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!

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.
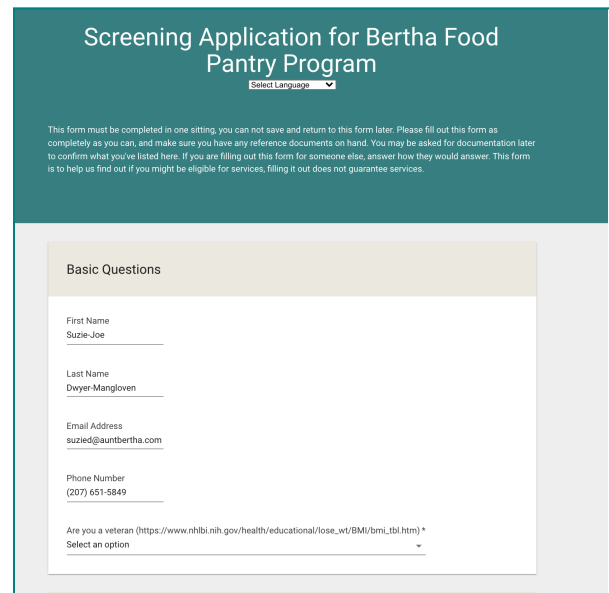
Option 2: Screening Form

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.*