



The Fundamentals

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

PROPRIETARY
Access limited to CSX
Partner Sites use only

888-INFO-CARE
info@cityservex.org
601 Market St. #471034
Celebration, FL 34747

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Findhelp's Mission

To connect all people in need and the programs that serve them, **with dignity and ease.**

This software platform is powered by **Findhelp**

CityServeX Mission

To **uncomplicate** and **humanize** social services for all.





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 Based Organization (CBO)

- 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.



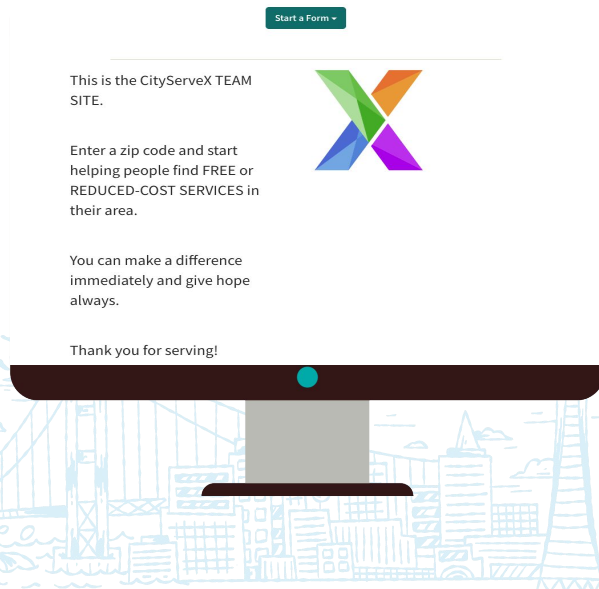


Overview

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Your Team Site

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



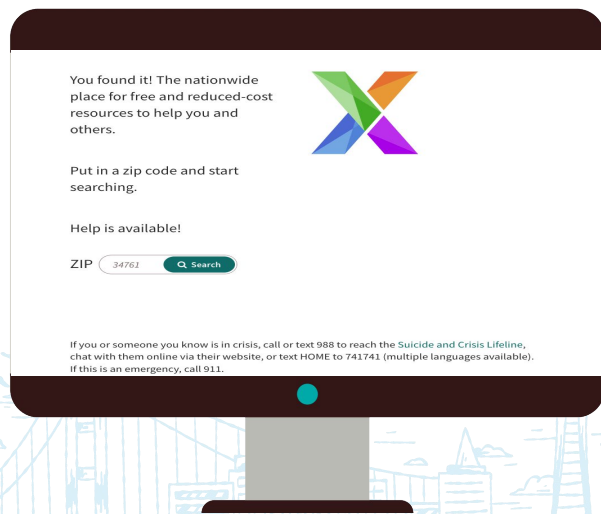
Team Site:

cityservexteam.findhelp.com

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

Your Community Site

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

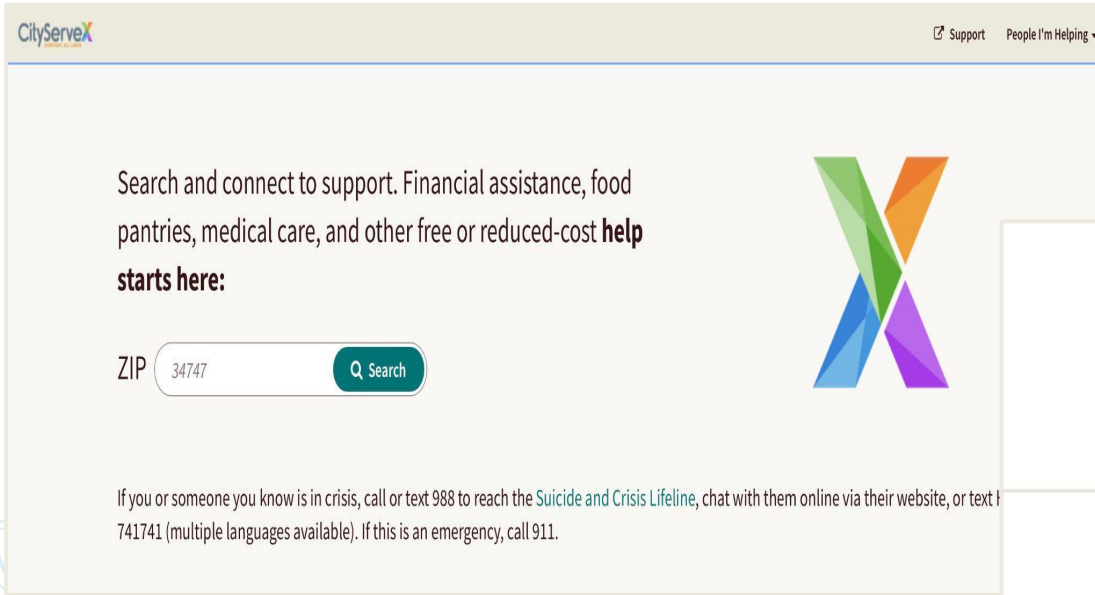


Community Site:
cityservex.findhelp.com **or**
cityservex.help

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

The Home Page

You can translate the page into any language supported by Google.



Use the drop down on the bottom right of the Home Page.



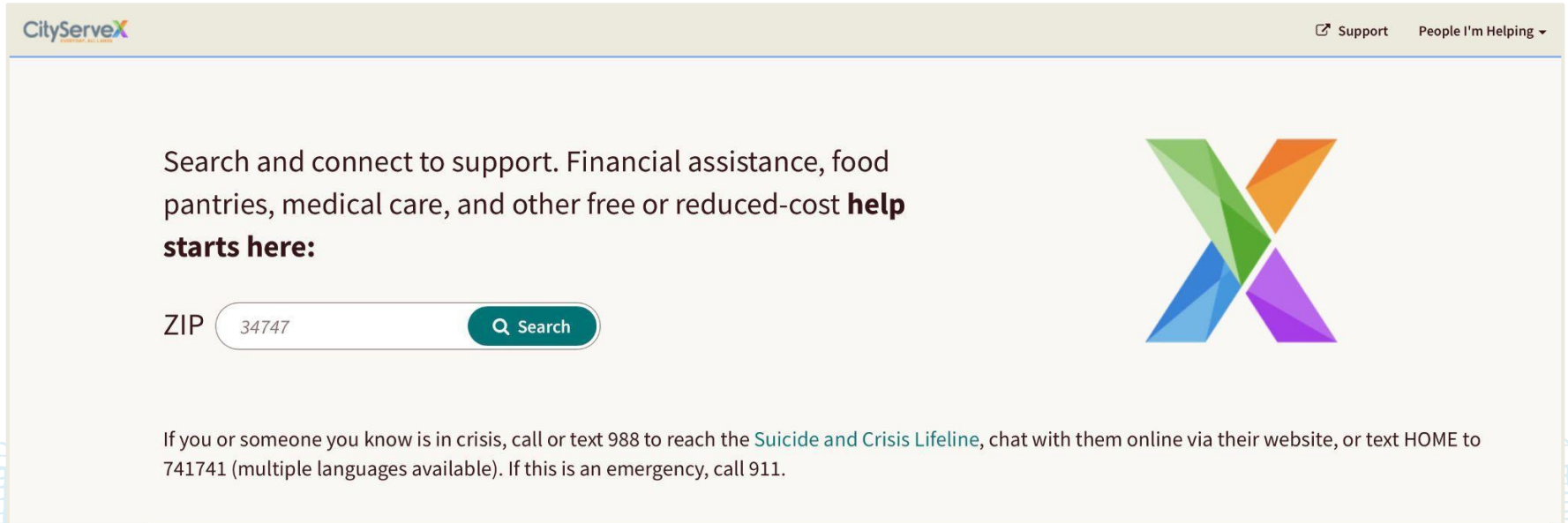


Searching for Programs



Starting a Search

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



CityServeX

Support People I'm Helping ▾

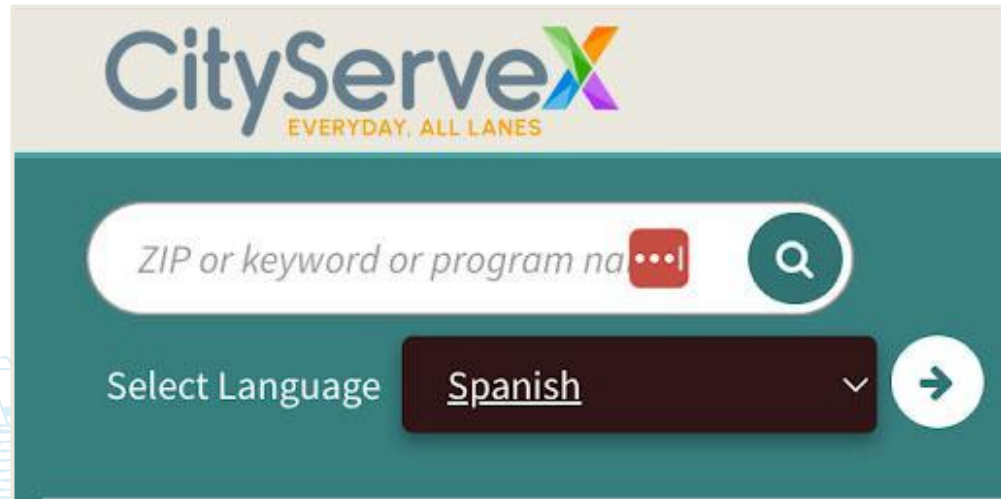
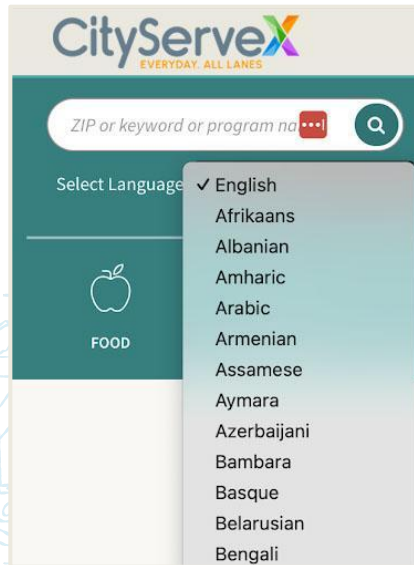
Search and connect to support. Financial assistance, food pantries, medical care, and other free or reduced-cost **help starts here:**

ZIP

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

Select the preferred one and then click on the arrow. The entire site will be translated in that language! To return to English, it remains at the top of the list.



Search for Programs

Enter a Zip Code, search phrase, or program name to start your search, and you'll see suggestions as you go.

Search
Terms

Browse

ZIP or keyword or program name

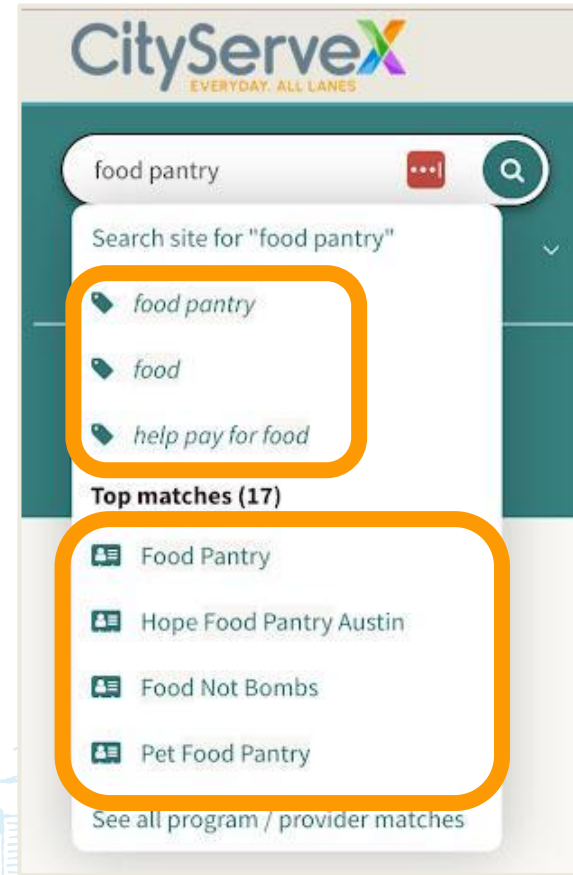
Select Language English

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

FOOD HOUSING GOODS TRANSIT HEALTH MONEY CARE EDUCATION WORK

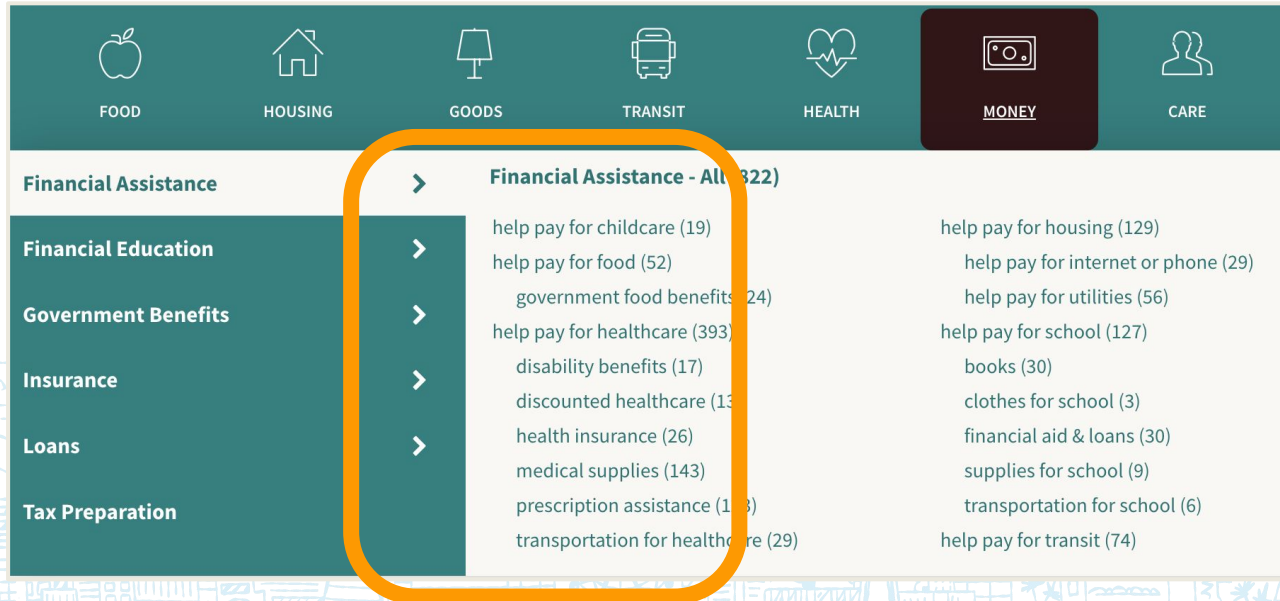
These Suggestions Are:

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

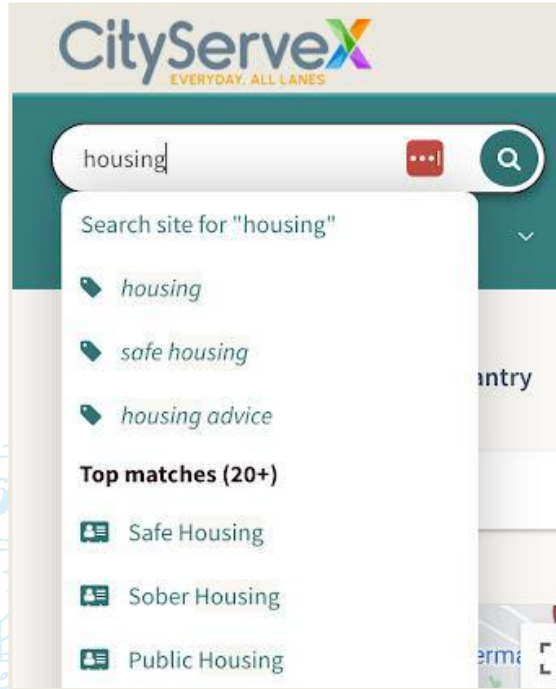


Browse

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



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 "CLOSEST" button located next to the RELEVANCE button.



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

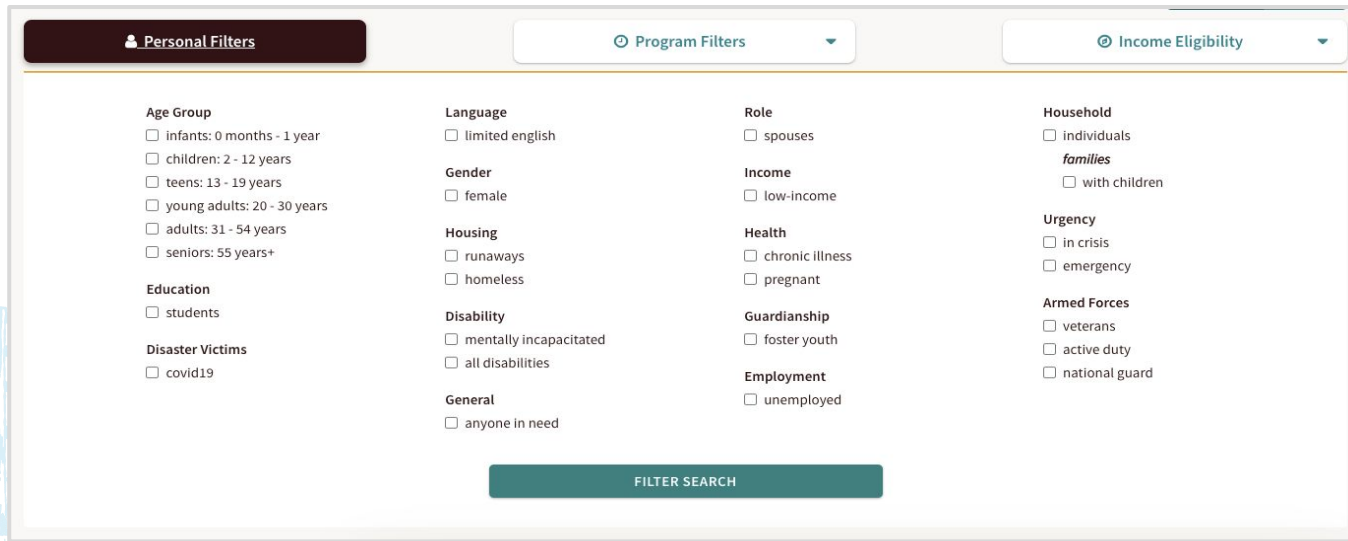


How do I narrow programs to meet Participant's needs?

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.



The screenshot shows a web interface for filtering search results. At the top, there are three tabs: 'Personal Filters' (selected), 'Program Filters', and 'Income Eligibility'. Below the tabs, the 'Personal Filters' section is displayed with a grid of filter categories and their corresponding options. At the bottom of the grid is a 'FILTER SEARCH' button.

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

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

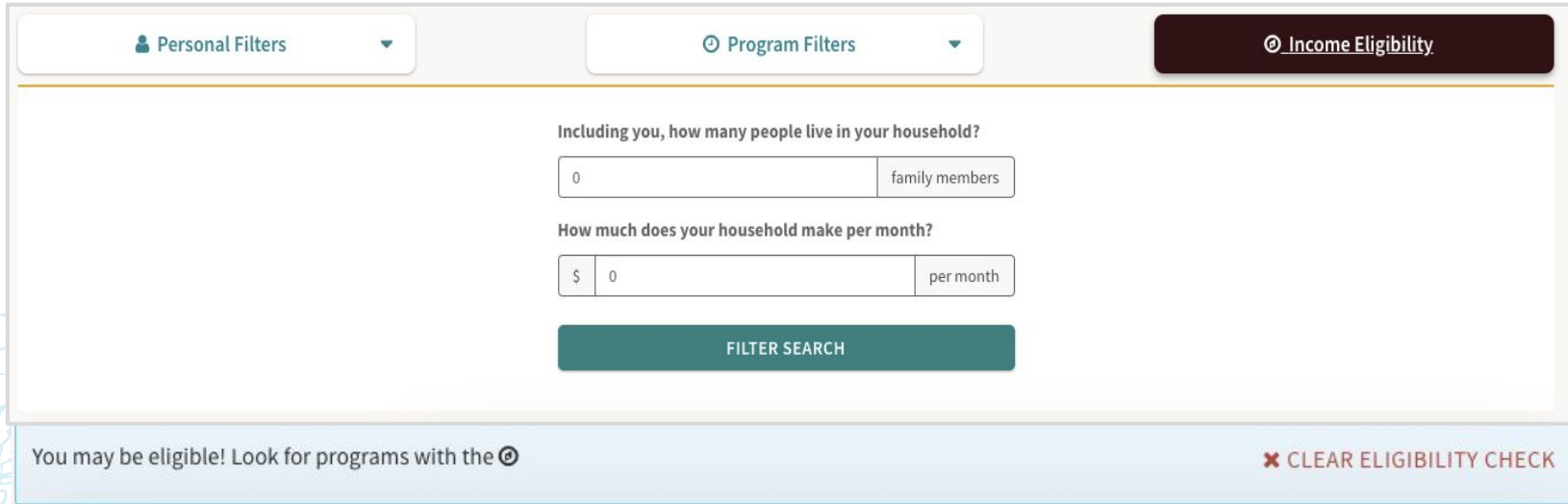
SELECT LANGUAGE

Documents Required

FILTER SEARCH

Income Eligibility

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



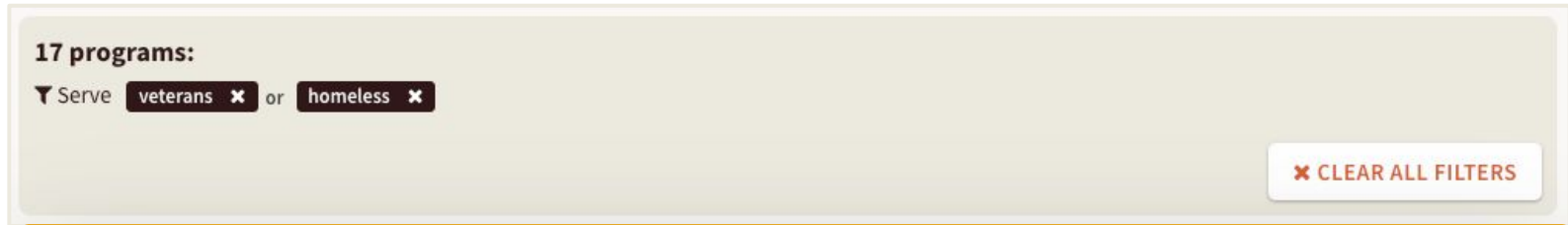
The screenshot shows a web interface for filtering resources. At the top, there are three filter tabs: 'Personal Filters' (with a person icon), 'Program Filters' (with a clock icon), and 'Income Eligibility' (which is selected and highlighted in dark purple). Below the tabs, the 'Income Eligibility' section contains two questions:

- 'Including you, how many people live in your household?' with a text input field containing '0' and a label 'family members'.
- 'How much does your household make per month?' with a text input field containing '\$ 0' and a label 'per month'.

Below these inputs is a green button labeled 'FILTER SEARCH'. At the bottom of the form, a light blue banner displays the message 'You may be eligible! Look for programs with the' followed by a clock icon. To the right of this banner is a red 'X' icon and the text '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!

Searching Best Practices

- If you don't find a resource you are looking for, try using a different search phrase.
- If you aren't getting results, make sure you have cleared your filters!
- If you aren't receiving relevant results, try using a filter or a subcategory.



Tips

1. If you change the zip code, click "More Info" on a program card to check its eligibility.
2. Featured programs appear higher in your search results.
3. Use the sort option to view programs closest to the zip code instead of by relevance.



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
601 Market St. #471034
Celebration, FL 34747

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CityserveX
EVERYDAY. ALL LANES

27

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

☐ 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

C

✓

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



Next Steps:

Call 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 build a stronger community.

The community organization has taken ownership of their listing to actively maintain their program information, and ensure 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!

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

1

2

3

Select Programs

Choose Account

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.

☐ Program Name	Agency/Provider Name
☒ Food Pantry 	Manos de Cristo
☐ 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

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](#)

Using the More Info Button

MORE INFO ^

SAVE SHARE NOTES SUGGEST

PRINT VIEW

Eligibility: This program helps middle school students, high school students, college students, adults interested in pursuing a college degree or certification. The College Hub 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

Click **MORE INFO** to see details like eligibility, cost, languages supported, availability, hours, and locations.

You can also print this information to share with the person you're helping.

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 easily find programs you've added in "Saved Favorites"

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!

The screenshot displays the 'Saved Favorites' section of the CityServeX application. At the top, the user's name 'Heather' is shown with a dropdown arrow. Below this, a sidebar lists navigation options: 'Saved Favorites', 'Referrals for Me', 'My Account', 'Search History', 'Internal Analytics', and 'Log out'. The main content area is titled 'Saved Favorites / Favorites (1)' and includes 'Share', 'Edit', and 'Print' buttons. It features a 'My Folders' section with a search bar and a list of folders: 'Demo Referral (1)', 'Favorites (1)', and 'Shared Folders'. The 'Favorites (1)' folder is selected, showing the 'College Hub' program. The program details include a checkbox, the name 'College Hub', the provider 'Foundation Communities', a review date of '09/09/2024', a description of the program, eligibility criteria, serving population, and a 'Next Steps' section with contact information and a location. At the bottom of the program card are buttons for 'MORE INFO', 'RESAVE', 'UNSAVE', 'SHARE', 'NOTES', and a 'REFER' button.

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.).

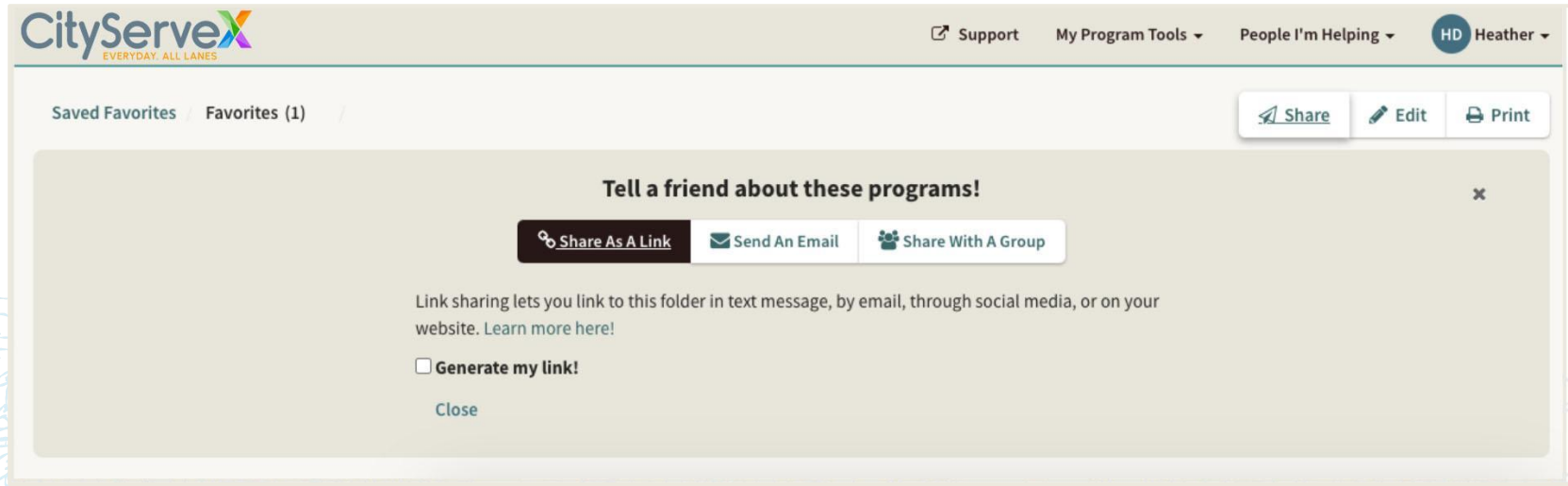
Serving: adults, young adults, students, limited english

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

Actions: 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. If shared with your group it puts the favorites folder created in their favorites!



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 add a personalized message, and you can also add a preferred language to have the email translated if helpful.

Sharing a program is private. It doesn't get saved to the Participant's profile.

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

Click on the **Selected** button. 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

SAVE

EMAIL

PRINT

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. Notes are private and not visible to the public or the program organization.

Once added
and saved,
notes can
NOT be
edited or
deleted at
this time.

MORE INFO ▾

★ SAVE ↗ SHARE 📋 NOTES ✎ SUGGEST ↻ REFER

Rate this program: ☆☆☆☆☆

Save a note about this program.

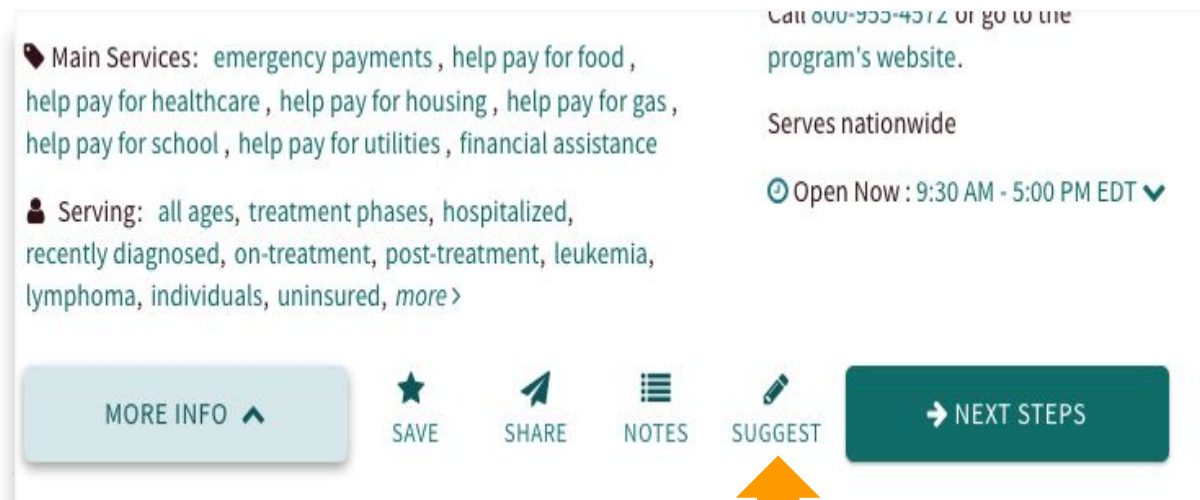
Have an edit or new information about this program listing? Report a change here!

☒ Save as a note for myself.

☐ Share with Counseling Resource Demo Group ▾

SAVE NOTE

Suggesting an Edit to Findhelp



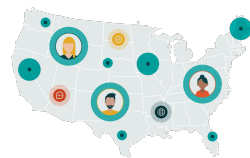
Click the "Suggest" button within the program card if you see incorrect information.

How the Platform Stays up to Date

Any of the millions of users can submit updates in real-time; Findhelp receives hundreds of ideas each week, and their Network Curation team validates and publishes changes.



Findhelp Users



Findhelp Network Curation Team

Findhelp Network Curation team members use a combination of people and technology to validate program information.

Nonprofits control their presence, manage their program listings for free (no contract required) and connect to clients via our intake tools.



Community Organizations & Customers



Adding or Editing Programs



Using Program Manager - Suggesting and Adding New Programs

You can suggest a new program or add one.

Enter the Program Manager Tool by clicking on Suggest Program from the Home Page.

[Site Map](#) [Suggest Program](#) [Claim Programs](#) [Accessibility](#) [Terms](#) [Privacy](#)



Using Program Manager

- Do a Search

Suggest a Program

First, let's do a quick search to see if the program you're looking for is already listed.

Provider Name

Program Name

Search the platform to see if the program already exists.

Adding a New Program

Suggest a Program

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



If it's not in your results, click either Suggest or Create Program to go to the Program Manager tool.

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 for students.

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 for students.

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.

Program Manager Weekly Training



→ The Program Manager Tool

Findhelp has a training course that will walk you through the Program Manager tool!

You can sign up for it on company.findhelp.com by selecting Resources and then Customer Training.



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

Findhelp doesn'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 the platform to help Resource Coordinators and Participants see the outcome of those referrals.



Referral Button Types

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.

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



SUGGES

↩ REFER

What is a Logged Referral?

The Resource Coordinator logs a referral and provides next steps to the Participant. The referral is saved to the Participant's profile, but is not sent to the provider. Updating the referral status is owned by the Resource Coordinator.



Starting a Logged Referral

😊 **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.

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 the Participant's Navigation History.

What Happens After You Click Submit on a Logged Referral?

- These referrals DO NOT go to the organization providing the service.
- If the referral was sent by email Participants receive an email notification where they can update the status of their referral.
- No notification is sent via text message if the referral was sent by text.
- The status updates are on the Resource Coordinator to make.

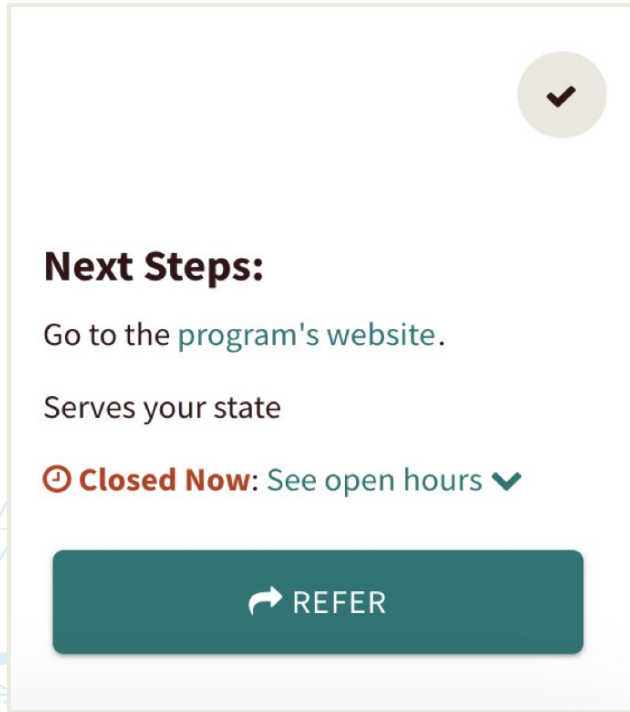
Note: Logged referrals are important for long term trend analytics.

What is a Live Referral?

A live referral is one that is sent to a CBO. The CBO reaches out to the Participant and provides the service or resource. The CBO then updates the status of the referral through the platform. The updated status can be seen in the Participant's Navigation History.



Starting a Live Referral



Next Steps:

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

Serves your state

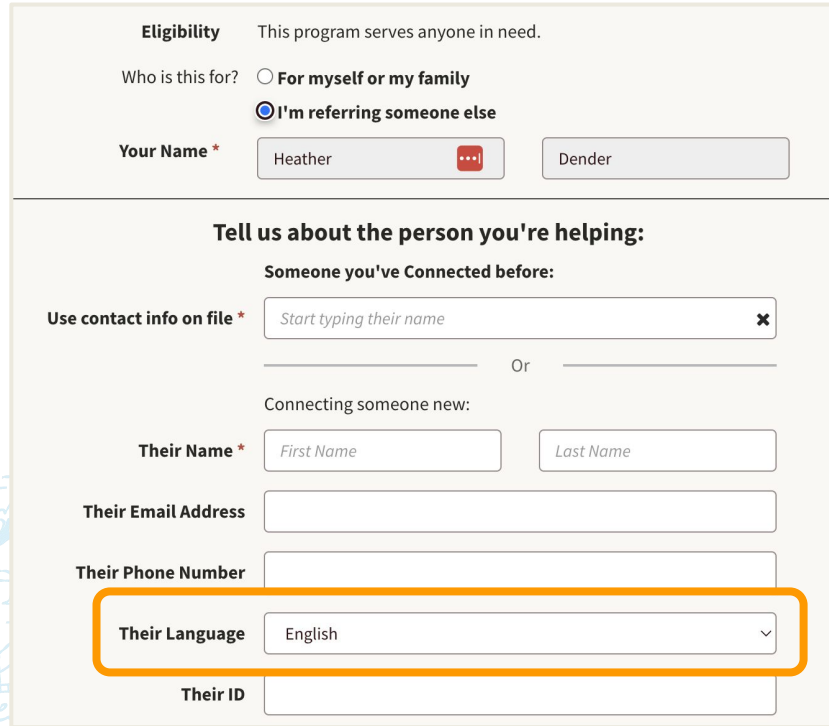
 **Closed Now:** See open hours 

 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 Live Referral Form



The screenshot shows a web form titled 'The Live Referral Form'. At the top, under 'Eligibility', it states 'This program serves anyone in need.' Below this, a question 'Who is this for?' has two radio button options: 'For myself or my family' and 'I'm referring someone else', with the second option selected. The 'Your Name' section has a text input with 'Heather' and a red speech bubble icon, and a 'Dender' label. The main section is titled 'Tell us about the person you're helping:'. It has two sub-sections: 'Someone you've Connected before:' with a text input 'Use contact info on file *' containing 'Start typing their name' and a close icon; and 'Connecting someone new:' with fields for 'Their Name *' (split into 'First Name' and 'Last Name'), 'Their Email Address', 'Their Phone Number', 'Their Language' (a dropdown menu with 'English' selected and highlighted by an orange border), and 'Their ID'.

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 * Start typing their name 

Or

Connecting someone new:

Their Name * First Name Last Name

Their Email Address

Their Phone Number

Their Language English 

Their ID

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 that WILL BE visible in the Participant's notification, as well as to the CBO, and any RCs in your group.

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 CityServeX platform (including any responses sent to them by the program).

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



What Happens When You Submit a Live Referral?

- The **Participant** will receive a notification about the program and next steps depending on their preferred contact method.
- The **CBO** will receive notification that a new referral has been made. They should contact the person you're referring.
- **You** will see the referral (and all updates) on your "People I'm Helping" dashboard.

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!

Thank you, they were helpful!

They referred me to another program.

They couldn't help, any other ideas?

I'm not interested in this program.

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

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>

CBO Referral Notification

Organizations that have claimed their program and enabled live referrals will receive a notification when a new referral is made.

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.



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.



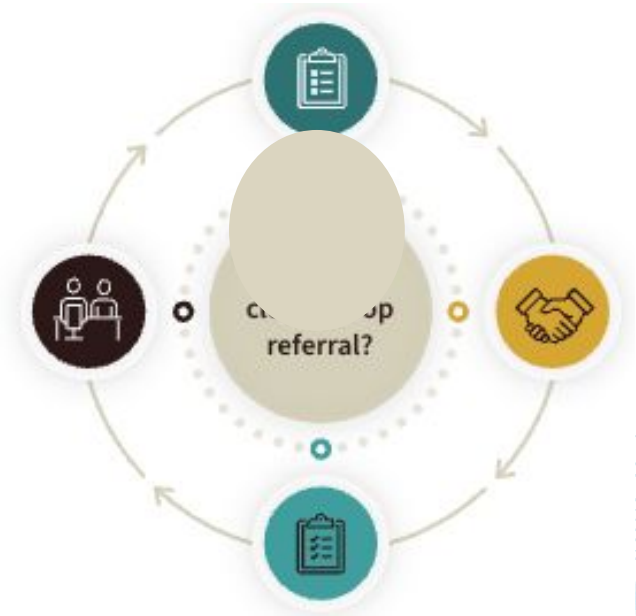
A CBO provides the assistance they need.

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

Ways to Close the Loop

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

- The Resource Coordinator
- The Participant
- The Community Based Organization



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!

Eligible: The Participant was eligible for the program.

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

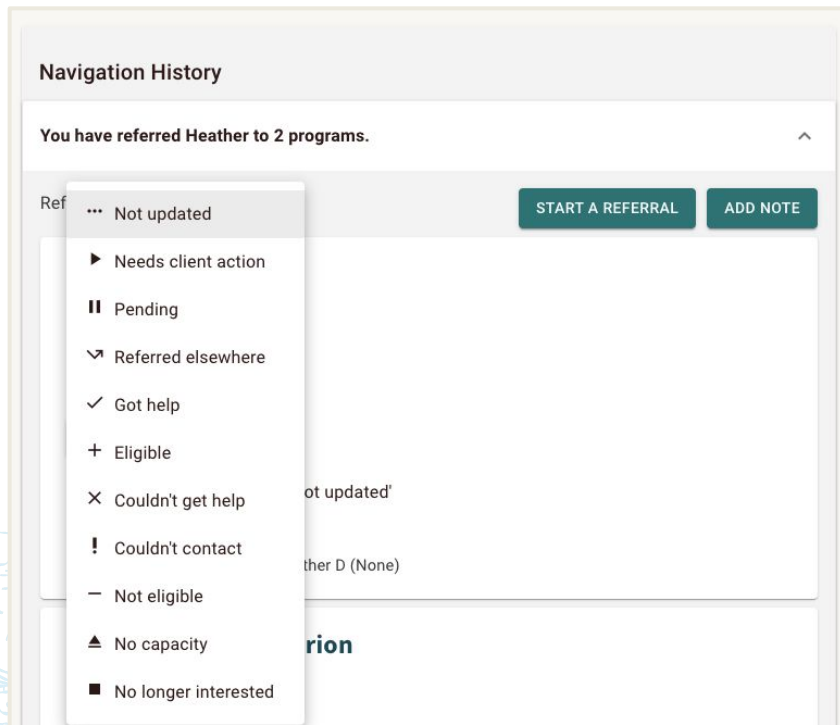
Couldn't contact: You were unable to contact the Participant.

Not eligible: The Participant was ineligible for the program.

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

No longer interested: The Participant is no longer interested.

Closing the Loop Yourself



Navigation History shows all referrals made for the Participant. Logged referrals appear at the top, and you can update their status using the drop-down menu.

Choose the correct closed status to close the loop!

Inform the Participant about Closing Their Own Loop

A logged referral can also be closed through the referral notification sent to the Participant if they chose text or email as their preferred contact.

In that message, they can indicate that the organization has already contacted them. If they respond, the referral status will automatically update in the system.

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

Update Referral Status

Will display customer site branding

How a Live Referral is Closed

Live referral loops are closed by the community-based organization providing the resource or service. To do this, the organization must first claim their program and enable live referrals as a contact method.

Once a referral is made, they receive an electronic notification and can update the referral status directly from that message.

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".

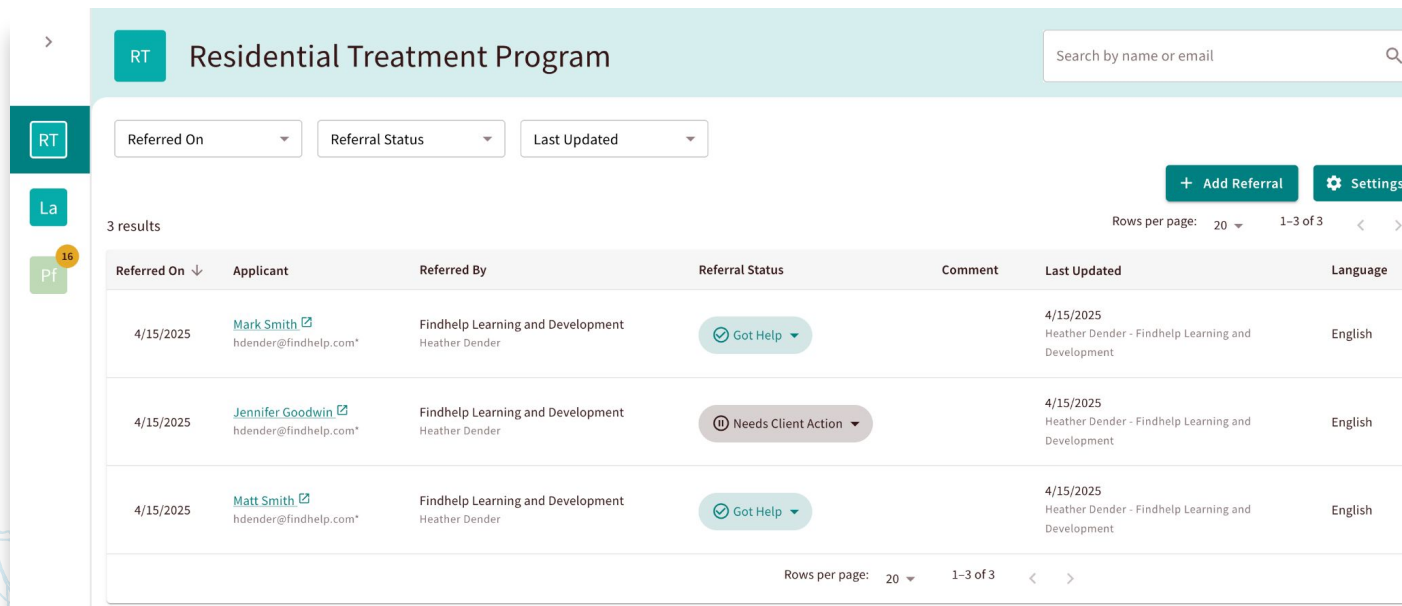
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CBO Inbound Referral Dashboards



RT Residential Treatment Program

Search by name or email

Referred On Referral Status Last Updated

+ Add Referral Settings

3 results Rows per page: 20 1-3 of 3

Referred On	Applicant	Referred By	Referral Status	Comment	Last Updated	Language
4/15/2025	Mark Smith hdender@findhelp.com*	Findhelp Learning and Development Heather Dender	Got Help		4/15/2025 Heather Dender - Findhelp Learning and Development	English
4/15/2025	Jennifer Goodwin hdender@findhelp.com*	Findhelp Learning and Development Heather Dender	Needs Client Action		4/15/2025 Heather Dender - Findhelp Learning and Development	English
4/15/2025	Matt Smith hdender@findhelp.com*	Findhelp Learning and Development Heather Dender	Got Help		4/15/2025 Heather Dender - Findhelp Learning and Development	English

Rows per page: 20 1-3 of 3

By claiming their program, CBOs also get access to an Inbound Referral dashboard which is another tool to help them close the live referral loop.

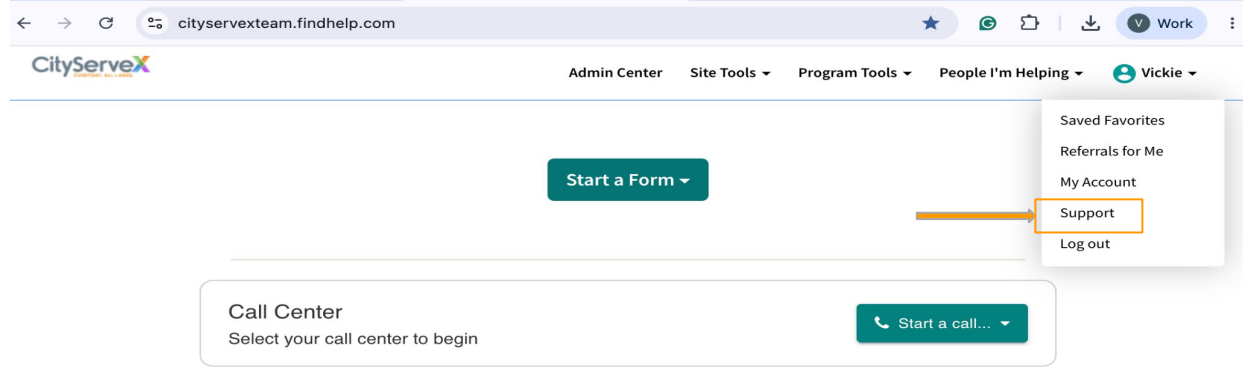


The Support Portal



Accessing the Support Page

The **Support** button is located in the dropdown under your name in the toolbar.

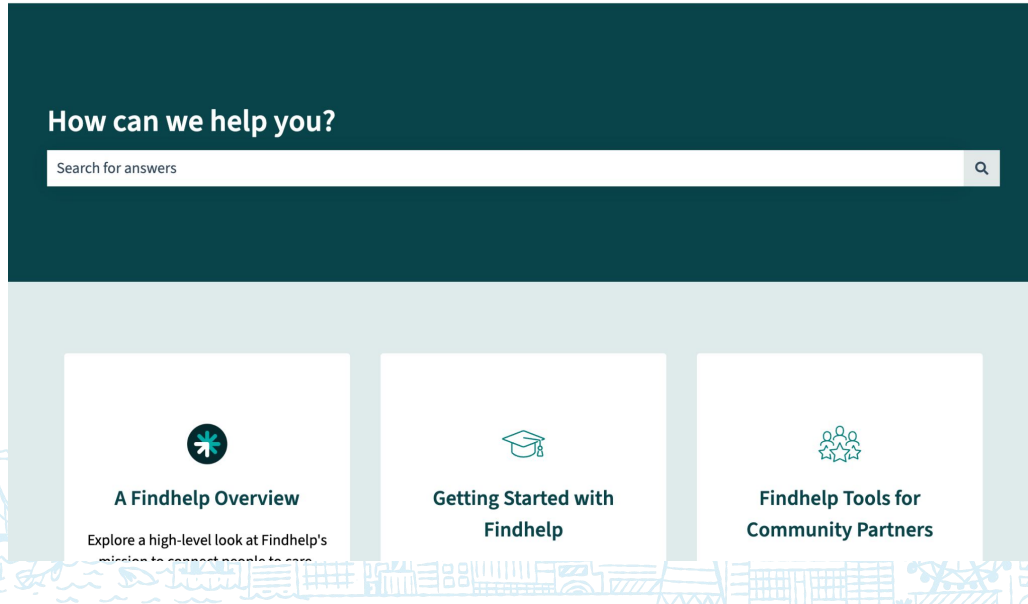


This is the CityServeX TEAM SITE.

Enter a zip code and start helping people find FREE or REDUCED-COST SERVICES in their area.



Click on the Featured Portals to Learn More



You can access any of the featured portals to look at articles specific to that topic.

You can also use the keyword search bar to bring up a specific article.

Findhelp Support Chat

For issues not addressed on the support page, use the **CHAT FEATURE** on the “People I’m Helping” page. It is located at the bottom right of the page.



Chat is a feature that allows Resource Coordinators who are signed in to chat directly with someone on Findhelp's Frontline Support team, Monday-Friday between 8am-6pm Central time.

They support:

- Questions about specific platform features
- Updating general program information
- Claiming your program
- Technical issues with your site

