

# Findhelp How-to Guide



powered by



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# 1 Introduction

CalViva Health Community Connect, powered by findhelp (formerly known as Aunt Bertha), is a network of social programs across the United States. It is the largest online platform used to identify local resources, support staff and community partners when searching for local services. Findhelp's network connects people seeking help to verified social services organizations that serve them. Findhelp makes it easy for people to find social services in their communities; for nonprofits to coordinate their efforts; and for customers to integrate social services into the work they already do.

The platform, which supports members with social determinants of health (SDOH) needs, provides an efficient way for staff to search no-cost or low-cost, direct social services to support these members. It also makes it easy to use for providers and community partners when they are making referrals to community resources, and it increases the visibility of community programs and services. Lastly, the platform meets regulatory requirements to provide culturally appropriate competent resources to better address the SDOH needs of the members and close the loop on referrals.

## 2 Key Roles

### Enhanced Care Management

Enhanced Care Management (ECM) provides a whole-person approach to care that addresses the clinical and non-clinical circumstances of high-need Medi-Cal beneficiaries enrolled into Medi-Cal managed care. ECM providers will be responsible for determining the member's eligibility and outreach to engage the member as stated in the [ECM Provider Guide](#). ECM providers will use the California Advancing and Innovating Medi-Cal (CalAIM) findhelp social service and referral platform to coordinate members to the appropriate Community Supports (CS) provider and services to ensure a seamless experience for the member.

### Community Supports

CS providers are pre-approved services and contracted with the Medi-Cal plan to provide medically appropriate services to eligible members. CS providers will be responsible for conducting an initial assessment and determining the member's eligibility by following the authorization guide before submitting an authorization through [Health Net's Provider Portal](#) for approval. CS will use the CalAIM findhelp platform when a referral is made, connect with the member to provide services, update the status, and close the loop on referrals in coordination with ECM providers.

## 3 Log In

### 3.1 Setting Up Your Account

Health Net\*, on behalf of CalViva Health, will invite people to their findhelp CalAIM platform using the User and Group Management tool. Once invited, users will receive an email with a link to verify their account and set their password. This link will expire after 24 hours.

#### Other ways to create accounts

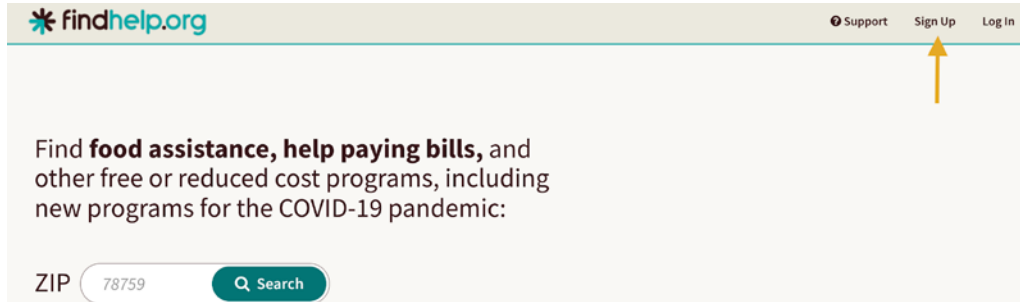
Anyone can use findhelp.org without logging in to search and connect to programs. You may also create a no-cost account that gives you access to additional features such as:

- Saving and sharing lists of your favorite programs.
- Contacting and referring directly to programs you find.
- Keeping notes about programs and/or the people you're helping.

Contracted ECM providers will have worker accounts in the Plan's findhelp platform for CalAIM work. Work with the Plan to assure you have the correct access and profile setup for this work.

### 3.2 How to Create an Account

1. Click Sign Up.



2. On the sign-up page, choose to sign up by email, and use the Email for ECM work that you provided the Plan. When entering your account information, you may also set an optional username to login with going forward.

3. Create a password with a minimum of eight characters with one capital letter, one lowercase letter, and one special character.
4. Check the box to affirm you have read our terms and conditions.
5. Choose whether you are searching for services for you and your family or helping other people.
6. Click Get Started!
7. You will then be sent a confirmation link via email or text message. Please click on the link within 24 hours to confirm your account. If you do not see the confirmation email, be sure to check your spam or junk folder.
8. You will know you are logged in because **your name will appear on the top right-hand corner** of your screen.

## Logging Out

To sign out:

1. Click on your name in the right-hand corner.
2. Click Log Out from the dropdown menu.

You will automatically be logged out after 30 minutes of idle time.

## Account Troubleshooting

If you are logging in and not seeing referrals that you expect to see, it could be that your account was created using different information than what was used when making your referral.

Tip: You may be notified by email or text message when a referral is made for a member on your behalf. You can use the information provided in these notifications to set up member accounts.

## 4 Search Overview

Search allows anyone in need to find no-cost and reduced-cost social service programs in their area that can serve them. When you type in your ZIP Code, or the ZIP Code of someone you're helping, the search will return the programs that serve that area.

From there, you can browse by category, search by keyword, program name, or organization name, and filter results to find the most relevant programs to meet their needs.

You can sort search results by relevance or by distance.



To search for a program, follow these steps:

1. From the homepage, enter your **ZIP Code**.
2. Use the **category navigation bar** or **type in a keyword** to find programs that match.
3. View the search results or use **search filters** to narrow your results.

### 4.1 ZIP Code Search



Entering your ZIP Code begins your search by identifying all of the local, statewide and national programs that provide services in that area.

To see where a program provides services, look at the program's **coverage area** in the **More Info** section of the program listing.

**Website:** [Program's Website](#)  
**Facebook:** [Program's Facebook](#)  
**Twitter:** [Program's Twitter](#)  
**Coverage Area:** This program covers residents of the following counties: Bastrop County, TX, Caldwell County, TX, Hays County, TX, Travis County, TX and Williamson County, TX.

## 4.2 Category Search/Service Tag Search

Once you've entered a ZIP Code, you can browse for programs using the **category navigation bar** and choosing a service subcategory.

When you choose a subcategory, you'll see a list of programs that have been categorized, or "tagged", with that service as one of its **Main Services**.



### The Downtown Shelter and Social Service Center by The Salvation Army of Austin

The Downtown Shelter and Social Service Center provides shelter for women, men and families with children. We offer temporary shelter for up to 7 days as space allows. Clients may be eligible for...

**Main Services:** [temporary shelter](#), [short-term housing](#)

**Other Services:** [help find housing](#), [daily life skills](#), [counseling](#), [childcare](#), [navigating the system](#), [case management](#), [one-on-one support](#), [spiritual support](#), [help find work](#)

By default, programs in search results are sorted by relevance. Relevance boosts programs that may be more likely to help.

For example, programs are boosted higher in search results if they are claimed, local or serve anyone in need. Similarly, if programs are not currently available, programs will be moved down in search results as they are less likely to be able to help.

**Tag Hierarchy:** There are different levels of service tags. The broadest category is considered the "parent" category. Tags underneath that broad category are called "child" categories.

**Example:** Here is a hierarchy currently in our classifications:

- *Mental Health Care* (parent)
  - *Anger Management* (child)
  - *Bereavement* (child)
  - *Counseling* (child)



When choosing a parent category, search results will contain programs with the tagged parent category, as well as all programs tagged with the child categories listed below it. However, if you choose the child category, you will only see programs with the child tag.

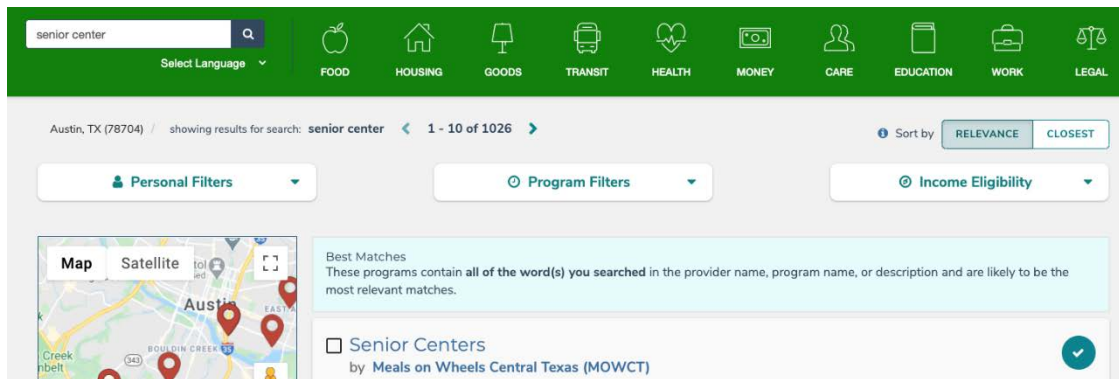
**EXAMPLE:** Using the example above, if you searched for "Mental Health Care," you would see programs for *Mental Health Care*, as well as *Anger Management*, *Bereavement* and *Counseling*.

If you searched for "Anger Management," you would only see programs that have been tagged *Anger Management*.

This allows people looking for services to browse by a broader range of services or dig into a specific kind of service.

### 4.3 Keyword Search

Instead of browsing by category, you may opt to **type in a keyword**, program name or organization name. *Typeahead* suggestions will appear based on program names, organization names service tags or serving tags.



Searching by an exact service tag or choosing it from *typeahead* will give the same results as if using the category bar.

Similarly, if you search for a serving tag (personal attributes about whom a program serves), all programs in the search results will have that serving tag. When searching by a serving tag, the same filter will be applied to the search results for that search and future searches.

By default, program results will again be **sorted by relevance**. To determine relevance with keyword searches, we first look to see how the search term matches information in the program listing. From there, we'll add in the other relevance factors to **boost programs that are more likely to help** and lower programs that are less likely to help due to their availability.

### 5 Search Filter

When a search is done there may be many search results. In order to find the most relevant program for your needs, you can use **Search Filters** to narrow the results by **cost, language, personal attributes, how you can contact the organization and more**. By using these filters, you can more quickly find the right program!

Once a search is performed, filters relevant to the search results will be available.



The screenshot shows a search filter interface with three main sections: Personal Filters, Program Filters, and Income Eligibility. The Personal Filters section includes options for 'I want to' (Visit, Walking or Biking (5 miles), Short Drive (15 miles), Long Drive (70 miles), Other: 150 miles), 'Call', 'Email', and 'Apply or Schedule Online'. The Program Filters section includes 'Open Hours' (Open Now, Open Late, Open Early, Open Weekends, Open 24 Hours) and 'Cost' (Free, Reduced Cost). The Income Eligibility section has a 'SELECT LANGUAGE' dropdown. A 'FILTER SEARCH' button is located at the bottom center.

While you may choose as many personal and program filters as you would like, we recommend choosing filters that will specifically impact the kind of program you need or how you want to receive services.

**EXAMPLE:** If you are looking for a **support group for pregnant women**, you could search for "support group," and then use the Personal Filter for *pregnant* to help you find a support group specific to pregnancy.

However, if you are searching for a food pantry, it may not matter if the food pantry specifically serves people who are pregnant, as you're likely to receive the same services whether you're pregnant or not. Instead, I may filter by **open hours** to find one that is available now.

## 5.1 Personal Filters

Personal filters are personal attributes about who a program serves, such as age, gender identity, veteran status, health information and more.

**EXAMPLE:** If you are a veteran looking for help finding work, there may be resources geared specifically toward veterans or people who are unemployed. You could search for "Help Find Work" and then apply the *veterans* and *unemployed* filters.

The screenshot shows the search filter interface with the Personal Filters section expanded. It includes categories like 'Age Group' (infants, children, teens, young adults, adults, seniors), 'Armed Forces' (active duty, national guard, veterans), 'Employment' (employed, unemployed), 'Gender & Identity' (female, lgbtqia+, male), 'General' (anyone in need), 'Guardianship' (foster youth), 'Justice Involvement' (criminal justice history), 'Language' (limited english), 'Mental Health' (all mental health, ptsd), and 'Race/Ethnicity' (african american, asian). The 'unemployed' and 'veterans' filters are checked.

Filtering by both will first show programs that serve both populations, followed by results that serve either population.

## 5.2 Program Filters

Program filters are details about a program, such as:

- **Contact method**

- **Hours**
- **Cost**
- **Language**

In the Program Filters section, the contact method is represented by the header, I want to, with options to **Visit**, **Call**, **Email**, **Apply** or **Schedule Online**. If you choose **Visit**, a radius filter will appear so you can see programs with service office within a certain distance.

I want to

- Visit
  - Walking or Biking (5 miles)
  - Short Drive (15 miles)
  - Long Drive (70 miles)
  - Other:  miles

**Hours** will filter based on the office hours in the program card.

**Cost** will filter based on whether the program is no-cost or reduced cost.

**Language** will filter based on the languages a program serves, as listed on the program's listing.

If using both Personal Filters and Program Filters, you'll see programs that meet both sets of criteria.

### 5.3 Eligibility Filters

Eligibility filters based on the eligibility section on the program card, specifically when there is a calculation for federal poverty guidelines (FPIL).

- Eligibility:**
- This program helps people with income at or below 185% of federal poverty guidelines.
  - This program helps children who are 0 to 5 years old.
  - This program helps pregnant, postpartum, and breastfeeding women.

**Availability:** available

**Description:** The Women, Infant and Children Supplemental Food Program (WIC) is designed to promote healthy food habits to low-income pregnant, postpartum, and breastfeeding women and infants and children birth to five years of age.

To use eligibility filters, enter a family size and income, and click **filter search**. Programs where you may be eligible based on the information you entered will have a **You may be eligible** label on the program.

**Women, Infant & Children (WIC) Program - Far South Clinic** ✓  
by Austin Public Health

👤 You may be eligible

The Women, Infant and Children Supplemental Food Program (WIC) is designed to promote healthy food habits to low-income pregnant,

Whereas the other filters will only show you programs matching that filter, with Eligibility Filters, all programs will be shown.

A note on all filters: Chosen filters will stay on for subsequent searches and can limit your search results. If you are searching for services and the number of available programs seems low, you may have too many filters on. Remove filters to broaden your search results.

**8 programs:**  
program serves adults ✕

✕ CLEAR ALL FILTERS

## 6 Connect Overview

The Connect button tells you **how to connect with a program**. This may be by going in person, scheduling an appointment, contacting through the site or filling out an Eligibility Screener. The Connect button on each program will reflect the program’s contact method and help you start the process of reaching out for services. The Connect button may also be used to make and track referrals.

The Connect button is on every program listing on the platform and on customer sites that have live referrals enabled. The Connect button tells you the best way to contact the program and may also be used to **make and track referrals**.

**Food Pantry** ✓  
by Bertha Support

Our food pantry is available for anyone who is in need of assistance with supplying food. Additional services may include help with filling out forms, locating available resources,

📍 Main Services: [food pantry](#), [navigating the system](#), [help fill out forms](#)

👤 Serving: [anyone in need](#), [all ages](#)








**Next Steps:**  
Contact or go to the [nearest location](#).  
📍 1.97 miles (Serves nationwide)  
🕒 Open Now: 8:00 AM - 5:00 PM ▼


MORE INFO ▼ ★ SAVE ➦ SHARE ☰ NOTES ✎ SUGGEST ➡ REFER

When using the live referral functionality, a **notification will be sent** to the program and to the person seeking services from that program (member). Some sites may not have live referrals enabled in findhelp. This means a referral can be logged and tracked, but a referral notification is not sent to the program.

## 6.1 Connect Button Options

Findhelp sets the button initially based on research by our data team. CS providers and programs can claim their listing and update this information. Once they have claimed, they can edit their **Contact Settings**. For contracted CS providers, their program cards will have the live referral functionality so they can receive referrals through findhelp and update referral statuses.

Button	Behavior
	<p>This <b>Apply</b> icon will appear if an Eligibility Screener is enabled on the Program card. Users connecting to this Program will fill out the Connect Form and then fill out the Screener to complete the referral.</p>
	<p>This <b>External Apply</b> icon will appear if the best way to connect with a Program is through an external application, typically hosted on their website.</p>
	<p>This <b>External Contact</b> icon will appear if the best way to reach the Program is through a contact form on their external website.</p>
 	<p>This <b>Contact</b> or <b>Refer</b> icon will appear if the best way to reach the Program is through a referral made through the platform.</p> <p>This is the same setting, however the language on the button changes based on if the user is logged into findhelp.</p> <p>Non-logged in users and some logged in users will see “<b>Contact Here</b>” as they are more likely to “Contact” an organization, while logged in users who typically help others will see “<b>Refer</b>” because as a helping professional, they are more likely to “Refer” someone to a Program.</p> <p>Depending on the screen size, users may see "Contact" instead.</p>
	<p>This <b>Schedule</b> button will appear if the best way to connect with a Program is to schedule an appointment either through the findhelp Scheduler, or through the Program’s own scheduling functionality.</p>
	<p>This <b>See Next Steps</b> button appears if none of the other options are true. This typically appears when the best way to reach a program is to call, email, or go in person.</p>

	<p>When “Tracking-Only referrals are enabled, “Log Referral” will replace the starred, “Contact,” “Refer,” “Schedule” and “Apply” buttons.</p>
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## 7 CalAIM Assessment

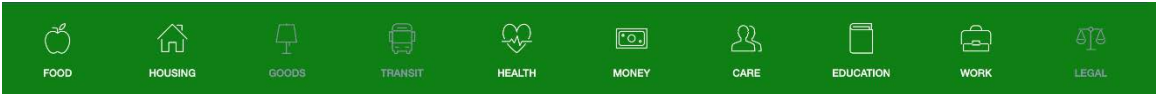
Assessments on findhelp are designed to help assess a person’s social needs, to understand how to best help them. They also streamline the process of gathering needed member information for the member’s findhelp profile. Once the findhelp assessment is completed and submitted, a list of contracted CS provider programs will appear that the member is eligible for. You can then navigate and connect to the CS provider programs that best meet those needs. Select CalViva Health Community Supports Assessment on the homepage of the site.



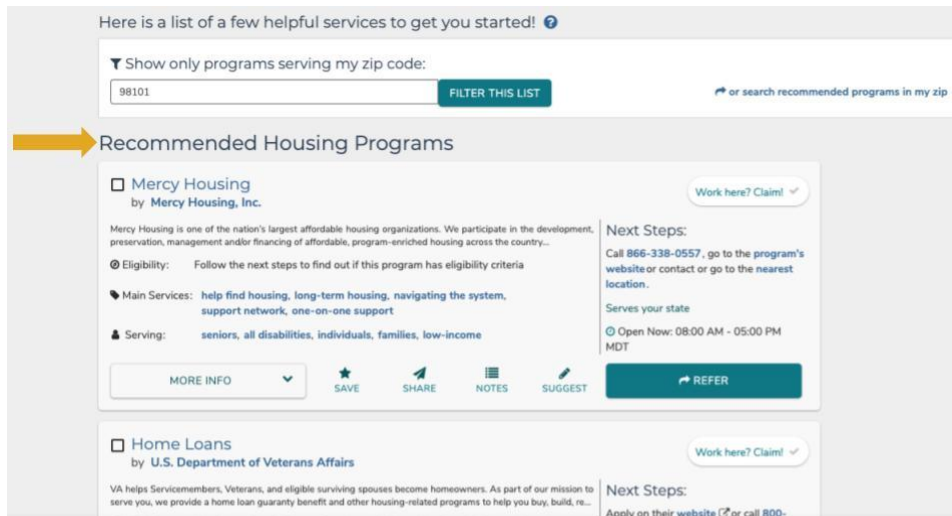
Once you have completed the assessment, you can review the assessment responses, confirm consent, and submit the assessment. Once you have submitted an assessment, you **cannot edit** the responses. However, you can undo the entire assessment and start over.

### 7.1 Custom Search Results

After the assessment has been submitted, the ECM provider will be guided to a Program Recommendation Summary (PRS). This is a list of contracted CS provider programs for which the member is eligible. ECM providers and member will also receive an email with a link to the search results.



**PRS** is a short, printable, curated list of programs that will be generated for people after they submit an assessment. We recommend using a PRS if you have a specific list of programs that you want to recommend. You can update this list at any time using your folders of your favorite programs. For CalAIM work, the Plan is using this functionality to list the contracted CS provider programs and guide ECM providers to available programs after completing the findhelp assessment.



## 8 Connect and Refer to Programs

Referrals connect a member in need to the program that can serve them. Through **referral dashboards** and **email notifications**, the status of the referral can be shared with the person being referred, the person who made the referral, and the program so that all parties involved know what happened with the referral and follow up as needed.

### 8.1 Live Referrals

When you identify a program that you think can help, you click the Connect button on the program card to refer yourself or someone else directly to that program.

When the Connect Button says **Apply**, **Schedule**, **Contact** or **Refer**, this will allow the user to make a referral through the platform:

1. Click the Connect button reading Apply, Schedule, Contact or Refer.
2. Fill out the contact information of the person needing services.
3. If you are helping someone else (ECM or CS provider), fill out your information.
4. Indicate the best way to reach the member.
  - **NOTE:** Currently messages from the platform to **T-Mobile/Sprint** customers are being blocked by the carrier. We are actively working with them to resolve this issue. In the meantime, use alternate options, such as printing or emailing the program or services that meet the member's need.
5. Add comments that you want to share with the seeker and the program about the referral.
  - Comments are optional and can be used when additional information about the person seeking services would be helpful for the program to know, or if someone other than the member should be contacted for follow up care.
6. Gather verbal consent from the member that you are sharing their name and contact information with this outside organization. The ECM provider must click the verbal consent box on the referral form before proceeding.
7. Click **Send** or **Next**. If the program has added a **Screener** to their referral, fill out the Screener and click **submit**.

Start a screener for this program

Who is this for?  For myself or my family  I'm referring someone else

Your Name \*

---

Tell us about the person you're helping.

Someone you've Connected before:

Use contact info on file \*

Or

Connecting someone new:

Their Name \*

Their Email Address

Their Phone Number

Their Patient ID

Their Medicaid ID

Best way to reach them\*  Email  Text message  Phone call  Don't reach out

Comment

Confirm Consent \*  I have verbal consent from the person or their guardian (under 18 to:   
 \* Send their contact info and additional info to this agency, and   
 \* Send them info about this program through the Aunt Bertha Enterprise Demo platform ( including any responses sent to them by the program ).

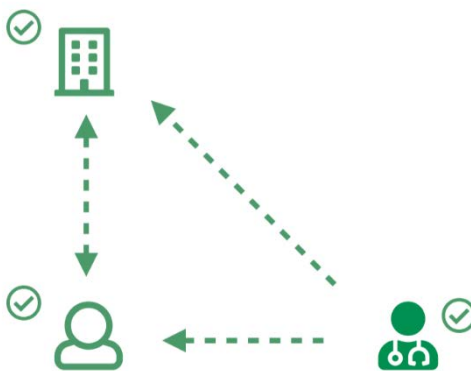
The program provider has a few more questions!   
 Choose "Next" to continue to the program's form.

Important! We'll do our best to send them your information, but it's possible that we may not be able to reach the agency or get a quick response. If you are in an emergency situation, call 911.

Once the referral has been submitted:

- **Members** will receive a referral notification about the referral.
- **ECM or referring providers** will be able to view the referral in the **People I'm Helping** dashboard.
- **CS providers** will receive a referral notification about the referral, and the referral will be added to their **Inbound Referrals** dashboard.

ECM and CS providers can update the status of referrals through email notifications or their respective dashboards. Regardless of who updates the status, the updated status will be reflected in real time in each respective dashboard.



For other *external* Connect buttons, the ECM or CS provider can still log the referral by clicking the **Connect button** followed by **Log a Referral** in the opened section.

When logging a referral, nothing will be sent to the program, but the referral information will be sent to the member. Additionally, the member and ECM provider will be able to view the referral in their respective referral dashboard.

\*In cases where a member chooses **Don't reach out**, no referral notifications will be sent. The referral will still show in **all** referral dashboards, but the program's inbound referrals dashboard will not include



the member's contact information, instead saying that the member will reach out to the program directly.

### Person Inquiring

Bruce Rogers

They'll reach out directly

## 8.2 Statuses

The following statuses are available and visible across respective referral dashboards:

Status	Definition
Not updated	The default status when a referral is first created and no action has been taken yet.
Needs client action	This update is usually made by the program and means that the member has to do something before services can be provided.
Pending	This update is usually made by a program and often means that the referral is being processed.
Referred elsewhere	The referral couldn't be fulfilled so an ECM or CS provider has referred the member to a different program.
Eligible	The member is eligible to receive services but hasn't actually received them yet.
Got help	The member received services and got the help they needed.
Couldn't get help	The member was unable to get help (the reason could vary). The next step is to refer the member to a different program.
Couldn't contact	The CS provider was unable to contact the member; if possible, follow up with the ECM provider to give alternative contact information for the member.
Not eligible	The member was ineligible for the program. The next step is to refer the member to a different program.
No capacity	The program doesn't have capacity to help the member. The next step is to refer the member to a different program.
No longer interested	The member has indicated they no longer need or are interested in this program. The next step is to follow up with the member and make sure their underlying need has been met.

### 8.3 Who Can See Submitted Referrals?

Live referrals made with Refer/Contact or Apply

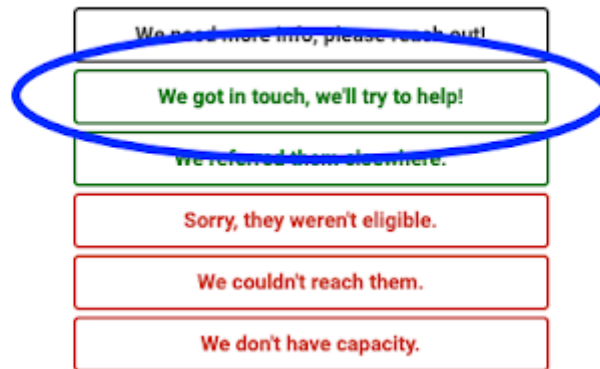
Party	Dashboard	Email	Text
Member	Referrals for Me	If the seeker chose "email" as the best way to reach them	If the seeker chose "text" as the best way to reach them
ECM provider	People I'm Helping	Their worker email they use to log into findhelp	-
CS provider	Inbound Referrals	Email(s) listed on the Contact Settings	-

## 9 Referral Notification

Referrals connect a member to the program that can meet their needs. Through email notifications and referral dashboards, the status of the referral can be shared with the member, the person who made the referral, and the program so that all parties involved know what happened with the referral, and follow up as needed.

Referral notifications are sent when live referrals are enabled. Once you have submitted a referral, the member and the CS program will receive email notifications. Email notifications give users the opportunity to update the status of the referral. Updated statuses will then be reflected in each respective **Referral Dashboard**.

Already reached out? Let us know what happened!



Referral comments are included in referral notification emails. Notifications for referrals made on site will be updated to reflect the site's branding.

If **"Don't reach out"** is selected as the best way to contact the member, each dashboard will be updated with the referral. However, no referral notifications will be sent to anyone, including the member or the CS program.

**NOTE:** All emails are TTS encrypted which is the industry standard.

## 9.1 Referral Notification

Members in need of services can choose how they would best like to be contacted:

- Email
- Text
- Phone
- Don't reach out

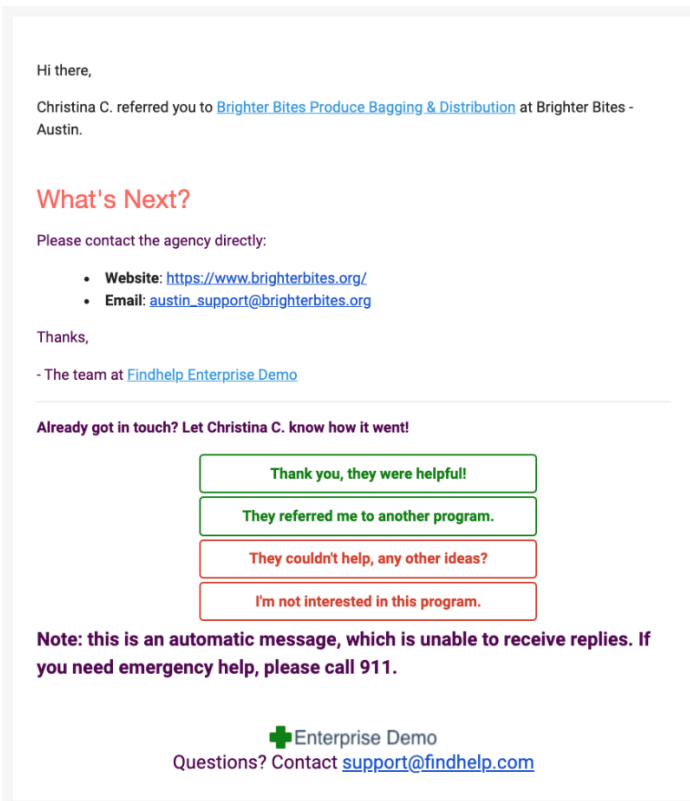
If they choose **email** or **text**, they will receive either an email or text notification. If they choose both email and text, we will prioritize the email address and only send them an email notification.

If they choose **phone**, they will not receive a referral notification.

If they choose **Don't reach out**, no referral notifications will be sent to anyone, including the member or the CS program.

### Email

If the member chooses email as the best way to reach them, they will receive the following email where they can update the status of their referral. Their referral notification email will be sent in their preferred language.



Emails to members will always be addressed, "Hi there," to limit the amount of Personal Identifiable Information (PII) in the email to the member.

If a member updates the status of the referral in the email, the ECM or CS provider who submitted the referral on their behalf (if there is one) will receive a **referral status update notification** by email. The status will also be updated in each party's respective referral dashboard.

If the status of a referral hasn't been updated in a week, the member would receive a referral reminder email if they chose email as the best way to reach them.

The first name and last initial of the ECM provider will be included in the referral notification email. No other identifying information or contact information for the ECM provider is shared with the member.

A member can click through on the program card link from this email and can go directly to the CS provider program card on the findhelp platform.

### Text

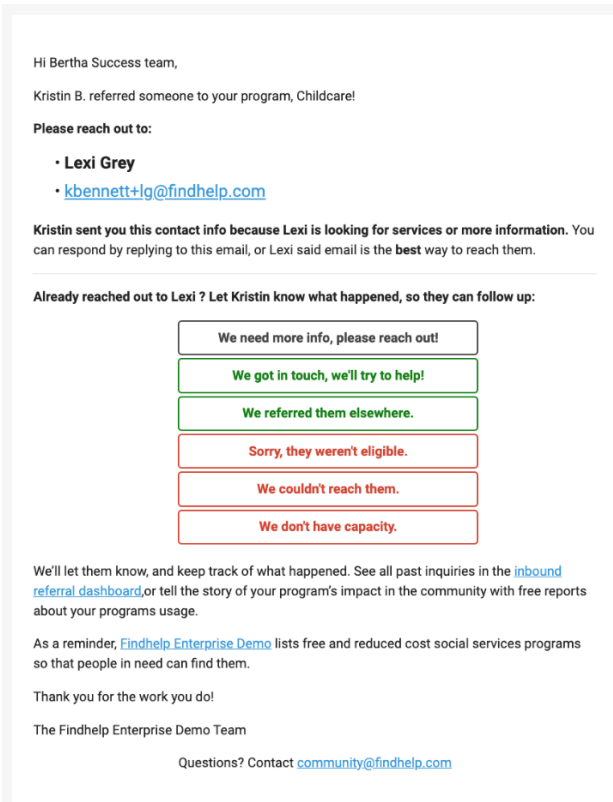
If a member chooses **Text** as the best way to reach them, they will receive a text message with a reference to the site where the referral was made, the name of the program, the next steps and a direct link to the program.

A member can click through on the program card link from this text message and can go directly to the CS provider program card on the findhelp platform. The findhelp platform is mobile-friendly.

**NOTE:** Currently messages from the platform to **T-Mobile/Sprint** customers are being blocked by the carrier. We are actively working with them to resolve this issue.

## 9.2 Program Referral Notification

Programs who **accept referrals through findhelp** will receive a notification letting them know they have a new referral.



The member's contact information is included in the notification so that CS can connect with the member directly from their inbox. If a comment was included at the time of the referral, that will be in the body of the email as well.

CS providers can update the status of the referral directly from the email notification. If you do, the member and ECM provider (if there is one) will receive a referral status update notification by email. The status will also be updated in each person's respective referral dashboard.

### Who at the Program receives the Referral Notification?

Under the programs **contact settings**, CS providers can choose who receives notifications when a referral has been made to their program. If desired, you may add multiple email addresses, separated by commas.

In cases where there is no email in this field, referral emails get sent in the following order:

1. **Office email** address.
2. If there is no office email, then to **contact email**.
3. If there is no contact email, then it will get sent to the **program email**.

## 9.3 Referral Notification and Dashboard

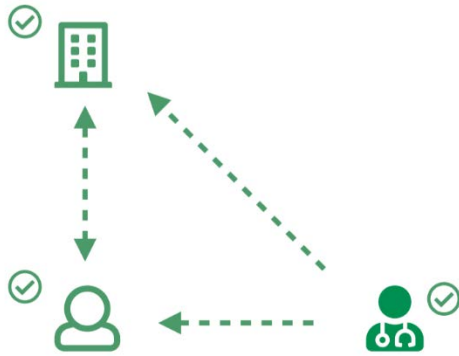
If you are submitting a referral on behalf of someone else, the referral will be logged in your **People I'm Helping Dashboard**. If the referral status is updated via email by the CS provider, you will get a status update notification email. The status will also be updated in each person's respective referral dashboard.

### Referral Dashboard

Referrals connect a member seeking services to the program that can meet their needs. Through referral dashboards and email notifications, the status of the referral can be shared with the member, the person who made the referral, and the program so that all parties involved know what happened with the referral and follow up as needed.

Once the referral has been submitted, the member and CS provider will receive a notification about the referral. Additionally, each party will have the referral information saved in their respective Referral Dashboard with the status of the referral.

ECM and CS providers can update the status of referrals through their dashboard. Regardless of who updates the status, the updated status will be reflected in real time in the respective dashboards.

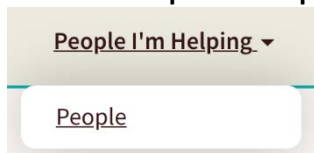


### 9.3.1 Navigator – People I’m Helping

The People I'm Helping Dashboard allows ECM and CS providers to view profiles of the people they've helped. These profiles contain the member's navigation history, including referrals the ECM or CS provider has made on the member's behalf.

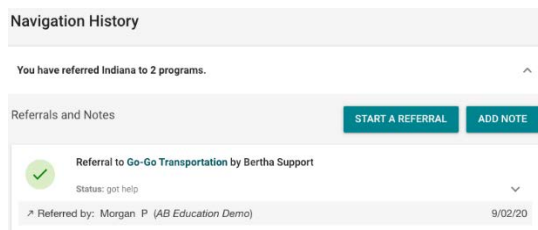
To access referrals you've made on behalf of others:

1. **Login** to your account.
2. From the **People I'm Helping** menu, choose, **People**.



3. Select the **member's name** to view their profile and manage their referrals.

When you update the referral status, it will also be updated in the referral dashboards. No referral status update notifications will be sent.



#### Who Can See and Interact with Referrals?

By default, the ECM or CS provider who made the referral can see the referral and update the status. If the ECM provider is in a group with Team Navigation enabled, anyone else in that group may see the referral, leave notes on the referral and update the status of the referral.

### 9.3.2 Programs – Inbound Referrals

Once a CS provider has claimed their program, they can see all of the referrals made to their program. To do this:

1. **Login** to your account.
2. From the **Program Tools** menu, choose, **Inbound Referrals**.

3. Of the programs you've claimed, choose the **program** for which you'd want to see referrals.

The dashboard will display all referrals made to your program including the member's contact information, information about the ECM provider (if there is one) and the date of the referral.

In cases where the person selected “**Don’t reach out**” on the connect form, the member’s name, but no contact information, will appear on the dashboard.

Status	Person Inquiring	Referred By	Referred On	Forms	Actions
<input type="radio"/> Not updated	Samantha Seeker <a href="mailto:sam@seek.com">sam@seek.com</a> 555-555-5555 Prefers email, text message	Renee Rivers <i>Bertha Engagement</i>	09/04/2020	N/A	N/A
<input type="radio"/> Not updated	Samantha Seeker <a href="mailto:sam@seek.com">sam@seek.com</a> 555-555-5555 Prefers text message	Renee Rivers <i>Bertha Engagement</i>	09/04/2020	N/A	N/A
<input type="radio"/> Not updated	Christina Seeker  5122979656 Prefers text message	Christina Seeker	09/02/2020	N/A	N/A
<input checked="" type="radio"/> Got help	Dayna Briggs <a href="mailto:morgan+daynabriggs@auntbertha.com">morgan+daynabriggs@auntbertha.com</a>  Prefers email	Morgan Peretti <i>Aunt Bertha Integrations</i>	09/02/2020	N/A	N/A

From here, you can update the status of the referral. When you update the referral status, it will also be updated in the respective referral dashboards.

If you update the status to one of the following options, the member will receive a referral status update notification:

- For “**Needs seeker action**” → "they need more information from the member to move forward."
- For “**Couldn’t contact**” → "they tried to contact you but couldn’t reach you."
- For “**Not eligible**” → "you are not eligible for their program."
- For “**No capacity**” → "they can’t provide services for you because their program is full."
- For “**Couldn’t get help**” → "they can’t provide services for you at this time. "

**NOTE:** If the member selected “**Don’t reach out**” on the connect form, the seeker will not receive a referral status update notification.

## 10 People I’m Helping

The **People I’m Helping Dashboard** and **Seeker Profiles** enable you to keep track of the people you are helping and how you are helping them.



## People I'm Helping

Assignee  
Show All

Follow Up Date  
mm/dd/yy - mm/dd/yy

Archived Profiles  
Hide

Search name, email, or ID

Name	Refer	Summary	Assignee	Email	Phone	Flagged
Chris Myrcrtest	REFER	SUMMARY		cdouglasmyrcrc@auntbertha.com		Yes
George Seekers	REFER	SUMMARY		gmauer+seeker@auntbertha.com		
Remus Lupin	REFER	SUMMARY		vrobinsin@auntbertha.com	(267) 779-0079	
Test This	REFER	SUMMARY			(512) 111-1111	

The People I'm Helping Dashboard is a dashboard and search page where you see a list of members you have helped via:

- **Referrals** you've made.
- Referrals you've received or added (programs).
- **Assessments** you've made.

To access the People I'm Helping Dashboard, from the main menu choose **People I'm Helping > People**.

From here, you will see a **list of the people that you're helping** and key information about them. Using the search, you can locate specific individuals by name or email address.

Once you have located the person you are helping, you may refer them to additional programs, or access the **Member's Profile** to view or track updates for how you're helping that person.

### 10.1 Access Member Profile

From the People I'm Helping Dashboard, access the profile of the person you're helping.

Profiles are automatically created any time a **referral** or **Assessment** has been made. They are also created when a referral has been received by a program or when the program adds a referral to their Inbound Referrals Dashboard.

From here, you can follow up on referrals, add notes, update personal information, create goals, and review Assessments. By default, any new referrals or Assessments will be added to the Member Profile.

#### Who Can Access Seeker Profiles?

By default, the ECM or CS provider taking actions on behalf of the member will have access to the profile.

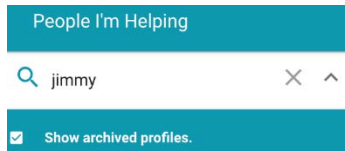
CS programs who receive referrals to their program will automatically see profiles of all people who have been referred to the program.

**Note:** Member profiles are not created for self-referrals or self-assessments. Additionally, member profiles are not created when you share a program with someone.

#### Archiving Member Profiles

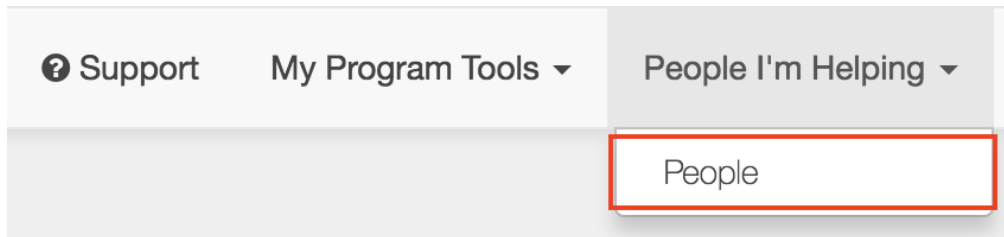
While member profiles cannot be deleted, they can be archived by clicking the archive **folder icon** on the top right of the **Member Profile**. Once archived, the profile will be archived for everyone that has access to that member profile.

To unarchive the profile, search for the profile on the **People I'm Helping Dashboard** and check the **show archived profiles** check box to view it. Then follow the same steps by clicking the folder icon.



## 10.2 Referral Status

The People I'm Helping dashboard allows you to view profiles of the members you have helped. On the profile, you can see to which programs you have referred them, comments made at the time the referral was sent and manage the status of those referrals. CS providers can also manage referrals that were made to their program.



To view and manage referrals:

1. Log in.
2. Click **People I'm Helping > People**.
3. **Search** for the Seeker you've helped.
4. Click on the **member's name** to view that member's profile.
5. **View** or **update the status** of the referral.

If anyone with access to the referral updates the referral status, the status is also updated across all dashboards. There is a history of every user that updated or interacted with the referral. This history shows the first name and last initial of that person and their organization if they belong to one in the system.

### Referral Notes

You can add notes to individual referrals. Open the referral and click **Add Note**.

**Referral to Bertha Childcare by Bertha Success**

Status: eligible

↗ Referred by: Morgan P (AB Education Demo) 11/24/20

Status: + Eligible Care

Next Steps

Notes and History ADD NOTE

🕒 Updated to eligible by Morgan Peretti on 11/24/20

📄 **Note added:** "Jon reached out to Bertha Childcare - there was a waiting list but they have tentative start date in a couple of weeks" by Morgan Peretti 11/24/20

**NOTE:** Notes cannot be edited, but they can be deleted by clicking the trash can icon next to the note.

### Managing Inbound Referrals

CS providers can update the status of referrals made to their program under the **Inbound Referrals** section on the profile or on the Inbound Referrals Dashboard.

≡ People I'm Helping / Meg Rodriguez

**Personal Info**

Meg Rodriguez  
Name

(859) 358-9413  
Phone Number

[EDIT PERSONAL INFO](#)

**Goals** ADD GOAL

🎯 Food 7/16/20  
Status: In progress

**Forms**

Coordinated Entry Sign-up  
Jul 16, 2020

[VIEW](#)

START A FORM

**Navigation History**

You have referred Meg to 1 programs.

**Inbound Referrals**

🛑 Referral to Coordinated Assessment and Housing Referral by Bertha Engagement  
Status: pending  
✓ Referred by: Lehua G (Aunt Bertha Health Demo) 7/10/20

**Sent Referrals and Notes** START A REFERRAL ADD NOTE

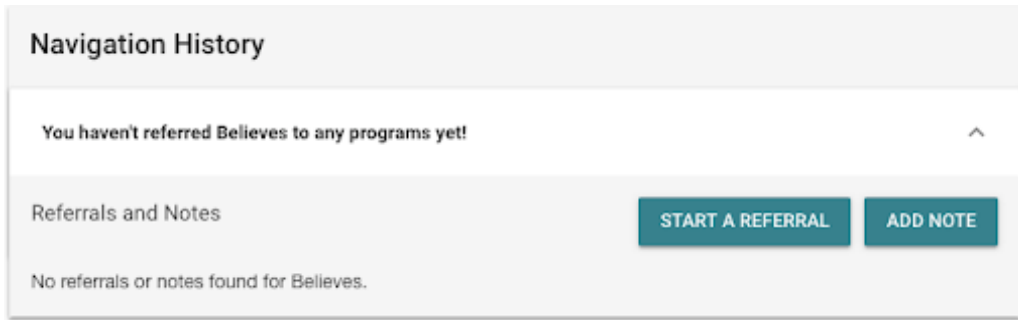
📄 **Note made by Lehua Gray** 7/10/20  
Completed CA with Meg, HMIS number 123456789

📄 **Note made by Lehua Gray** 7/10/20  
First attempt to call - did not answer her phone. Left a message.

🛑 **Referral to Bertha Builds: Home Repair by Bertha Communities Foundation**  
Status: pending  
↗ Referred by: Lehua G (Aunt Bertha Health Demo) 7/10/20

### Start a Referral – Making new Referrals

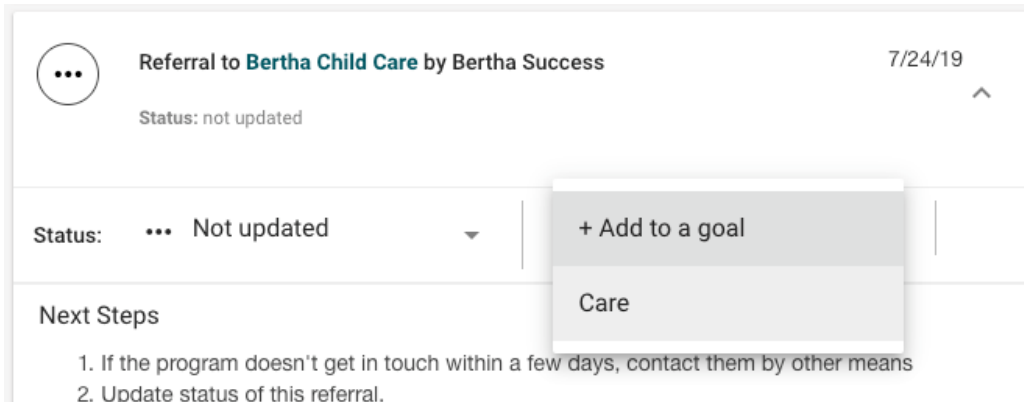
The **Start a Referral** button appears in the Navigation History section:



The **Start a Referral** button launches a search in the member's ZIP Code if it's stored in their personal information. You see a banner at the top letting you know which member you are searching for. The connect form is pre-populated with any information saved on the member's profile.

### Adding and Removing Referrals to Goals

Once the ECM provider has completed the findhelp assessment for the member, goals will automatically be created in the member's profile based on the CS category(ies) they are eligible for. The ECM or CS provider can open the referral in the member's profile, and click on the **+Add to a Goal** option and select the Goal to which they would like to add the referral.



If the user wants to move or remove a referral from a goal, they can use the same dropdown to either remove it from a goal or assign it to a new goal.

## 11 Claim Your Program

Claiming your programs on findhelp has never been easier! If you founded, run, work for or are otherwise affiliated with a community based organization that has a **program listed on findhelp**, you can **claim that program** in just a few easy steps.

Claiming allows people at programs listed on findhelp to take ownership of their program listing. Once you've claimed your program you can:

- **Edit and update** your **program information**.
- **Respond to inquiries** and **referrals** to your program.
- **Track outcomes**.
- Leverage **analytics** to support your organization.

As a part of the CS provider onboarding process, all CS providers will have a custom program card made on the Plan's findhelp site and will need to claim their program card.

### 11.1 Who Can Claim

If you founded, run, work for or are otherwise affiliated with a program listed on findhelp, you can claim that program. You do not have to be the program director or executive director to claim the program but we do verify that the user attempting to claim is affiliated with the program.

A single program can be claimed by more than one person so multiple staff within your organization can have access to edit your program and use the no-cost tools.

### 11.2 Benefits of Claiming

Claiming allows people at programs listed on findhelp to take ownership of their program listing. After claiming, programs will have access to a suite of **no-cost** intake tools and have the ability to directly manage and update their program listings. Additionally, you can access **no-cost** data collection forms to measure outcomes and view analytics to measure and show your impact.

These tools allow programs to:

Maintain and update their program information

- Enable intake tools:
  - Receive and respond to electronic referrals.
  - Screen for seeker eligibility.
  - Schedule in-person appointments.
- Enable data collection tools:
  - Track the actions you've taken on behalf of seekers.
- Access analytics
  - Understand your programs impact.
  - Share data with funders or use in proposals for new grants.

### 11.3 How to Claim

1. Go to: <https://calvivahealth-ecm-cs.findhelp.com/claims>
2. Enter the name of your organization or program, then click **Search**.

#### Step 1: Search for your Program

Search for your program or agency name \*

Aunt Bertha Community Foundation ✓

Program zip code (optional)






78731 ✓

Q Search

3. Select one of the programs you'd like to claim by clicking the **Claim** button.

## Step 2: Select a Program






You searched for **Aunt Bertha Community Foundation**, here are some possible matches. **Pick one** of them to see if we list any other program from your organization.

Program Name	Agency/Provider Name	
<a href="#">Case Management</a> 	Aunt Bertha Community Foundation	<a href="#">Claim</a>
<a href="#">Healthy Food Program</a> 	Aunt Bertha Community Foundation	<a href="#">Claim</a>
<a href="#">Food Pantry</a> 	Aunt Bertha Community Foundation	<a href="#">Claim</a>
<a href="#">Soup Kitchen</a> 	Aunt Bertha Community Foundation	<a href="#">Claim</a>
<a href="#">Residential Housing Program</a> 	Aunt Bertha Community Foundation	<a href="#">Claim</a>

4. Select any additional programs you'd like to claim by checking the box to the left, then click, **I Work Here**.

### Select additional programs

We found these other programs in our database that belong to **Aunt Bertha Community Foundation**. Please select any other programs you would like to claim.

<input checked="" type="checkbox"/>	Program Name	Agency/Provider Name
<input checked="" type="checkbox"/>	<a href="#">Case Management</a> 	Aunt Bertha Community Foundation
<input checked="" type="checkbox"/>	<a href="#">Residential Housing Program</a> 	Aunt Bertha Community Foundation
<input checked="" type="checkbox"/>	<a href="#">Soup Kitchen</a> 	Aunt Bertha Community Foundation
<input checked="" type="checkbox"/>	<a href="#">Healthy Food Program</a> 	Aunt Bertha Community Foundation
<input checked="" type="checkbox"/>	<a href="#">Food Pantry</a> 	Aunt Bertha Community Foundation

[I Work Here!](#)

[I Need Services](#)

**NOTE:** There is also an **I Need Services** button for members who accidentally try to claim a program thinking that they are “claiming” a benefit like social security. When members click **I Need Services** they will be directed to the program details page for the first program they clicked so that they can request services.

5. If you have an account, you'll be asked to log in. Otherwise, you can **create an account** using your **work email address** at this time.

### Step 3: Verify Your Claim

You're almost done claiming your programs! You just need to create an account to verify that you work for **Aunt Bertha Community Foundation**.

<b>Your first Name</b>	<b>Your last name</b>
<input type="text" value="Leslie"/>	<input type="text" value="Knobe"/>

**Work email address**

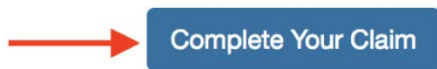
*We use this to verify that you work for Aunt Bertha Community Foundation.*

**Your password**

*Use your account password if you already have one, or create a new one if you don't. [Forgot your password?](#) Min. 8 characters with 1 capital, 1 lowercase, and 1 special character.*

I agree to the [Terms and Privacy Policy](#) for the Aunt Bertha system and I consent to creating an account and storing this data to create an account.

6. Click Complete Your Claim.



7. If we are able to auto-verify your claim, you will receive an email with a link to validate the claim.

If we are unable to auto-verify your claim, our support team will follow up with you to confirm your association with the program within **two business days**.

If you have any questions, enter your email address and click, **Get Help** at the bottom of the page.

#### Having Trouble?

If you can't find your program or would like help, let us know how to contact you and we'll reach out as quickly as possible! Clicking "Get Help" won't navigate you away from this page.

**Your email address**

8. Once your claim has been validated, you will see a **confirmation email to activate** your claim. Once you receive the email, click to **Activate your claim**.



Hi Lehua!

We've received a request to claim your programs on Aunt Bertha Enterprise Demo. In order to finish claiming your programs, we need you to verify your email address by clicking the link below.

Activate your claims now!

## 11.4 Claim Verification

### Auto Verification

When you submit your claim, findhelp will match your email domain against the website address on file for that program. If they match, then you will be sent an email with a link to validate the claim.

Verification links are valid for 24 hours after which the verification email will need to be resent.

### Manual Verification

In cases where we cannot automatically verify a claim, a support ticket will be created. Findhelp will verify that you work for the program and should have access. Once that has been verified, you will receive the verification email where you can click to activate your claim.

Verification links are valid for 24 hours after which the verification email will need to be resent.

## 11.5 Program Information Verification

The findhelp data team works hard to research programs and accurately reflect your program information on the platform. Still, you're the expert of your own program! When you claim a program, we want you to confirm or update key information about your program to ensure members are seeing the correct information.

## Is this Information Correct?

Thank you for claiming, and welcome to our network! It's important that we provide accurate information to people who need your services. Please take a moment to confirm or edit this key information about your program.

**Bertha Builds: Home Building & Repair Program by Aunt Bertha Community Foundation**

Is this program available to new applicants?

Available

SAVE

If someone lets us know they're interested in your program, what should we do?

Pass along their name, phone number, and email address with One-Step Referrals

All our digital intake and case management tools are free to use, forever!

Where should we email their information?

staff@example.com

We will not publish this email address, it will remain private to your staff.

SAVE

When you verify your claim, you'll be asked to verify key information about your program. Once that happens, you'll be taken to the homepage where you can view a dashboard of the tools that you have access to as a program claimer. Here you will see links to:

- **Track Inbound Referrals** → Inbound Referrals Dashboard.
- **View Program Analytics** → link to your program analytics.
- **Update Your Programs** → Edit Program Listings.
- **Manage Your Team** → My Team Tool (if applicable).
- **See People You're Helping** → People I'm Helping Dashboard.
- **Learn from Tutorials & Training** → Trainings.

## 12 Invoice and Billing

CS providers are able to invoice the Plan for their services provided after completing the Data Collection form with needed information and updating the referral status in inbound referrals to Got Help.

### 12.1 Data Collection Forms

Programs that receive referrals may take different actions when helping someone seeking services (seeker). If they want to keep track of those activities so that they may report on them, they can use Data Collection Forms.

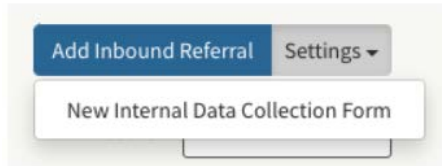
Data collected in these forms can be used to help programs understand trends related to how they serve their members or provide information to funders about the impact of their services.

## 12.2 Setting up a Data Collection Form

### How to Set Up Your Data Collection Form

From the Inbound Referrals Dashboard, locate the Settings dropdown.

Select New Internal Data Collection Form.



Once set up, you can edit your form in the same place.

The Plan is providing guidance on the needed data fields to include in the Data Collection form. Findhelp is assisting in the setup of these forms and providing training for CS providers.

## 12.3 Filling Out Data Collection Forms

Once set up, the form is associated with referrals your program receives. You and other claimers on your program can fill out Data Collection Forms from the Inbound Referrals Dashboard, under the forms section.

Status	Person Inquiring	Referred By	Referred On	Forms	Actions
Not updated	Heather ZC heather@auntbertha.com 4134266718	Heather ZC Aunt Bertha Health Demo	10/26/2020	+ New 2020 Outcome Tracking Form	View Profile

### How to Fill Out a Data Collection Form


1. Under the Forms column, select the Data Collection form.
2. Fill out the information in the form.
3. Choose whether to save or submit your form.
  - To save your responses, choose Save Draft. This allows users to save what information they currently have, even if they don't have all the information required in a form. You can return later to complete the form.
4. To submit your response, click Review and Submit. All mandatory fields are required in order to submit. Once a form is submitted:
  - The detailed form responses will show in Analytics.

The form will be available for printing and will appear in the Seeker Profile under the Forms section.

## 12.4 Billing

Once the following steps have been completed and documented by the CS provider, findhelp will compile and deliver the needed information to the Plan in an invoice to be processed for payment.

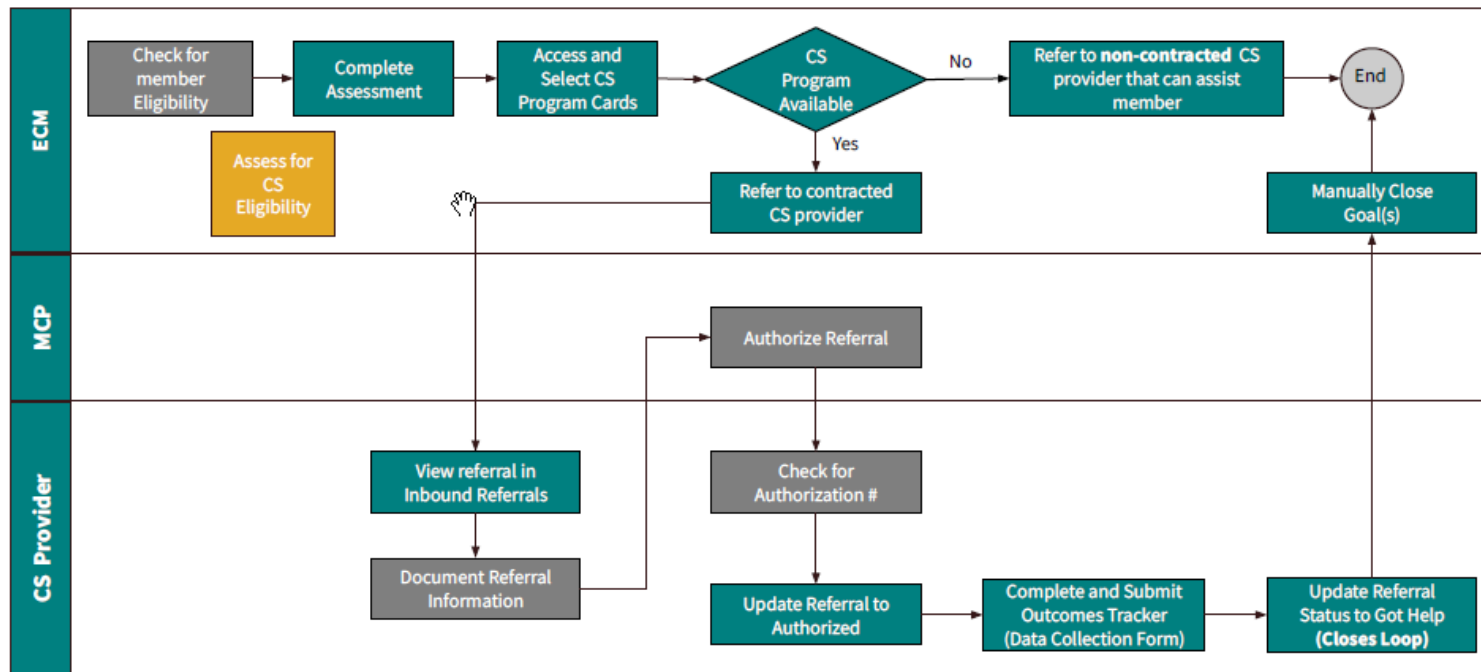
1. Program claimed.
2. Referral received to Inbound Referrals Dashboard.
3. Status of referral is set to “Authorized.”
4. Data Collection Form completed.
5. Referral status updated to “Got Help.”

Status	Person Inquiring	Authorization Status	Invoice Status	Referred By	Referred On	Last Updated	Forms	Actions
 Got help	Kiki Bradley <a href="mailto:kikibeetest@findhelp.com">kikibeetest@findhelp.com</a>  Prefers email Speaks English	Authorized	Not Invoiced	Christina Cusimano <i>Community Supports</i>	01/20/2022	Christina Cusimano <i>Community Supports</i> 01/20/2022	<a href="#">View Data Collection Form</a>	<a href="#">View Profile</a>

# Appendix A: ECM and CS Provider Workflow



## CalAIM Community Supports Referral Process



Action completed in findhelp

Action completed in provider portal

Where action completed Varies

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