



The Basics

Purpose: Learn about the functions and features you can utilize with your site!

CityServeX Mission

To **uncomplicate** and **humanize** social service systems for the benefit of all who use them.





Important Roles on Your Site

Participant or Seeker

- A person looking for help on the site.

Resource Coordinator or Navigator

- A person looking for programs on behalf of the Participant.

Site Administrator

- A person or persons designated by your organization who can add users and create groups. They can also make updates to the site and give analytic reporting access.



Important Terms

Program Card

- A resource on your site that houses all of the program specific information that is important to help a Participant get access to that resource or service.

Community Organization

- The organization providing the resource or program you want to refer a Participant to.

Important Terms

Connect Button

- The button on a program card that connects a Resource Coordinator or Participant with the organization providing the service. This button starts the referral process.



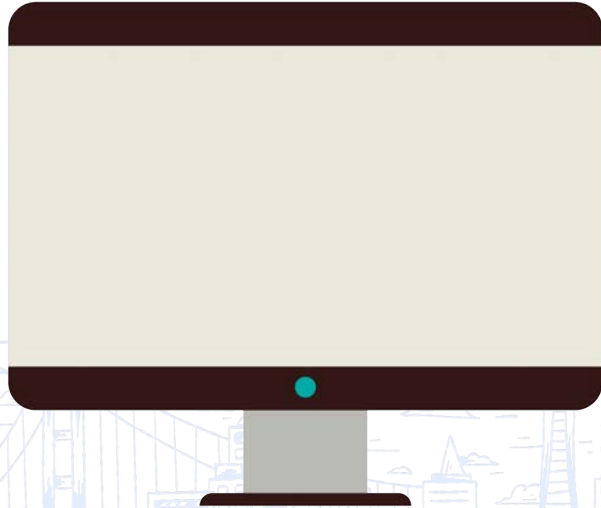


Overview

- Assessments
- Getting Started to Help People
- Searching for Programs
- What's In a Program Card
- Sending Program Referrals
- People I'm Helping
- Closing the Referral Loop
- Suggesting Programs and Making Changes in Program Manager
- The Support Portal

Your Site

The CityServeX site has been custom branded.
Please bookmark it for easy access!



Team Site:

- Requires a login or uses SSO
- Allows you to use additional tools
- Allows for collaboration between teams (if enabled)
- Facilitates data for reporting & analytics

Community Site:

- Share this site with community
- Created for individuals to self-serve

Why Can't I Access the Site or Login ?

I didn't receive the confirmation email	Check your spam folder
I don't see our logo when I log in	Confirm that the user is on the site
I don't see menu options along the top	Confirm that the user is on the site
I can't log in	<p>Confirm user is using the right credentials</p> <ul style="list-style-type: none">• After five (5) incorrect login attempts, the user's account will be locked for 1 hour for security reasons• Direct user to click "forgot password" link to quickly reset their password
None of these worked, I still can't access the site	Contact support@findhelp.com

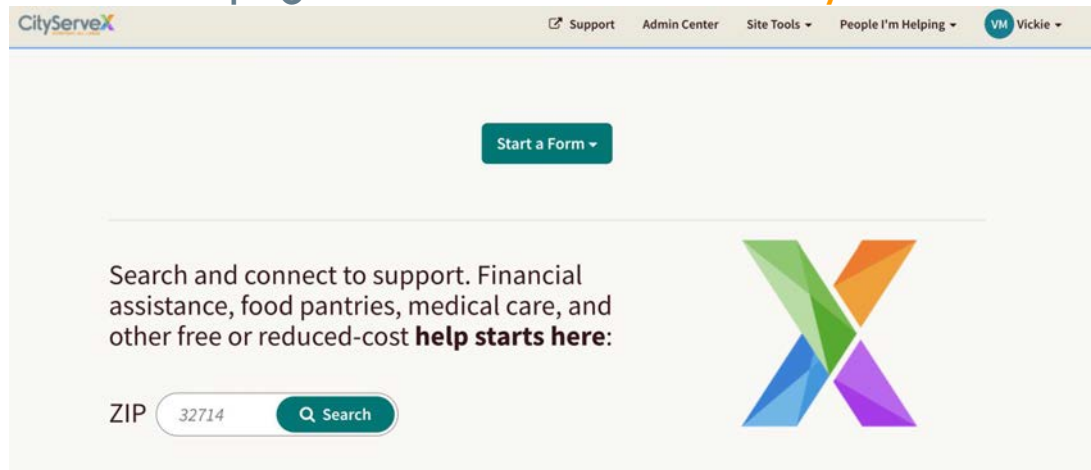


Assessments

Forms Designed to Help You Get to Know a Participant
and Serve Them.

Assessments on the Home Page

The **Start a Form** button the home page contains access to the **CityServeX Intake Form** and the **Inquiry Form**.



The **CityServeX Intake Form** should be accessed here when conducting in-person, "live" events.

The **Inquiry Form** can be accessed here for the purpose of converting phone messages into a usable form. Primarily, this is RESERVED FOR CARE CHAMPIONS.



Getting Started to Help People



Knowing Who to Contact

On the Home Page, click on People under the "People I'm Helping" tab of your site toolbar.

A list will appear of Participants that have been assigned to you by your Care Champion.

If they are newly assigned, or have previously been assigned, but not contacted yet, "Yes" will appear beside their name under the **Flagged** column.

Click on Participant's name and their Profile will open up. **Assessments that have been completed, or are available, are located on the left side, under Forms.**

They are either the **Intake Form** or **Inquiry Form**.

Knowing Who to Contact CONTINUED

Contact information is provided on either form, but only the **Intake Form** should be used to add further information needed, if any.

If there is no **Intake Form** one should be created upon making contact with the Participant for the first time. To do this, BACK BUTTON, click on **Start A Form** and select the **CityServeX Intake Form**. Information from the **Inquiry Form** will automatically populate into it.

*BE SURE AND UNFLAG THE PARTICIPANT ONCE CONTACT HAS BEEN MADE. To unflag click on the red **"Unflag"** at the upper right of the Participant's Profile.

Keeping Track of Attempts to Contact

Each time you attempt to contact a Participant for the 1st time, keep track of this by entering the ascending number in the **Number of Call Attempts** blank. This is located under **Edit Personal Info.** of a Participant Profile.

The number you enter will be seen in the Number of Call Attempts column, on the People page, under the **People I'm Helping** tab.

Once contact has been made this number should remain unchanged. It is only to track how many attempts it took before the 1st contact is made.

***REMEMBER -**

Once you do make contact with a Participant, **BE SURE AND UNFLAG THE PARTICIPANT PROFILE.**

To unflag click on the **red "Unflag"** at the upper right of the Participant's Profile.

Using the CityServeX Intake Form

Once a **CityServeX Intake Form** is completed, and the **REVIEW FORM** button is clicked at the bottom, the following will appear:

Use of this Platform:

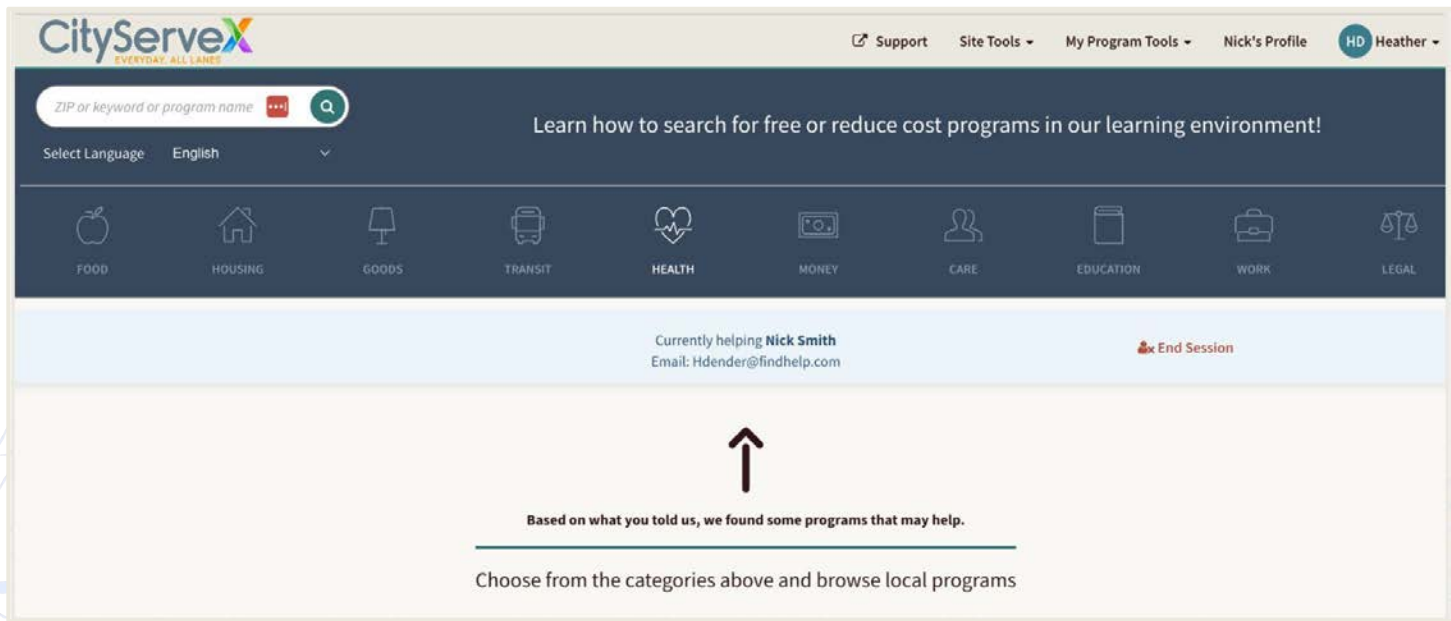
Do you have appropriate consent from this person or their guardian (if under 18) for CityServeX to collect and store this profile information? By consenting they agree to the CityServeX platform's Terms and Privacy Policy.

Yes, I consent.

You will then have an opportunity to either **Edit Responses** or **Submit**.

Tailored Search Results

Once the **Intake Form** is submitted, relevant categories will be highlighted based on the answers the Participant provided.



The screenshot shows the CityServeX website interface. At the top, the logo "CityServeX EVERYDAY. ALL LANES" is on the left, and navigation links "Support", "Site Tools", "My Program Tools", "Nick's Profile", and a user profile "HD Heather" are on the right. Below the header is a search bar with the placeholder "ZIP or keyword or program name" and a magnifying glass icon. To the right of the search bar is a message: "Learn how to search for free or reduce cost programs in our learning environment!". Below the search bar is a language selector showing "English". A row of ten icons represents different categories: FOOD (apple), HOUSING (house), GOODS (lamp), TRANSIT (bus), HEALTH (heart with pulse), MONEY (dollar bill), CARE (two people), EDUCATION (book), WORK (briefcase), and LEGAL (scales). Below this row, a light blue banner states "Currently helping Nick Smith" with the email "Email: Hdender@findhelp.com" and a red "End Session" button. In the center of the page, a large black arrow points upwards towards the category icons. Below the arrow, the text reads: "Based on what you told us, we found some programs that may help." followed by a horizontal line and "Choose from the categories above and browse local programs".




Searching for Programs




Starting a Search

From the home page, enter in a zip code and click on the search button.


Support People I'm Helping ▾

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

ZIP

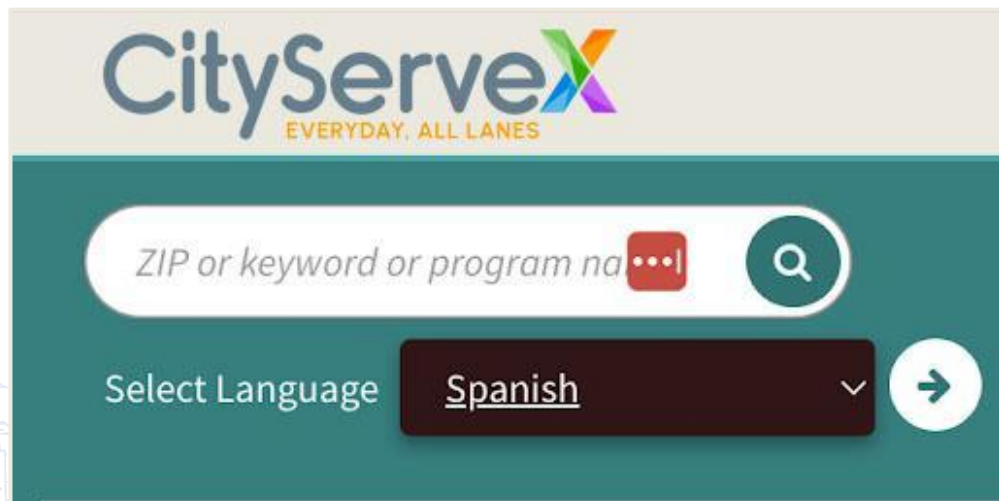
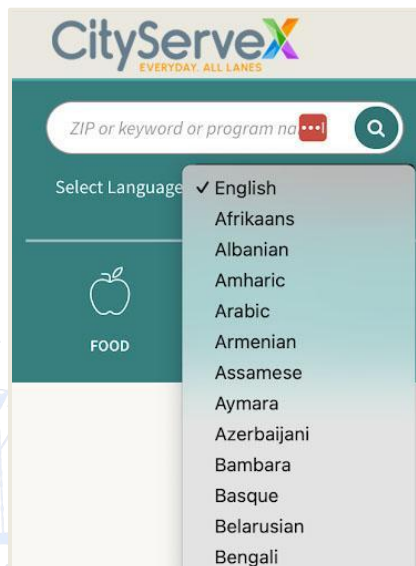
 Search

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, or text HOME to 741741 (multiple languages available). If this is an emergency, call 911.



Changing the Preferred Language

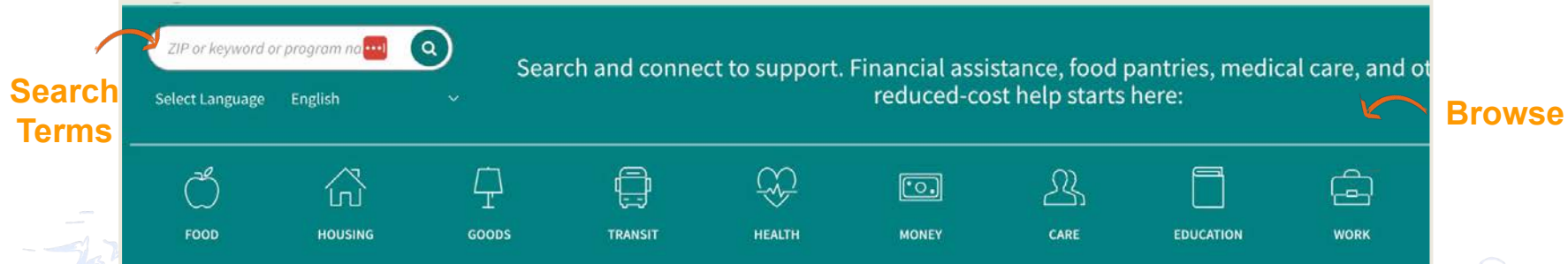
You can translate the page into any language supported by Google. Select the preferred one for your Participant and then click on the arrow. The entire site will be translated in that language!



Search for Programs

Once you have entered a Zip Code to start your search, you can look for programs in a couple different ways:

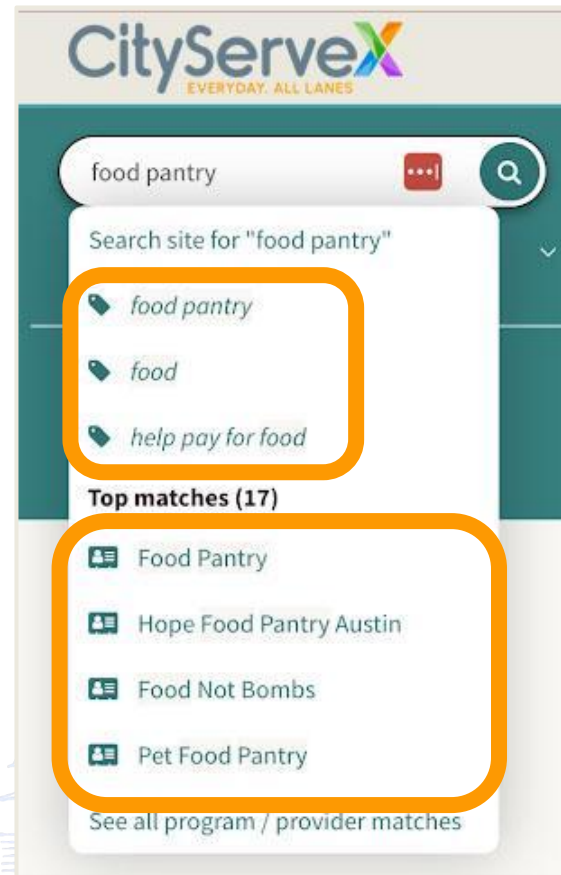
- **Type** a search term
- **Browse** categories, subcategories, and sub-subcategories



Type a Search Term

As you type, various suggestions will appear:

- **Tags:** These correspond to related categories and subcategories
- **Matches:** These are specific programs whose name matches the phrase you typed



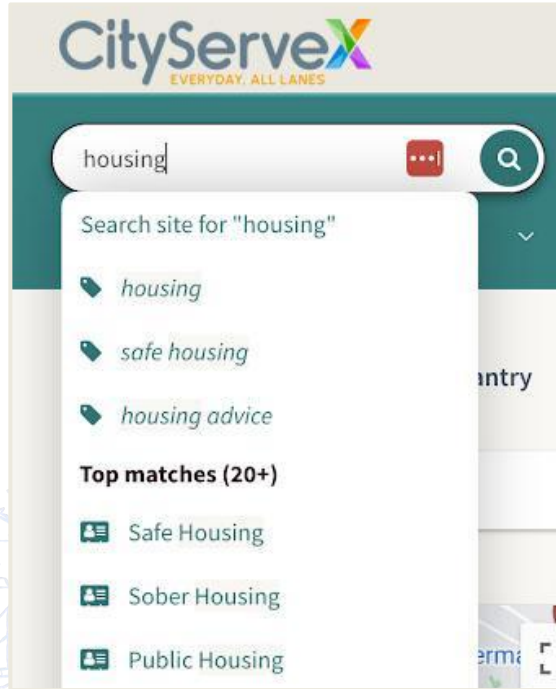
Browse

Every category has an array of subcategories. The number next to the category name indicates how many programs match that specific category.

The screenshot displays the 'Browse' page of the CityServeX website. At the top, there is a horizontal navigation bar with icons and labels for seven main categories: FOOD (apple icon), HOUSING (house icon), GOODS (lamp icon), TRANSIT (bus icon), HEALTH (heart icon), MONEY (credit card icon, highlighted with a dark background), and CARE (people icon). Below this bar, a list of subcategories is shown on the left, each with a right-pointing chevron. The 'Financial Assistance' subcategory is highlighted with an orange rounded rectangle. To the right of this list, the details for 'Financial Assistance - All (822)' are displayed, listing various sub-subcategories and their corresponding program counts.

Category	Subcategory	Program Count
FOOD	Financial Assistance	822
	Financial Education	
	Government Benefits	
	Insurance	
	Loans	
	Tax Preparation	
	MONEY	help pay for childcare
help pay for food		52
government food benefits		24
help pay for healthcare		393
disability benefits		17
discounted healthcare		13
health insurance		26
medical supplies		143
prescription assistance		123
transportation for healthcare		29

Search Terms vs. Browsing



austin, tx (78731) / showing results for search: **housing** < 1 - 10 of 422 >

If a Participant has a housing need, your first instinct may be to type 'housing' in the search field.

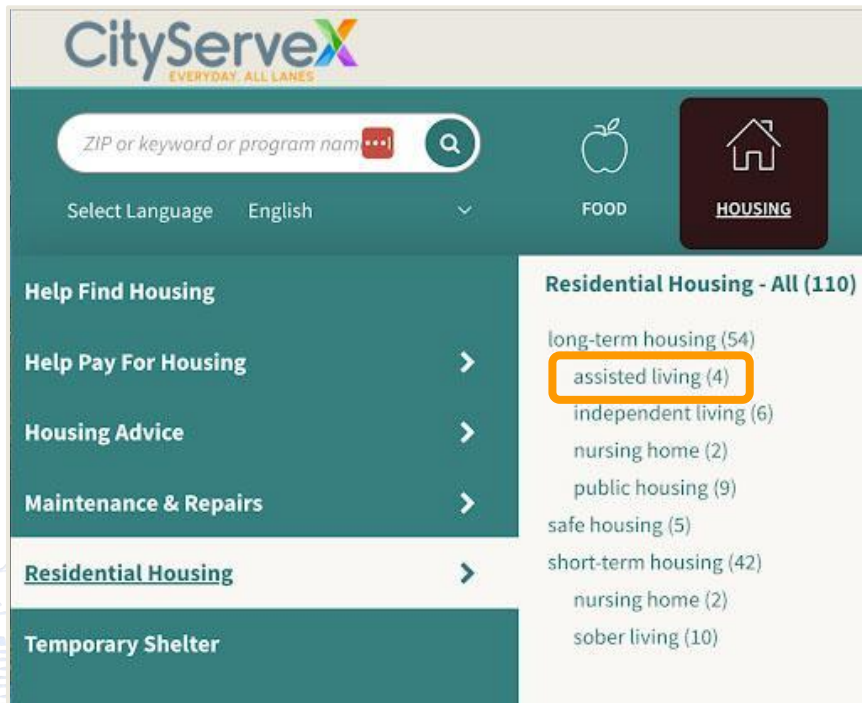
This search, however, has 422 results in this search area:

Search Terms vs. Browsing

Instead, if you know the specific housing need of your Participant, for example assisted living, you can use sub categories to narrow that down.

Clicking on Housing, and then Residential Housing, there is a subcategory for assisted living you can select.

This now gives you 4 programs to choose from.



Search Results

By default, program results are listed in order of **relevancy** . However you can sort by distance using the sort by buttons located above the program listings.



Items that impact relevancy:

- Keyword search match to program or provider name
- Keyword search match to words in program description
- If program is featured
- Program location



How do I narrow programs to meet Participant's needs?

Using Filters

Personal Filters

Filter by situations that are **specific to the person** you're helping, such as age group or armed forces status. The filters are dynamic and will change based on the category chosen and program availability.

Personal Filters | Program Filters | Income Eligibility

- Age Group**
 - ☐ infants: 0 months - 1 year
 - ☐ children: 2 - 12 years
 - ☐ teens: 13 - 19 years
 - ☐ young adults: 20 - 30 years
 - ☐ adults: 31 - 54 years
 - ☐ seniors: 55 years+
- Education**
 - ☐ students
- Disaster Victims**
 - ☐ covid19
- Language**
 - ☐ limited english
- Gender**
 - ☐ female
- Housing**
 - ☐ runaways
 - ☐ homeless
- Disability**
 - ☐ mentally incapacitated
 - ☐ all disabilities
- General**
 - ☐ anyone in need
- Role**
 - ☐ spouses
- Income**
 - ☐ low-income
- Health**
 - ☐ chronic illness
 - ☐ pregnant
- Guardianship**
 - ☐ foster youth
- Employment**
 - ☐ unemployed
- Household**
 - ☐ individuals
 - families**
 - ☐ with children
- Urgency**
 - ☐ in crisis
 - ☐ emergency
- Armed Forces**
 - ☐ veterans
 - ☐ active duty
 - ☐ national guard

FILTER SEARCH

Program Filters

Filter by items that are **specific to the program** you're trying to find, including hours or operation or language. Filters correspond to the tags that are associated with the program.

Personal Filters **Program Filters** **Income Eligibility**

I want to

- ☐ Visit
- ☐ Call
- ☐ Email

Open Hours

- ☐ Open Now
- ☐ Open Late
- ☐ Open Early
- ☐ Open Weekends

Cost

All programs are either free or reduced cost

- ☐ Free

Program communicates in

SELECT LANGUAGE

Documents Required

FILTER SEARCH

Income Eligibility

Narrow resource by **household and income eligibility** -- a new header and program label will appear.

Personal Filters

Program Filters

Income Eligibility

Including you, how many people live in your household?

family members

How much does your household make per month?

\$

per month

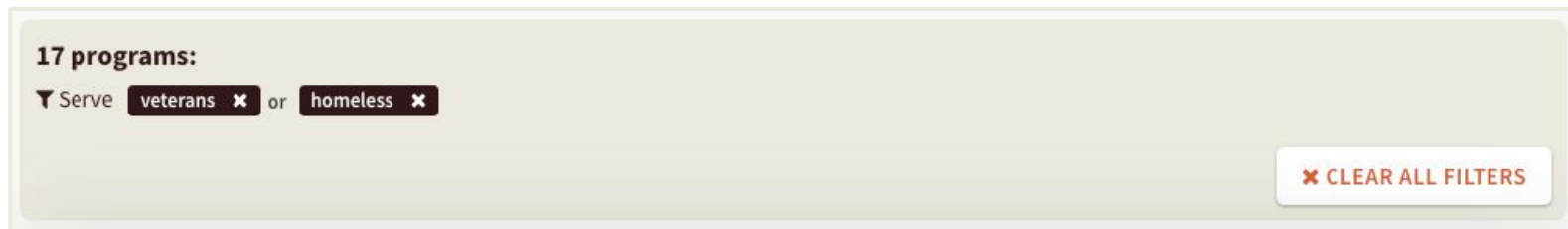
FILTER SEARCH

You may be eligible! Look for programs with the 

 CLEAR ELIGIBILITY CHECK

Clear Filters

Remove Filters by clicking the 'x' on the tags or by clicking 'CLEAR ALL FILTERS'



Filters are dynamic, so they will remain active as you move between categories. Make sure to clear them when you start a new program search!



What's in a Program Card?



A Program Card

College Hub

by Foundation Communities

Reviewed on: 09/03/2024

The College Hub, Austin's first college support center for low-income nontraditional students, provides wraparound support services to help students get to and through college. This program...

Main Services:

financial aid & loans , understand government programs , financial education , navigating the system , help find school , college readiness , skills & training , resume development

Serving:

adults , young adults , students , limited english

Next Steps:

Email collegehub@foundcom.org to schedule an appointment or call 512-610-4012.

3.56 miles (serves your local area)

5900 Airport Boulevard, Austin, TX 78752

Open Now : 10:00 AM - 7:00 PM CDT

MORE INFO

SAVE

SHARE

NOTES

SUGGEST

REFER

This is a thumbnail view of a program that shows up in your search results.

It has important information at a glance!

888-INFO-CARE
info@cityservex.org

CityServeX
EVERYDAY. ALL LANES

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Sections of a Program Card

1 Program Details

☐ **College Hub**
by Foundation Communities
✓ Reviewed on: 09/03/2024

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MORE INFO ▼

★ SAVE

📍 SHARE

☰ NOTES

✎ SUGGEST

➡ REFER

2 Next Steps

3 Additional Actions

Program Details

- A. Program name
- B. Community organization name
- C. Claimed program icon
- D. Program description
- E. Main Services tags
- F. Serving tags

A

B

D

E

F

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C

✓

👤

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5900 Airport Boulevard, Austin, TX 78752

🕒 Open Now : 10:00 AM - 7:00 PM CDT ▼

MORE INFO ▼




★ SAVE

📌 SHARE

📋 NOTES

📝 SUGGEST

➡ REFER




Next Steps:

Call [512-463-4630](tel:512-463-4630) (your nearest location).

📍 2.85 miles (serves nationwide)

🕒 **Closed Now** : See open hours ▼

 [APPLY HERE](#)

Claimed Programs



What is a **claimed program** and why does it matter?

Claimed Programs

The community organization has taken ownership of their listing and is now ready to accept **referrals**. They actively maintain their program information, ensuring it stays up to date and accurate.

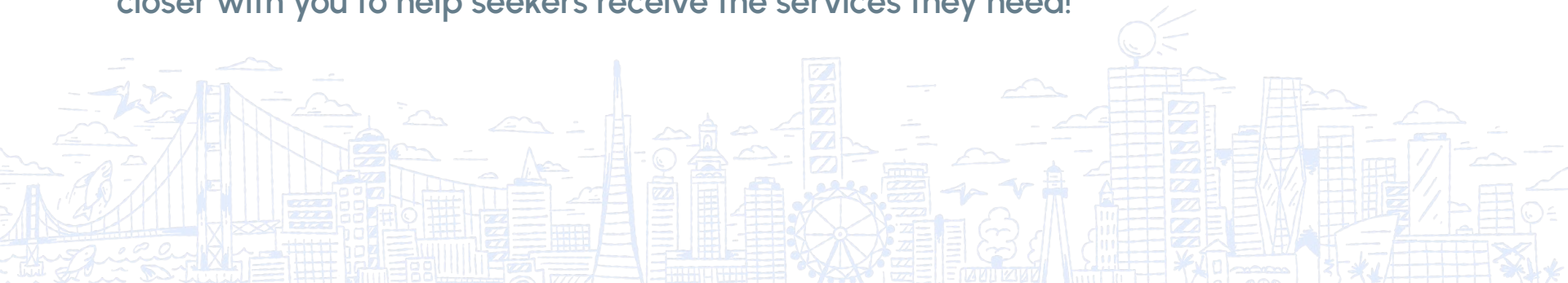
Claimed programs are marked with a checkmark badge next to the program name, so be sure to look for them!



What is a **claimed program** and why does it matter?

More Claimed Programs = Stronger Community of Help

When more programs are engaged with their listing and your platform, they can work closer with you to help seekers receive the services they need!



How can I **claim a program** I own?

Start by finding your program on the platform and clicking on the program name to get into the more detailed view. Then click on **Work here? Manage your listings!**

Food Pantry



Work here? Manage your listings!

by Manos de Cristo



Share




Save

Manos de Cristo offers a food pantry to help alleviate hunger in the community hungry individuals and families.

This program provides:

Claim Approval Process



The flowchart shows a three-step process: 1. Select Programs, 2. Choose Account, and 3. Verify You Work Here. Step 1 is currently active.

1 Select Programs

2 Choose Account

3 Verify You Work Here

Work at a Program? Manage your Listings!

Work for a program? Claim your program listing today and make the process of helping people easier. Claiming only takes a minute, and gives you free access to edit your information, manage referrals, screen applicants, see person analytics, [and more!](#)

You are claiming on findhelp, part of the [findhelp Social Care Network](#), which powers search and referral tools to support people in finding and accessing social services.

Select additional programs

We found these other programs in our database that belong to **Manos de Cristo**. Please select any other programs you would like to claim.

<input type="checkbox"/> Program Name	Agency/Provider Name
<input checked="" type="checkbox"/> Food Pantry 🔗	Manos de Cristo
<input type="checkbox"/> Dental Services 🔗	Manos de Cristo

All claims are reviewed by the Findhelp Network Curation team.

If verified, you will receive a link in your email to accept your claim.

Your link is good for 24 hours.



You can also encourage community organizations in your area to claim their programs!

Next Steps

- A. Summary of next steps
- B. Distance from zip code search
- C. Location address & link to Google maps
- D. Location Hours
- E. Next Step button: Will change based on preferred contact methods

May also show **Waitlist** icon if applicable

Waitlist 🕒 Open Now:: 08:00 AM - 05:00 PM CDT



Next Steps:

Call [512-463-4630](tel:512-463-4630) (your nearest location). **A**

📍 2.85 miles (serves nationwide) **B**

C [1100 Congress Avenue, Austin, TX 78701](#)

D 🕒 **Closed Now** : See open hours ▼

E [📄 APPLY HERE](#)

Additional Actions

- A. More info drop-down
- B. Print View
- C. Save programs to favorites folders
- D. Share programs via text, email, or Facebook
- E. Write personal or team notes
- F. Suggest an edit

The screenshot shows a web interface for a program. At the top, there is a navigation bar with a 'MORE INFO' dropdown (labeled A) and five action buttons: 'SAVE' (star icon, labeled C), 'SHARE' (share icon, labeled D), 'NOTES' (list icon, labeled E), and 'SUGGEST' (pencil icon, labeled F). Below the navigation bar, there is a 'PRINT VIEW' button (labeled B). The main content area contains three sections: 'Eligibility:', 'Availability:', and 'Description:'. The 'Eligibility' section describes the program's target audience. The 'Availability' section states the program is available. The 'Description' section provides a brief overview of the College Hub and a list of services provided.

Eligibility: This program helps middle school students, high school students, college students, and adults interested in pursuing a college degree or certification. The College Hub serves first-generation and post-traditional students (adult learners, comebackers, etc.).

Availability: available

Description: The College Hub, Austin's first college support center for low-income nontraditional students, provides support services to help students get to and through college.

This program provides:

- Financial aid & scholarship assistance
- College coaching and planning
- Support finding and applying for scholarships
- Enrollment in college support programs

Saving to a Favorites Folder

MORE INFO ▾

★
SAVE

SHARE

NOTES

SUGGEST

REFER

Save a Favorite!

CREATE A NEW FOLDER

PICK A FOLDER... ▾

SAVE

Find programs you've added in "Saved Favorites"

TIP: From Saved Favorites, you can edit or delete programs.

Personal Folders

- ☐ Demo Referral
- ☐ Favorites

Shared Folders

- ☐ Baby Clothes + NYC
- ☐ Community Gardens + NYC
- ☐ Gloucester Housing
- ☐ JC Resources

When you select **SAVE**, you can add the program to a new folder or one you have already created.

This saves it to your favorites folder which helps you easily access up to date resources you use most often!

Accessing Your Favorites

Click on your name icon and select **Saved Favorites** . Then click on the folder you want to view and have your chosen programs ready to share, print, or refer a Participant to!

HD Heather

Saved Favorites / Favorites (1)

Share Edit Print

★ My Folders

Select a folder below to see the programs you have saved

Find a folder

Sort: A-Z

Personal Folders

- Demo Referral (1)
- Favorites (1)**

Shared Folders

- Transportation (0)
- Wilco Clinical/TB (3)

☐ **College Hub**
by Foundation Communities
Reviewed on: 09/09/2024

The College Hub, Austin's first college support center for low-income nontraditional students, provides wraparound support services to help students get to and through colle...

Eligibility: This program helps middle school students, high school students, college students and their parents/guardians; and adults interested in pursuing a college degree or certification. The College Hub is uniquely prepared to support first-generation and post-traditional students (adult learners, comebackers, etc.).

Serving: adults, young adults, students, limited english

Next Steps:

Email collegehub@foundcom.org to schedule an appointment or call 512-610-4012.

3.56 miles (serves your local area)

5900 Airport Boulevard, Austin, TX 78752

Closed Today See open hours

MORE INFO RESAVE UNSAVE SHARE NOTES REFER

Share or Print Your Favorite Folders

You can also share or print your favorites folder. It can be shared as a link, an email, or with a group you are a part of.

The screenshot shows the CityServeX interface with a 'Share or Print' modal open. The modal has a title bar with the CityServeX logo and navigation links. Below the title bar, there are tabs for 'Saved Favorites' and 'Favorites (1)'. To the right of the tabs are buttons for 'Share', 'Edit', and 'Print'. The main content area of the modal is titled 'Tell a friend about these programs!' and contains three buttons: 'Share As A Link', 'Send An Email', and 'Share With A Group'. Below these buttons is a paragraph of text explaining link sharing, followed by a checkbox labeled 'Generate my link!'. At the bottom of the modal is a 'Close' button.

CityServeX
EVERYDAY. ALL LANES

Support My Program Tools People I'm Helping HD Heather

Saved Favorites Favorites (1)

Share Edit Print

Tell a friend about these programs!

Share As A Link Send An Email Share With A Group

Link sharing lets you link to this folder in text message, by email, through social media, or on your website. Learn more here!

☐ Generate my link!

Close

Share via Email, Text, or Facebook

Best method if the Participant wants to do some research or discuss the program with friends or family members, or do more research before getting connected.

You can also add a preferred language to have the email translated to!

Tell someone about this program!

☒ SEND AN EMAIL ☐ SEND A TEXT ☐ SHARE ON FACEBOOK

Your Name*

Your name (so they'll actually open it).

Your Email*

Don't worry, we won't share your email when you send this.

To*

Email of the person you're sending this to.

Message

Let them know your thoughts on this program.

Email Language

English

Only the stock message wording will be translated.

Share or Print in Bulk

You can share more than one resource at a time! Click in the box next to the program name to select it. Once you do, a **Selected** button will appear showing how many you have chosen.

☒ **Food Pantry**
by Westover Hills Church of Christ
✓ Reviewed on: 08/08/2024

Westover Hills Church of Christ provides a food pantry for the community. This program provides:- Food to meet basic nutritional needsWhen you first come in, you will be asked...

🔑 Main Services: emergency food , food pantry , baby supplies , personal care items

🔑 Other Services: baby supplies , personal care items , spiritual support

👤 Serving: anyone in need, all ages, individuals, families

5 SELECTED

MORE INFO ▼

★ SAVE

➦ SHARE

☰ NOTES

✎ SUGGEST

Bulk Email or Printing

This will take you to a list of your selected programs. You can save them all to a favorites folder and you can email or print them out in a consolidated resource.

5 Programs Selected ✕

- College Hub by Foundation Communities - Remove
- Outreach Program by St. Austin Catholic Parish - Remove
- Hope Family Thrift Store by Austin Disaster Relief Network (ADRN) - Remove
- Food Pantry by Westover Hills Church of Christ - Remove
- Food Pantry by St. Louis Catholic Church - Remove

SAVEEMAILPRINT

CLEAR ALL

Adding a Note

You can add a note and rate the program as a reference for yourself. You can also share that note with your team.

MORE INFO ▼

★ SAVE

➦ SHARE

☰ NOTES

✎ SUGGEST

➦ REFER

Rate this program: ☆☆☆☆

Save a note about this program.

Have an edit or new information about this program listing? Report a change here!

☒ Save as a note for myself.

☐ Share with Counseling Resource Demo Group ▼

SAVE NOTE



Sending Referrals



Difference Between **Sharing** and **Referring**



Sharing a resource allows the Participant to follow up on the information in their own time.

Referring a Participant to a program is directly connecting them with the next step to get the support or resource that program provides.

This also creates a record you can review in their **Participant Profile**.

There are Different Ways to Contact Programs

We don't require that organizations have to accept emailed referrals. This allows for Findhelp to prioritize listing every social service program.

Organizations can use their existing intake and connection methods, like their website or phone line, while using our platform to help Resource Coordinators and Participants see the outcome of those referrals.



Starting a Referral

Referrals are started by clicking on the connect button inside of a program card. There are two types of referrals: **live** and **logged**.

☐ **Healthcare Ground Transportation** ✓


by Mercy Medical Angels (MMA)

✓ Reviewed on: 08/08/2024

Mercy Medical Angels' non-emergency ground transportation program provides financially qualifying patients with gas cards, or commercial bus or Amtrak tickets to medical-related...

🔑 Main Services: [help pay for gas](#) , [help pay for transit](#) , [bus passes](#)

👤 Serving: all ages, veterans, treatment phases, on-treatment, cancer, chronic illness, benefit recipients, low-income

Next Steps:
Apply on their [website](#) 
Serves nationwide
🕒 Open Now : 9:00 AM - 5:30 PM EDT ▼


MORE INFO ▼

★ SAVE

📌 SHARE




☰ NOTES

✎ SUGGEST





 REFER

Type of Contact Button

Live Referrals

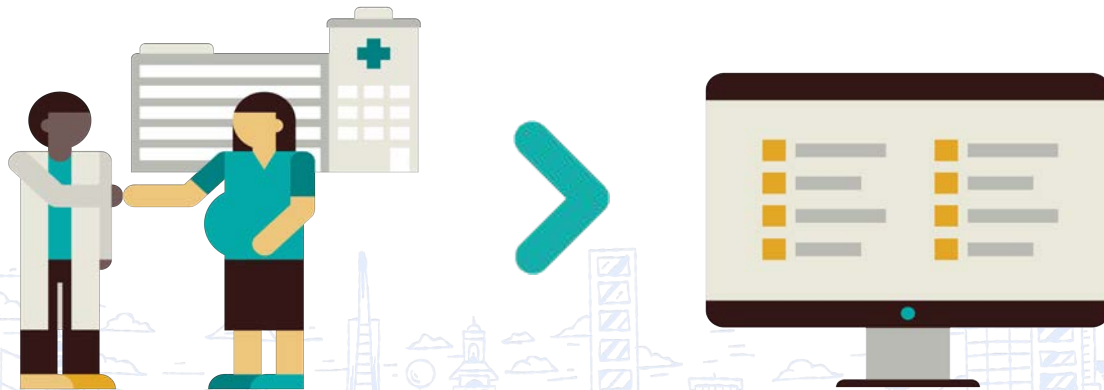
Button	Next Step
 Apply through platform	Create a referral for the Participant and then complete a screener within the platform to collect eligibility
 One-step referral	Create a referral for the Participant
 Schedule	Schedule an appointment for the Participant within the platform to create the referral

Logged Referrals

Button	Next Step
 External Apply	A new tab in your browser will open, taking you to the organizations screener on their website
 External Contact	Contact the organization through an external website
 External Schedule	A new tab in your browser will open, taking you to the organizations scheduling tool
 See Next Steps	The best way to reach a program is to call, email or go in-person.

What is a **Logged Referral**?

A logged referral is one that is documented to the Participant's profile but is not sent to the organization providing the service. Updating the referral status is owned by the Resource Coordinator.



Starting a **Logged Referral**

Click on the connect button and share the next steps with your Participant.

Then click on the **Log A Referral** button and fill out the form so it saves to their Participant profile.

😊 **Best way to connect!**

Call 405-364-9910 to get more info.

Helping someone else?

LOG A REFERRAL



The form below is **NOT** sent to the program. Please follow the program's "Next Steps" to get help. [Learn more...](#)

This form:

- Sends the person you're helping "Next Steps" to contact this program, if email/text selected as the "Best Way to Reach Them."
- Records the program's information in your [People I'm Helping](#) dashboard.
- Creates an account if you and/or the person you're helping don't have one.

Eligibility

Must meet income requirements.

What Happens After You Click Submit on a Logged Referral ?

- These referrals **DO NOT** go to the organization providing the service.
- Participants receive an email notification where they can update the status of their referral.
- They are important for long term trend analytics.
- They also help track and organize your workflow.
- The status updates are on the Resource Coordinator to make.

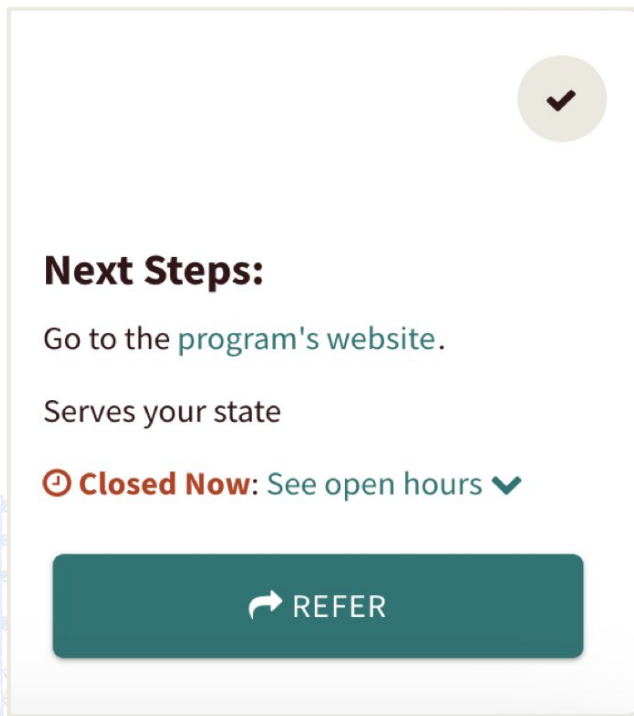


What is a **Live Referral** ?

A live referral is one that is sent to the organization providing the service. It is also saved to a Participant's profile. The organization receives a **notification** of the referral and updates the status.





Starting a **Live Referral**




Next Steps:

Go to the [program's website](#).

Serves your state

 **Closed Now:** See open hours 

 REFER

Programs that have live referrals turned on will be claimed and have the check mark badge in the upper corner.

Clicking on the connect button leads to a referral form to fill out.

The Referral Form

Eligibility This program serves anyone in need.

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

Your Name * Heather ✖ Dender

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 Language ▼

Their ID

Everything necessary will have an asterisks next to it.

You can choose a **preferred language** for your Participant which will inform the program organization so they can best support.

The referral notification the Participant receives will also be translated to that language.

Preferred Contact Method & Comments

Select the preferred contact method for your Participant. You can also add a comment with important information for the organization you are referring to.

Best way to reach them*

- ☐ Email
- ☐ Text message
- ☐ Phone call
- ☐ Don't reach out

Comment

This comment is visible to you, your team, the agency, and person you're helping.


She is currently living with friends and has no internet access

Gaining Consent

Because we are sending the Participant's information to another organization, we have a consent checkbox to confirm before the referral is sent. Organizations receiving these referrals will only see the information provided in the form.

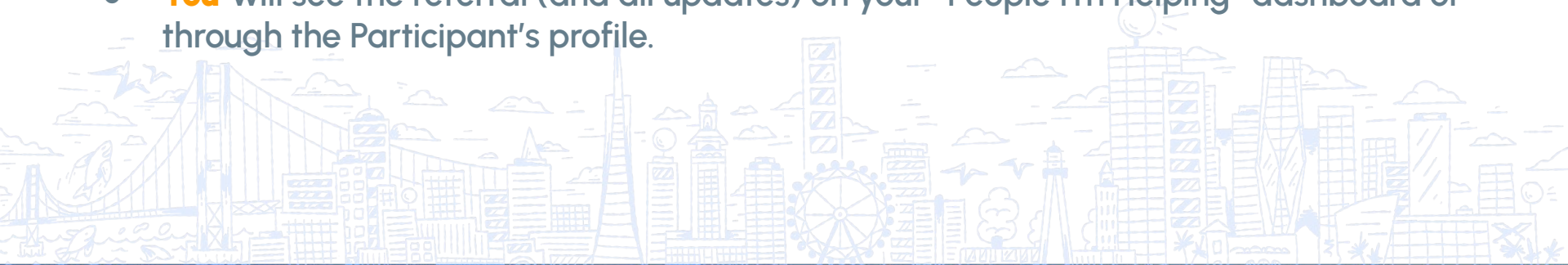
Confirm Consent *

- ☐ I have appropriate consent from the person or their guardian (if under 18) to:
- Send their contact info and additional info through this system to this agency, and
 - Send them info **about this program** through the Nexus (Training) platform (including any responses sent to them by the program).

 SEND

What Happens When **You Submit** a **Live Referral** ?

- The **person** that you are sharing the resource with will receive an email or text with information about the program and next steps depending on their preferred contact method.
- The **community organization** providing the program will also receive an email with the contact information of the person you're referring.
- **You** will see the referral (and all updates) on your "People I'm Helping" dashboard or through the Participant's profile.



What Are the Main Differences Between Live and Logged Referrals ?

Live Referrals



- Participant consent is needed
- Notes are viewable by both sides
- The organization receives a referral notification
- The organization updates the status

Logged Referrals



- This referral is for the Resource Coordinator only
- Consent is not needed
- Notes made are for the Resource Coordinator or team
- The Resource Coordinator updates the status



Referral Notifications



Participant Referral Notification

If your Participant chooses email or text as their preferred contact method, they will receive one of these notifications.

Hi there,

Shelli R. referred you to [Food Pantry](#) at Bertha Support with the following comment:

"Sadie has a peanut allergy"

Referral Comment

What's Next?

Please contact the agency directly:


- Closest location to 78723:
Address: 710 West Cesar Chavez Street, Austin, TX, 78701 - [Get Directions](#)
Phone Number: ext.

Thanks,

- The team at [Connecting the Dots Demo](#)

Already got in touch? Let Shelli R. know how it went!

Note: this is an automatic message, which is unable to receive replies. If you need emergency help, please call 911.

 **Connecting the Dots Demo**
Questions? Contact support@findhelo.com

Will display customer site branding

Update Referral Status

Today 11:49 AM

Someone on Connecting the Dots Demo referred you to Food Pantry. Call at [512-555-0518](tel:512-555-0518).
More contact info: <https://bit.ly/3YeyCQH>

Community Based Organization New Referral Notification

Hi Bertha Support team,

Shelli R. referred someone to your program, Food Pantry!

Please reach out to:

- Sadie Seeker
- sadieseeker@findhelp.com

Shelli left the following comment about Sadie: "Sadie has a peanut allergy".

Shelli sent you this contact info because Sadie is looking for services or more information. You can respond by replying to this email, or Sadie said email is the best way to reach them.

Already reached out to Sadie? Let Shelli know what happened, so they can follow up:

Needs client action : More client information is needed
Pending : We are processing the referral.
Referred elsewhere : Referred somewhere else that could help.
Got help : We were able to provide help.
Eligible : They are eligible.
Couldn't contact : We were unable to reach them.
Not eligible : They are not eligible for our services.
No capacity : We do not have the capacity at this time.
Couldn't get help : We could not provide them with our services.
No longer interested : They were no longer interested in our services.

We'll let them know, and keep track of what happened. See all past inquiries in the [inbound referral dashboard](#), or tell the story of your program's impact in the community with free reports about your programs usage.



People I'm Helping





What tools do I have to manage the referrals I am making?

The People I'm Helping Dashboard

A dashboard of all the Participants you have helped through the platform with filters to help you organize your workflow!

The Participant Profile

A record that holds data relating to your Participant such as personal information, referral navigation history, goals, documents, and more!



What tools do I have to manage the referrals I am making?

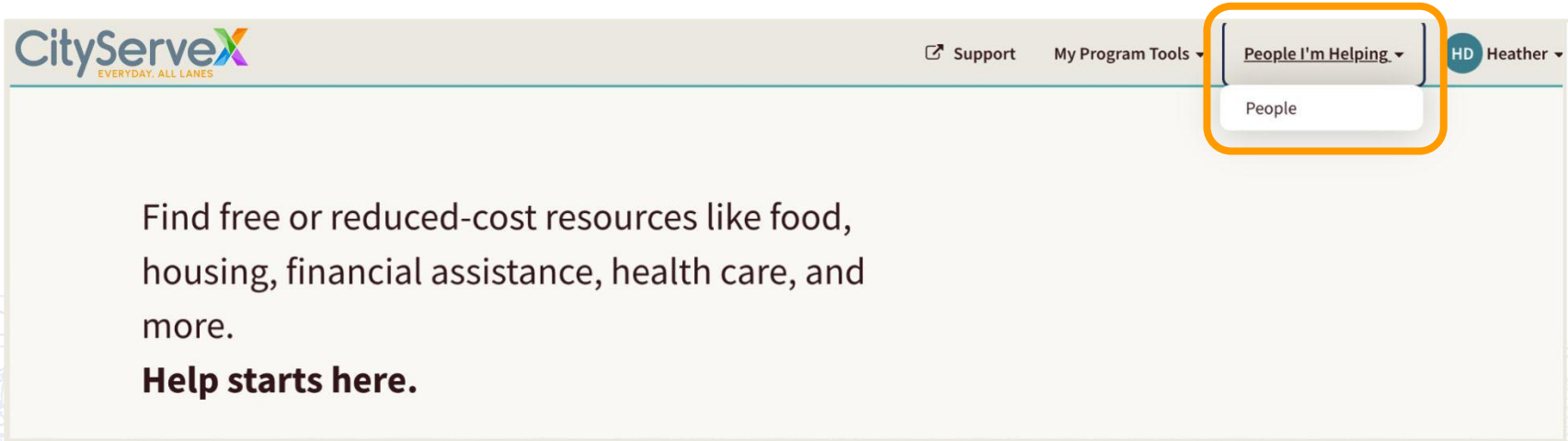
Groups Connected with Team Navigation

When added to a group, Resource Coordinators can share and collaborate over program information and Participant care!



Accessing the People I'm Helping Dashboard

When you are signed into the site, you can click on People I'm Helping from the top menu bar and click on People.



"People I'm Helping" Dashboard

- A. Dashboard Filters
- B. Keyword Search
- C. Link to a Participant Profile
- D. Quick Start Referral Button
- E. Referral Summary Button

People I'm Helping

Assignee **A**
Show All

Follow Up Date
mm/dd/yyyy - mm/dd/yyyy **C**

Date of Birth
mm/dd/yyyy - mm/dd/yyyy

Gender
Show All

B

Name	Refer	Summary
Laurie Britt	D <input type="button" value="Refer"/>	E <input type="button" value="Summary"/>
Patricia Washington	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>
George Williams	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>
Laurie O	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>
John Smith	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>

Using the Dashboard Filters

Edit Personal Info

Follow Up Date

|mm/dd/yyyy

If you go into a Participant profile, you can edit the personal information to set a follow up date and assign the Participant profile to yourself.

People I'm Helping / Robert Smith

Assignment

Heather Dender X

This lets you use those filters in the dashboard to organize your workflow!



The Participant Profile





How Participant Profiles are Created

Participant profiles are automatically created any time a **referral** or assessment has been made for a Participant by a Resource Coordinator.

If users are in a group with **Team Navigation** enabled, all Participant profiles will be visible and accessible to all members of the group.

Participant profiles are **NOT** created for self-referrals or self-assessments. Additionally Participant profiles are not created when a you **share** a program with someone.

Participant Profile Overview

- A. Personal Info
- B. Assignment
- C. Household
- D. Forms
- E. Documents
- F. Flag and Archive
- G. Goals
- H. Navigation History

A People I'm Helping / Heather Dender **F** Flag Archive

G Personal Info **G** Goals Add Goal

Heather Dender
Name
hdender@findhelp.com
Email Address
Edit Personal Info

B Assignment **H** Navigation History

Assign To Me

C Household

Household information has not been added.
Create

D Forms

No forms have been submitted for this user.
Start A Form

E Documents

Care Plan.pptx
Sep 9, 2024
Upload

Heather has 1 goal.

Getting ID
Replacing a Missing ID
Status: In progress
9/09/24

You have referred Heather to 1 programs.

Referrals and Notes Start a Referral Add Note

Mitch Food Pantry
by Mitch Food Pantry
Status
Needs client action

Add Note Add/Remove Goals

9/09/24 "Heather needs to replace her ID to qualify for this program"
Heather Dender
9/09/24 Status set to 'needs client action'
Heather Dender
7/31/24 Status set to 'not updated'
Heather Dender
7/31/24 Referred by Heather D (Findhelp Learning and Development)

Personal Info

Personal Info

Heather Dender
Name

hdender@findhelp.com
Email Address

Edit Personal Info

First Name: Heather
Last Name: Dender

Email Address: hdender@findhelp.com
Phone Number: (555) 555-5555

Next Follow-up Date: 05/01/2021

Patient ID
Medicaid ID
Street Address
ZIP Code

CANCEL SAVE

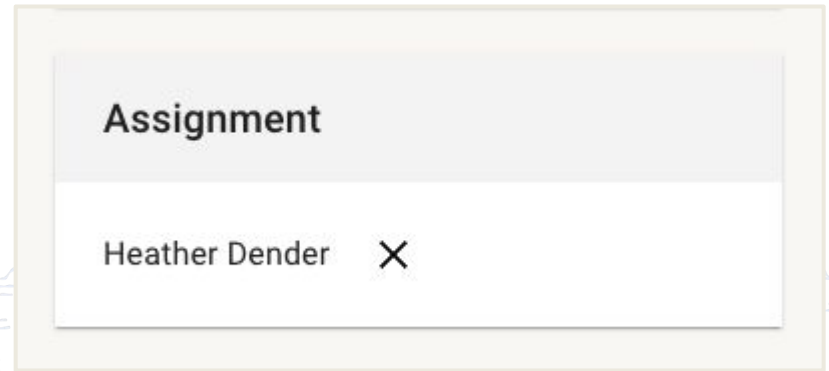
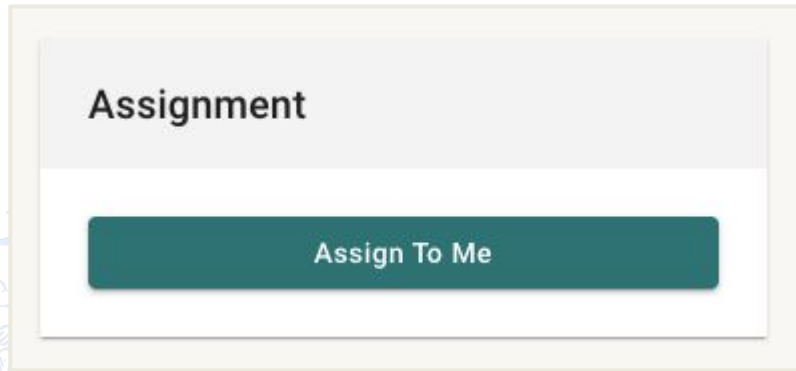
You can add the Participant's information into this section.

You can also add a follow up date here which is a filter used in the **People I'm Helping dashboard**.

Assignment

You can also assign yourself to a Participant profile. This will give you an additional filter you can use in the **People I'm Helping** dashboard.

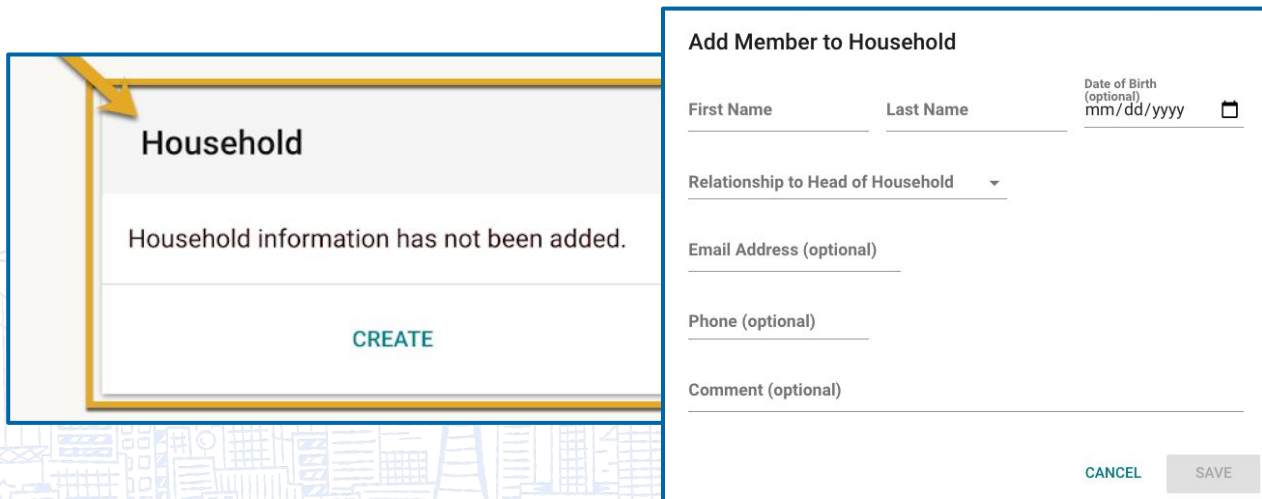
This can also help your group see who on your team is working with a specific Participant.



Households

You can add household details to help you when you are working with families and groups of Participants. This lets you add in relationships important to your Participant's care.

This is visible to Resource Coordinators who have access to these profiles.



Household

Household information has not been added.

CREATE

Add Member to Household

First Name Last Name Date of Birth (optional) mm/dd/yyyy

Relationship to Head of Household

Email Address (optional)

Phone (optional)

Comment (optional)

CANCEL SAVE

Household Important Details

Household Details

Households are only visible to staff.

Penny Proud - EDIT

Child

Trudy Proud - EDIT

Head of household

Penny's Mom

Phone: (589) 987-4568

Oscar Proud - EDIT

Partner

Cece Proud - EDIT

Other - family member

Penny's sister

Date of Birth: 6/01/20

ADD MEMBER

CANCEL

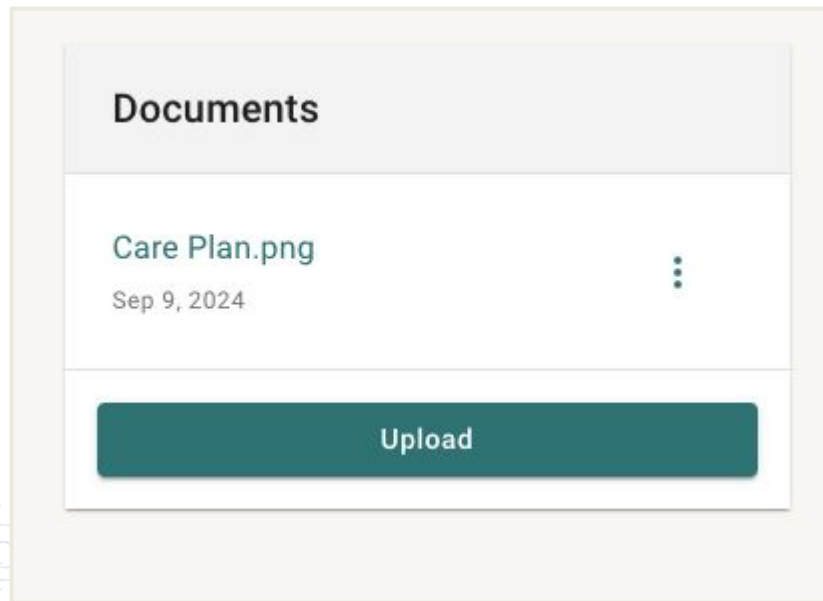
SAVE

Household member names are not direct links to Participant profiles.

Adding a member to a household does not create a Participant profile for that member.

Household members will not be matched to preexisting Participant profiles.

How do I upload a document ?

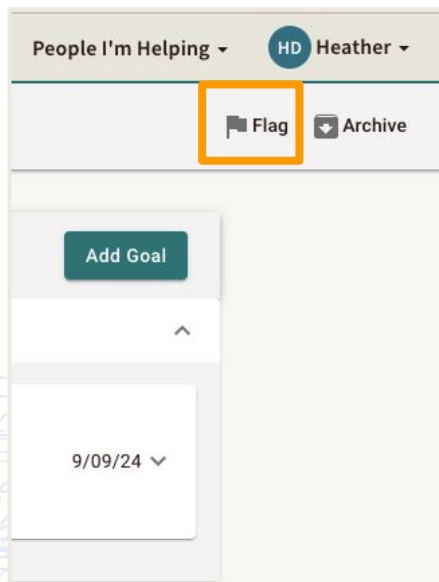


Select upload and then choose the document you wish to attach to the Participant profile.

Documents are viewable by any team member who is a part of your group when team collaboration is enabled.

Flagging a Participant Profile

Flagging a profile will prioritize it in the People I'm Helping dashboard.



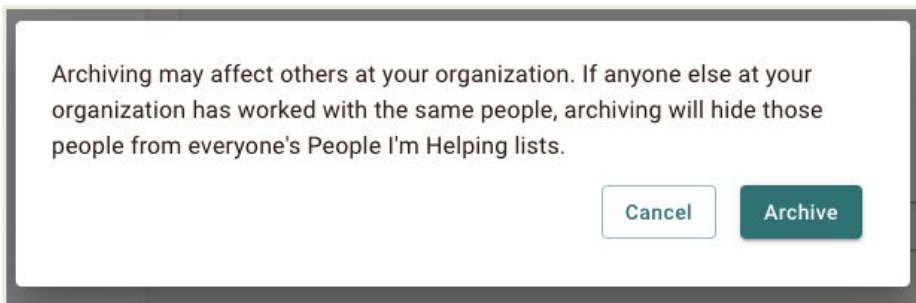
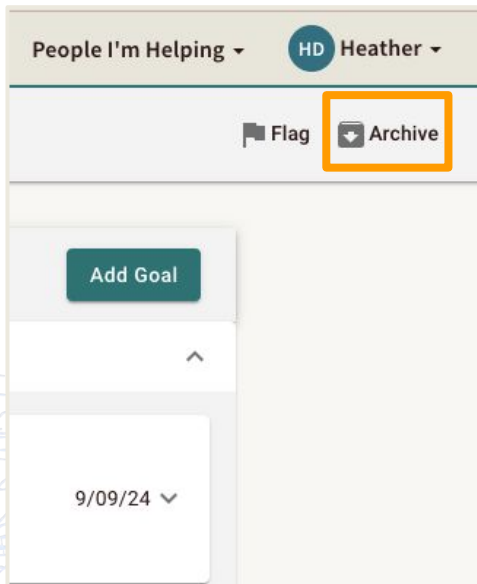
By flagging a profile, you prioritize it and bring it to the top of the People I'm Helping list. Note that flags are visible to others at your organization who have worked with the same person.

Cancel

Flag

Archiving a Participant Profile

Archiving a profile will hide it in the People I'm Helping dashboard. While not deleting the record, it does remove it from being searchable in the dashboard unless you use the archived profile's filter.



Unarchiving a Participant Profile

If you toggle the **Archived Profiles** to show all, you can then select the archived Participant's name and access their profile. Inside you will click on Unarchive to make the profile viewable again in the dashboard.

People I'm Helping

Unread Messages

Unread By Me

Messages Received Within

mm/dd/yyyy - mm/dd/yyyy

Assignee

Show All

Archived Profiles

Show All

Flag

Unarchive

Add Goal

888-INFO-CARE
info@cityservex.org

CityServeX
EVERYDAY. ALL LANES

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Goals

In this section you can review goals you or your team have set with the seeker or start a new one. This is a great place to add notes and track milestones as you are working with the person you are helping.

Goals

Add Goal

Pamela has 1 active goal.



Getting ID
Pamela is getting a new ID to apply for a program

Status: In progress

4/30/25 ▾

Adding a New Goal

In this section you can review goals you or your team have set with the seeker or start a new one. This is a great place to add notes and track milestones as you are working with the person you are helping.

Goals

Add Goal

What kind of goal is this?*

Please select a goal type.

Goal Description

Cancel Save

Navigation History

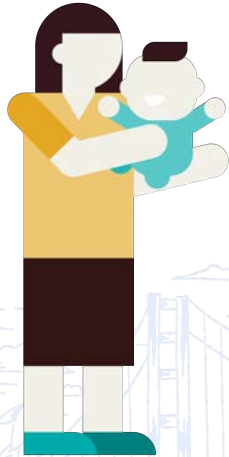
Select a goal type.


- ask
- Care
- Disability Support
- Education
- Family/Community Support
- Financial
- Food
- Getting ID
- Goods
- Health Coverage
- Health Literacy
- Home Maintenance
- Housing
- Immunizations
- Legal

You can create a new goal by clicking **"Add goal"** and choosing the appropriate type from the dropdown menu. There's also an option to include a description for more context.

Adding a Relevant Referral to a Goal

You can use add referrals to goals when you are helping a seeker. In this example, Pamela wants to get custody of her children. You can create that as a goal.






Legal
Pamela is working to get custody of her children



5/01/25 ^

Status: In progress

Status

 In progress ▼

Notes and Referrals

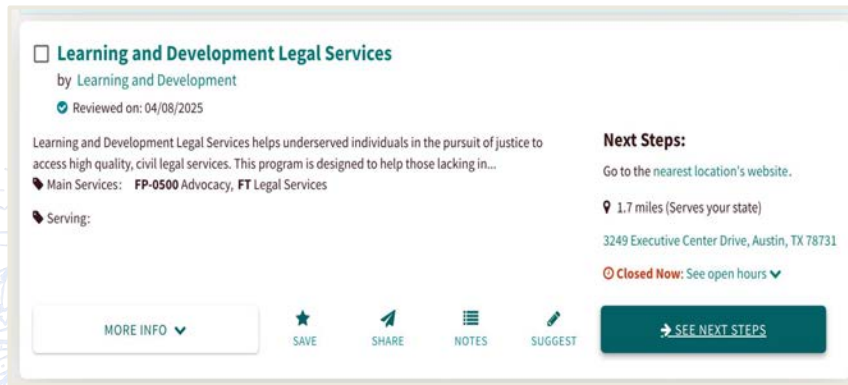
Add Note

Find the Right Referral



Click the **"Start a Referral"** button to search for a relevant program for the seeker.

Once you find a program, click the Connect button to begin the referral. After it's sent, return to the seeker's profile to view the referral in their Navigation History.



Adding that Referral to a Goal

You can then add that referral to that goal by clicking the 'Add/remove goals' button and selecting the right goal.

You have referred Pamela to 2 programs. ^

Referrals and Notes Start a Referral Add Note

Learning and Development Legal Services
by Learning and Development

Status
... Not updated ▾

Add Note Add/Remove Goals

5/01/25 Status set to 'not updated'
Heather Dender

5/01/25 Referred by Heather D (Findhelp Learning and Development)

Learning and Development Legal Services
by Learning and Development

Status
... Not updated ▾

Add Note Add/Remove Goals

5/01/25

5/01/25

Add to a goal... ated'

Getting ID

Legal

(Findhelp Learning and Development)

The Referral Is Now In The Goal Section

The screenshot displays the CityServeX interface. At the top, under the 'Legal' category, a goal is listed: 'Pamela is working to get custody of her children' with a date of '5/01/25' and a status of 'In progress'. Below this, a 'Status' dropdown menu is set to 'In progress'. To the right of the dropdown are edit and settings icons. A green 'Add Note' button is positioned to the right of the 'Notes and Referrals' section. Below this, a card titled 'Learning and Development Legal Services' by 'Learning and Development' is shown. It has a 'Status' dropdown set to 'Not updated'. Below the card are two buttons: 'Add Note' and 'Add/Remove Goals'. At the bottom, a log shows two entries: '5/01/25 Status set to 'not updated' Heather Dender' and '5/01/25 Referred by Heather D (Findhelp Learning and Development)'.

Legal
Pamela is working to get custody of her children 5/01/25 ^

Status: In progress

Status
► In progress

Notes and Referrals **Add Note**

Learning and Development Legal Services
by Learning and Development

Status
... Not updated

Add Note **Add/Remove Goals**

5/01/25 Status set to 'not updated'
Heather Dender

5/01/25 Referred by Heather D (Findhelp Learning and Development)

The referral will now be viewable from the goal you have created. You can update the status of both from here.

Navigation History

Navigation History

You have referred Heather to 2 programs. ^

Referrals and Notes

Start a Referral

Add Note

Housing Services

by Placer County Homeless Resource Helpline

Status:

*** Not updated ▾

Add Note

Add/Remove Goals

9/10/24	Status set to 'not updated' Heather Dender
9/10/24	Referred by Heather D (Findhelp Learning and Development)

Mitch Food Pantry

by Mitch Food Pantry

Status:

► Needs client action ▾

All referrals made for an individual and their current status will automatically appear under Navigation History.

Self referrals will not appear here.

888-INFO-CARE
info@cityservex.org

CityServeX
EVERYDAY. ALL LANES

90

Updating Referral Statuses

You have referred Heather to 2 programs. ^

Referrals and Notes Start a Referral Add Note

- ⋮ 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

Resource Helpline

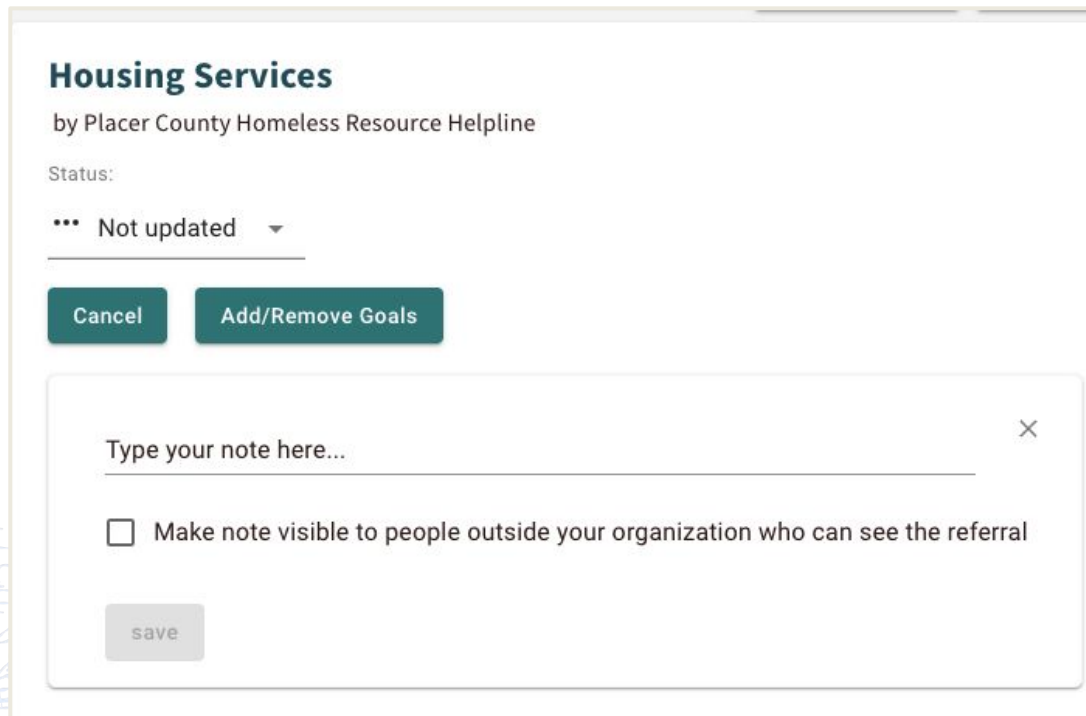
ove Goals

'not updated'

Heather D (Findhelp Learning and Development)

In the Navigation History you can see the status of the referral and update the status yourself of any **logged referrals** you have made.

Referral Notes



Housing Services
by Placer County Homeless Resource Helpline

Status:
... Not updated ▼

Cancel **Add/Remove Goals**

Type your note here... ✕

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

save

You can add a note to a referral that can be shared with the community organization!

Click the checkbox next to the **"Make the note visible"** option.

The note will be visible to staff and community organizations with access to the referral.



Team Collaboration



Team Collaboration

Being added to a group with team collaboration turned on gives you a lot of ways to interact within your organization.

- You can share **Notes** added to program cards.
- You can collaborate in the **People I'm Helping Dashboard**.
- You can share **Favorites Folders**.

Talk to your designated **Site Administrator** if you want to collaborate with a certain group!



Sharing Notes

Inside of the program card you can leave a note you can share with your team. This can be really helpful if you have a tip or note about a program that is often referred to by your organization.

Rate this program ☆ ☆ ☆ ☆ ☆

Save a note about this program.

Have an edit or new information about this program listing? [Report a change here!](#)

☐ Save as a note for myself.

☒ Share with Pay for Books Group

SAVE NOTE

Sharing Favorites

You can share a favorite folder resources with your group. This puts the favorites folder created in their favorites!

Saved Favorites Book Resource (1)

Share Edit Print

Tell a friend about these programs!

Share As A Link Send An Email Share With A Group

Share with: Pay for Books Group

The members of the group(s) you share with will be able to:

- ★ See this folder in their own My Favorites page
- ➕ Add or remove programs in the folder

Send Close

Navigation History

You can do handoffs by accessing Participant profile records shared with your group and changing the assignment. This also gives you access to notes, goals, and referrals done by your team.

People I'm Helping / Nick Smith

Edit Personal Info

Assignment

Heather Dender ✕

People I'm Helping / Nick Smith

Edit Personal Info

Assignment

Assign To Me

People I'm Helping

The dashboard features a sidebar with filters and a main table of individuals. The filters include Assignee, Follow Up Date, Date of Birth, Gender, Race, Ethnicity, and State, each with a 'Show All' dropdown. The main table has columns for Name, Refer, Summary, Assignee, and Email. Each row includes 'Refer' and 'Summary' buttons. The background of the slide features a faint cityscape illustration.

Name	Refer	Summary	Assignee	Email
Laurie Britt	Refer	Summary		laurie.oneill@helplinecenter.org
Mitch Partners	Refer	Summary		mlango+jennamarbles@findhelp.com
Michael Partners	Refer	Summary		mlango+jennamarbles@findhelp.com
Mickey Mouse	Refer	Summary		mlango+jennamarbles@findhelp.com
Rachel Anderson	Refer	Summary	Rachel Sehr	xyz@hotmail.com
Lisa Dean	Refer	Summary		mkarls@findhelp.com
Wednesday Nexus	Refer	Summary		noemail@noemail.com
sd s	Refer	Summary		
Himani Care-2575	Refer	Summary	Himani Testing	hkulkarni+himani-care-2575@findhelp.com
Lauren Taylor	Refer	Summary		ltaylor@findhelp.com

You have access to People your group has also helped in the People I'm Helping dashboard.

This can support collaboration on the same member or help when you might need to take on a team member's task.



Closing the Referral Loop



What is a Closed-Loop Referral ?

The referral is transmitted electronically to a CBO that can provide help.

A Resource Coordinator makes a referral for service on behalf of someone who needs help.



A CBO provides the assistance they need.

The CBO replies to the Resource Coordinator electronically to let them know they provided the assistance.

Referral Statuses - Pending

... Not updated

► Needs client action

|| Pending

+ Eligible

Not Updated: This is the default setting all referrals come in under.

Needs Client Action: The Participant needs to do an action before services can be provided.

Pending: This can be used by the program receiving the referral and means it is being processed.

Eligible: The Participant is eligible for the service but has not received it yet.

Referral Statuses - Closed

- ✔ Referred elsewhere
- ✓ Got help
- + Eligible
- ✗ Couldn't get help
- ! Couldn't contact
- Not eligible
- ▲ No capacity
- No longer interested

Referred elsewhere: You have directed them to a different organization for help.

Got help: You have helped them!

Couldn't contact: You were unable to contact the Participant.

Not eligible: The Participant was ineligible for the program.

No capacity: The program doesn't have capacity to help the Participant.

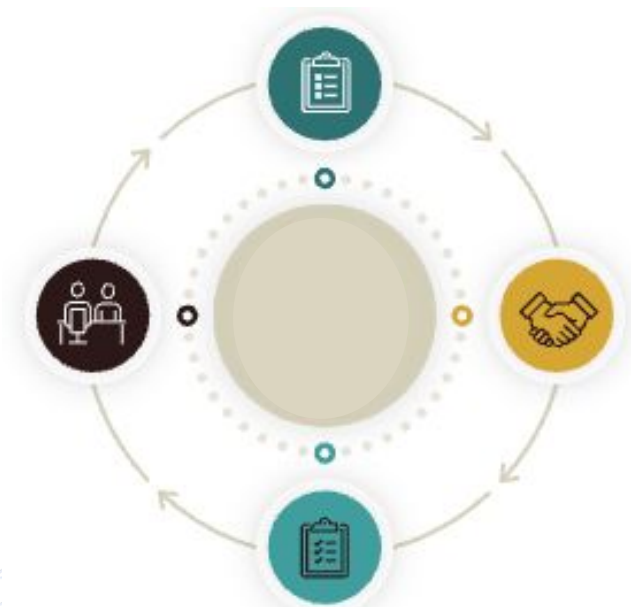
Couldn't get help: The Participant was unable to get help for various reasons from the program.

No longer interested: The Participant indicated they no longer need or have an interest in the program.

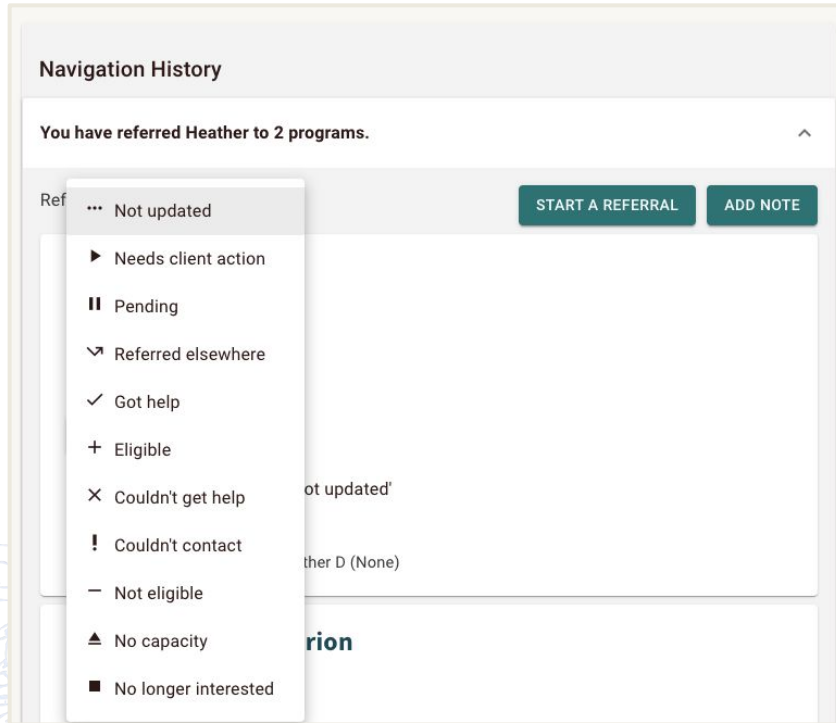
Ways to Close the Loop

There are four ways that the referral loop can be closed.

- The Resource Coordinator
- A Group with Team Navigation turned on
- The Participant
- The Community Based Organization



Closing the Loop on Logged Referrals



When working with a logged referral, you own both sides of the communication pathway.

Closing out the status can be done through the Participant's profile.

Participant Updating the Referral Status

Hi there,

Shelli R. referred you to [Food Pantry](#) at Bertha Support with the following comment:

"Sadie has a peanut allergy"

Referral Comment

What's Next?

Please contact the agency directly:


- Closest location to 78723:
Address: 710 West Cesar Chavez Street, Austin, TX, 78701 - [Get Directions](#)
Phone Number: ext.

Thanks,

- The team at [Connecting the Dots Demo](#)

Already got in touch? Let Shelli R. know how it went!

Note: this is an automatic message, which is unable to receive replies. If you need emergency help, please call 911.

 **Connecting the Dots Demo**
Questions? Contact support@findhelp.com

Will display customer site branding

The Participant can also close the referral loop by replying through their notification email.

CBO Closed Loops

Hi Bertha Support team,

Shelli R. referred someone to your program, Food Pantry!

Please reach out to:

- Sadie Seeker
- sadieseeker@findhelp.com

Shelli left the following comment about Sadie: "Sadie has a peanut allergy".

Shelli sent you this contact info because Sadie is looking for services information. You can respond by replying to this email, or Sadie said email reach them.

Already reached out to Sadie? Let Shelli know what happened, so they can update their referral.

Needs client action : More client information is needed.

Pending : We are processing the referral.

Referred elsewhere : Referred somewhere else that could help.

Got help : We were able to provide help.

Eligible : They are eligible.

Couldn't contact : We were unable to reach them.

Not eligible : They are not eligible for our services.

No capacity : We do not have the capacity at this time.

Couldn't get help : We could not provide them with our services.

No longer interested : They were no longer interested in our services.

We'll let them know, and keep track of what happened. See all past inquiries in the [inbound referral dashboard](#), or tell the story of your program's impact in the community with free reports

Support
My Program Tools
People I'm Helping

[Add Inbound Referral](#)

Search:

Showing all statuses
Showing all eligibilities

Show
10 entries

Status	Person Inquiring	Referred By	Referred On	Last Updated	Forms
<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 50%; width: 20px; height: 20px; margin-right: 5px;"></div> <div>Not updated</div> </div>	Simonee Seeker tfagan+simoneeseeker@findhelp.com (555) 111-2222 Prefers phone call Speaks English	Tanoa Fagan <i>Internal Sandbox</i>	12/13/2023	Tanoa Fagan Internal Sandbox 12/13/2023	May not be eligible View Screener + New Data Collection Form
<div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; border-radius: 50%; width: 20px; height: 20px; margin-right: 5px;"></div> <div>No longer inter...</div> </div>	Simonee Seeker tfagan+simoneeseeker@findhelp.com (555) 111-2222 Prefers phone call Speaks English	Tanoa Fagan <i>Internal Sandbox</i>	12/12/2023	Kelly Ross Find Help Admin 12/18/2023	May not be eligible View Screener + New Data Collection Form



Suggesting Programs and Making Changes in Program Manager

The Network



Network Data Curation Team

The Findhelp Network Curation Team creates and reviews programs by contacting organizations to verify their information. They also review updates made through the Program Manager Tool.

Suggest a Program

First, let's do a quick check!

Fill out the form below with any information you have, a

Program or Provider Name

Joe's Food Pantry

State program serves

Program Edit Suggestions

Community members and service providers play an active role, keeping the platform up-to-date and ensuring Participants find accurate, relevant support faster.

Join the Network

Join America's largest network of community-serving organizations. Get free tools to collaborate, report on impact, and serve your clients.

What program or agency do you work for?*

Program/Agency name

Program

78/795

CBO Claimers

Community-based organizations (CBOs) can claim and personalize their listings, giving them ownership over their profile.

 Edit this Program  Print

Learning and Development

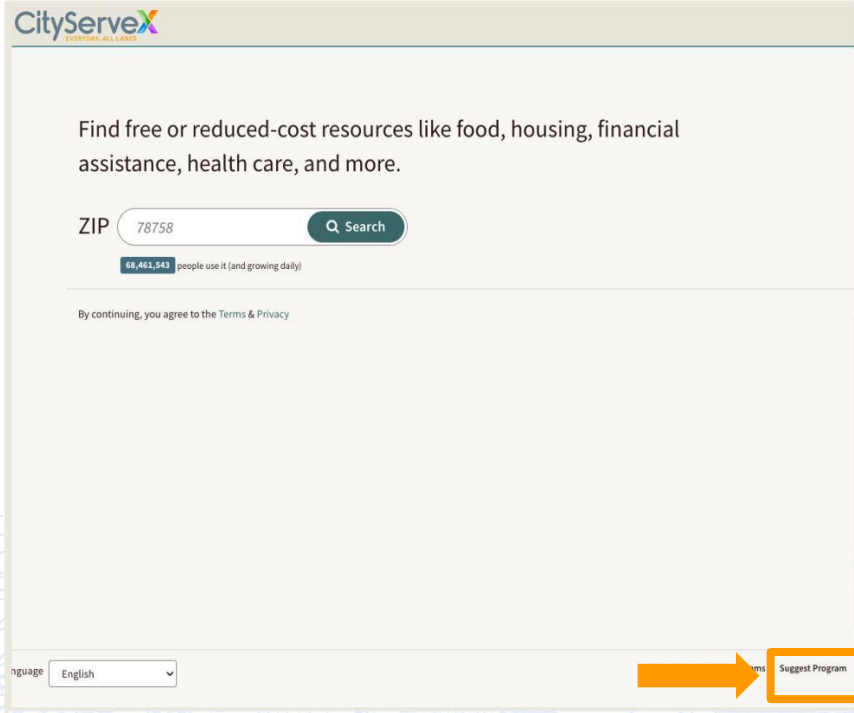
by Learning and Development Training P

 Share  Save

New - Program Manager

The Program Manager tool allows organizations to actively manage and monitor network listings, ensuring that information is current, comprehensive, and aligns with their capacity and services.

Adding or Suggesting a New Program



The screenshot shows the CityServeX website interface. At the top left is the CityServeX logo with the tagline "EVERYDAY. ALL LANES". Below the logo, a text block reads: "Find free or reduced-cost resources like food, housing, financial assistance, health care, and more." Below this is a search bar with the label "ZIP" and the value "78758". To the right of the search bar is a "Search" button with a magnifying glass icon. Below the search bar, a small box displays "65,461,543 people use it (and growing daily)". At the bottom left, there is a language dropdown menu currently set to "English". At the bottom right, there is a "Suggest Program" button, which is highlighted with an orange arrow pointing to it from the left.

You can add a new program using the Program Manager or suggest one through the "Suggest a Program" link.

Before submitting, check if the program already exists to avoid duplicates. Start by searching on the **Suggest a Program** page.

Checking for Duplicates

CityServeX
EVERYDAY. ALL LANES

Support People I'm Helping

Suggest a Program

Tip: Try searching with different word variations, e.g. "St." vs. "Saint".

Provider Name

Program Name

State Program Serves

Phone Number

Website

Enter a valid 10 digit phone number

Enter a valid website starting with http:// or https://

Search Programs

Looking for help?
Go to findhelp.org to connect with free and reduced-cost programs.

English

Site Map Browse Programs Suggest a Program Claim Program Work at an Organization? About Us Accessibility Terms Privacy © 2011-2024 P

Enter in the following:

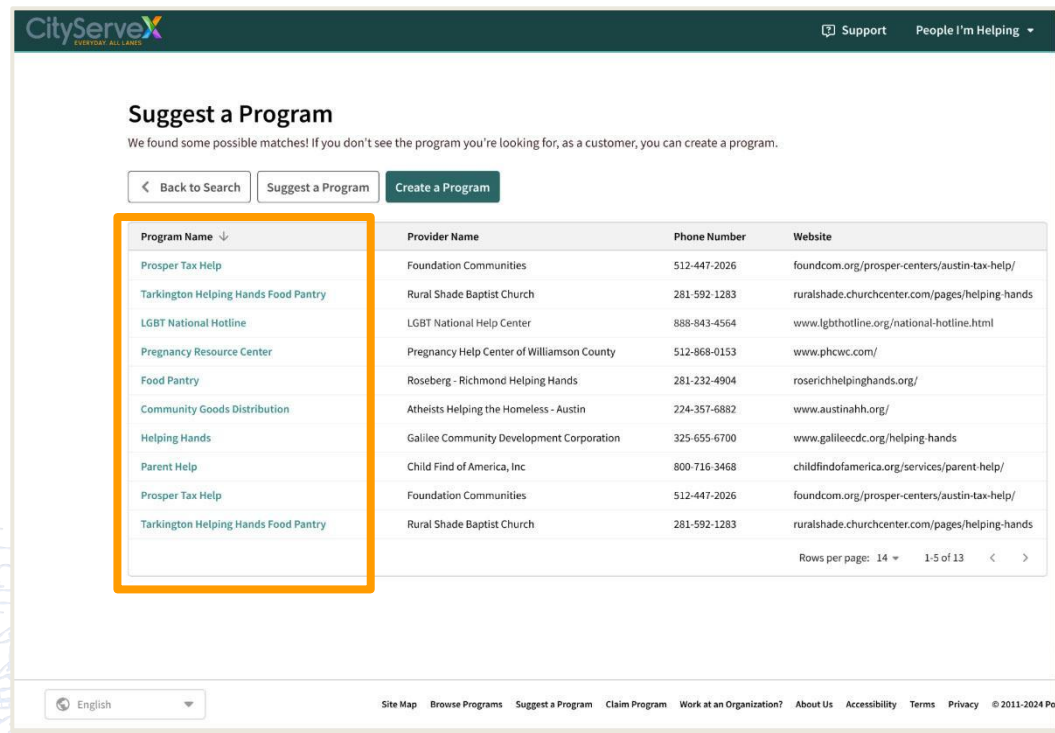
- Provider Name
- Program Name
- State the Program Serves

And either of the following:

- Phone Number
- Website

Then click **Search Programs** to see if the program is already on our platform.

Review the Results



CityServeX
EVERYDAY. ALL LANES

Support People I'm Helping

Suggest a Program

We found some possible matches! If you don't see the program you're looking for, as a customer, you can create a program.

[Back to Search](#) [Suggest a Program](#) [Create a Program](#)

Program Name	Provider Name	Phone Number	Website
Prosper Tax Help	Foundation Communities	512-447-2026	foundcom.org/prosper-centers/austin-tax-help/
Tarkington Helping Hands Food Pantry	Rural Shade Baptist Church	281-592-1283	ruralshade.churchcenter.com/pages/helping-hands
LGBT National Hotline	LGBT National Help Center	888-843-4564	www.lgbthotline.org/national-hotline.html
Pregnancy Resource Center	Pregnancy Help Center of Williamson County	512-868-0153	www.phcwc.com/
Food Pantry	Roseberg - Richmond Helping Hands	281-232-4904	roserichhelpinghands.org/
Community Goods Distribution	Atheists Helping the Homeless - Austin	224-357-6882	www.austinh.org/
Helping Hands	Galilee Community Development Corporation	325-655-6700	www.galileecdc.org/helping-hands
Parent Help	Child Find of America, Inc	800-716-3468	childfindofamerica.org/services/parent-help/
Prosper Tax Help	Foundation Communities	512-447-2026	foundcom.org/prosper-centers/austin-tax-help/
Tarkington Helping Hands Food Pantry	Rural Shade Baptist Church	281-592-1283	ruralshade.churchcenter.com/pages/helping-hands

Rows per page: 14 1-5 of 13

English

Site Map Browse Programs Suggest a Program Claim Program Work at an Organization? About Us Accessibility Terms Privacy © 2011-2024 Po

If you see the program in the results list, you can use Program Manager to make the edit.

Clicking on the program link will take you to that program's card.

Adding a New Program

If you do not find the program, you can click on either the **Suggest a Program** or **Create a Program** button. You will only see the option to create if you are signed in.

CityServeX
EVERYDAY. ALL LANES

Suggest a Program

We found some possible matches! If you don't see the program you're looking for, as a customer, you

[← Back to Search](#) [Suggest a Program](#) [Create a Program](#)

Program Name ↓	Provider Name
Prosper Tax Help	Foundation Communities
Tarkington Helping Hands Food Pantry	Rural Shade Baptist Church
LGBT National Hotline	LGBT National Help Center
Pregnancy Resource Center	Pregnancy Help Center of Williamson County
Food Pantry	Roseberg - Richmond Helping Hands

Let's go to Program Manager.

As a customer, you're able to create a program in Program Manager.

[Cancel](#)

[Let's go!](#)

Using Program Manager

The screenshot displays the CityServeX Program Manager interface. On the left is a sidebar with a navigation menu containing: Provider Details, Program Details (selected), Seasonality & Special Hours, Geographic Coverage, Eligibility, Special Fieldsets, Tags/Taxonomy, and Connect Settings. Each item has a green checkmark icon. The main content area is titled 'General Information' and contains several form fields: 'Name' (Pay for Books Online), 'Description' (a text area containing details about the program's purpose and a list of provided services: School books and Vouchers for book purchases), and 'Languages' (a dropdown menu with 'English' and 'Spanish' buttons). On the right side of the main area, there is a 'Select Section' dropdown set to 'Information', a 'Claimed' button, and a detailed program summary including the program name, provider, ID, verification date, last update, validation date, partial validation date, claimer validation date, and program status (Published).

Provider Details

- General Information (Name, Description, Type)

Program Details

- General Information (Description, Languages, Availability, Cost)
- Seasonality & Special Hours
- Geographic Coverage (State, County, City, ZIP)
- Eligibility
- Special Fieldsets
- Tags/Taxonomy
- Connect Settings

General Information

Name: Pay for Books Online

Description: Learning and Development's Pay for Books Online program provides gently used school books at reduced prices. In addition they also provide vouchers for purchasing books needed to complete school courses.

This program provides:

- School books
- Vouchers for book purchases

Languages: English, Spanish

276/14603

Select Section: Information

Claimed

Pay for Books Online
by Learning and Development
Program ID: 6728629866856448

Verified On:
02/27/2025 12:12 PM

Last updated by:
hdender+siteadmin@findhelp.com

Validation Date:
02/27/2025 12:12 PM

Partial Validation Date:
11/15/2024 12:46 PM

Claimer Validation Date:
02/19/2025 12:15 PM

Program Status:
Published

You can add select new programs or edit existing ones. You cannot add or edit:

- National programs
- Programs with confidential office locations
- Programs tagged as clinical abortion or pregnancy centers

Editing an Existing Program

☐ **Learning and Development Tutoring** ←

by Learning and Development Training Programs

Reviewed on: 08/23/2024

Learning and Development Tutoring provides a hands-on learning environment to support development and success.

Main Services: LJ-50
HH Educational Program

Serving: YG-80

Edit this Program ←

Learning and Development Tutoring ✓

by Learning and Development Training Programs

Share Save

Learning and Development Tutoring provides a hands-on learning environment to support development and success.

This program provides:

- Tutoring
- In home sessions
- More education

Search for the program you want to edit on your site and click on its name to open the detailed view.

If the program is editable, you will see an **"Edit this Program"** option.

Clicking on that will open a new tab that takes you into the tool.

Resources Built into the Tool



Each section of the Program Manager tool includes helpful built-in videos to guide you through adding or updating programs.

Simply click on the video icon to watch and get step-by-step instructions!

Suggesting an Edit

MORE INFO ▾

★
SAVE

➦
SHARE

☰
NOTES

✎
SUGGEST

➦ REFER

Let us know about any missing or out-of-date information

Suggestion from: hdender@findhelp.com

Message*

Tell us how to make this listing better.

Work here?

Manage this listing to unlock and update this listing.

SEND

We'll notify our data management team to update this listing.

You can suggest edits to any program card that isn't editable through the Program Manager tool by clicking the **"Suggest"** button on the program card.

Updates to your request can be viewed in the Support Portal.

Program Manager Training



→ The Program Manager Tool

You can sign up for a training course on how to utilize Program Manager. They are offered weekly on Wednesdays!

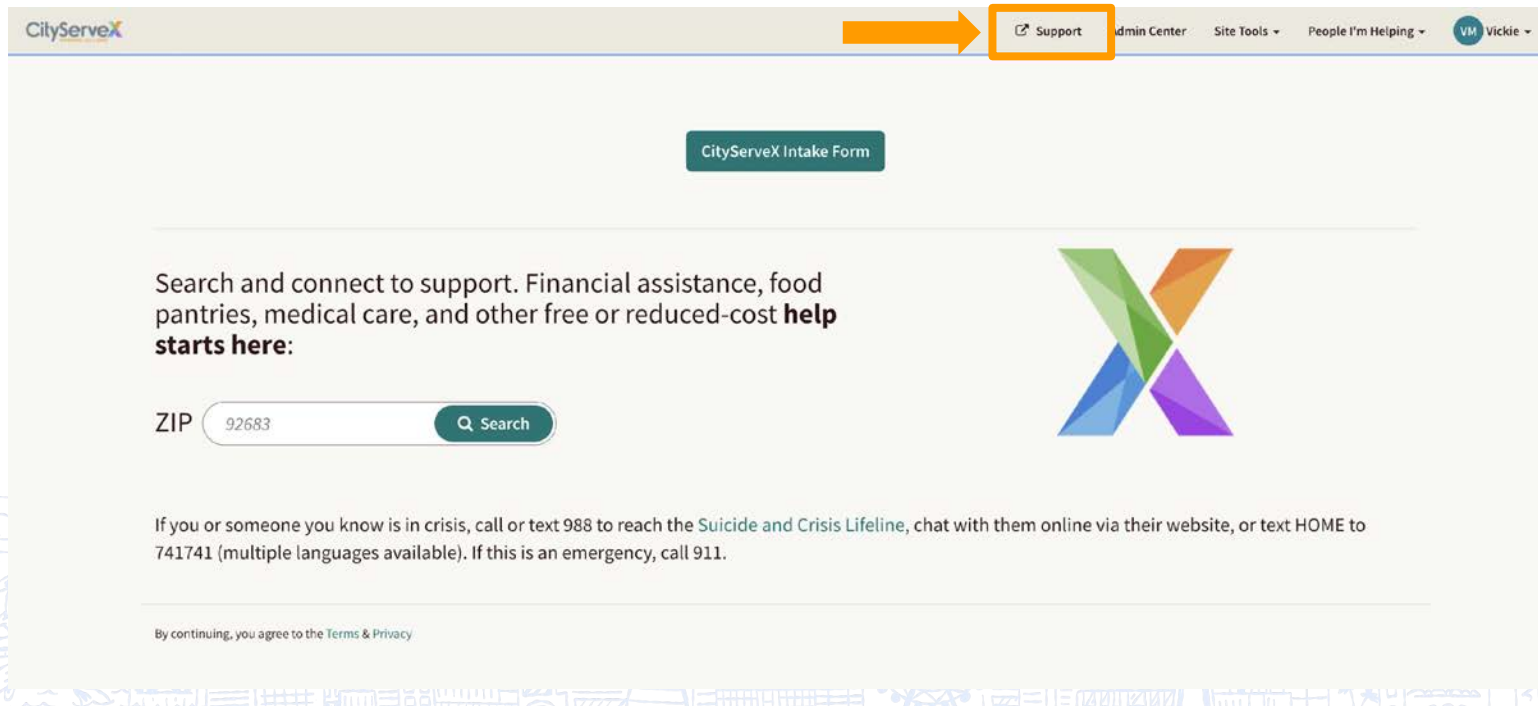


The Support Portal



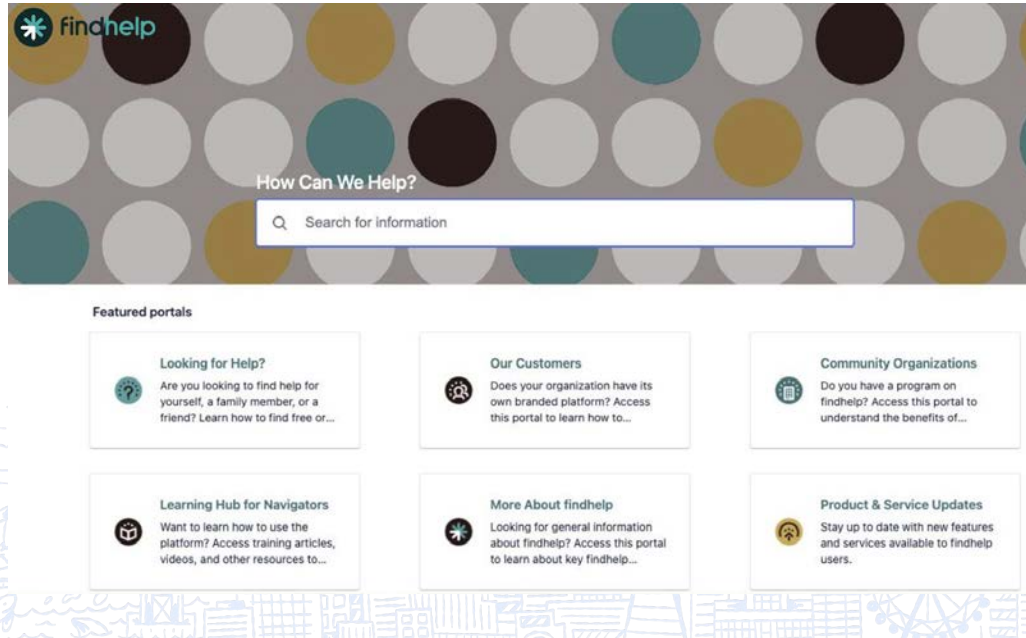
Accessing the Support Page

Click on **Support** in the upper corner of your site toolbar.



The screenshot shows the CityServeX website interface. At the top, there is a navigation bar with the CityServeX logo on the left and several links on the right: 'Support', 'Admin Center', 'Site Tools', 'People I'm Helping', and a user profile 'VM Vickie'. An orange arrow points to the 'Support' link. Below the navigation bar, there is a 'CityServeX Intake Form' button. The main content area features a search bar with the text 'ZIP 92683' and a 'Search' button. To the right of the search bar is a large, colorful 'X' logo. Below the search bar, there is a paragraph of text: '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, or text HOME to 741741 (multiple languages available). If this is an emergency, call 911.' At the bottom of the main content area, there is a small link: 'By continuing, you agree to the Terms & Privacy'.

Click on the **Featured Portals** to learn more



For issues not addressed on the support page, use the **CHAT FEATURE** on the “People I’m Helping” page.

