

Job Aid for Community Based Organizations

Findhelp User Guide and Social Care Network Referral Guide



Creating a Screener Form

What are Screener Forms?

Screener forms are a way for CBOs to ask additional information from the referring party. This could include information like:

- Living situation
- Income
- Employment status
- Age

Screener forms are 100% customizable and can be any length. You can view results of the screener forms in your Inbound Referral dashboard

! This program needs additional information before they can help you. If you do not complete this form, you may not be able to receive services.

Living Situation

Street Address *
123 Main St.

City *

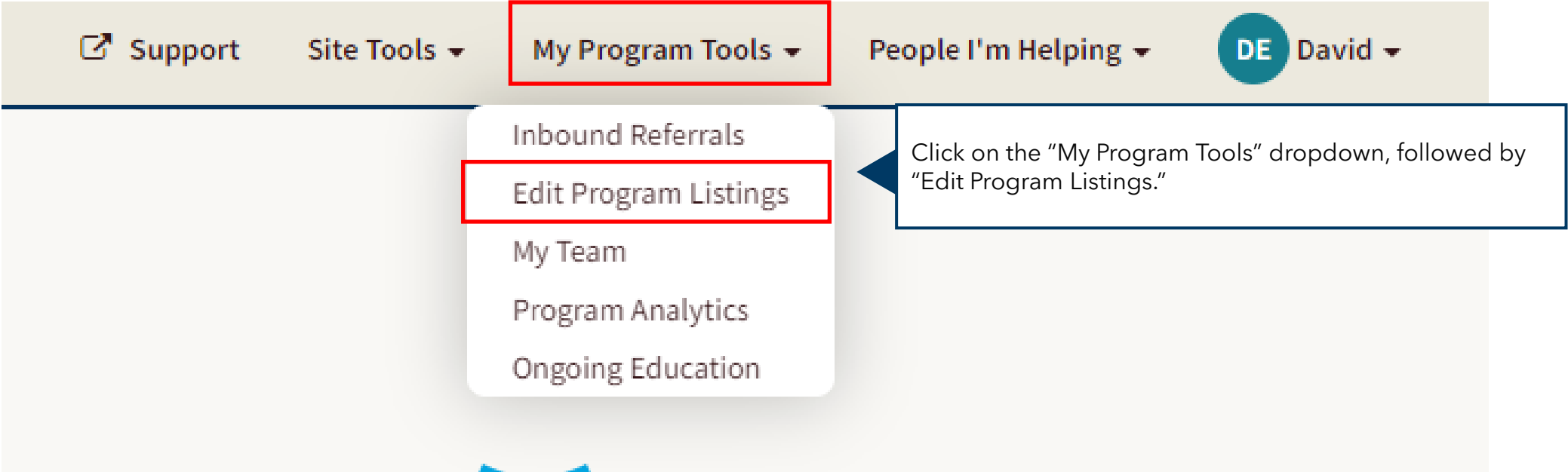
State *
Select an option ▼

ZIP Code *

What kind of place do you live in?
Select an option ▼

i These are EXAMPLE questions; your screener form is completely customizable and may be very different.

Getting Started with Screener forms



The screenshot shows a navigation bar with the following items from left to right: a link with an external icon labeled "Support", a dropdown labeled "Site Tools", a dropdown labeled "My Program Tools" (highlighted with a red box), a dropdown labeled "People I'm Helping", and a user profile icon labeled "DE David" (also highlighted with a red box). The "My Program Tools" dropdown menu is open, showing a list of options: "Inbound Referrals", "Edit Program Listings" (highlighted with a red box), "My Team", "Program Analytics", and "Ongoing Education". A blue callout box with a pointer to the "Edit Program Listings" option contains the text: "Click on the 'My Program Tools' dropdown, followed by 'Edit Program Listings.'"

Support Site Tools ▼ My Program Tools ▼ People I'm Helping ▼ DE David ▼

- Inbound Referrals
- Edit Program Listings
- My Team
- Program Analytics
- Ongoing Education

Click on the "My Program Tools" dropdown, followed by "Edit Program Listings."

Click on "Contact Settings"

My Program Listings

Program	Agency	Last Edited	Actions
Highmark Demo Food Bank	Highmark Community Support Organization	08/01/2024	<div><div> Program</div><div> Contact Settings</div><div> Hours/Locations</div></div>
Highmark Demo Program	Highmark Community Support Organization	08/01/2024	<div><div> Program</div><div> Contact Settings</div><div> Hours/Locations</div></div>
Highmark Demo Utility Service	Highmark Community Support Organization	08/01/2024	<div><div> Program</div><div> Contact Settings</div><div> Hours/Locations</div></div>

Have more programs for your agency?

Claim More Programs

Note that you'll need to go through this process with EACH program card if you want a screener form for it. You can use the same screener for all program cards, different screeners, or use screener forms only for some program cards.






Choose the second option

Once you choose the screener option, the page will automatically update below with the information to help you build a screener form.

Connecting with Highmark Demo Utility Service Online

Your program's Next Steps include a customizable teal "connect" button that allows people to easily connect to your program or inquire about services.

From the dropdown list below, please choose the best option for your program; this will be reflected on your program's connect button ([learn more in our support portal](#))

-  Send us their name and contact information via findhelp in a secure email (default)
-  Fill out a screener application to determine eligibility
-  Fill out an existing application, scheduler, or contact form
-  Schedule an appointment
-  Visit our website, call, or email us to receive services

Customize Your Eligibility Screening Application

Screeners form options

The screenshot shows a configuration window for a question. At the top, there are fields for 'Question title *' (containing 'What kind of place do you live in?') and 'Question name *' (containing 'Living'). Below these, it says 'Question type: Dropdown'. There are two radio buttons: 'Required' (unselected) and 'Eligibility Question' (selected). Below the radio buttons is a section titled 'Options for this question:'. It contains a table with four visible rows. Each row has an 'Option *' column and an eligibility status column. The first row is 'House or apartment' with 'May be eligible' (checked). The second row is 'Dormitory/College Residence' with 'Not Eligible' (unchecked). The third row is 'With friends or family' with 'May be eligible' (checked). The fourth row is 'Housing program' with 'Not Eligible' (unchecked). Red lines connect the 'Eligibility Question' radio button to the 'May be eligible' buttons in the first and third rows of the options table.

Option *	Eligibility
House or apartment	<input checked="" type="radio"/> May be eligible
Dormitory/College Residence	<input type="radio"/> Not Eligible
With friends or family	<input checked="" type="radio"/> May be eligible
Housing program	<input type="radio"/> Not Eligible

Screeners forms allow you to

- Have different sections of questions (e.g., living situation, or income level)
- Customize questions and answer formats
- Make questions optional or required
- Help determine eligibility for a program
- Customize a message after the form is completed relating to eligibility

Example message on a screener form

The image shows a screenshot of a web form editor interface. At the top, there is a teal header bar with the text "You May Not Be Eligible". Below this, a text area contains an instructional paragraph: "If someone doesn't fit the requirements you've given us, tell them about some alternate resources with similar services for other populations. This is the page people will see after they submit the form. You can include links in this section, including links to program websites, your publicly shared Aunt Bertha Favorites Folders, or applications for other programs. Learn how to link here." Below the text area is a rich text editor toolbar with options like "Normal", "B", "I", "U", "Link", "List", and "Image". A red rectangular box highlights a sample message within the editor: "Based on your situation and the information you provided, you may not be eligible for services. We'll still send them your application. Please contact the program if you believe you still may be eligible and you're getting this message in error." To the right of the editor, a blue callout box points to the highlighted message, stating: "Here's an example of an automated message that the referrer could receive if they are NOT eligible based on their answers in the screener form. Automated responses can include links to other programs on findhelp or to a website." At the bottom of the editor, there is a teal bar containing two buttons: "PREVIEW" and "PUBLISH". A red rectangular box highlights these buttons. A blue callout box points to the "PUBLISH" button, stating: "As always, remembered to scroll down and click 'publish' to save the form. After you do this, the form will immediately go live."

You May Not Be Eligible

If someone doesn't fit the requirements you've given us, tell them about some alternate resources with similar services for other populations. This is the page people will see after they submit the form. You can include links in this section, including links to program websites, your publicly shared Aunt Bertha Favorites Folders, or applications for other programs. Learn how to link here.

Normal B I U Link List Image

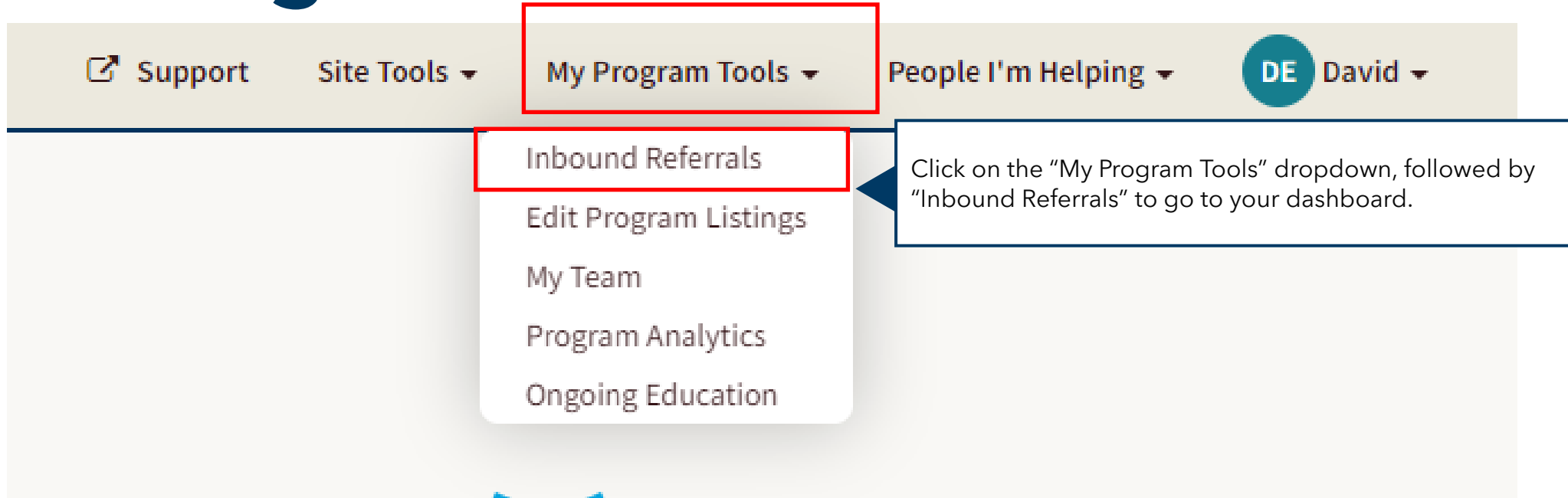
Based on your situation and the information you provided, you may not be eligible for services. We'll still send them your application. Please contact the program if you believe you still may be eligible and you're getting this message in error.

Here's an example of an automated message that the referrer could receive if they are NOT eligible based on their answers in the screener form. Automated responses can include links to other programs on findhelp or to a website.

PREVIEW PUBLISH

As always, remembered to scroll down and click "publish" to save the form. After you do this, the form will immediately go live.

Finding screener results



The screenshot shows a navigation bar with the following items: a pencil icon followed by "Support", "Site Tools" with a downward arrow, "My Program Tools" with a downward arrow (highlighted with a red box), "People I'm Helping" with a downward arrow, and a teal circle with "DE" followed by "David" with a downward arrow. A dropdown menu is open under "My Program Tools", listing: "Inbound Referrals" (highlighted with a red box), "Edit Program Listings", "My Team", "Program Analytics", and "Ongoing Education". A callout box with a blue arrow pointing to "Inbound Referrals" contains the text: "Click on the 'My Program Tools' dropdown, followed by 'Inbound Referrals' to go to your dashboard."

Support Site Tools ▼ My Program Tools ▼ People I'm Helping ▼ DE David ▼

- Inbound Referrals
- Edit Program Listings
- My Team
- Program Analytics
- Ongoing Education

Click on the "My Program Tools" dropdown, followed by "Inbound Referrals" to go to your dashboard.

Navigate to Inbound Dashboard

>

HD Highmark Demo Program

HD

HD 7

HD 6

Referred On

Referral Status

Eligibility

Last Updated

Highmark Demo Program

174 results









Referred On	Applicant	Referred By	Screener	Referral Status	Con
8/7/2024	Test Test New	Allegheny Health Network Community Support	View	<input type="radio"/> Not Updated	
7/30/2024	Referral Test New	Allegheny Health Network Community Support	None	<input type="radio"/> Not Updated	

Click on "View" to see the responses from the screener form.



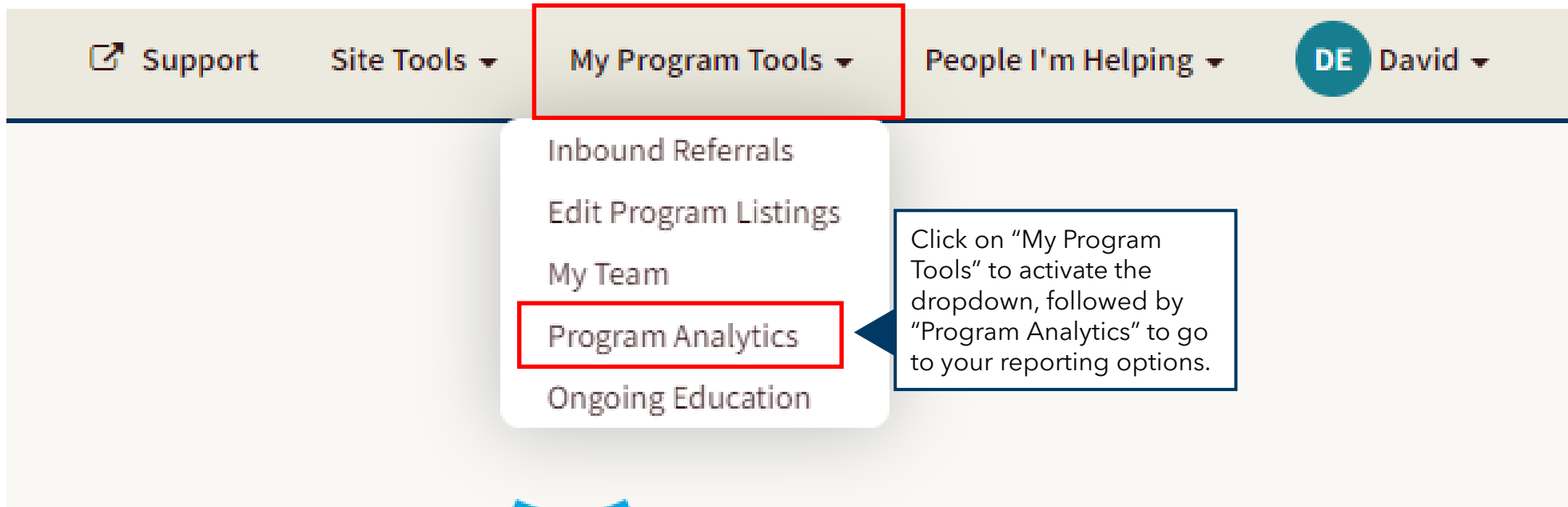
Remember! You won't have results for referrals that came in before you set up your screener form.

Eligibility Questions

7/30/2024	Test Referral  New	Allegheny Health Network Community Support	 Ineligible	<input type="radio"/> Not Updated ▼
7/16/2024	Test Test  test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support David Eddy	 Ineligible	<input type="radio"/> Not Updated ▼
7/3/2024	Test Test  New	Allegheny Health Network Community Support	 Eligible	<input type="radio"/> Not Updated ▼
7/1/2024	Test Test  test.test@test.com* phone (555) 555-5555*	Allegheny Health Network Community Support David Eddy	 Ineligible	<input type="radio"/> Not Updated ▼

If you've asked eligibility questions on your screener form, you'll see if the client is eligible here. You can also click on the word "Ineligible" or "Eligible" to see the full response of the screener.

To see all screener responses, use program analytics



Click “View Report”

My Analytics

Report Name	Description	
My Activity Dashboard	Basic report showing your recent activity and area information for the past 90 days based on the last postal code you searched.	View Report
Screener Dashboard	This report displays data on the screeners set up by organizations that you are a navigator at.	View Report
Claimed Program Dashboard	This report will show you information on how people in need are accessing and interacting with your program listing and the impact your organization is having on the community. Reports are downloadable for presentations or grant proposals!	View Report
Search Trends in Your Coverage Area	Understand top needs in your program's geographic coverage area by reviewing search trends, common search terms, and searches over time.	View Report
Social Care Index	Understand program data in the context of the Social Vulnerability Index to better understand a region and focus improvements to data availability to the highest impact areas.	View Report
Your Organization's Data Collection Report	This report shows data related to your organization's Data Collection forms.	View Report

Remember! You may not have some of these reports available if you have not created screener forms or data collection forms.

Screeners Dashboard overview

This dashboard can give you several insights. This includes:

- Number of responses
- How many screeners were started
- Average completion time for the screener
- Breakdown of eligibility

You can also:

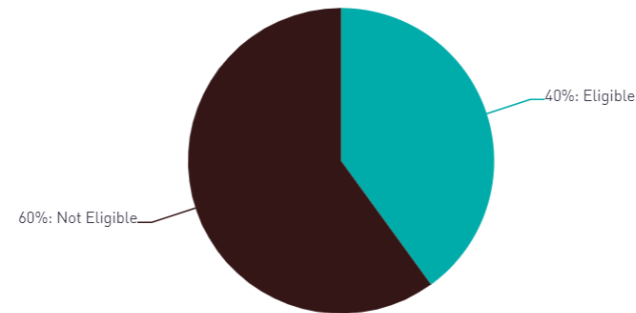
- Change date ranges for the reporting
- Download images
- Export screener results into a spreadsheet
- See the Analytics Section of this presentation for more information about customizing reports in findhelp

9

Screeners Started

12:00:44

Average time to Complete Screener



Screener Dashboard (continued)

Scroll down to “Screener Response Details” to get a comprehensive list of all your screener results.

① Screener Response Details

SCREENER ID	SITE	PROGRAM	SUBMITTED BY	SUBMITTED FOR	
1711306	findhelp	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	brad.eddy@highmarkhealth.org	
1761200	findhelp	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	307e5fe0-b41b-42cf-909a-9ba08a15	
1766197	findhelp	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	307e5fe0-b41b-42cf-909a-9ba08a15	
1784707	findhelp	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	307e5fe0-b41b-42cf-909a-9ba08a150351	2024-07-30 14:00
1807669	findhelp	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	testreferral@test.com	2024-07-30 14:00
1821349	findhelp	Highmark Demo Program	brad.eddy@highmarkhealth.org	307e5fe0-b41b-42cf-909a-9ba08a150351	2024-08-07 14:00

1

⋮

2

Edit Pivot

Search

Download Data
6 Rows

- To download the information:
1. Click the three vertical lines to access the menu
 2. Click “Download Data” to get the screener data