



Free Intake Tools on findhelp.org

Findhelp.org offers multiple ways for people in need to connect with your Organization. In this guide, we will review our 2 most popular intake options: a One-Step Referral and a Screening Form.

If you have any questions about the tools below or are interested in learning more about our other options, please feel free to reach out to Amanda at abowen@findhelp.org

How to Add an Intake Tool:

Under My Program Tools, Edit Program Listings, Edit Contact Settings, your team can select from one of the 5 options as a “next step” for each program listing.

Note: You can select different tools for each of your programs!

A screenshot of a selection menu for intake tools. It contains five options, each with an icon and text:

- Pass along their name, phone, and email address with One-Step Referrals (free, default)
- Gather more info about eligibility with a customized Screening Form (free)
- Let them schedule an appointment (free, must set up available times)
- This program can't help people who make contact through Aunt Bertha
- We want to link them to an existing application, scheduler, or contact form

Option 1: One-Step Referrals

A “One-Step” referral gives Organizations the basic information they will need to begin working with a client. This is a great option for Organizations who want a simple way to capture referrals & respond to them quickly.

Benefits:

- Simple and quick process for client or person navigating on their behalf (captures name, phone or email).
- You will receive an email notification regarding your referrals and can update the status right from your inbox.
- Referrals can be translated into over 100 languages.
- Referral details will show up in your Inbound Referrals dashboard.
- Allows for statuses to be updated and keep everyone involved in the referral up-to-date.
- Data on referrals is collected in your analytics.

Limitations:

- Only basic contact information is captured.

A screenshot of the One-Step Referral form. The form includes the following sections:

- Eligibility:** Must be applying for this program for this need.
- Who is this for?:** Radio buttons for "For myself or my family" and "I'm referring someone else" (selected).
- Your Name*:** Input fields for "Mikaela" and "Dwyer".
- Tell us about the person you're helping:** Section for "Someone you've Connected before:" with a "Use contact info on file*" dropdown (placeholder: "Start typing their name").
- Connecting someone new:** Input fields for "Their Name*" (split into "First Name" and "Last Name").
- Their Email Address:** Input field.
- Their Phone Number:** Input field.
- Their Language:** Dropdown menu (selected: "English").
- Best way to reach them*:** Radio buttons for "Email", "Text message", "Phone call", and "Don't reach out".
- Comment:** Text area with placeholder "Add a comment...".
- Confirm Consent*:** Checkbox for "I have verbal consent from the person or their guardian (if under 18) to:" followed by bullet points: "Send their contact info and additional info through this system to this agency, and" and "Send them info about this program through the findhelp platform (including any responses sent to them by the program)".
- SEND:** A button at the bottom.
- Important!:** Footer text: "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."

Option 2: Screening Form

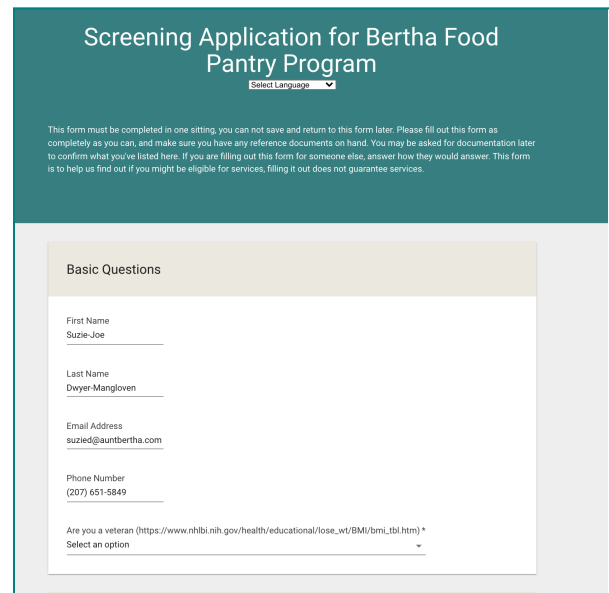
A “Screener” allows Organizations to ask additional questions to determine eligibility or gather information about people interested in their program. This is a great option for Organizations with intake forms or assessments that need to be completed before they can determine eligibility.

Benefits:

- Completely customizable. Your team can add questions and create eligibility rules based on the responses.
- Ability to translate the screener into over 100 different languages.
- Gives dignity back to the seeker by letting them know right away if they are a good fit for your program.
- Clients/navigators assisting them can upload related documents.
- Details and responses to your screener questions can be analyzed in your analytics dashboard.

Limitation:

- To access the screener details, you must login to the platform.
- Screener responses cannot be edited. *Consider adding a “Data Collection Form” to track outcomes and response changes.*



The screenshot shows a web form titled "Screening Application for Bertha Food Pantry Program". At the top, there is a "Select Language" dropdown menu. Below the title, a disclaimer states: "This form must be completed in one sitting, you can not save and return to this form later. Please fill out this form as completely as you can, and make sure you have any reference documents on hand. You may be asked for documentation later to confirm what you've listed here. If you are filling out this form for someone else, answer how they would answer. This form is to help us find out if you might be eligible for services, filling it out does not guarantee services." The form is divided into a "Basic Questions" section with the following fields: "First Name" (filled with "Suzie-Joe"), "Last Name" (filled with "Dwyer-Mangloven"), "Email Address" (filled with "suzied@aubbertha.com"), and "Phone Number" (filled with "(207) 651-5849"). At the bottom, there is a question "Are you a veteran" with a link to a website and a dropdown menu for "Select an option".