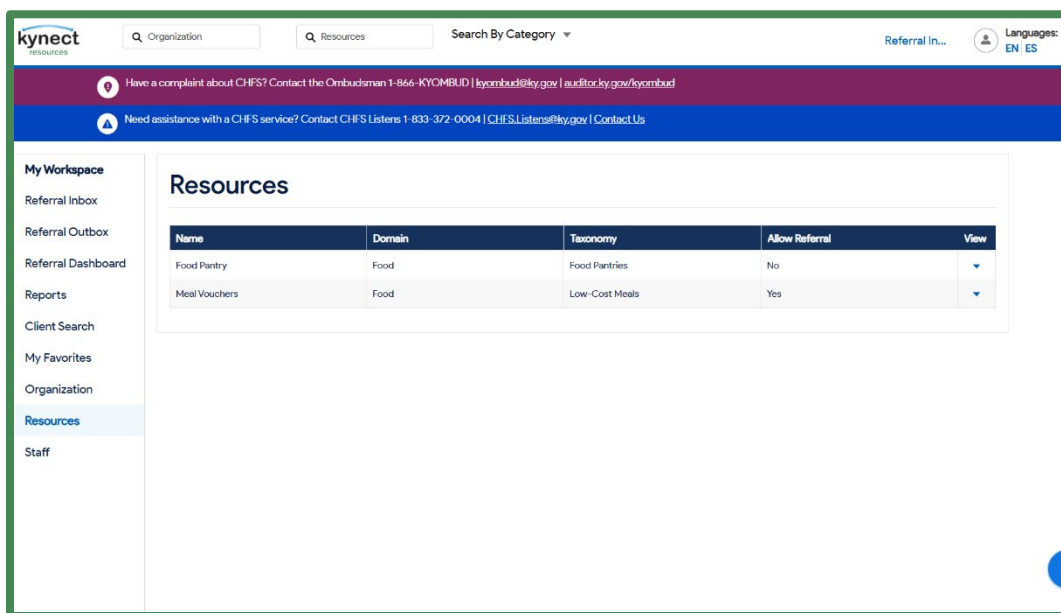
There are two organizational settings that are specific to **kynect resources** and can be changed on the Organization tab. Firstly, there is a toggle to mark your organization as offering its services Statewide. Checking the “Statewide” indicator will make your organization’s resources populate in search 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.