

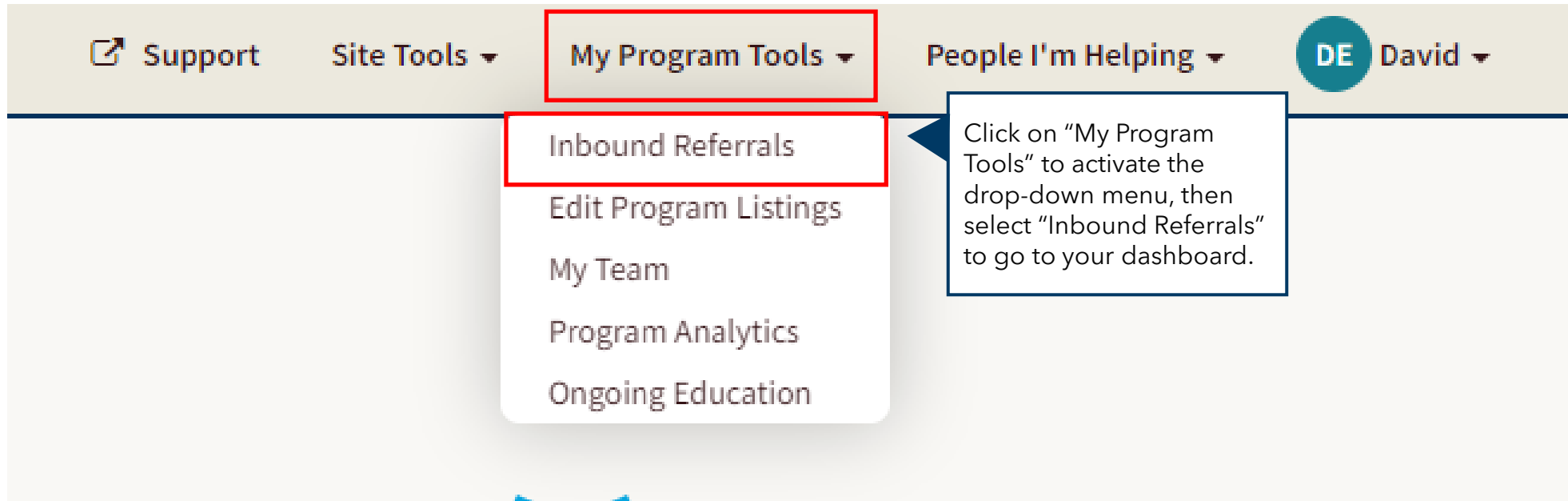
Job Aid for Community Based Organizations

# Findhelp User Guide and Social Care Network Referral Guide



# **Inbound Referral Dashboard**

# Navigate to any screen of findhelp



# Inbound Referral Dashboard Overview

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HD

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HD

5

HD

9 results

Referred On	Applicant	Referred By	Referral Status	Comment	Last Updated	Forms	Language
8/20/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<div>○ Not Updated</div>		10/23/2024 Brad Eddy - Allegheny Health Network Community Support	<div> Forms</div>	English
8/13/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<div>○ Not Updated</div>		10/23/2024 Brad Eddy - Allegheny Health Network Community Support	<div> Forms</div>	English

HD

Highmark Demo Food Bank

Your program card name will be listed here.

Referred On

Referral Status

Last Updated

+ Add Referral

Settings

Rows per page: 20

1-9 of 9

All program cards will be listed here. You can click on the initials for the program to switch to the dashboard for that program.

# Inbound Referral Dashboard (continued)

HD

Highmark Demo Food Bank

Search by name or email

Referred On

Referral Status

Last Updated

+ Add Referral

Settings

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	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<div>○ Not Updated</div>		10/23/2024 Brad Eddy - Allegheny Health Network Community Support	<div>Forms</div>	English
8/13/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<div>○ Not Updated</div>		10/23/2024 Brad Eddy - Allegheny Health Network Community Support	<div>Forms</div>	English

You can search for an individual's name or email address here.

You can find the name and contact information of the person looking for help here.

# Updating referrals

Referred On	Applicant	Referred By	Referral Status
8/20/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<input type="radio"/> Not Updated ▾
8/13/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<input type="radio"/> Not Updated ▾
8/8/2024	<a href="#">David Eddy</a> brad.eddy10@gmail.com* phone (724) 833-6628	Test Test	<input checked="" type="radio"/> Needs Client Action ▾
8/8/2024	<a href="#">Test Test</a> <span>New</span>	Allegheny Health Network Community Support	<input type="radio"/> Not Updated ▾

Click the status box to show the other status options. Click on any option and the referral status will be updated.

Select a Status

- ☐ Not Updated
- ☒ Needs Client Action
- ☐ Pending
- ☒ Referred Elsewhere
- ☒ Got Help
- ☒ Eligible
- ☒ Couldn't Get Help
- ☒ Couldn't Contact
- ☒ Not Eligible
- ☒ No Capacity
- ☒ No Longer Interested



There are 11 status options. See the program manual for more information about what Highmark considers a "closed loop" status.

TIPS & TRICKS

# Additional Tips

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HD Highmark Demo Food Bank

Search by name or email

Referred On Referral Status Last Updated

The numbers you see next to the program card icons tell you how many new referrals you've received since your last log in.

+ Add Referral Settings



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	<a href="#">Test Test</a> 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	<div>Forms</div>	English
8/13/2024	<a href="#">Test Test</a> 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	<div>Forms</div>	English

# Additional Tips (continued)

9 results Rows per page

Referred On	Applicant	Referred By	Referral Status	Comment	Last Updated
8/20/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support	○ Not Updated ▼		10/23/2024
8/13/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Network Community Support Brad Eddy	○ Not Updated ▼		
8/8/2024	<a href="#">David Eddy</a> brad.eddy10@gmail.com* phone (724) 833-6628	Test Test	⏸ Needs Client Action ▼		8/13/2024 Test Test

Test works midnight shift and is only available to speak from 7 am to 10 am. X

If you see a text box under "Comment" then the referral maker has sent you a comment that might be helpful. Click on the text box to see the comment.

# Additional Tips (continued)

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

You'll see the source of the referrals here.

The current status of the referrals will be here. Remember! We ask that you update referrals from Highmark within 2-3 business days.



Remember! Highmark only compensates you for referrals sent from Allegheny Health Network and Highmark.

# Filtering referrals



You can filter your inbound referrals using the options at the top of your inbound referral page.



9 results

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8/20/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<input type="radio"/> Not Updated
8/13/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<input type="radio"/> Not Updated



Filtering by referral status can be a good way to follow up on referrals in batches.

# Closing Loops

- You can update referral statuses from the Inbound Referral Menu or from The People I'm Helping Menu
- Highmark gives organizations in this network a bonus when they "close the loop" at a high rate. There's also a bonus when you get a high percentage of referrals help

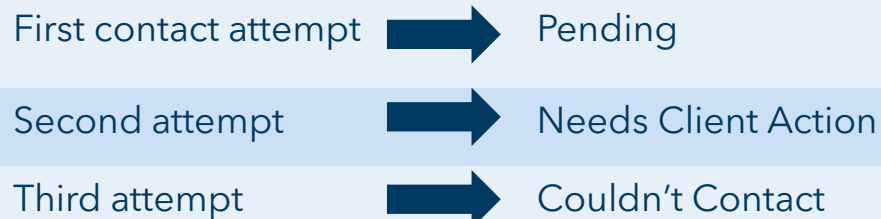
Status	Closed Loop?
Not Updated	No
Needs Client Action	No
Pending	No
Eligible	No
Couldn't Get Help	No
Couldn't Contact	Yes
Got Help	Yes
No Capacity	Yes
No Longer Interested	Yes
Not Eligible	Yes
Referred Elsewhere	Yes

# Updating Referrals: Best Practices



Update your referrals within 2-3 business days of receiving them. You can always update a referral, even from one "closed loop" status to another. You might select "Couldn't contact" after a few attempts, but if the client eventually calls you back and you get them help, you can always update to "Got Help."

## Suggested workflow for updating referrals:



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8/13/2024	<a href="#">Test Test</a> test.test@test.com* phone (555) 555-5555	Allegheny Health Network Community Support Brad Eddy	<input type="radio"/> Not Updated ▼
8/8/2024	<a href="#">David Eddy</a> brad.eddy10@gmail.com* phone (724) 833-6628	Test Test	<input checked="" type="radio"/> Needs Client Action ▼
8/8/2024	<a href="#">Test Test</a> <span>New</span>	Allegheny Health Network Community Support	<input type="radio"/> Not Updated ▼