

Job Aid for Community Based Organizations

Findhelp User Guide and Social Care Network Referral Guide



Flagging Referrals and Assigning Referrals

Assigning or Flagging Referrals



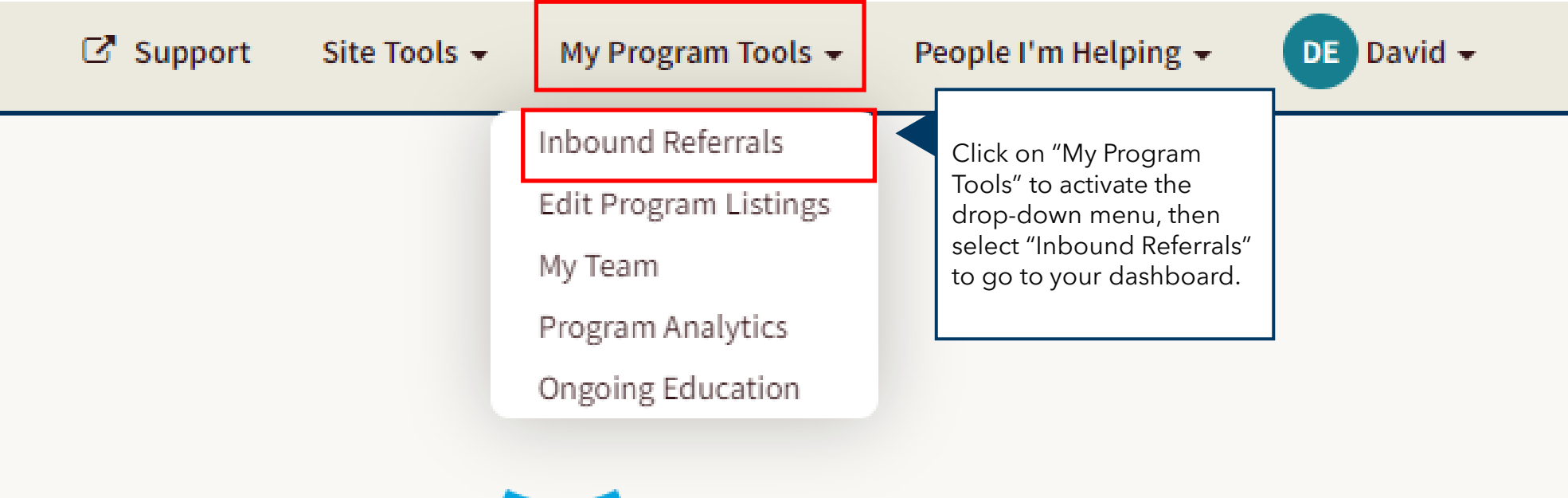
You can “flag” referrals to make sure they come to the top of your “People I’m Helping” dashboard. This is good option if you’ve had some initial contact with the client, but they haven’t received all services yet. You can also “flag” all referrals that come to you from Highmark/AHN so they are housed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

<div><div></div><div>Search</div></div>						
	Refer	Summary	Assignee	Email	Phone	Flagged
dy	<div>Refer</div>	<div>Summary</div>		brad.eddy@highmarkhealth.org	(724) 833-6628	Yes
otta	<div>Refer</div>	<div>Summary</div>		olivia.culotta@highmarkhealth.org	(443) 827-8631	Yes
Jackie Johnson	<div>Refer</div>	<div>Summary</div>	Brad Eddy	jackie.johnson@exampleemail.com		Yes
Kristin Free	<div>Refer</div>	<div>Summary</div>			(412) 555-5555	Yes
Test Referral	<div>Refer</div>	<div>Summary</div>		testreferral@test.com	(724) 833-6628	

How to flag or assign referrals

Go to your Inbound Referral Dashboard.



Click on the name of the client

9 results

Rows per page: 20 1-9 of 9 < >

Referred On	Applicant	Referred By	Referral Status	Comment	Last Updated	Forms	Language
8/20/2024	Test Test test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<input type="radio"/> Not Updated		10/23/2024 Brad Eddy - Allegheny Health Network Community Support	Forms	English
8/13/2024	Test Test test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<input type="radio"/> Not Updated		10/23/2024 Brad Eddy - Allegheny Health Network Community Support	Forms	English
8/8/2024	David Eddy brad.eddy10@gmail.com* phone (724) 833-6628	Test Test	<input checked="" type="radio"/> Needs Client Action		8/13/2024 Test Test	Forms	English

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

People I'm Helping / Jamie Test Radick

Personal Info

Jamie Test Radick
Name

jamieradick@gmail.com
Email Address

(412) 335-8105
Phone Number

EDIT PERSONAL INFO

Goals

Jamie Test has no goals added yet.

ADD GOAL

Navigation History

You referred Jamie Test to 2 programs.

Remember! You can only assign referrals to yourself, not to other team members

START A REFERRAL

ADD NOTE

ASSIGN TO ME

You can assign referrals here.

Flag

Archive

"Flagging" referrals makes sure they appear first in the "People I'm Helping" dashboard. If you flag all your referrals from Allegheny Health Network and Highmark, then you'll be able to locate them all easily in the next menu.

Referral

Food Insecurity

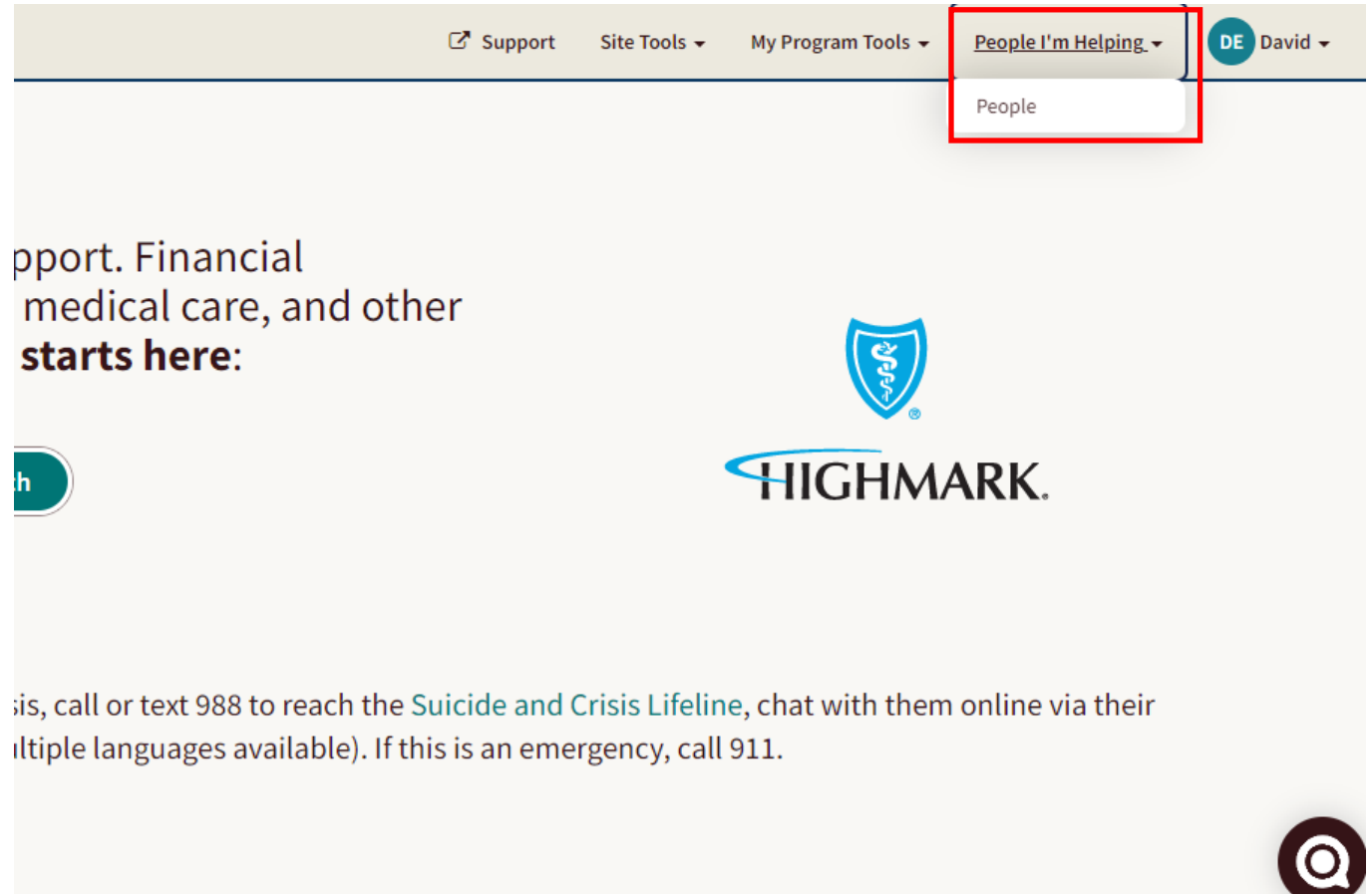
Status: Not eligible

SDoH Domain*: Food Insecurity

Please select all domains that apply

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

Assignee

Show All

Assigned to me

Unassigned

Archived Profiles

Hide

Search name, email, or ID

Search

	Summary	Assignee	Email	Phone	Flagged	ECI *
<div>Refer</div> <div>Summary</div>			jackie.johnson@exampleemail.com		Yes	
<div>Refer</div> <div>Summary</div>				(412) 555-5555	Yes	
<div>Refer</div> <div>Summary</div>			olivia.culotta@highmarkhealth.org	(410) 333-3333	Yes	
<div>Refer</div> <div>Summary</div>	David Eddy	amanda.mihalko@highmarkhealth.org			Yes	
<div>Refer</div> <div>Summary</div>			jamieradick@gmail.com	(412) 335-8105		
<div>Refer</div> <div>Summary</div>	David Eddy	kristin.free@highmarkhealth.org				
<div>Refer</div> <div>Summary</div>	David Eddy	jamie.radick@highmarkhealth.org	(412) 456-7890			123456
<div>Refer</div> <div>Summary</div>	David Eddy	oliviaculotta@gmail.com	(412) 555-5555			

You can view all your "assigned" referrals by selecting "Assigned to me."

All your "flagged" referrals will appear first.

Notes and Referring to Other CBOs

Using Notes

Accessing notes in findhelp allows you to:

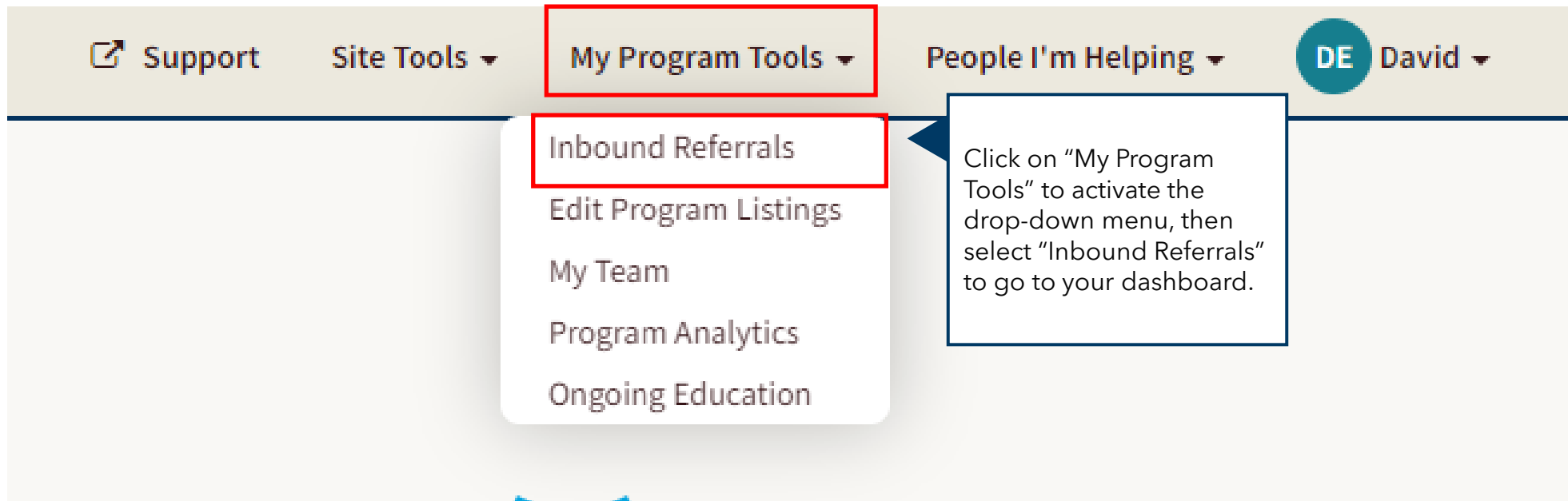
- Keep a secure record for the client
- Set goals and assign outcomes
- Communicate with the referring party (Highmark clinician or the individual)
- Update referrals
- Upload supporting documents
- Start a referral to other organizations for the client

The screenshot displays a web interface for managing a client's referral. The header shows 'People I'm Helping / Test Referral' and a 'Flag' icon. The main content is divided into four sections:

- Personal Info:** A form containing fields for 'Test Referral Name' (with value 'testreferral@test.com'), 'Email Address' (with value '(724) 833-6628'), and 'Phone Number'. An 'Edit Personal Info' button is at the bottom.
- Goals:** A section with an 'Add Goal' button and a message: 'Test doesn't have any goals yet!'.
- Navigation History:** A section with a message: 'You have referred Test to 4 programs.'.
- Referrals and Notes:** A section with 'Start a Referral' and 'Add Note' buttons.

Accessing the Note Feature

Go to your Inbound Referral Dashboard.



Click on the name of the client

9 results

Rows per page: 20 1-9 of 9 < >

Referred On	Applicant	Referred By	Referral Status	Comment	Last Updated	Forms	Language
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8/8/2024	David Eddy brad.eddy10@gmail.com* phone (724) 833-6628	Test Test	<input checked="" type="radio"/> Needs Client Action		8/13/2024 Test Test	Forms	English

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

Client profile page: Notes

People I'm Helping / Jamie Test Radick

Flag

Archive

Personal Info

Jamie Test Radick

Name

jamieradick@gmail.com

Email Address

(412) 335-8105

Phone Number

EDIT PERSONAL INFO

Assignment

ASSIGN TO ME

Goals

ADD GOAL

Jamie Test has no goals added yet.

Navigation History

You have referred Jamie Test to 2 programs.

Referrals and Notes

START A REFERRAL

ADD NOTE

Food Assistance Referral Services

by Greater Pittsburgh Community Food Bank

Status:SDoH Domain*:

Not eligible

Food Insecurity

Please select all domains that apply

You can add a note to the referral by clicking "Add Note" here.

Note Options

Referrals and Notes

Start a Referral Cancel

Type your note here...

Test came in on 10/22/24 for food vouchers. We also processed a SNAP application for Test.

save

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



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

You have referred Test -SDoH to 1 programs.

Referrals and Notes **Start a Referral** **Add Note**

Beverly's PGH - Birthday Support Services for Families in Need
by Beverly's Birthdays

Status: **Not updated** SDoH Domain*: **!**
Please select all domains that apply

Overall Health:
In general, how would you rate your overall health?

Mental/Emotional Health:
In general, how would you rate your mental or emotional health?

Add Note

12/18/23 Status set to 'not updated'
Brad Eddy

12/18/23 Referred by Brad E (Highmark Community Support)

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 your note here...

×

Contacted four times: 10/1/24 via text, 10/9/24 via phone and left a message, and 10/18/24 via email and phone (left another message)

☒ Make note visible to people outside your organization who can see the referral

Workers who can see this referral, including workers at Highmark Community Support and Beverly's PGH - Birthday Support Services for Families in Need, will be able to see this note.

NOTICE: Users will not be notified your note has been added so it may not be seen. Notify them directly if necessary.

save

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

- Internal follow up
- Pre-existing history with client
- Sensitive information you don't want to share with external individuals

External Note

- 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

Referrals and Notes

Start a Referral Cancel

Type your note here...

Test came in on 10/22/24 for food voucher Test.

Click "Start" a referral to begin the referral process.


save



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)

 Community Support

SupportSite ToolsMy Program ToolsTest's Profile

Client's information should be saved here.

Currently helping **Test Referral**
Email: testreferral@test.com
Phone: 7248336628

End Session



Search and connect to support. Financial assistance, food pantries, medical care, and other free or reduced-cost **help starts here:**

ZIP

15220

Search

Enter the client's zip code here. Press enter to begin the process of making a referral.



If you or someone you know is in crisis, call or text 988 to reach the [Suicide and Crisis Lifeline](#), chat with them online via their website,

HIGHMARK HEALTH

81


Next steps

ZIP or keyword or program name


Select LanguageEnglish

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.


es, medical care,




FOOD




HOUSING




GOODS




TRANSIT




HEALTH




MONEY




CARE



EDUCATION



WORK



LEGAL

Emergency Food

Emergency Food - All (10)

Food Delivery

Food Pantry

Help Pay For Food

Meals

Nutrition Education

>

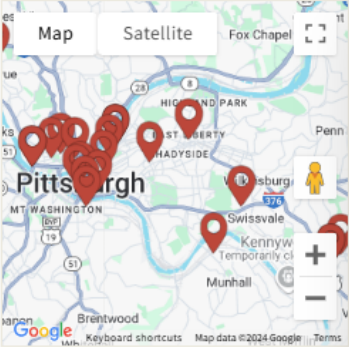
A list of core services will be visible here.

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

HIGHMARK HEALTH

82

Program Card Listing



Map Satellite Fox Chapel

Pittsburgh

MT WASHINGTON (62) (19) (51) (57) (78) (79) (80) (81) (82) (83) (84) (85) (86) (87) (88) (89) (90) (91) (92) (93) (94) (95) (96) (97) (98) (99) (100)

Keyboard shortcuts Map data ©2024 Google Terms

Notice out-of-date information or see a program you work for? Click [Suggest](#) to share an update or claim your program listing to get access to free tools and data.

☐ **Housing Services**
by Pittsburgh Community Services, Inc. (PCSI)
Reviewed on: 10/23/2024
High Performing Social Care Network

Pittsburgh Community Services Incorporated (PCSI) prepares and distributes an updated rental housing list bi-weekly. In obtaining housing, PCSI can help to stabilize food security and provide...

Main Services: help find housing, navigating the system

Other Services: help pay for utilities, food delivery, food pantry, nutrition education, help find housing, clothing, transportation, financial education, skills & training, interview training, resume development, specialized training, job placement

Serving: adults 18+, individuals, families, low-income

[MORE INFO](#) [SAVE](#) [SHARE](#) [NOTES](#) [SUGGEST](#) [APPLY HERE](#)

☐ **MyPlace Youth Program**
by ACTION-Housing
Reviewed on: 10/23/2024
High Performing Social Care Network

The MyPlace Youth Program works to prevents youth homelessness while helping young people achieve their educational and employment goals.This program provides:- Rapid Re-Housing (for ages...

Main Services: help find housing, short-term housing, daily life skills, financial education, navigating the system , case management , support network, one-on-one support

Serving: young adults, homeless, near homeless

[MORE INFO](#) [SAVE](#) [SHARE](#) [NOTES](#) [SUGGEST](#) [REFER](#)

☐ **Genesis House**
by Genesis of Pittsburgh, Inc.
Reviewed on: 10/24/2024

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

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

People I'm Helping / Jamie Test Radick

FlagArchive

Personal Info

Jamie Test Radick

Name

jamieradick@gmail.com

Email Address

(412) 335-8105

Phone Number

EDIT PERSONAL INFO

Assignment

ASSIGN TO ME

Goals

Jamie Test has no goals added yet.

ADD GOAL

Click "Goal" to add potential goals for the client. These include a robust dropdown as well as free text for customizable goals.

Navigation History

You have referred Jamie Test to 2 programs.

Referrals and Notes

START A REFERRALADD NOTE

Food Assistance Referral Services

by Greater Pittsburgh Community Food Bank

Status:SDoH Domain*:

Not eligibleFood Insecurity

Please select all domains that apply