kynect resources Overview and KHIE Integration Training
Integration Mission

Mission

• The kynect resources and KHIE integration provides users a broad data set of **SDoH information** for residents. The integration of the two systems will allow both to **share assessment results** and provide **timely updates of information**.

• This integration situates a direct **link to kynect resources** from **within the ePartnerViewer**, where users can **create referrals** for patients to community organizations and services.

• KHIE and kynect resources will collect **metrics and data** concerning SDoH to help inform policy, processes and practices for all levels of users.
**System Interfaces**

### United Way 211
- Sends data about the organization (contact information, location details, resources offered, etc.) from UW 211 to kynect resources
  - **Over 10,000 resources available from 211 data**

### IEES (Integrated Eligibility and Enrollment System)
- Sends eligibility information of all active and approved cases in IEES for the member identified from IEES to kynect resources
- Sends demographic information of all household members present in active and approved IEES cases

### KHIE (Kentucky Health Information Exchange)
- Social Determinant of Health information captured by a KHIE Participant is relayed to kynect resources
- kynect resources SDoH Assessment results are shared in the ePartnerViewer
- kynect resources link added to the ePartnerViewer

### kynect resources
- Receives organization data and resource data about the Community Partner from UW 211
- Receives case details, eligibility information, and household information from SSP
- SDoH information shared between KHIE and kynect resources
kynect resources Overview
Residents browse programs or services in the community by situation, keyword, or category.

Community Organizations and Programs can manage referral activity and work together with residents and other organizations to address needs.
Search by Category aligns with SDoH categories and offers Subcategory options or a View All option.

Search Results return based on proximity to location. KY Partner designation indicates the organization is an onboarded kynect resources user. Users can connect to organization, see details of program or service, and share the resources information from the results list.
Residents
- **Browse resources** available in the area and connect with them by creating a referral
- See **suggested resources** that could be helpful to the individual
- Complete assessments to **identify areas of need** that could be addressed
- **Share resources** with other Kentuckians

Community Partners
- Support residents by **managing referral activity** in a timely manner
- **Track metrics** related to how your organization is utilizing kynect resources
- Help Kentuckians by **creating referrals** to organizations
- Complete SDoH Assessments

DCBS Staff
- Help Kentuckians by **creating referrals** to organizations that could help them
- Help complete assessments

Provider Offices
- Help patients connect to organizations via **outbound referrals**
- Complete SDOH Assessments

State Agencies
- Help Kentuckians with **support programs**
- Find and create referrals to address those in need
- Complete Assessments

United Way
- Helps Community Partners access **kynect resources**
- Provides the database of resources that Kentuckians connect with
- Provides **2-1-1 Phone Access** to helpful resources

kynectors
- Help Kentuckians find **health coverage and create referrals** for resources
- Help residents address any needs and complete Assessments

Kynect resources Stakeholders
- United Way
- Community Partners
- DCBS Staff
- Provider Offices
- State Agencies
In its simplest form, kynect resources is an easy to access, easy to navigate directory.

To access additional information and management tools offered in kynect resources, an Onboarding process is required to be assigned the accurate role in the kynect resources system.

Claim Site on kynect resources
Reviewed and approved by local United Way chapters

Create a KOG Account
Link to create an account is sent once Site Claim Request is approved.
There is a specific link in this email for those who have an existing KOG account

Complete Final Onboarding
Download MFA, Complete brief system training

Resident Consent: Residents control access to their information in kynect resources. Referrals can be made on behalf of a resident without consent or full access to their information. Consent to view resident record may be provided via email, text or verbal acknowledgement.
Community Partner Workspace

- View and respond to referrals received
- Send referrals
- View Dashboard with key metrics specific to your organization
- Search for Clients or view existing clients
- Create a Favorites list for quicker referral generation
- Edit Organization information
- Add and Edit resources and programs your organization offers
- Add and Edit Staff
Upon log in, kynect resources users begin on their Organization’s Dashboard. The Referral Inbox is like an email inbox, containing incoming requests for services. Click the **Edit** drop down to open the referral.
From the **Referral Detail Screen**, click the **Resident** name to view additional information and function.

The **Status** can be changed from **New**, to **In Progress** or **Closed**.

The referral can be **Assigned to** **Staff** members.
Click **Request Consent** to launch the Consent process and gain access to resident record in kynect resources.

**Create Referral** button is used to create a referral.

*Consent is not required to create a referral.*
Consent is granted via email, text or captured verbally.

Select the method to request consent. If **Send Email** or **Send Text** is selected, the kynect resources system will generate a Consent Request to that resident.

Once the resident responds via email or text, you will be granted access to their information.
When meeting with a resident in person or via phone, select **Verbal Consent**.

Read each acknowledgement statement and check the box next to the statement.

When completed, click **Submit**.
Resident Information Screen

Quick Action Buttons

Integrated IEES Data Sources

SDOH data is populated based on kynect resources Assessment or KHIE data. This tab indicates the date of last assessment and source.

Coordination across partners

Referral Activity and history

Social Determinants of Health Information

Amy Brand

Client Information
- Client ID: 901007575
- Gender: Female
- DOB: 12/01/1985

Contact
- Email Address: estill@gmail.com
- Preferred Contact Method: Phone
- Phone: (030) 241-2679
- Address: 123 MAIN STREET NEW LANE FRANKFORT, KY 40601-

Household

<table>
<thead>
<tr>
<th>Client</th>
<th>Age</th>
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<tr>
<td>CLARK MERCER</td>
<td>19</td>
<td>Son</td>
</tr>
<tr>
<td>HAPPY BROTHER</td>
<td>35</td>
<td>Brother/Half-Brother</td>
</tr>
<tr>
<td>(Child)</td>
<td>9</td>
<td>Son</td>
</tr>
<tr>
<td>RICHARD POW</td>
<td>59</td>
<td>Husband</td>
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Enrolled Programs

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<tr>
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<td>4/1/2016</td>
</tr>
<tr>
<td>Medicaid</td>
<td>6/1/2015</td>
<td>4/1/2016</td>
</tr>
<tr>
<td>Qualified Health</td>
<td>6/1/2015</td>
<td>4/1/2016</td>
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</table>

Assessments

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<th>Taken By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/21/2020</td>
<td>CMS Self-Su</td>
<td>Catherine Eliza</td>
</tr>
</tbody>
</table>

Notes

<table>
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<tr>
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<th>Created Date</th>
<th>Created By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estill is expect...</td>
<td>1/21/2020</td>
<td>Catherine Eliza</td>
</tr>
</tbody>
</table>
Managing Referrals

The **Referral Inbox** displays referrals received by the organization. Here, users can use the search function for **Clients**, view the **Status** of referrals and Close referrals when services have been provided.
Managing Referrals

The **Referral Sent** or Outbox displays referrals sent by the organization. Users can use the search function for **Clients and** view the **Status** of referrals sent. The organization who received the referral is responsible for managing and closing the referrals when services have been provided. The **Status** is tracked and displayed in the Referral Outbox.

![Referral Sent Outbox](image)
Creating a Referral

To create a referral, click the **Create Referral** button from the resident record.
Creating a Referral

Use the **Search** under **Organization** to find the organization to refer. **Select from your Favorites** can be used if you have built a list of organizations that are frequently used.
Creating a Referral

Select the organization’s **Location** as some organizations may offer services in multiple locations.
Creating a Referral

Next, select the **Resource** and click **Submit**. This will send the referral to the Organizations inbox.
Creating a Referral using My Favorites

Users can build a **My Favorites** list for organizations that are frequently used. These favorites are listed in the **My Favorites tab**. Click the **Select from you Favorites** drop down.
Creating a Referral using Favorites

When creating referrals from the Favorites list, multiple organizations can be selected to send several referrals for a resident. Click the selector box to select the resources, then click Create Referral(s).
Closing Referrals and Tracking Outcomes

Closed Loop Referral systems require the closing of the received referral once services have been provided. kynect resources monitors closure of referrals and tracks **Outcomes** by **closure reason**.

**Tell us about your experience**

* How was your experience with the resident? Though a mandatory field, this information is not currently displayed or shared within the kynect resources system. Stakeholders will be included in future development for this feature.

* Was the resource provided?

  - None
  - Yes
  - No

If **Was the resources Provided** question is answered with **No**, user will be prompted to select a **Reason**.

* Reason it was not provided

  - None
  - Canceled by Client
  - Client made eligibility errors
  - Client didn't come to appointment
  - Client refused plan
  - Funding not available
  - Unable to reach client
  - Services requested didn't fit the client's need
  - Other
  - Expired

After **Reason it was not provided** has been selected, click **Submit** to close the referral.
ePartnerViewer Screens
To view SDoH data in the ePartnerViewer, ePartnerViewer Users must first search for a patient by entering the patient’s **First Name**, **Last Name**, and **Date of Birth** in the appropriate fields on the **Quick Search** section of the **myDASHBOARD** screen. Once the patient details are entered, click **Search**.
The patient search results display. ePartnerViewer Users can click View next to the appropriate patient to navigate to the Patient Summary screen for the patient.
If the selected patient is not part of the ePartnerViewer User’s organization’s patient notification panel, the Restricted Access pop-up displays. Select the appropriate **reason for accessing this patient record** from the dropdown menu. Once complete, click **I Accept**.
ePartnerViewer Users have 4 options to view SDoH data for the patient on the **Patient Summary** screen of the ePartnerViewer portal: (1) **KHIE Summary CCD** which is a consolidated summary of the patient’s health history, the (2) **KHIE Medicaid CCD** which contains Medicaid claims data and is applicable only if the patient is a Medicaid recipient, the (3) **Social Determinants of Health Portlet**, and the (4) **SDoH Tab**.
ePartnerViewer Users can select the **KHIE Summary CCD** from the **Clinical Documents** Portlet on the **Patient Summary** screen and review the **Social History** section for SDoH details received from kynect resources and/or KHIE Participants. The **Social History** section displays the list of social determinants of health impacting the patient’s health.
ePartnerViewer Users can select the Medicaid CCD from the Clinical Documents Portlet on the Patient Summary screen and review the Social History section for SDoH details received from Medicaid claims data. The Social History section displays the list of social determinants of health impacting the patient’s health.
The Social Determinants of Health Portlet on the Patient Summary screen displays a list of the 5 most recent individual determinants impacting the patient’s health. ePartnerViewer Users can click View All SDOH to navigate to the SDoH Tab to review the full list of SDoH domain indicators and individual determinants.
The **SDoH Tab in the ePartnerViewer** is populated with the comprehensive list of Individual Determinants Impacting Health received from kynect resources, KHIE Participants, and Medicaid claims data.
• **Individual Determinants Impacting Health** are displayed along with the source from which the information was obtained.

• **Link to kynect resources** has been added to the SDoH Tab for ePartnerViewer users to connect resident to resources.
The kynect resources screen that ePartnerViewer Users land on when using the kynect resources hyperlink will vary depending on the onboarding status of the user and level of consent from the resident.

**Onboarded User with Consent**
ePartnerViewer User has completed kynect resources onboarding steps and has previously received consent from resident.

**Onboarded User without Consent**
ePartnerViewer User has completed kynect resources onboarding steps but has not yet confirmed consent from resident.

**Onboarded User: No SDoH Data**
ePartnerViewer User has completed kynect resources onboarding steps and received consent from resident, but there is no SDoH data for the resident in kynect resources.

**Onboarded User: Client Not Found**
ePartnerViewer User has completed kynect resources onboarding steps, but no client match was found within kynect resources.

**Onboarded User: Multiple Clients Found**
ePartnerViewer User has completed kynect resources onboarding steps, but multiple individual IDs were found in kynect resources.

**User Not Onboarded**
ePartnerViewer User has not completed kynect resources onboarding steps and cannot access kynect resources.
Onboarded User

An ePartnerViewer User who has completed kynect resources Onboarding will be navigated to the Welcome to the Kentucky Online Gateway screen upon clicking the kynect resources hyperlink on the SDoH Tab of the ePartnerViewer.

The user must click Sign In to proceed. The onboarded ePartnerViewer User does not have to re-enter his KOG credentials because the kynect resources hyperlink uses the Single Sign-On functionality.
An ePartnerViewer User who has completed kynect resources Onboarding will be navigated to the kynect resources Warning screen upon clicking Sign In.

The user must click Next to proceed to the kynect resources tool.
An ePartnerViewer User who has completed kynect resources Onboarding and has obtained resident consent will be navigated to the Resident Detail screen on kynect resources.

The onboarded ePartnerViewer User arrives at this screen when the patient/clientid (IndividualID) is present in the IEES system, and the patient/client has already given the request for consent for the ePartnerViewer User to view his details in kynect resources.

User has access to all functions on the resident record.
Onboarded User without Consent

An ePartnerViewer User who has completed kynect resources Onboarding, the patient/clientid (IndividualID) is present in IEES system, but the patient/client has not yet given consent for the ePartnerViewer User to view his details, will land on the kynect resources screen shown below.

From this screen, the user can Request Consent or Create a Referral for this resident.
An ePartnerViewer User who has completed kynect resources onboarding and has obtained resident consent, and the patient/clientid (IndividualID) is present in IEES, but there is no SDoH data for the resident in kynect resources, users will land on the Resident Detail screen. However, the Needs - SDoH section will be grayed out and a banner will display indicating that the resident is due for his first Needs Assessment.

From this screen, the user is encouraged to complete the Assessment to capture SDoH data for the resident.
Onboarded User: client not found

When no match is found within kynect resources for the patient/clientid (Individual ID) KHIE record, a **No Individual ID Found in IEES** banner will display.

To appear in search results, the resident would need to create a Kentucky Online Gateway (KOG) account. **ePartnerViewer Users** can click the **kynect resources home page** at the top left of the website to find resources and provide information on organizations, programs, and services.
Onboarded User: Multiple clients found

When multiple patient/clientid(IndividualID) are found in IEES system, a banner will display indicating that multiple individuals were found.

Enter the individual’s First Name, Last Name, and DOB and click Search to display the multiple search results.
Onboarded User: Multiple clients found

The multiple results will display upon clicking Search. Determine the correct match by using **Email Address** and **Phone Number**.

Use the **View** dropdown to open the Resident Information screen and **Request Consent** from the resident.
User Not Onboarded

An ePartnerViewer user who has not completed the kynect resources Onboarding steps will receive an Access Denied message. Use the link within the Access Denied message to link to kynect resources.

Access Denied
If you are a resident, select “Create Account” and click “Log in.”
If your organization wishes to join kynect resources, please click the “Join as a Community Partner” link at the bottom of the home page.

To navigate to the homepage, click the link below:

kynect resources

kynect resources can still be used as a directory to find information about organizations, programs, and services that can be shared with residents.

Use the Search Keyword, Search by Category or click Explore within a situation tile to populate resource results.
Onboarding to kynect resources
Steps to Onboard with existing KOG Account

Step 1: Claim Site on kynect resources
Reviewed and approved by local United Way chapters

Step 2: KOG Account Set up
ePartnerViewer users have an existing KOG Account and must use specific link to add kynect resources to their KOG Role.

Step 3: Complete required training
Complete brief system trainings
- Privacy and Security
- kynect programs Overview
- System Navigation
First time log in
Claim your site

Join as a Community Partner

Use the Join as a Community Partner link in the footer of kynect.ky.gov\resources

My situation is different

Show me more

The expanded kynect is working to keep every Kentuckian safe, healthy and happy. Go to kynect.ky.gov to see all your options.
The Welcome page offers a six-minute video with step-by-step view of Claiming Your Site.

Click Get Started to find your Organization.
Search Organization


Enter Organization name in the search field and click **Search**. Organizations can be searched by Name or by City.

**Please Note:** You may find your organization under full name or abbreviated name. 
Example: Search CHFS if Cabinet for Health and Family Services is not found.
Search Organization

Click Select to claim the Organization to navigate to the Site Claim Request form.

If the organization is not displayed, click Load More to display additional organizations.

If the organization is not found, click I can’t find my organization.
Claim Site Request form must be completed by entering information into the required fields as indicated by a red asterisk *. Click Continue
If the organization is not listed. **Dial 2-1-1**

A United Way coordinator will gather the organization details and add the organization to kynect resources.
If the organization has already been claimed, a grayed, inactive button is displayed in the search results. If you need additional information about the Claimed status, please email kynectresources@ky.gov
Upon approval of the Claim Site Request, kynect resources will send a Welcome email with next steps to complete Onboarding.

**Important Note:** Users with an existing Kentucky Online Gateway (KOG) account MUST use the link specified in the Welcome email message. This assigns the correct role in kynect resources and adds the kynect Staff Portal widget to the KOG homepage.
Required kynect resources Training

Upon log in, three required training modules will be displayed. Click **Launch** to begin each training.

Upon completion of the Privacy and Security, Program Summary, and System Trainings, click **Next** to complete this step.
Onboarding is complete. When you log into your KOG Account you will see the **kynect Staff Portal** widget added to your KOG homepage. Click **Launch** to access kynect resources.
Adding Staff

To manage the organization users, navigate to the Staff link in the My Workspace section. Use the View drop down to open staff record and change status to inactive when staff is no longer employed or required to have access to kynect resources.

To add Staff to your organization, click Add User.
Adding Staff

Enter the staff member’s information into the Team Members Details screen. Assign the Team Member either Admin or Staff Permissions and click Save. The added staff member will receive the onboarding email from kynect resources to complete the required training.

Admin Permission allows user to edit Organization details, add other staff, and add or remove resources.
Additional Training and Support

Additional training materials and videos are found in the Help section of kynect resources.

These videos and materials can also be accessed on the Department for Medicaid website here

Support materials and trainings continue to be updated and added
# kynect resources Escalation Path

## Community Partners

<table>
<thead>
<tr>
<th>Topic</th>
<th>Check These Materials First</th>
<th>I still have questions, who do I contact?</th>
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<tbody>
<tr>
<td><strong>Onboarding</strong></td>
<td><a href="#">Onboarding Quick Reference Guide</a></td>
<td>United Way 211 by dialing 2-1-1</td>
</tr>
<tr>
<td>• Organization not found in kynect resources</td>
<td></td>
<td>For help with KOG account creation, contact the KOG Helpdesk</td>
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<tr>
<td>• Questions about resource information, data</td>
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<td>• Email Address: <a href="mailto:KOGhelpdesk@ky.gov">KOGhelpdesk@ky.gov</a></td>
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<td>KOG creation process:</td>
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<td>• Phone Number: 502-564-0104</td>
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<td>• Access Denied error message</td>
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<td>• Hours of Operation: Monday – Friday 8:30am-5:00pm ET</td>
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<td>• Community Partners logged in with a Resident role rather than CP Staff/Admin role</td>
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<td>• Expired KOG link</td>
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<td>System Training</td>
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<td>• Multi-Factor Authentication (MFA)</td>
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<td>Experian Identity Proofing</td>
<td>Helpline: 1-866-578-5409</td>
<td>If you fail Experian ID Proofing while creating a KOG account, you must contact Experian</td>
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<td>System Navigation</td>
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<td>• Managing/Creating Referrals</td>
<td>Materials on <a href="#">DMS Website</a>, WalkMe Solutions, Help content</td>
<td>Email <a href="mailto:kynectresources@ky.gov">kynectresources@ky.gov</a></td>
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<td>• Functional questions regarding processes (e.g., resident information, IEES integration)</td>
<td><a href="mailto:kynectresources@ky.gov">kynectresources@ky.gov</a></td>
<td>Email <a href="mailto:Tracy.Williams@ky.gov">Tracy.Williams@ky.gov</a> or <a href="mailto:Seth.Butt@ky.gov">Seth.Butt@ky.gov</a></td>
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Thank You

kynectresources@ky.gov