Job Aid for Community Based Organizations

Findhelp User Guide and Social Care Network Referral Guide
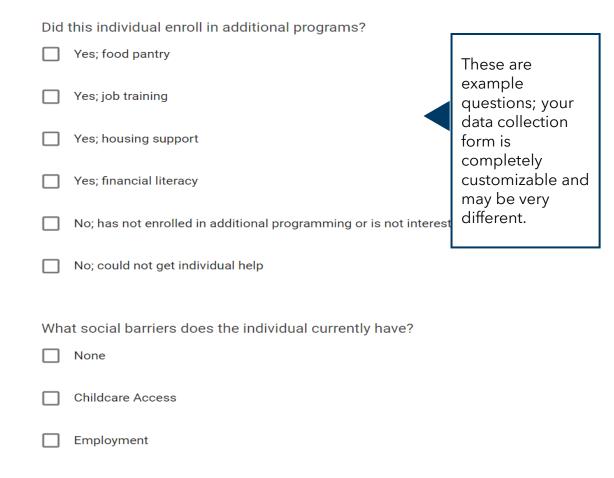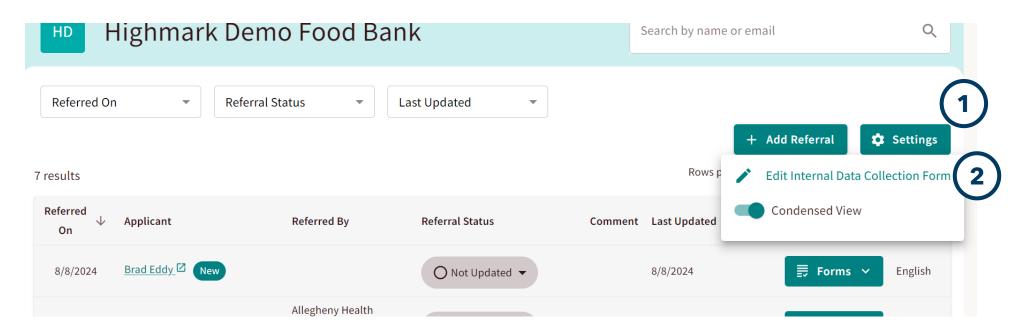
HIGHMARK. HEALTH

Data Collection Forms

What are Data Collection Forms?

Data collection forms are like screener forms that your organization can fill out AFTER the referral has come to you. Like Screener forms, these are completely customizable. Data Collection forms can be a good way to collect additional information on referrals and run reporting on this information. Examples could be
- Number of contact attempts
- Additional services given
- Client completed or didn't complete program

Did this individual enroll in additional programs?

☐ Yes; food pantry

☐ Yes; job training

☐ Yes; housing support

☐ Yes; financial literacy

☐ No; has not enrolled in additional programming or is not interest

☐ No; could not get individual help

What social barriers does the individual currently have?

☐ None

☐ Childcare Access

☐ Employment

These are example questions; your data collection form is completely customizable and may be very different.
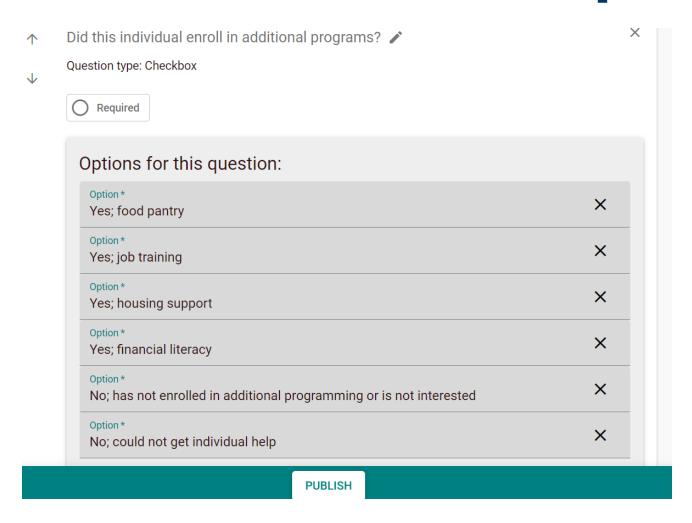
Creating your data collection form

Once you know what data you'd like to collect, go to your inbound referral dashboard and take the following steps:

1. In the upper right corner, click "Settings."

2. Click "Edit Internal Data Collection Form." You may see the message "Add a Data Collection Form" if you haven't added a form yet. If that's the case, click on that instead.
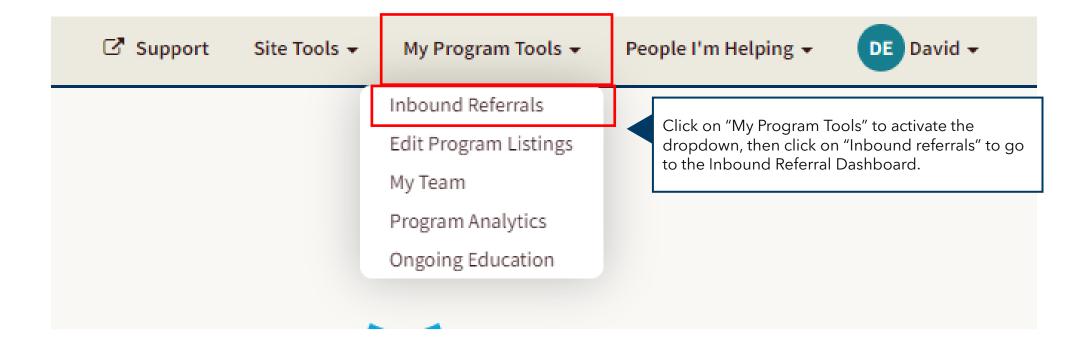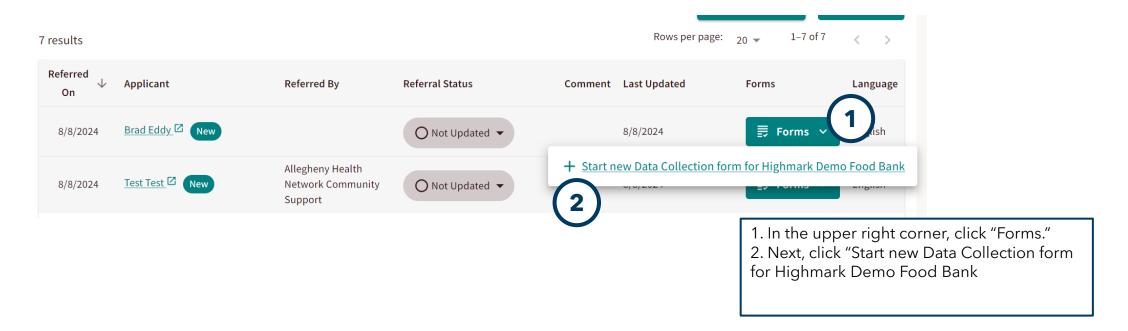
Data collection form options

Like screener forms, data collection 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

Filling out a data collection form

Click on "My Program Tools" to activate the dropdown, then click on "Inbound referrals" to go to the Inbound Referral Dashboard.

Filling out a data collection form

1. In the upper right corner, click "Forms."
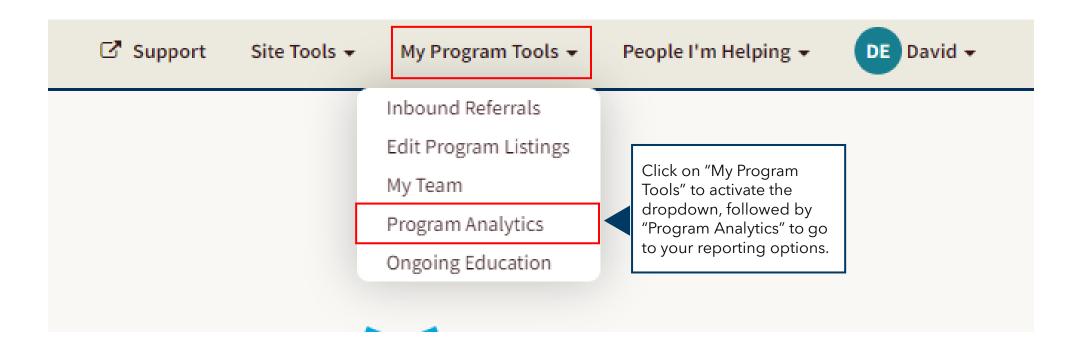2. Next, click "Start new Data Collection form for Highmark Demo Food Bank

Remember! You can set up different data collection forms for each of your program cards.

Fill out the form and submit

Client Outcomes

You can change the title of the form when you set the form up initially. You can also have different sections.

Did you see this person at AGH? *

○ Yes

○ No

You can set up many different types of questions. They can be multi-select, radial, free text, or other options.

Did this individual enroll in additional programs?

☐ Yes; food pantry

☐ Yes; job training

☐ Yes; housing support

☐ Yes; financial literacy

To see all data collection form responses, use program analytics

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 "My Program Tools" to activate the dropdown, followed by "Program Analytics" to go to your reporting options.

Click on the appropriate 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

Click "View Report" to see the report.

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

Data Collection form reporting overview

Data Collection Form Details | 2024-05-10 to 2024-08-08

ID	PROGRAM NAME	SUBMITTED BY	SUBMITTED FOR	CREATED
1807677	Highmark Demo Program	brad.eddy@highmarkhealth.org	referraltest@test.com	2024-07-
1807678	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	testreferral@test.com	2024-07-
1788927	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	307e5fe0-b41b-42cf-909a-9ba08a150351	2024-07-
1788933	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	307e5fe0-b41b-42cf-909a-9ba08a150351	2024-07-18 00:00:00
1788934	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	307e5fe0-b41b-42cf-909a-9ba08a150351	2024-07-18 00:00:00	Test
1788935	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	testreferral@test.com	2024-07-18 00:00:00	Test
1738576	Highmark Demo Utility Service	brad.eddy@highmarkhealth.org	brad.eddy@highmarkhealth.org	2024-06-14 00:00:00	David

① Menu:
- Edit Pivot
- Search
- Download Data
  7 Rows
- **②**

1. Click the three vertical lines to access the menu.
2. Click "Download Data" to get the screener data.