Job Aid for Community Based Organizations

Findhelp User Guide and Social Care Network Referral Guide

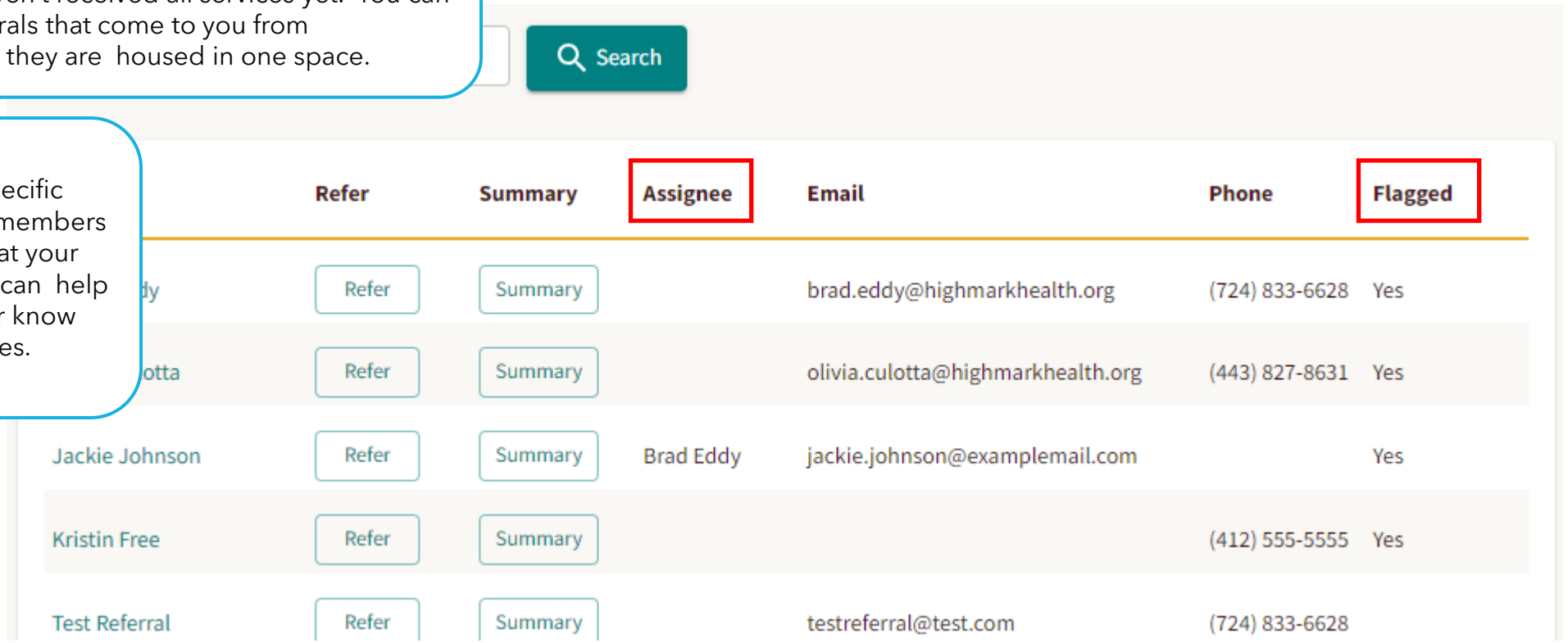
HIGHMARK HEALTH

Flagging Referrals and Assigning Referrals

Assigning or Flagging Referrals

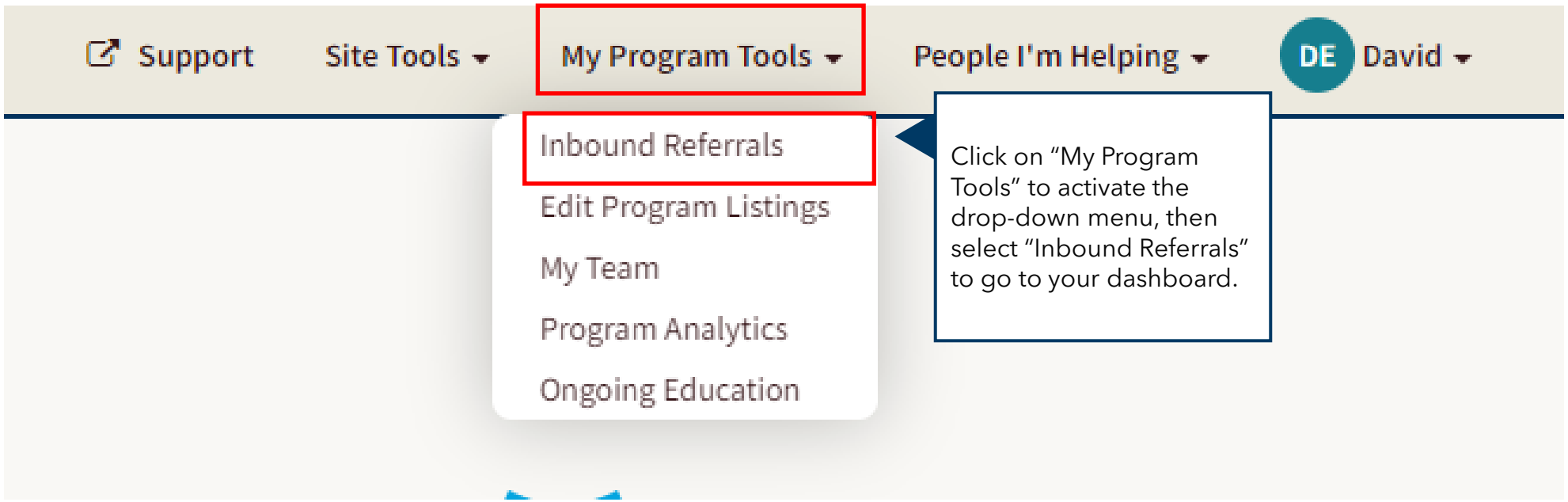
You can “flag” referrals to make sure they come to the top of your “People I’m Helping” dashboard. This is good option if you’ve had some initial contact with the client, but they haven’t received all services yet. You can also “flag” all referrals that come to you from Highmark/AHN so they are housed in one space.

You also assign specific referrals to team members who use findhelp at your organization. This can help that team member know their responsibilities.

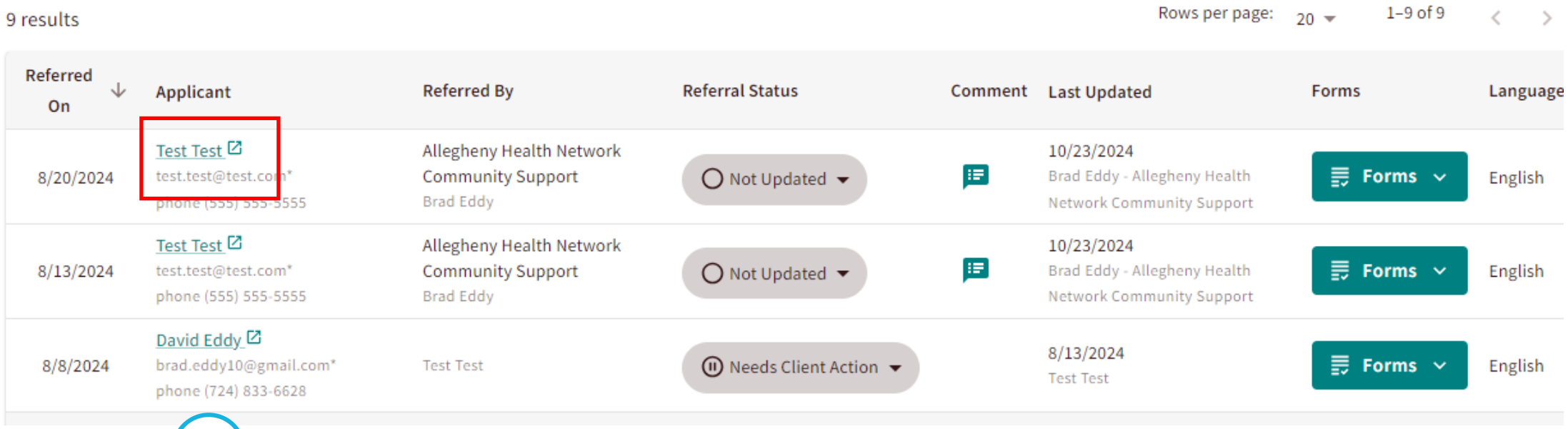


How to flag or assign referrals

Go to your Inbound Referral Dashboard.

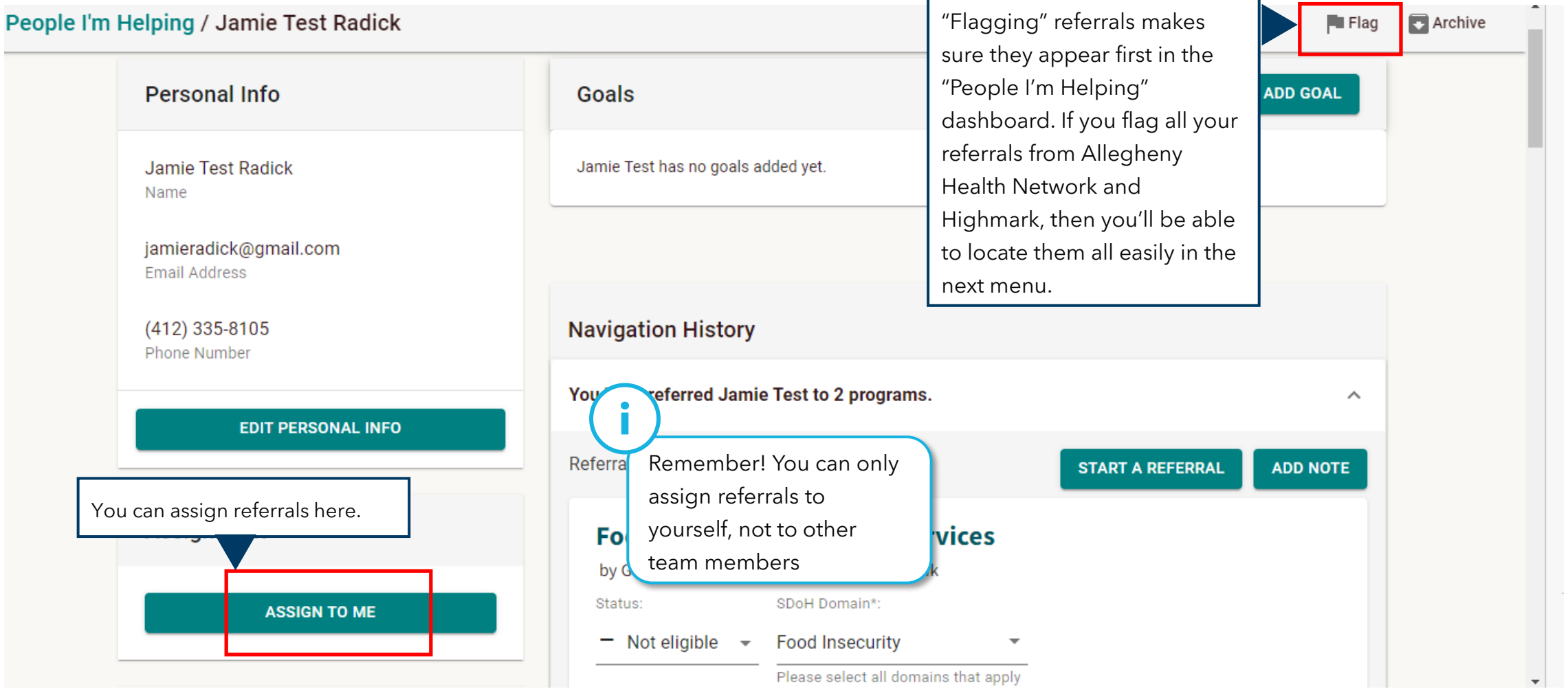


Click on the name of the client



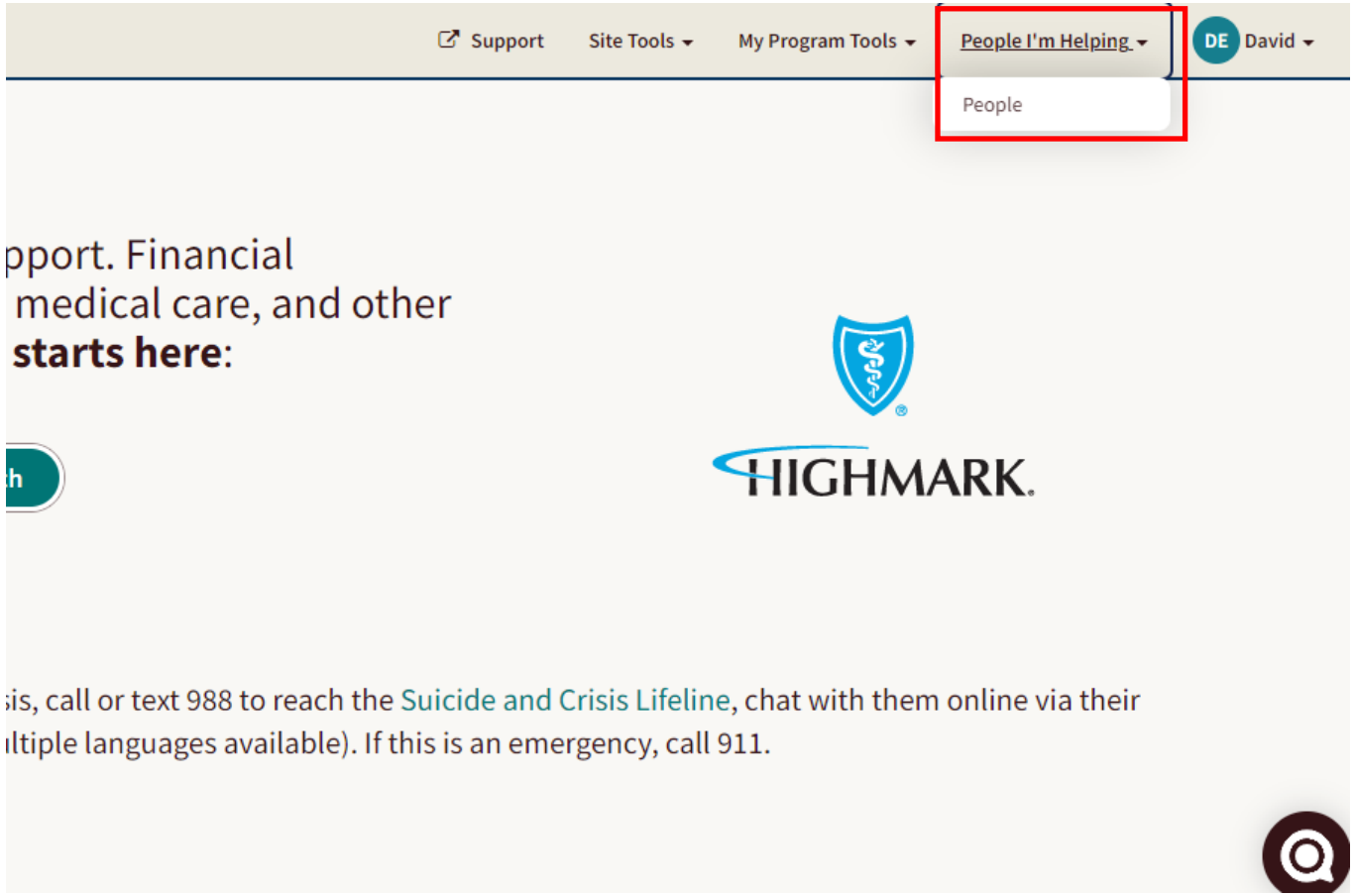
Clicking on the client's name will take you to that client's main page in "People I'm Helping."

How to assign or flag referrals

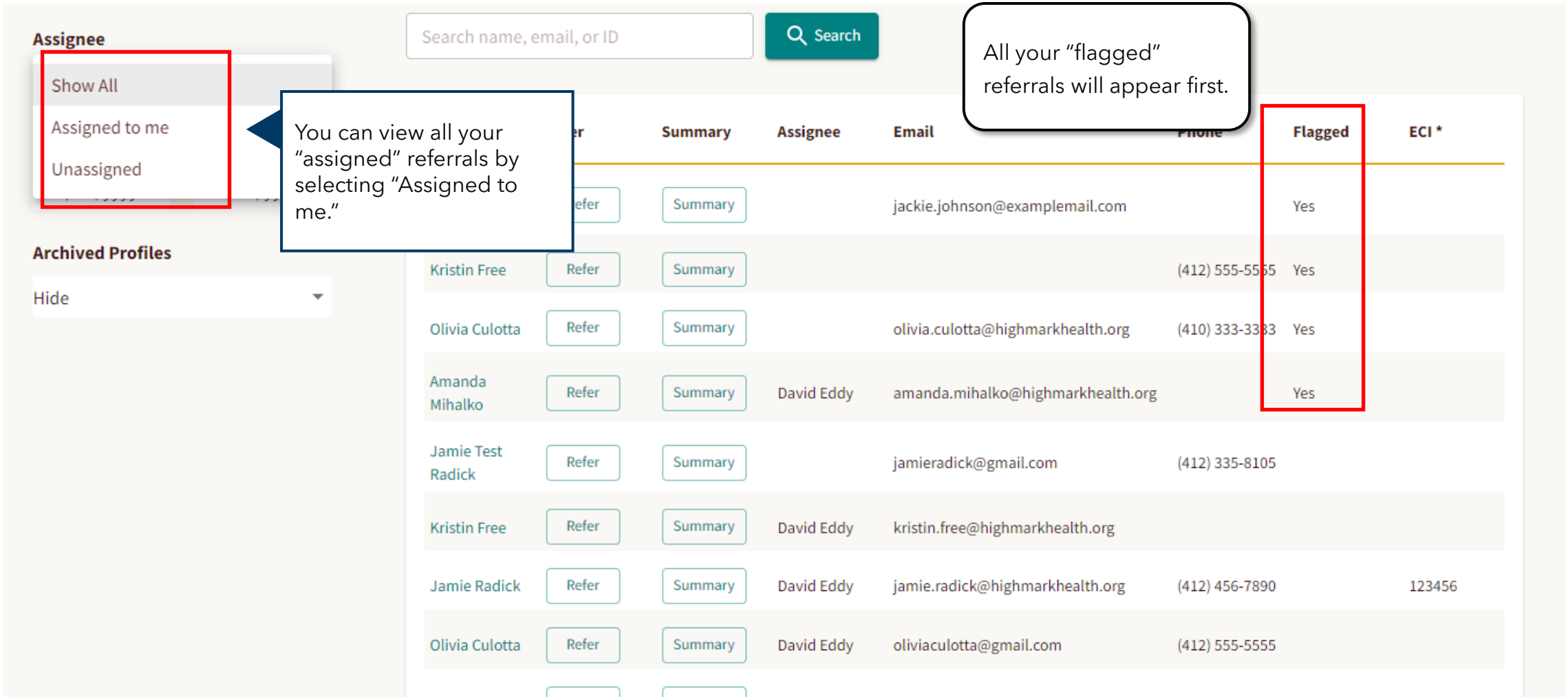


Next Steps

- Flag or assign all your referrals from Highmark or AHN
- Next, click on “People I’m Helping” from any screen
- Click the “People” drop down



People I'm Helping

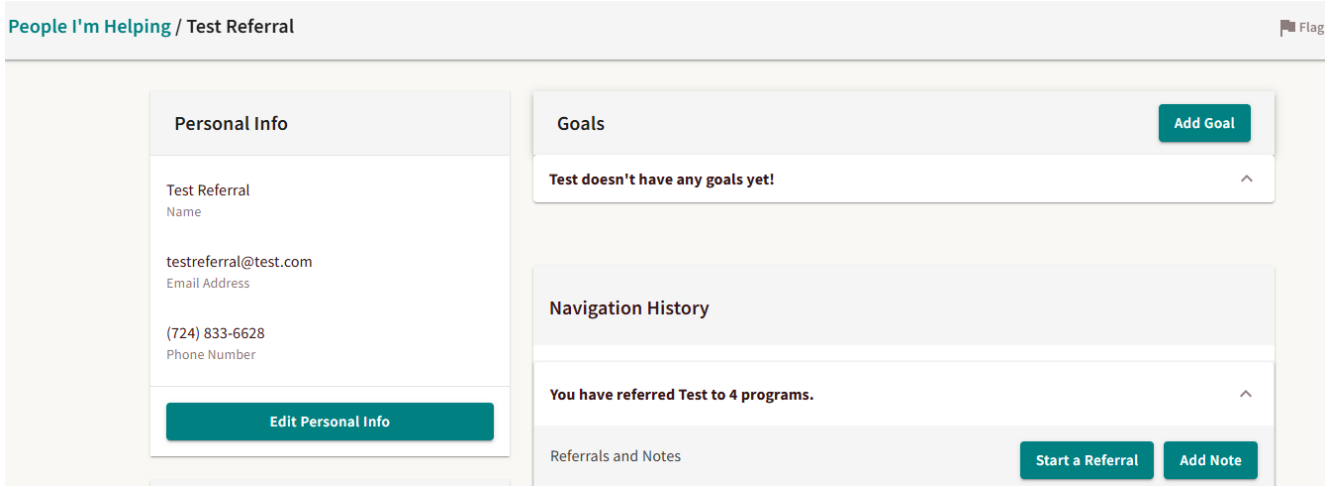


Notes and Referring to Other CBOs

Using Notes

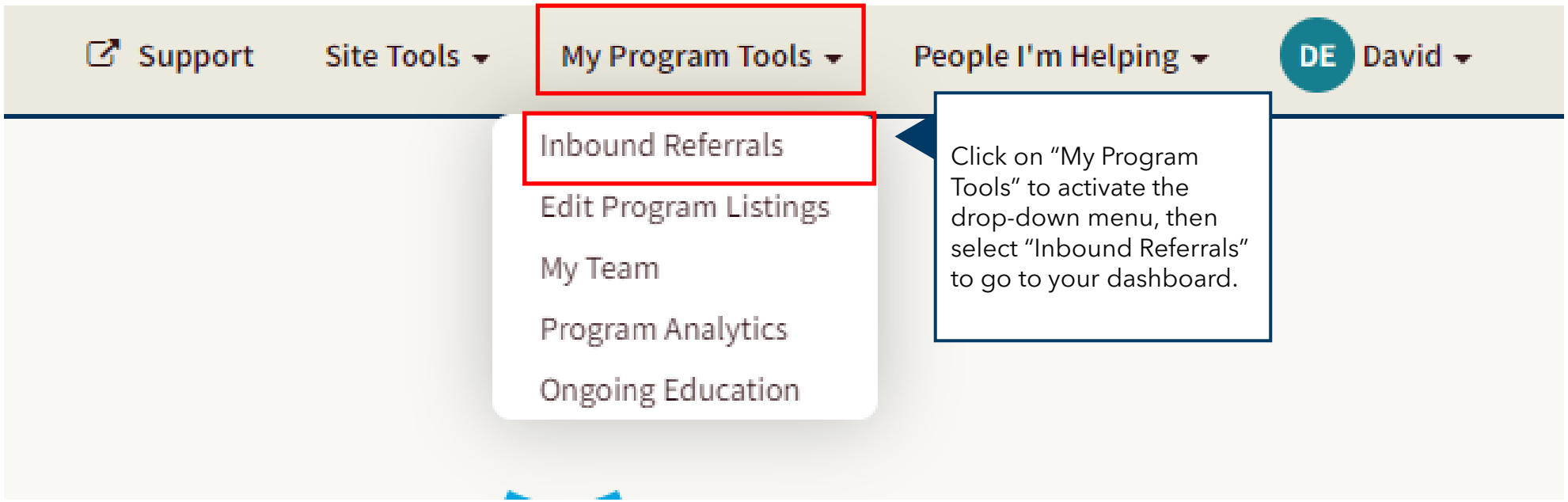
Accessing notes in findhelp allows you to:

- Keep a secure record for the client
- Set goals and assign outcomes
- Communicate with the referring party (Highmark clinician or the individual)
- Update referrals
- Upload supporting documents
- Start a referral to other organizations for the client

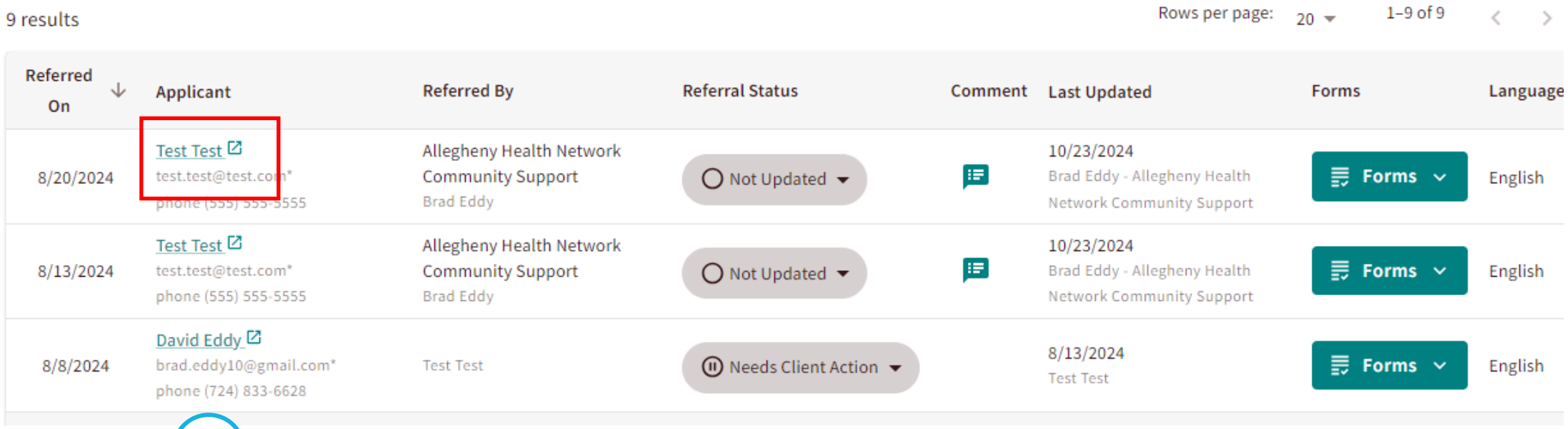


Accessing the Note Feature

Go to your Inbound Referral Dashboard.

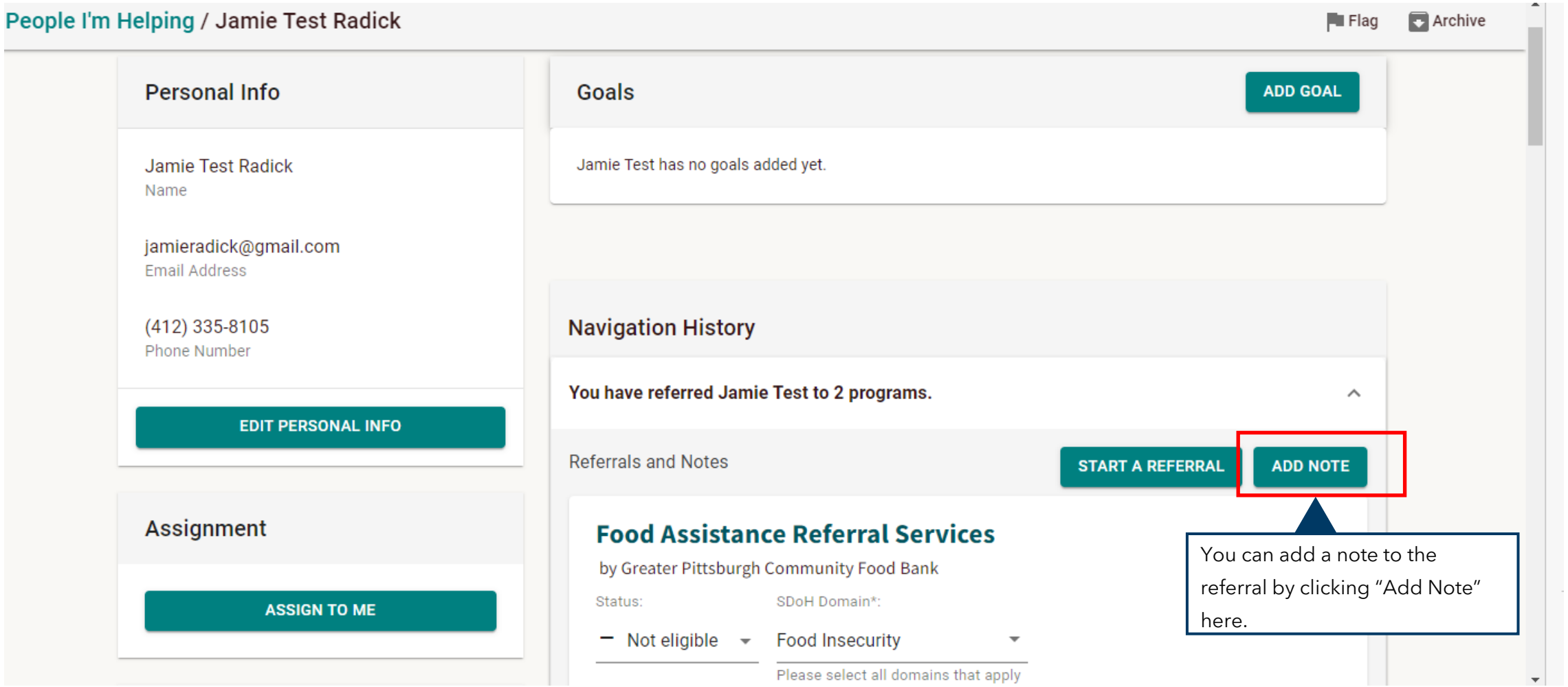


Click on the name of the client

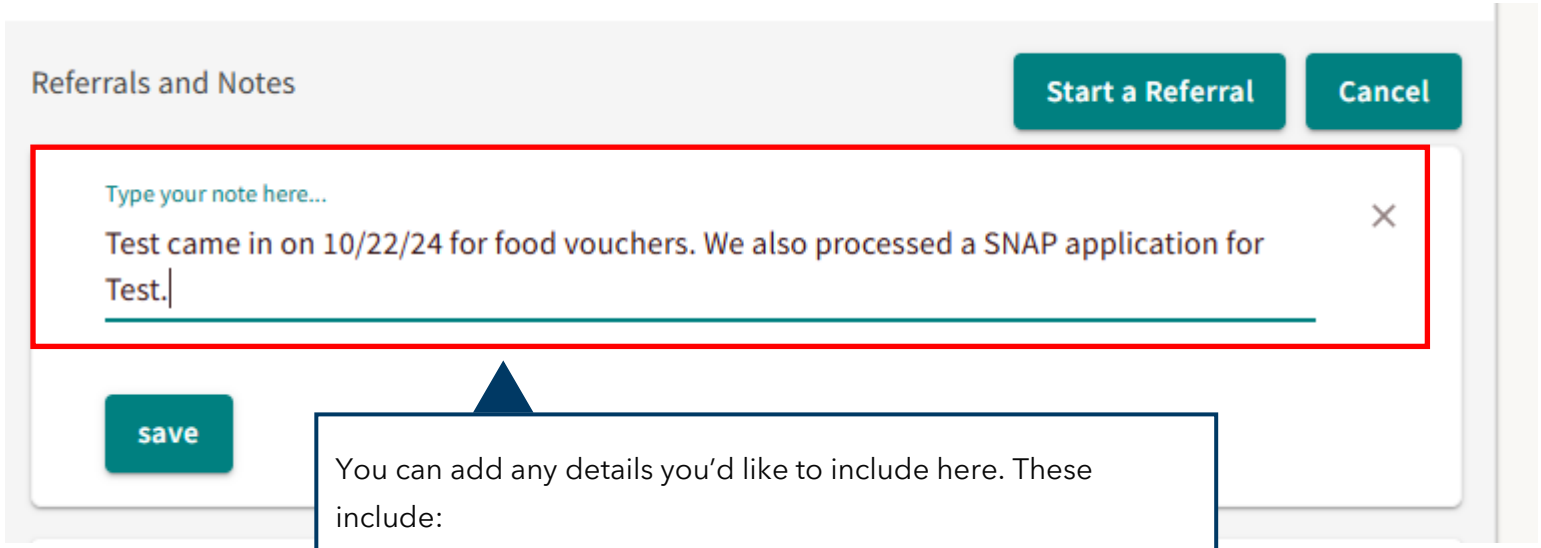


Clicking on the client's name will take you to that client's main page in "People I'm Helping."

Client profile page: Notes



Note Options



You can add any details you'd like to include here. These include:

- Date of service
- Additional services rendered
- Reason for denial of services
- Other organizations you may have referred the client
- Follow up dates

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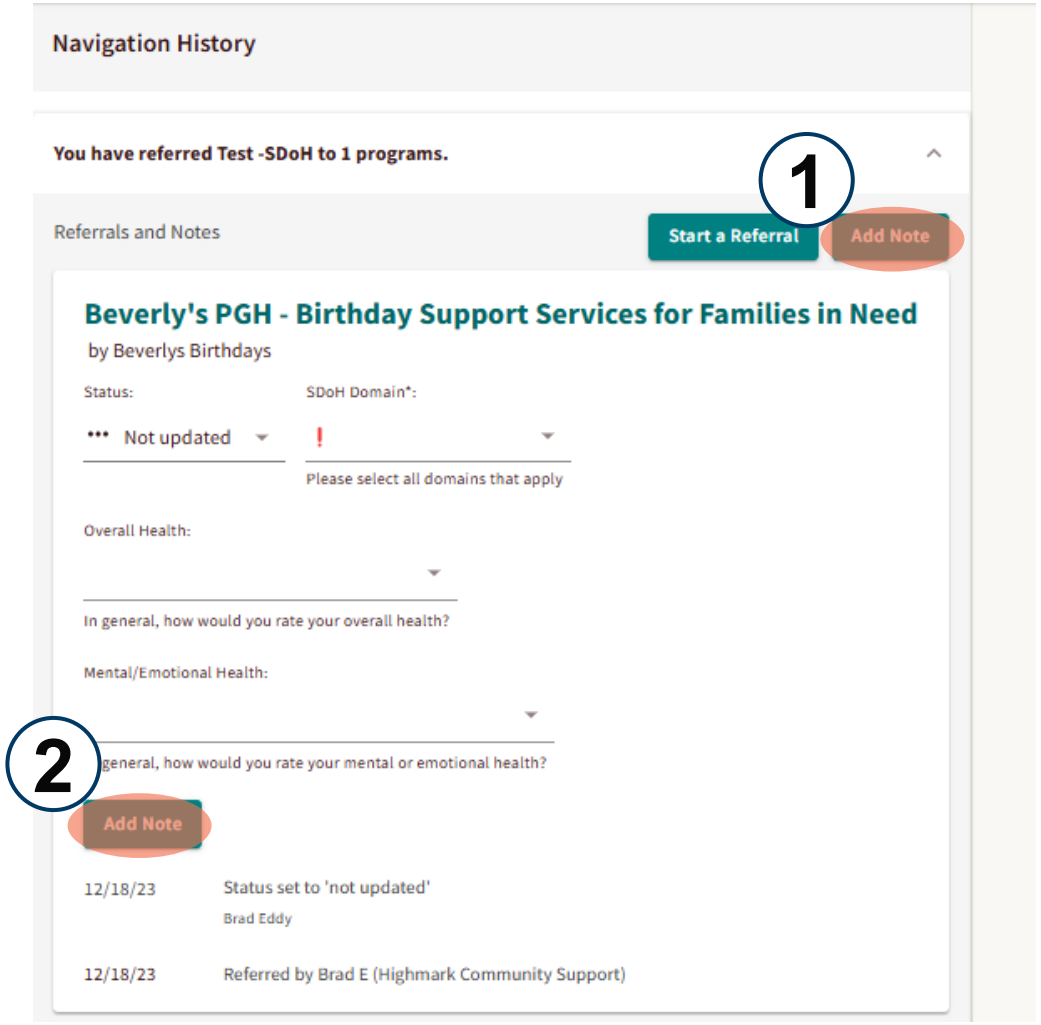
These notes will be visible **INTERNALLY**; individuals outside of your organization **WILL NOT** see these notes.

Internal Notes

There are two places to add notes on the Client Profile page:

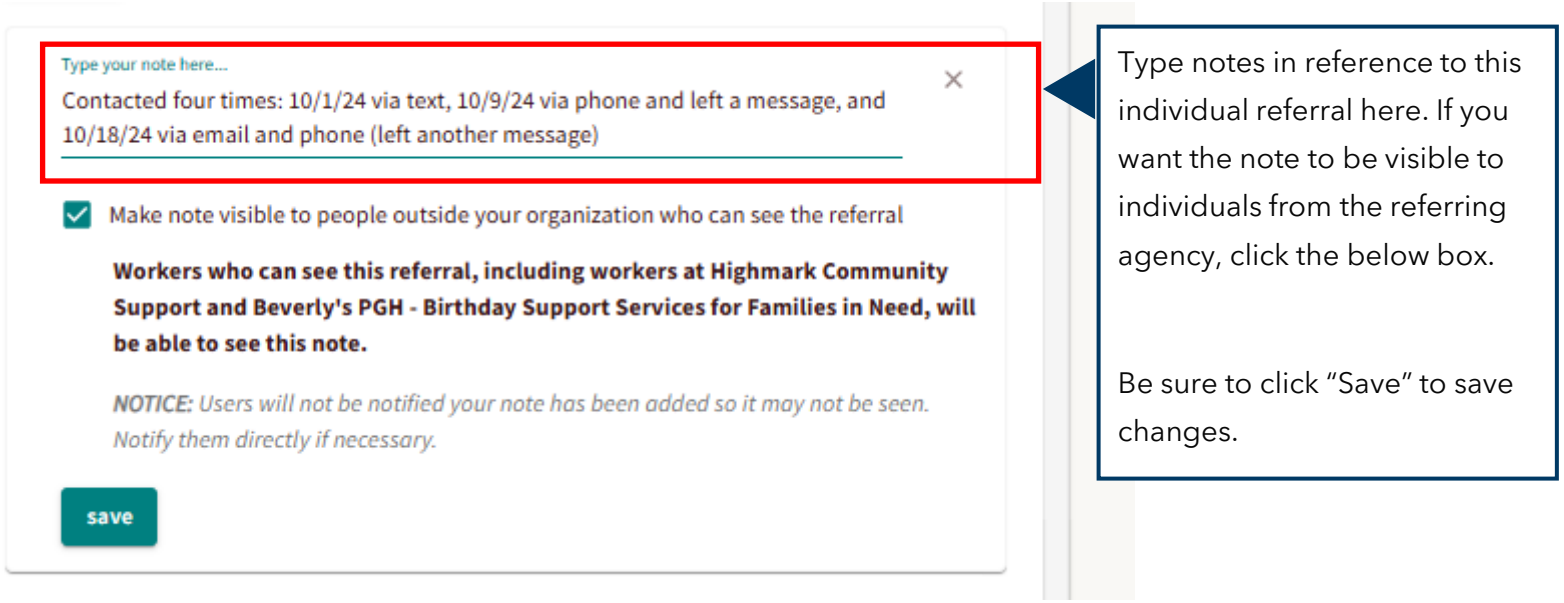
1. Navigation History
2. Individual Referral



Navigation History is a place for general, internal notes.

Individual Referral is in reference just to that specific referral. You can also make this note visible for people **OUTSIDE** your organization.

External Notes



Type notes in reference to this individual referral here. If you want the note to be visible to individuals from the referring agency, click the below box.

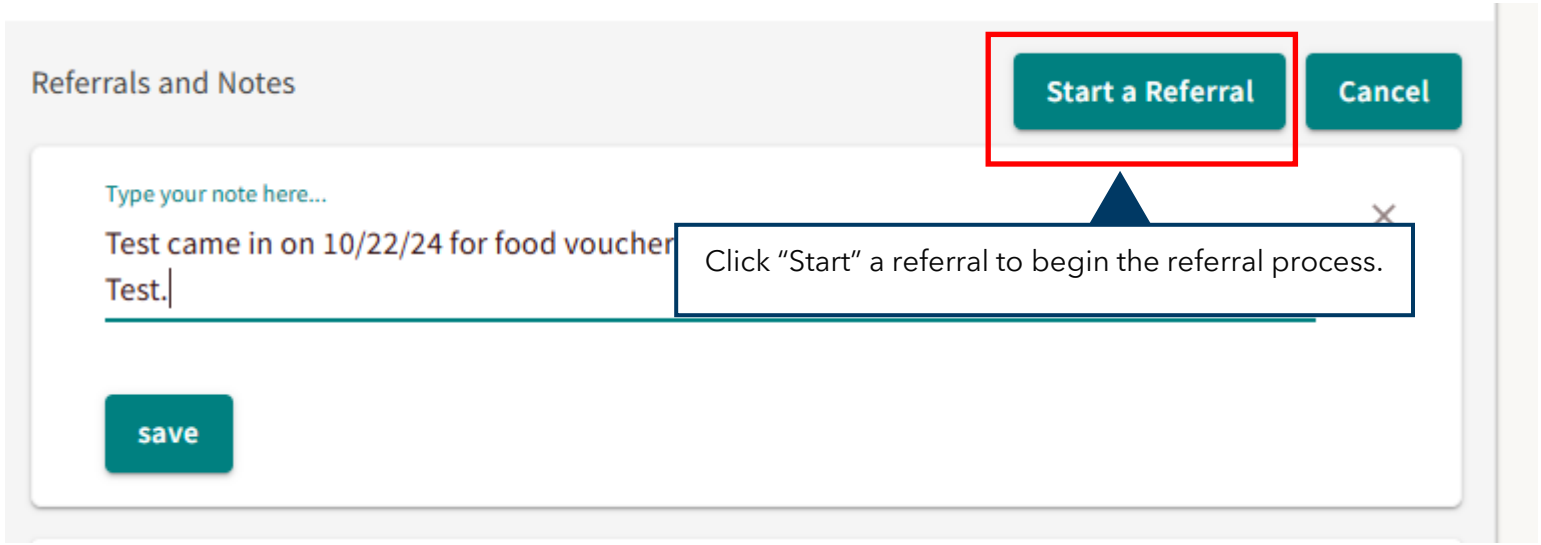
Be sure to click "Save" to save changes.

Potential use cases for notes

Internal Note	External Note
• Internal follow up • Pre-existing history with client • Sensitive information you don't want to share with external individuals	• To contact referral maker • To include more information to Highmark regarding the patient like: i. Additional services given ii. Repeat services iii. Contact attempt

External notes are visible to Highmark Health and to the person who made the referral.

Starting an external referral



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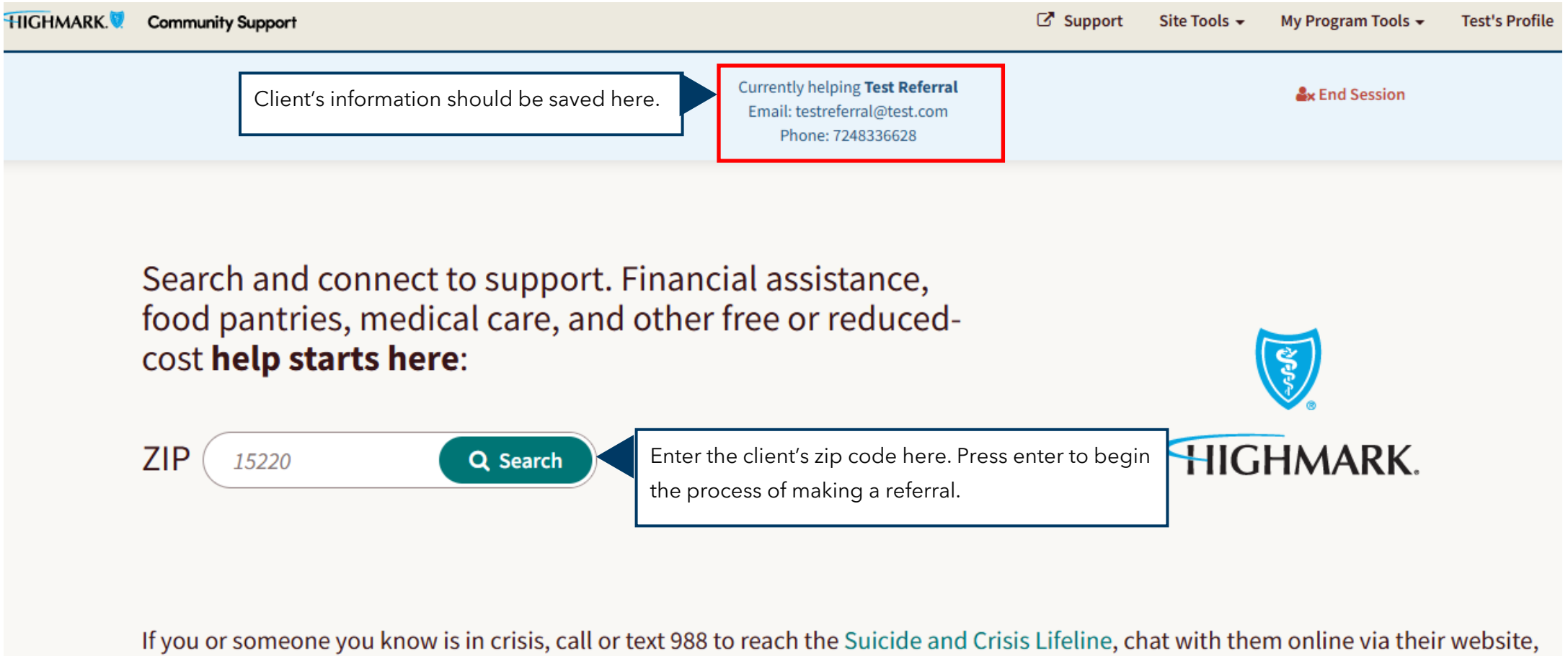
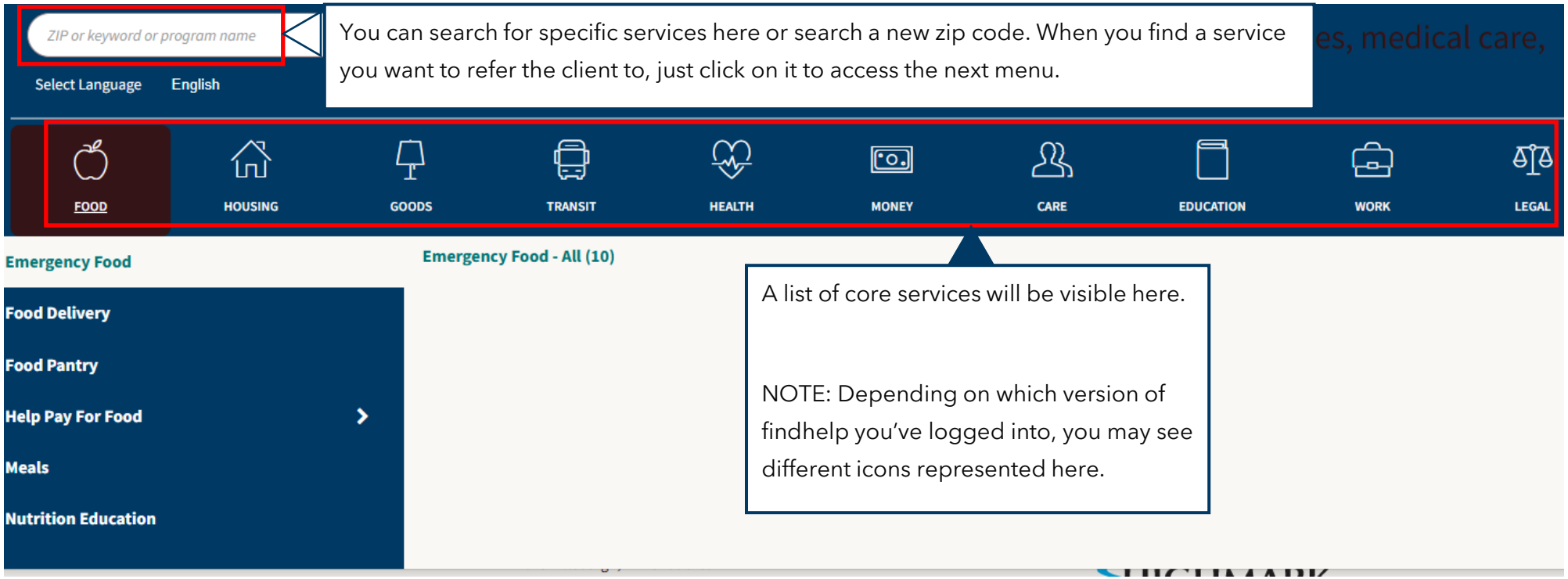
When might you refer someone externally?

- If the client isn't eligible for your services
- The client needs services you don't provide
- The client would prefer to see another organization (e.g., one closer to them)
- You have already provided the client with services, but they need more help

Starting an external referral (continued)



Next steps

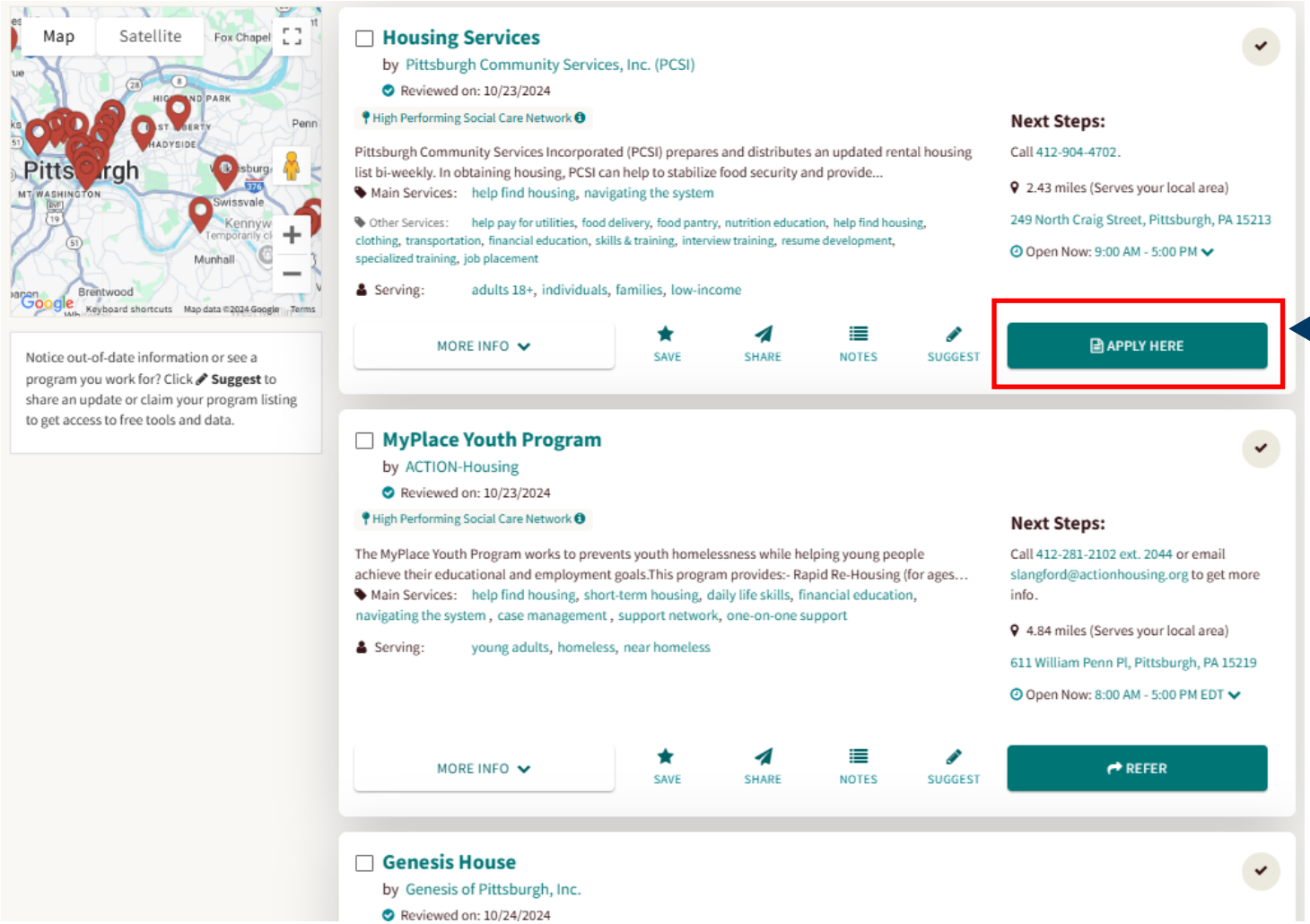


You can search for specific services here or search a new zip code. When you find a service you want to refer the client to, just click on it to access the next menu.

A list of core services will be visible here.

NOTE: Depending on which version of findhelp you've logged into, you may see different icons represented here.

Program Card Listing



Find the appropriate service and click the "connect" button to start the referral.

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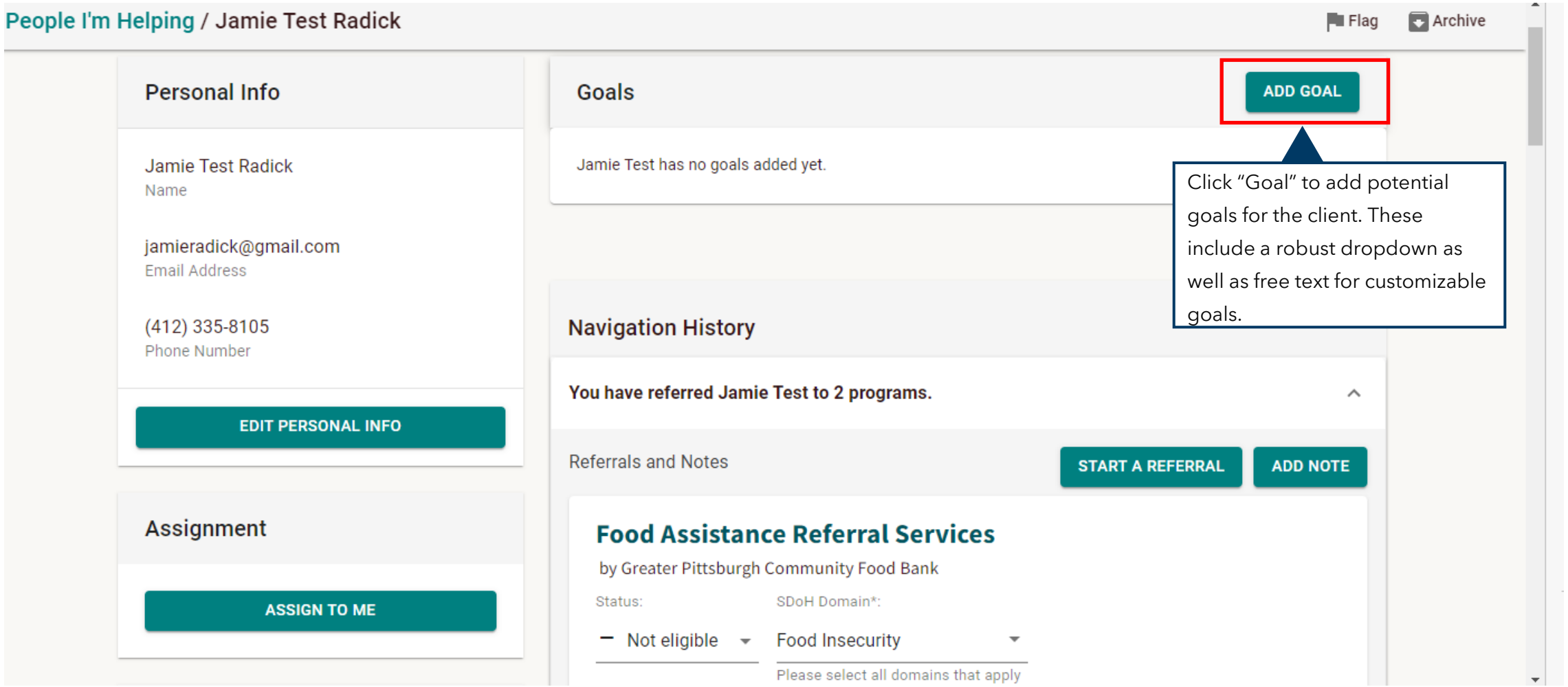
Remember! These tiles will have different text depending on what the organization's contact settings are. If you see "Apply Here" or "Refer," then the organization has electronic referrals activated.

Client profile page: Goals