The Participant Database

within the CSX/Fh platform!

PROPRIETARY
Access limited to CSX
Partner Sites use only

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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.

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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.

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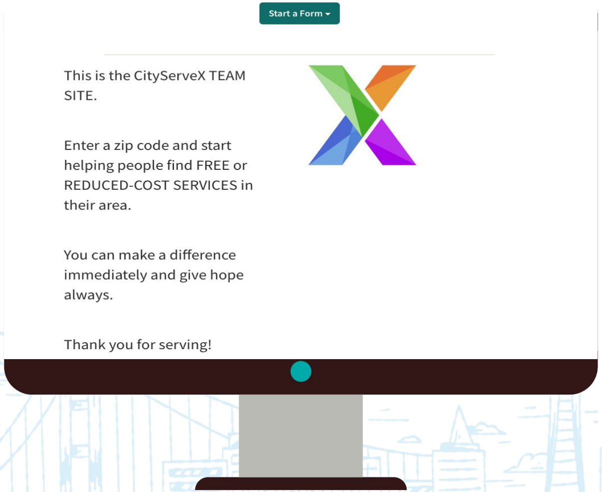
Overview

Your Team Site

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

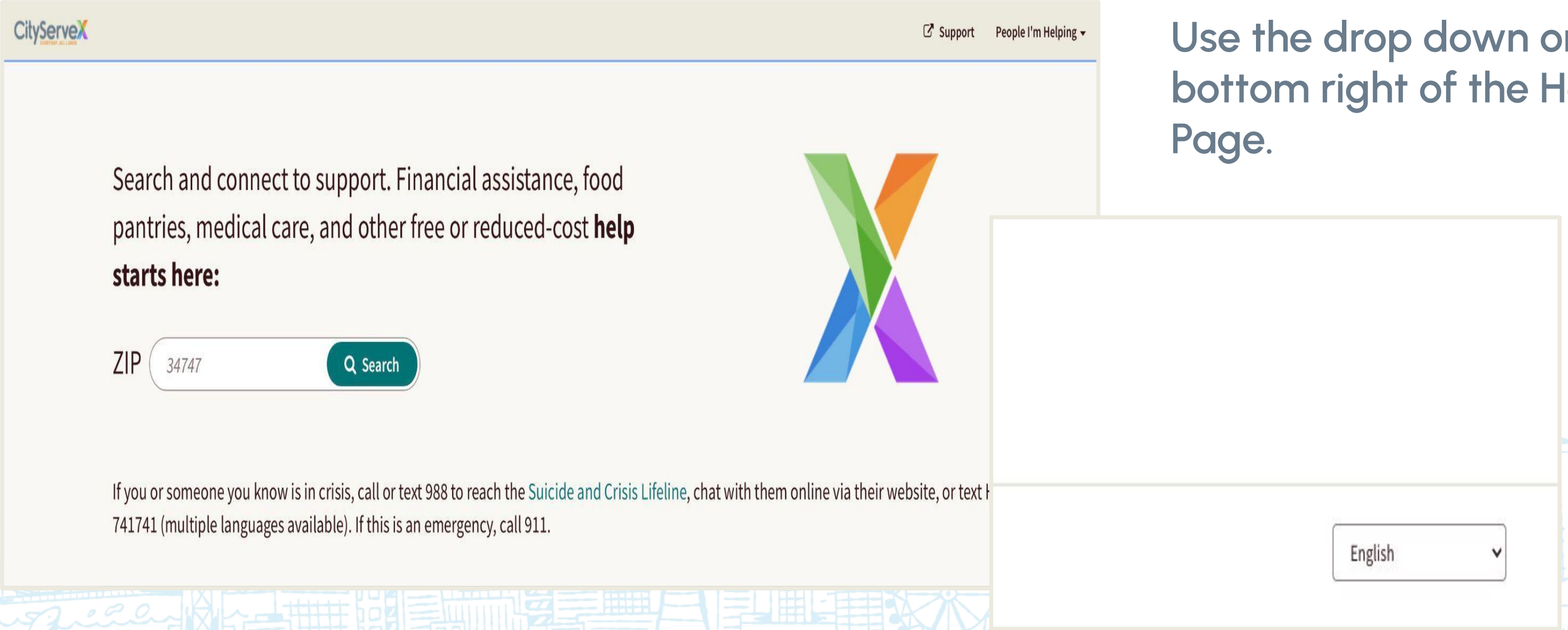


Team Site:
cityservexteam.findhelp.com

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

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.

Assessments

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

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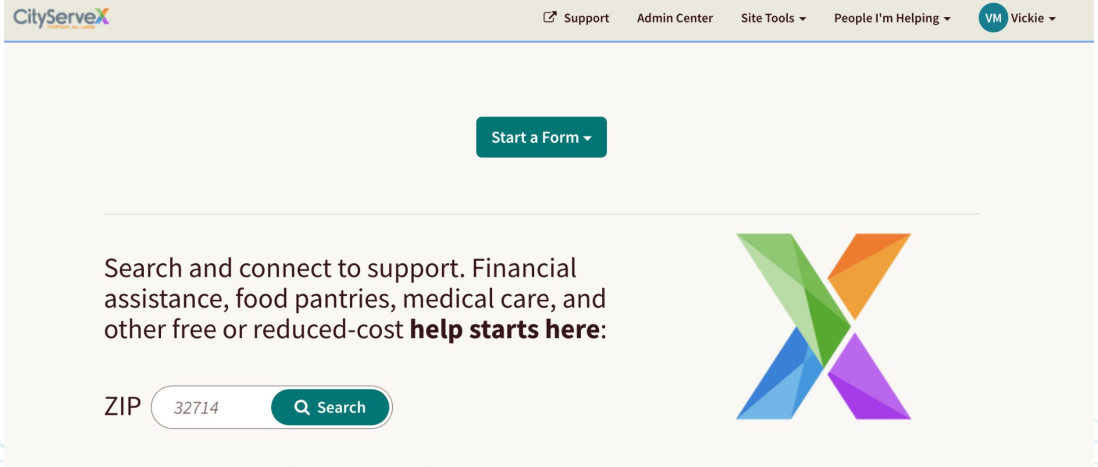
Assessments on the Home Page

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

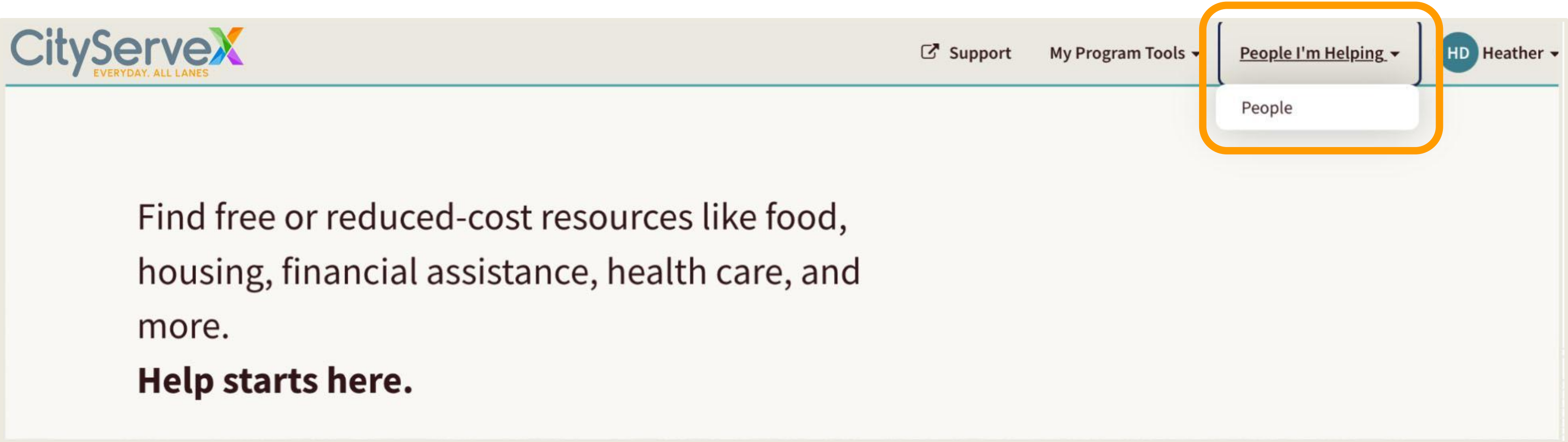


The CityServeX Intake Form should be accessed here when conducting phone, in-person or virtual meetings.

The Inquiry Form can be accessed here for the purpose of converting phone messages into a usable form, or for follow up from a Participant recruitment event.

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.** A list will appear of Participants that need assistance or that you have have already assisted, and therefore, have assigned to yourself.



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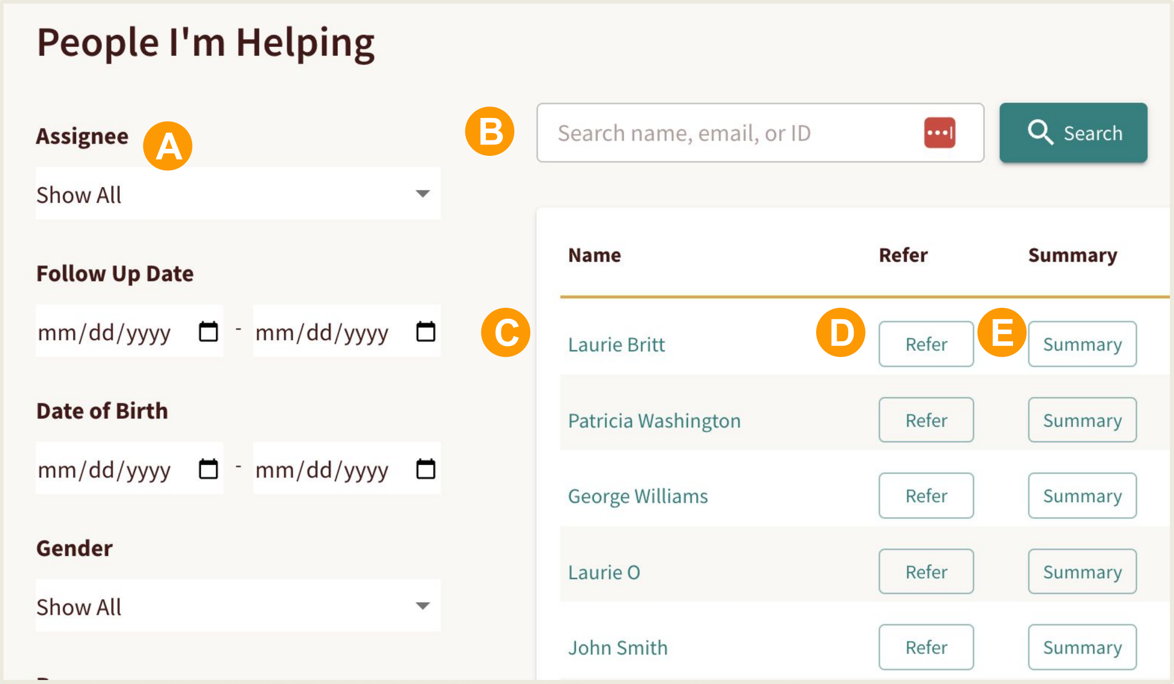
"People I'm Helping" Dashboard

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



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Knowing Who to Contact

Look at the list of Participants -

If they have NOT been contacted - the Assignee column will be blank and **"Yes"** will appear beside their name under the **Flagged** column.

Assignee	Email ↑	Phone	Flagged	Number of Call Attempts

Click on Participant's name and their profile will open up. Read any relevant notes in Navigation History before you try and make contact.

Once you make contact, **Assign** the Participant to yourself, and **Unflag** their name.

The Participant Profile

How Participant Profiles are Created

Participant profiles are automatically created any time a **referral** , **Intake or Inquiry Form** has been submitted for a Participant by a Resource Coordinator.

The same Intake or Inquiry Form should never be used with the same Participant more than once.

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 when a you **share** a program with someone.

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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.**

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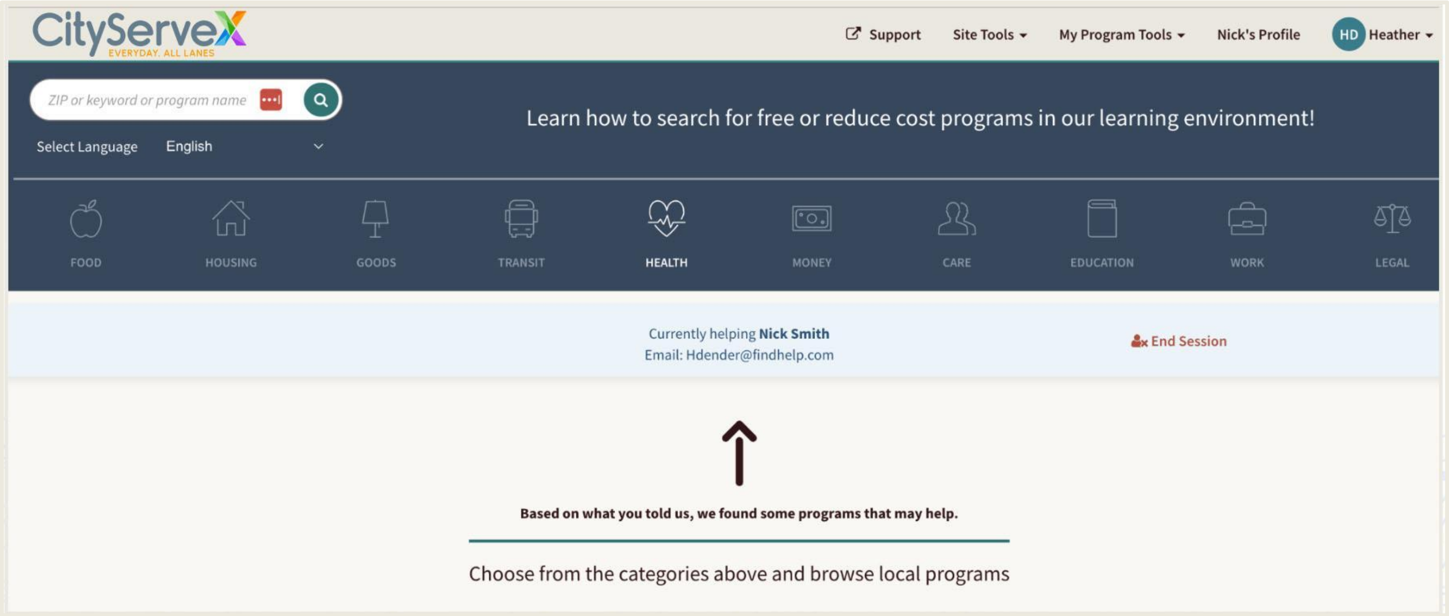
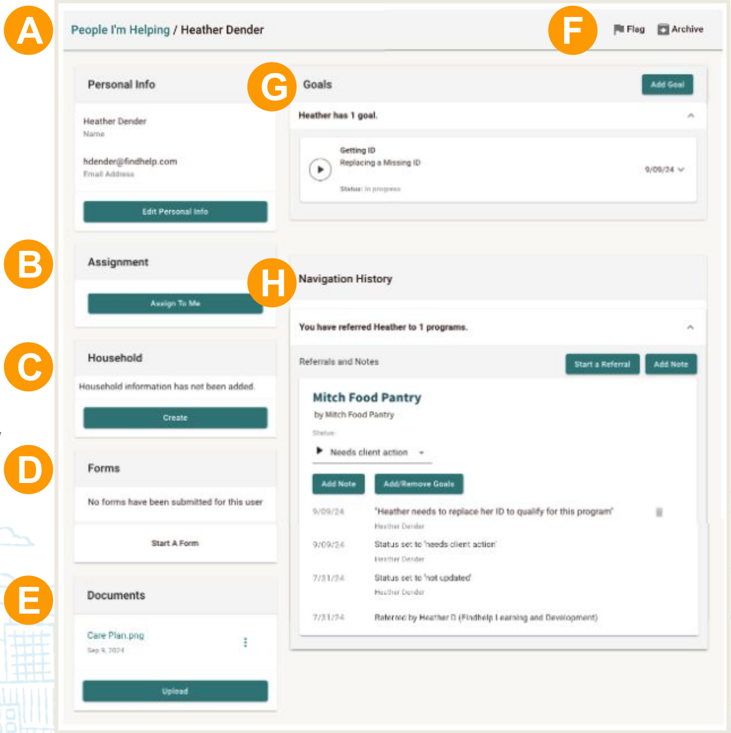
Tailored Search Results

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



Participant Profile Overview

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



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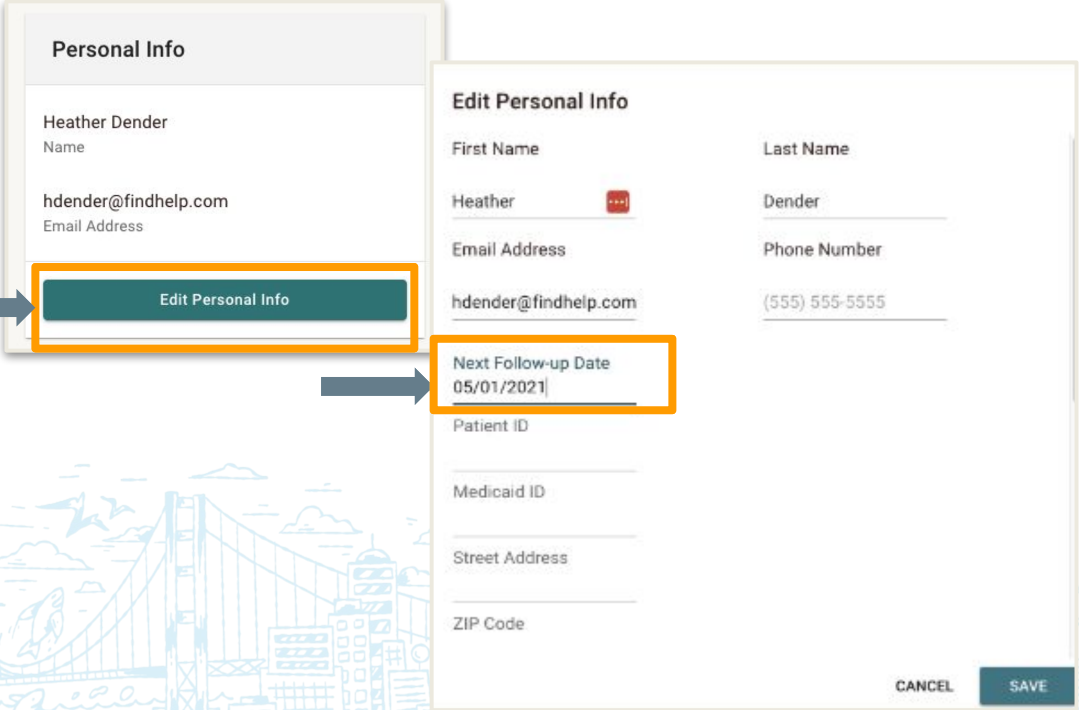
Personal Info



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** .

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. THIS APPLIES IF YOU CALL, TEXT, OR EMAIL.

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.

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.

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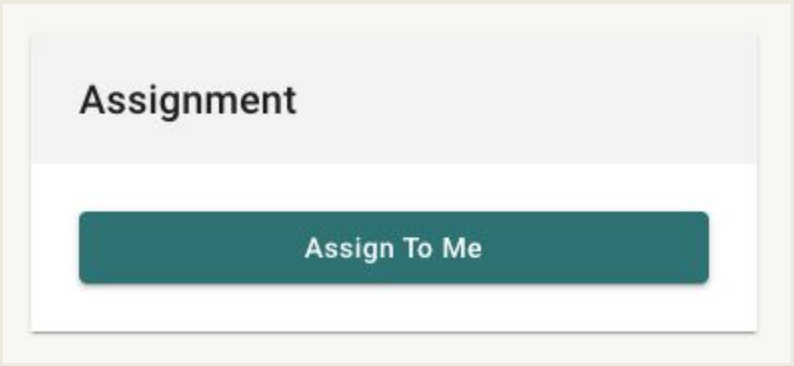
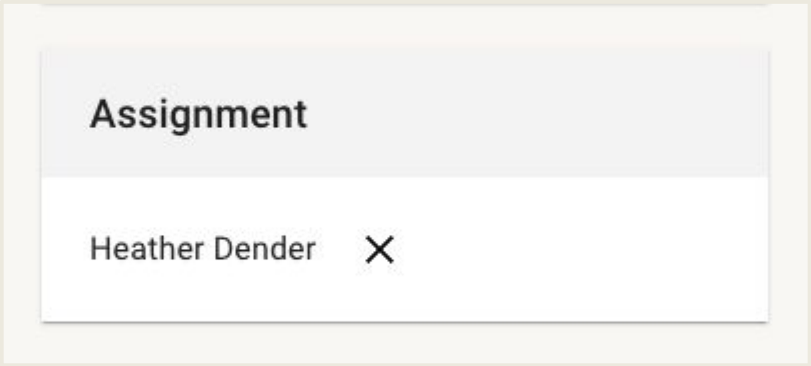
Assignment

You can 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.





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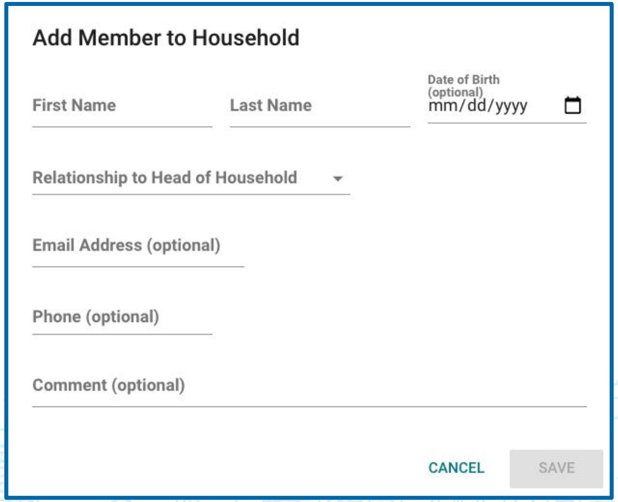
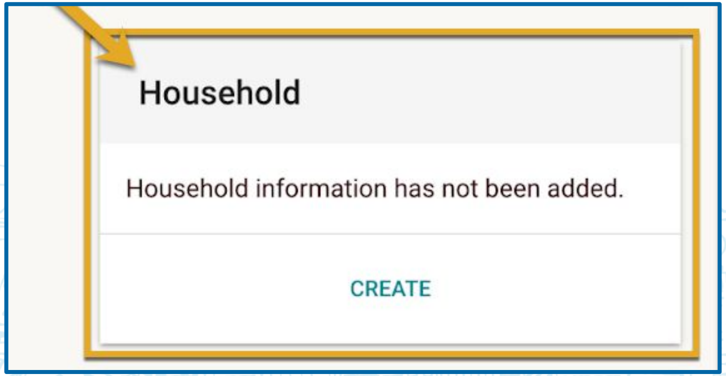
Households

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.





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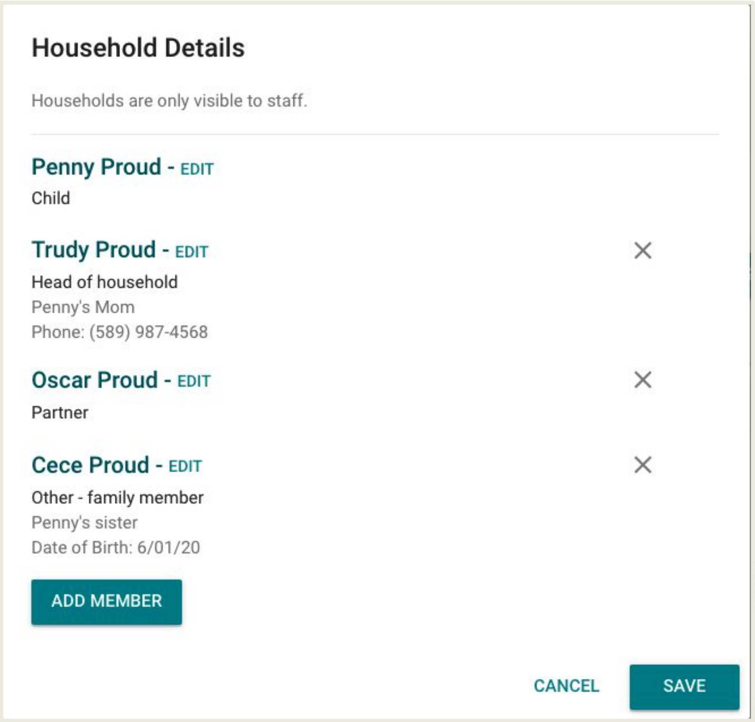
Household Important Details



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.

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Forms

Contact information is provided on both Inquiry and Intake Forms, 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, 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.

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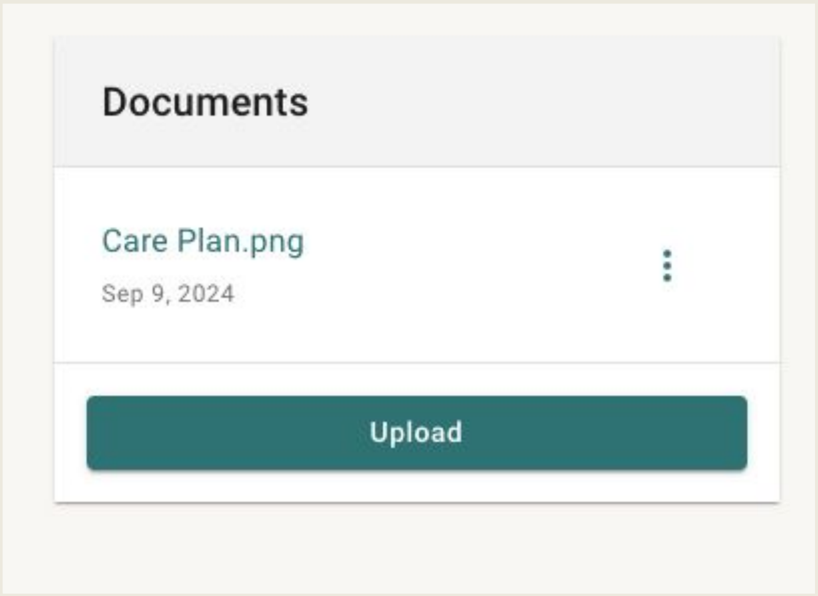
How do I Upload a Document?



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 navigation is enabled.

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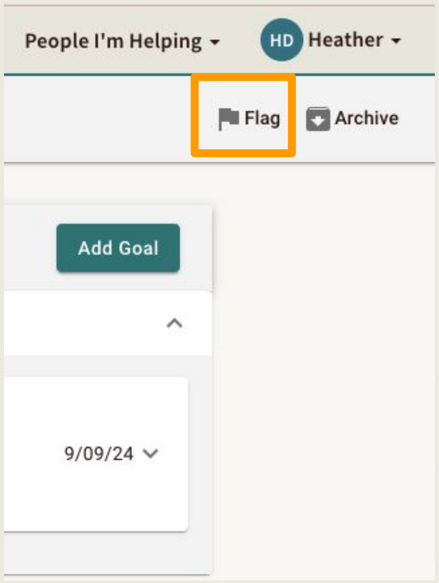
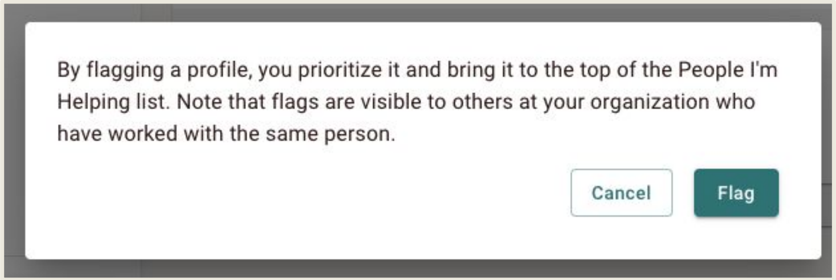
Flagging a Participant Profile

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





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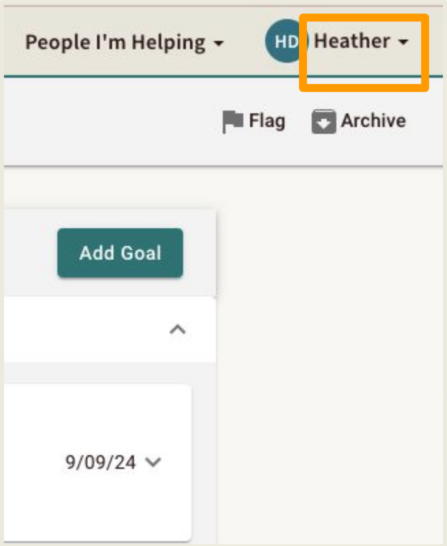
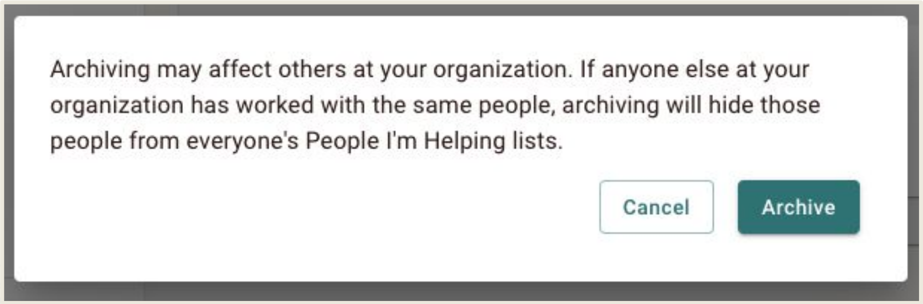
Archiving a Participant Profile

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.





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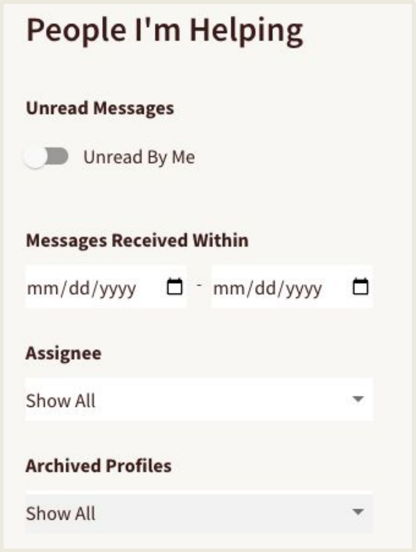
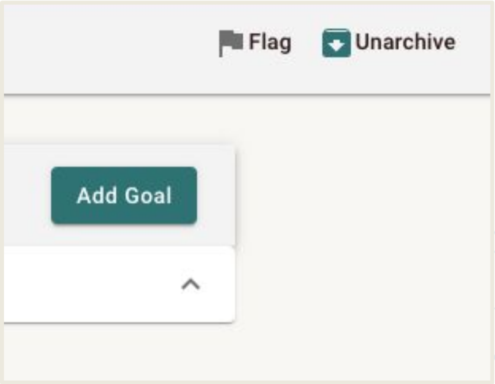
Unarchiving a Participant Profile

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.





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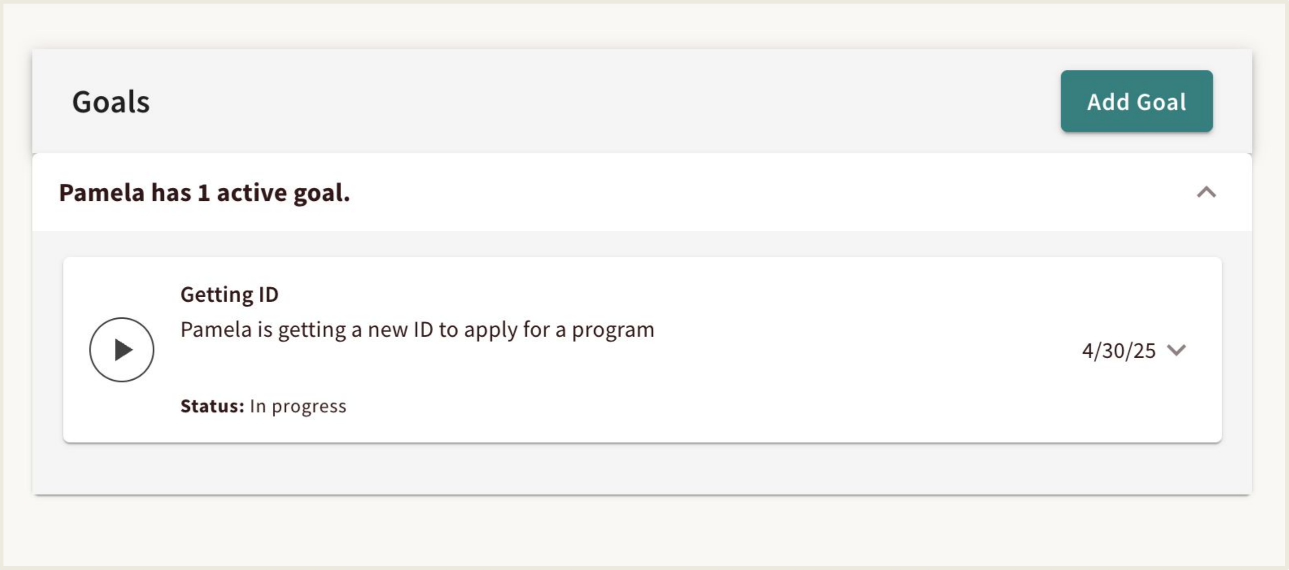
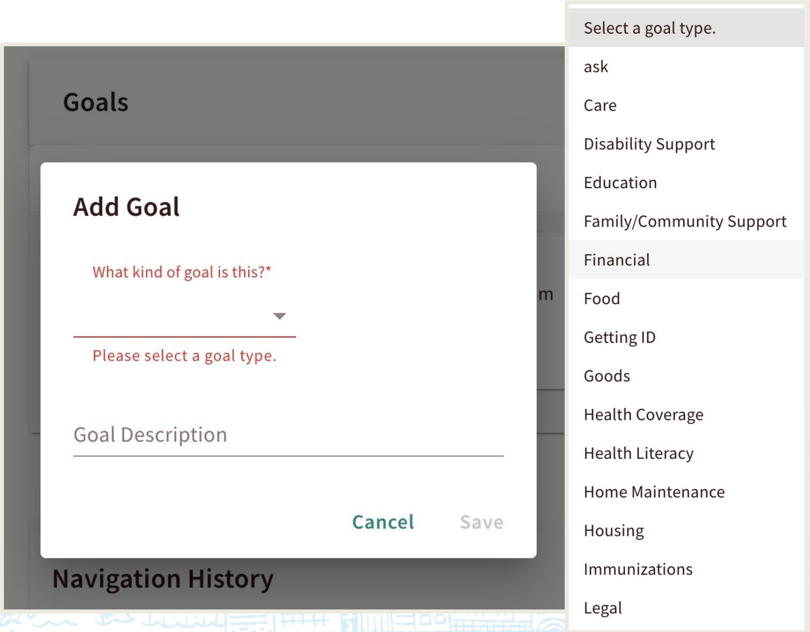
Goals

In this section you can see previously created goals, add new goals, and view or update the status and notes associated with a goal.



Adding a New Goal



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.

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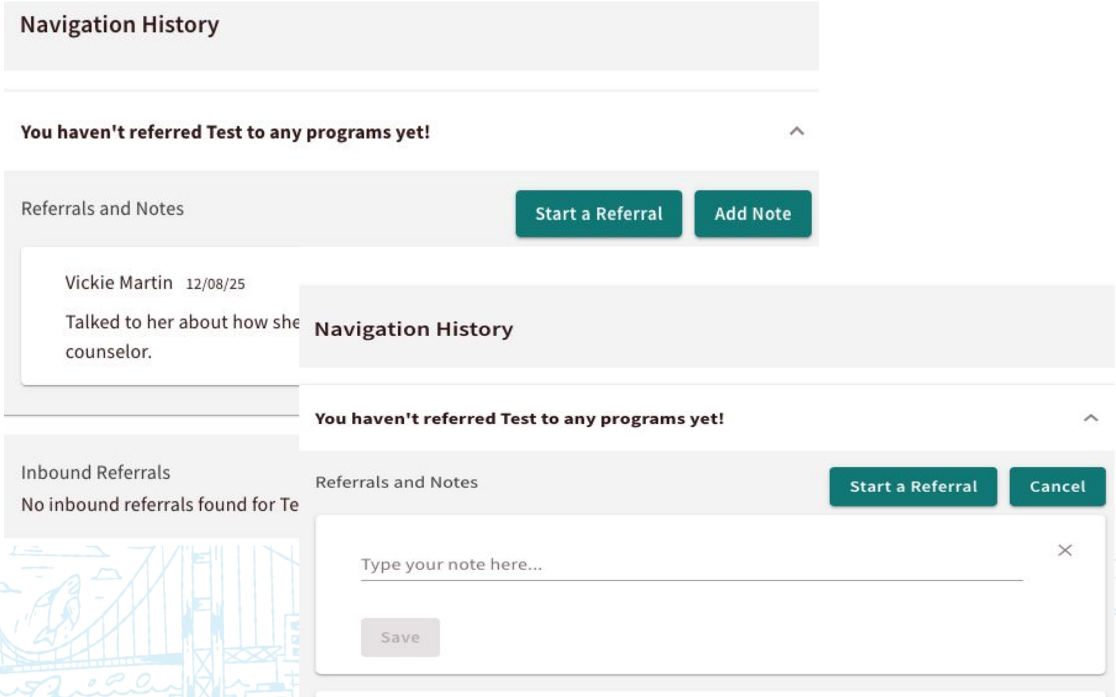
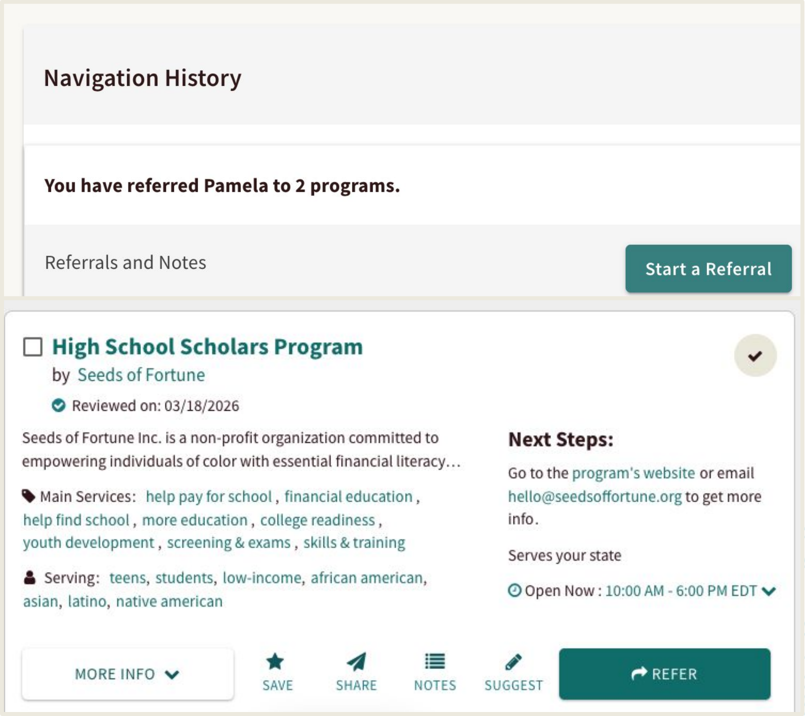
Navigation History



All communication and interactions with a Participant are to be recorded in Navigation History.

Click **Add Note** and the box opens where you can type then save. The note will automatically be dated. The most recent note stacks on top of the previous.

Find the Right Referral



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

Once you find a program, click the **Refer** button to begin the referral.

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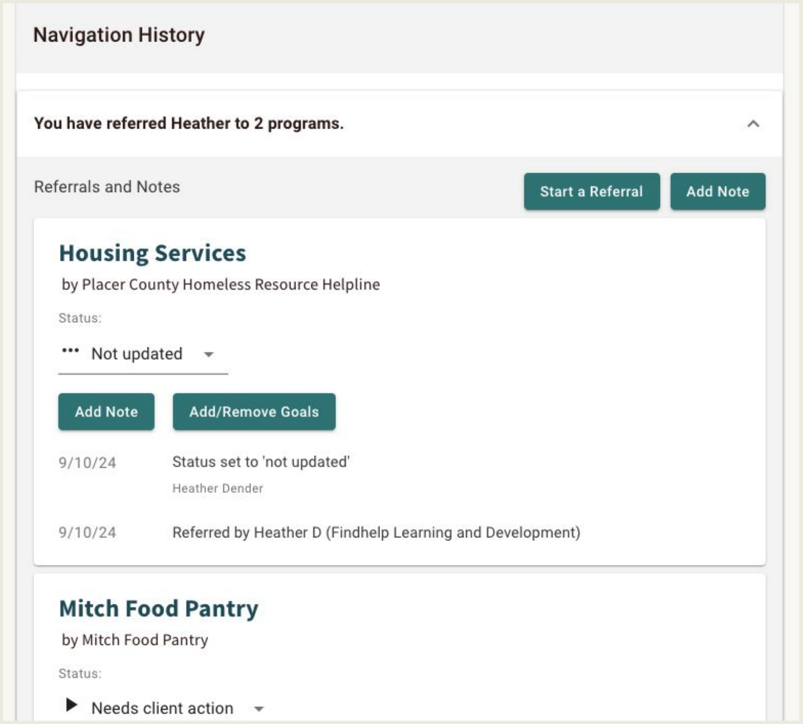
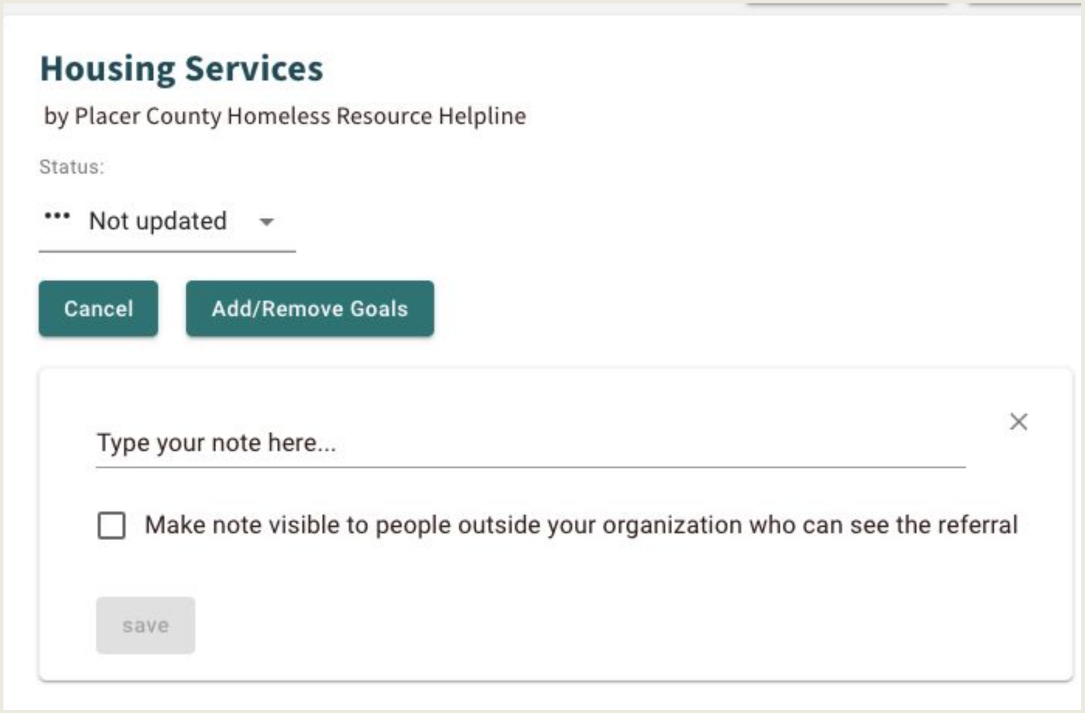
Referrals in Navigation History



All referrals made for a Participant and their current status will automatically appear under Navigation History.

Navigation History/ Referral Notes



You can add a note to a referral and choose to share it with the CBO.

Check the box next to the **"Make the note visible"** option.

The note will be visible to the team and CBO.

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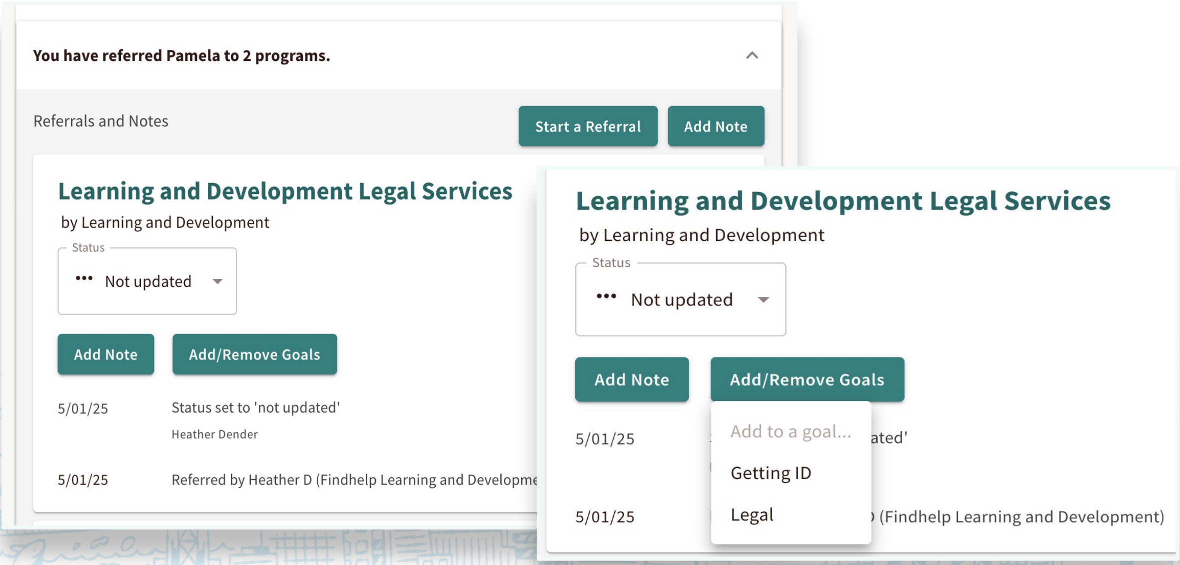
Adding a Relevant Referral to a Goal

You can use add referrals to goals when you are helping a Participant.



To link a referral to a specific goal, click the **"Add/Remove Goals"** button inside the referral, then select the goal you want to connect it to.

When you add a referral to a goal, the referral then moves into the goal section.

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Texting Participants

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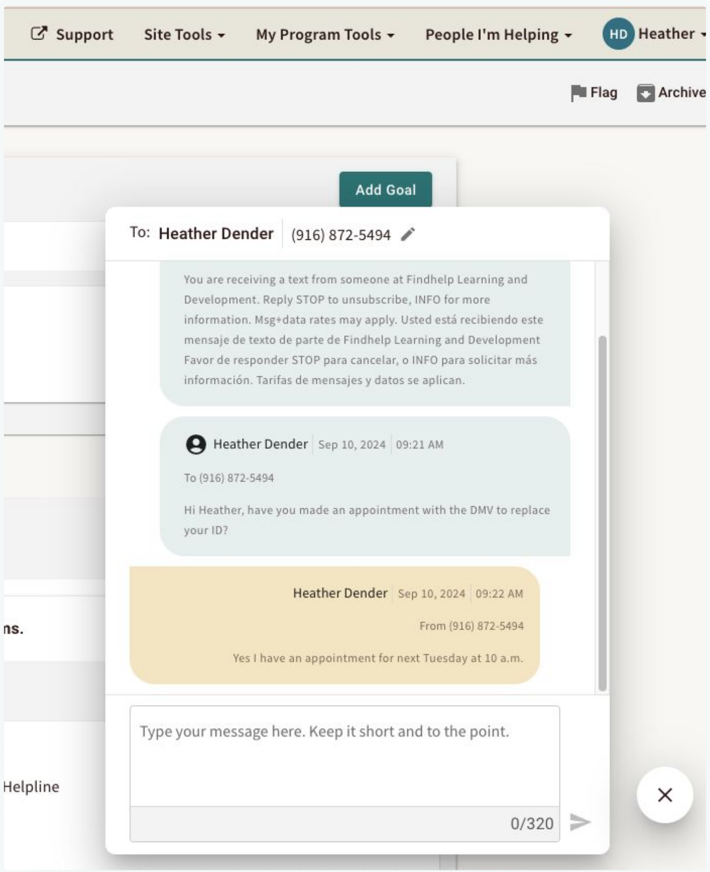
Participant Texting

Enable Resource Coordinators to more easily reach out to Participants via free-text SMS Messages. This is an easy way to provide relevant information to enable Participants to follow through on receiving help and ask any needed questions.

This feature can be enabled for one-way or two-way messaging.



Participant Texting

Resource Coordinators can send free-text SMS messages to Participants, who can respond directly to these messages.

- Allowing Participants to ask about referrals or appointments
- Creating back-and-forth communication between Resource Coordinators and Participants
- Giving Participants a way to share feedback on services, including updates on their referral status

This feature can be enabled for one-way or two-way messaging.

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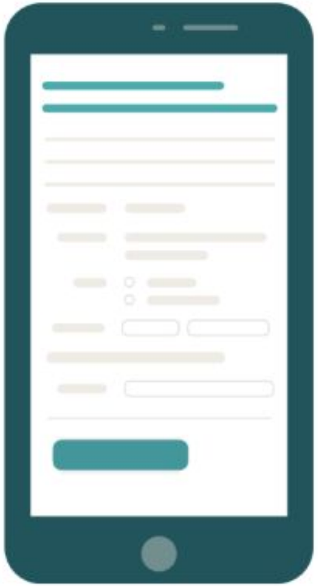
Participant Texting

Two-Way Seeker Texting: Resource Coordinators can send free-text SMS messages to Participants, who can respond directly to these messages.

This feature is useful for:

- Allowing Participants to ask about referrals or appointments
- Creating back-and-forth communication between Resource Coordinators and Participants
- Giving Participants a way to share feedback on services, including updates on referral statuses



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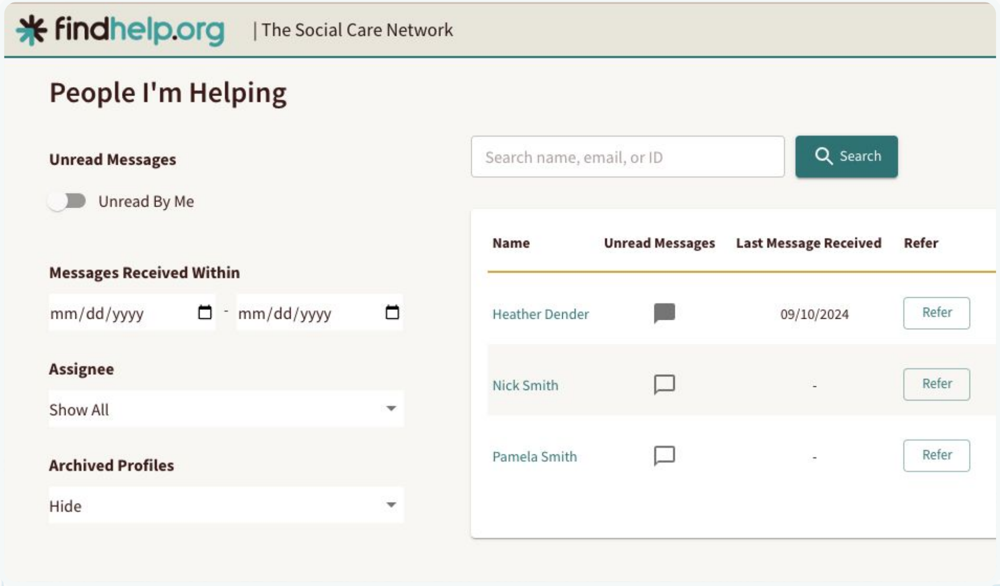
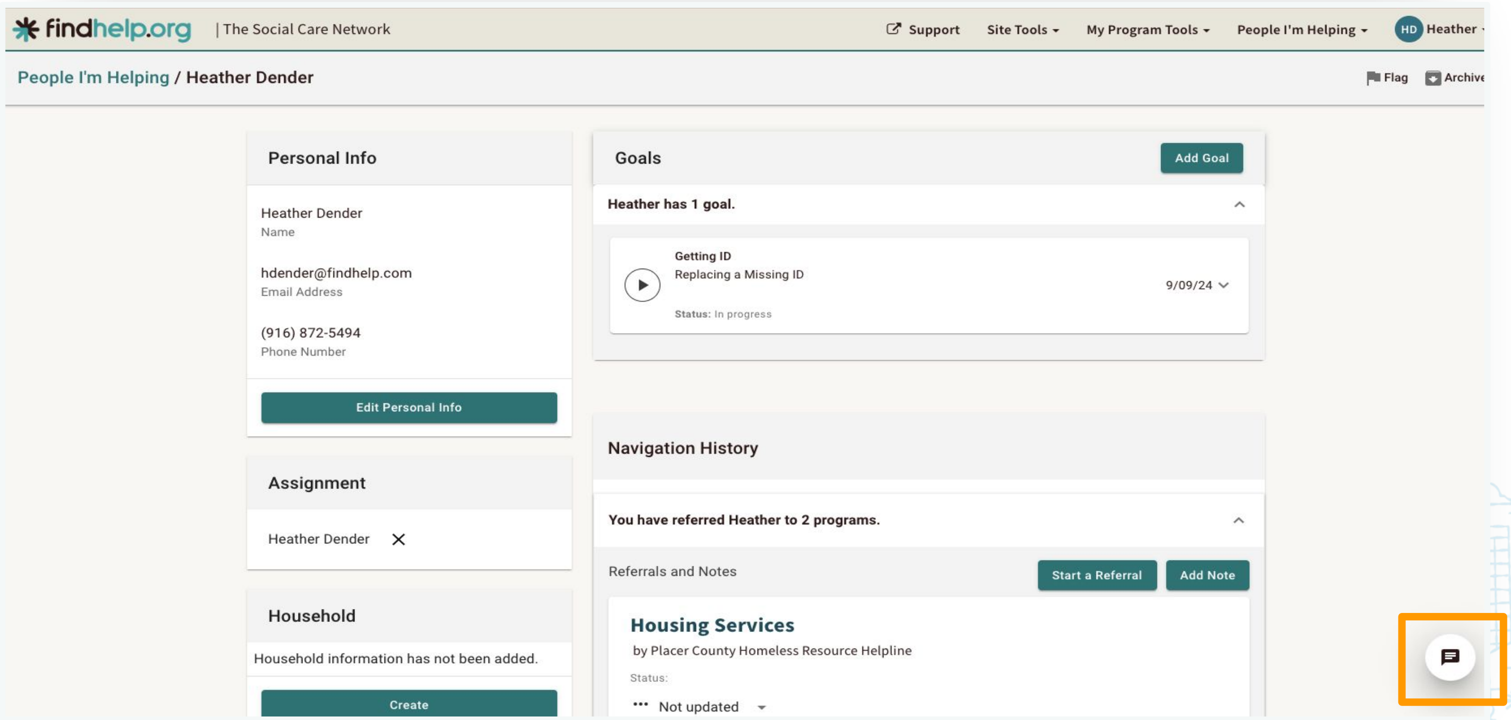
Start Inside of the Participant Profile

Access the profile of the person you want to message by using the **People I'm Helping** dashboard.

Click on their name to enter their Profile.

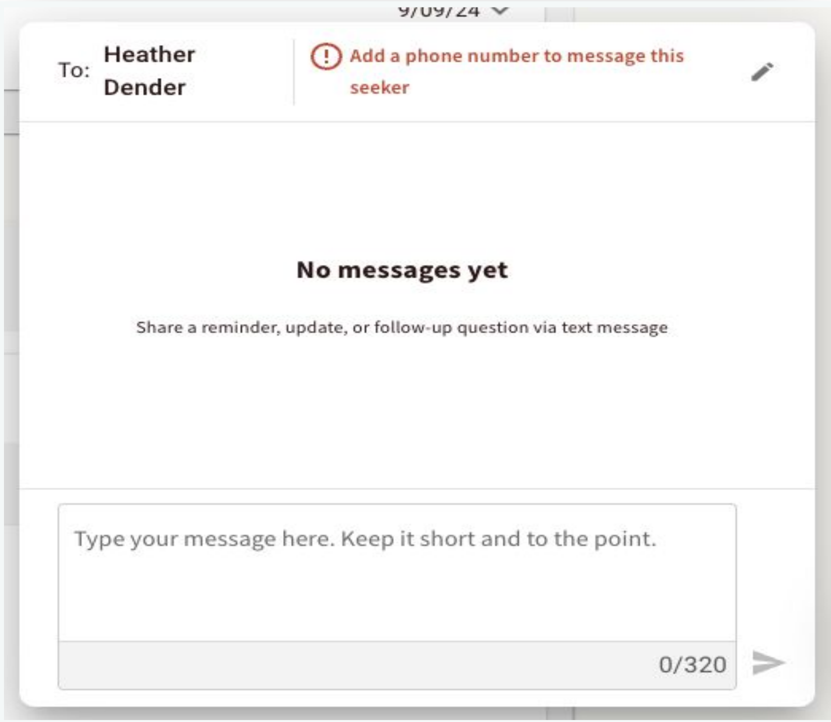


The SMS Widget



Starting a Conversation

If a number is not added to the Participant's profile, you will be prompted to enter one in before you can send a message.



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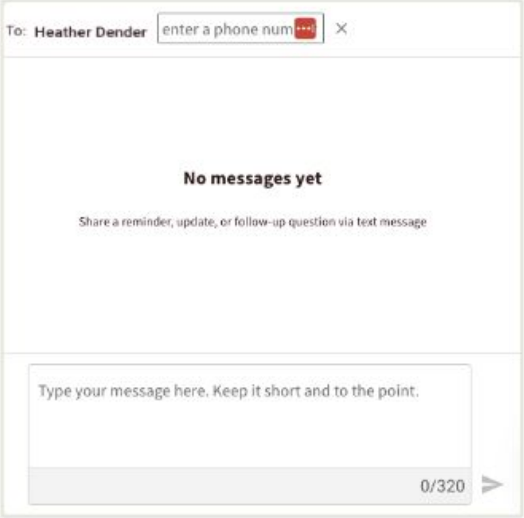
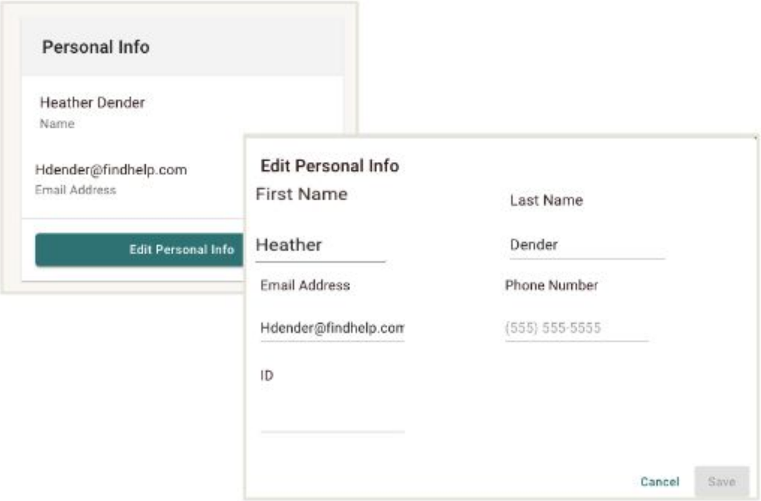
Adding a Phone Number

You can add a number directly into the widget, or you can add the number in their personal info. section of their profile.





Crafting Your Message

You have up to 320 characters for your message.
When you are ready, click "Send" to deliver it.

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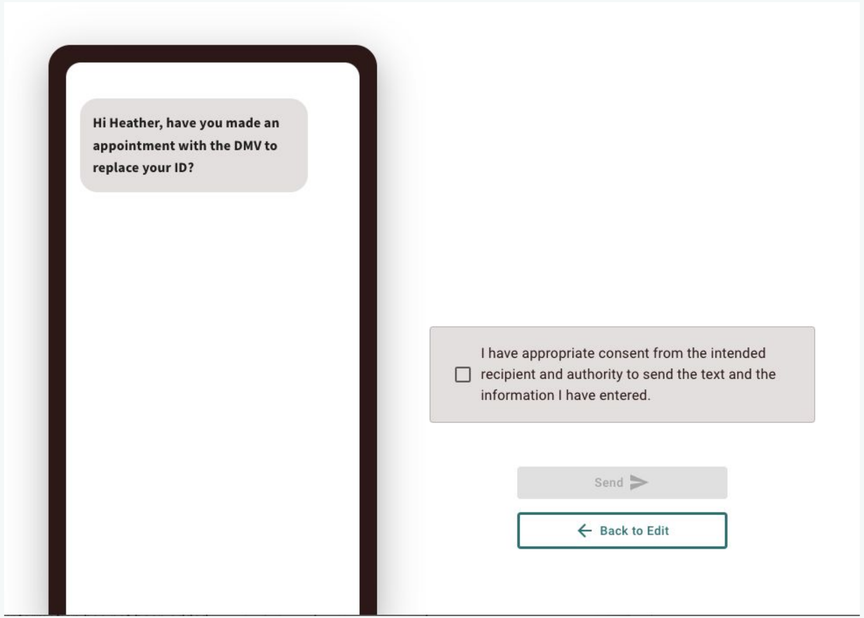
Messaging Consent

A preview of your message will appear, along with a checkbox to confirm that you have obtained the Participant's consent to send SMS messages.



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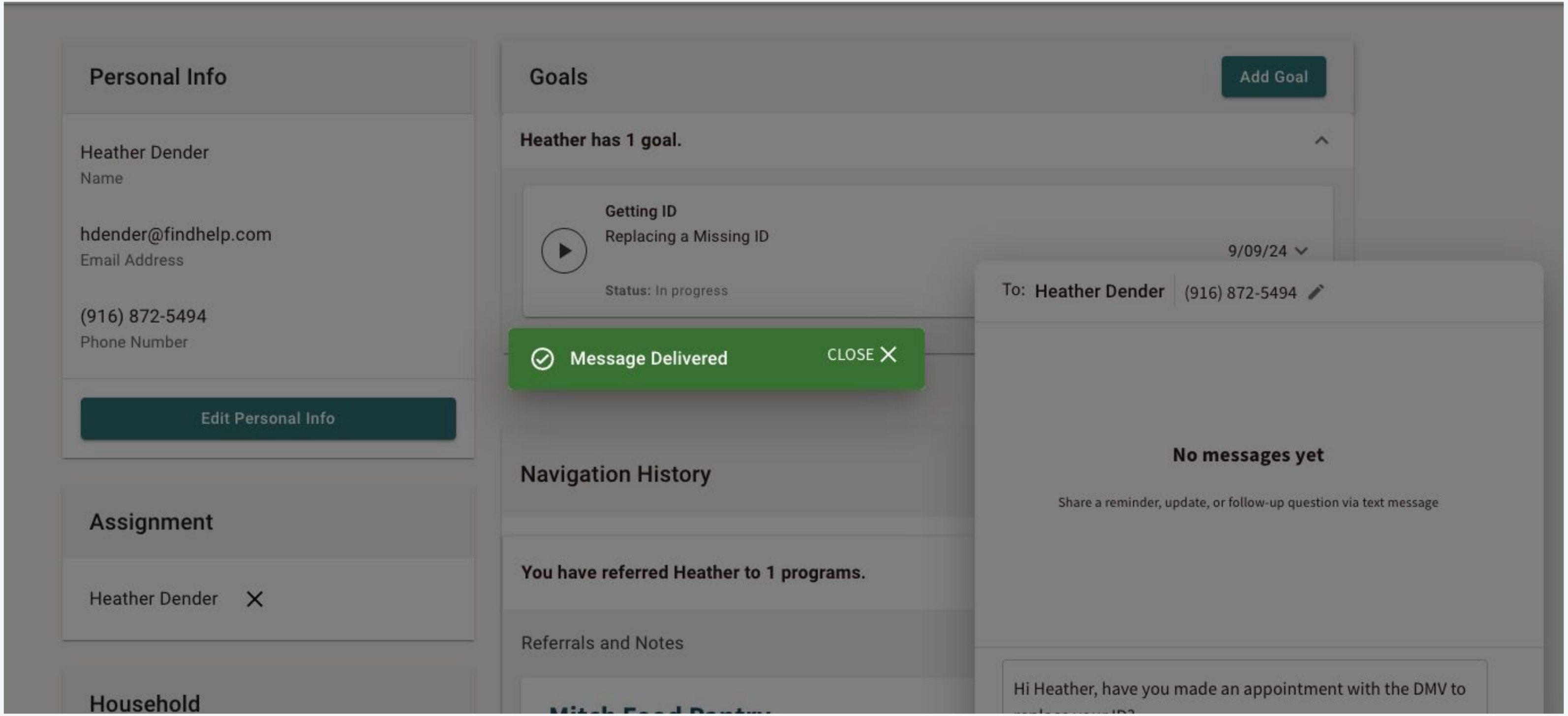
Your Message has been Delivered!



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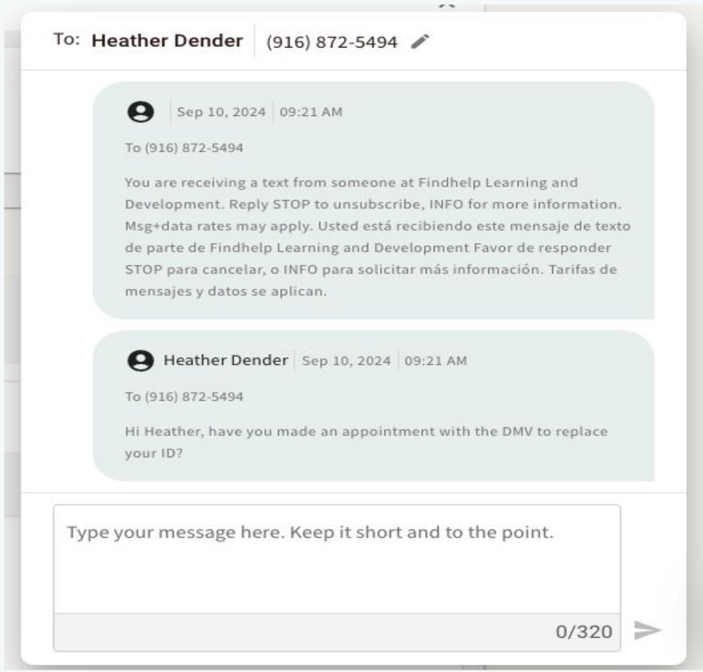
Reviewing the Message You Sent

You can review the message you sent within the widget.

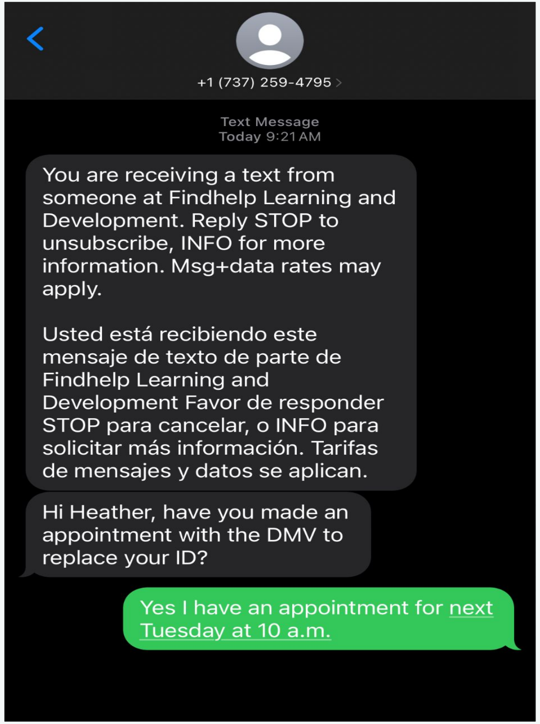
This will include a message that let's the Participant know who is texting them and how to opt out if they no longer want to receive SMS messages.



Message the Participant Sees

The Participant receives the message you sent. They can respond to it if you have two-way messaging enabled.

They will only receive the first notice about who is texting them, and how to opt out at the start of the conversation.



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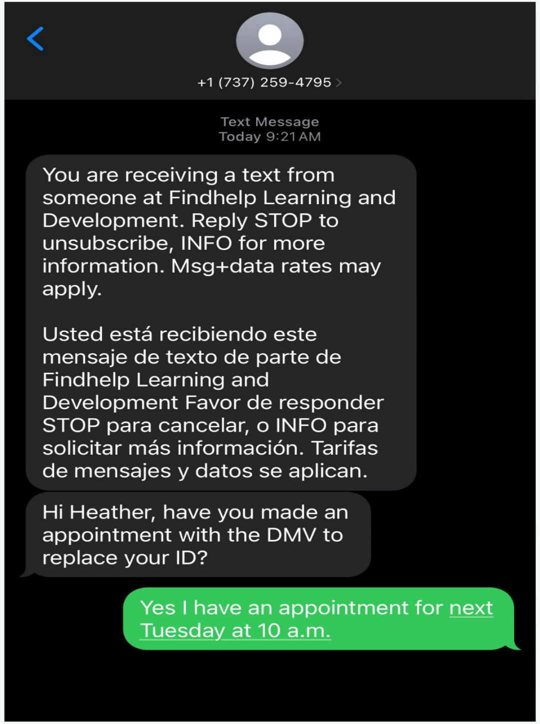
Participant Opt Out

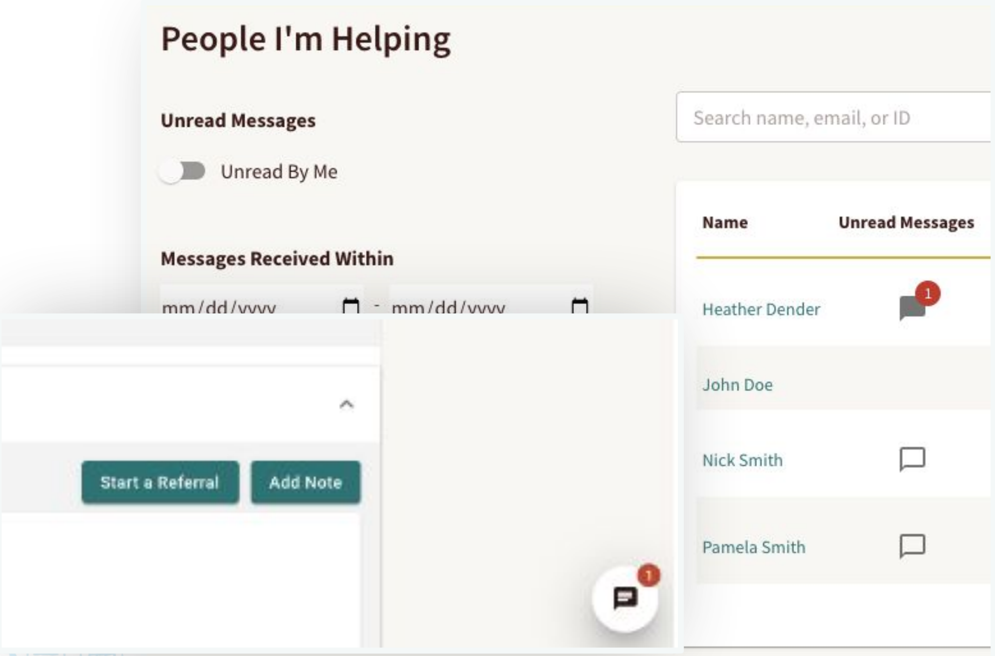
A Participant can reply STOP if they no longer want to receive messages. They will receive a message letting them know they have unsubscribed. No further messages from the widget will be sent to them.

If a Participant wants to re-enable SMS messaging, they can reply back to the thread with START. This will allow for messages to be sent through the widget.



Unread Message Notification

You will receive a notification in the **"People I'm Helping"** dashboard indicating that you have a new message from the Participant. Click on the notification to open the Participant's profile and access the SMS widget to read the message.



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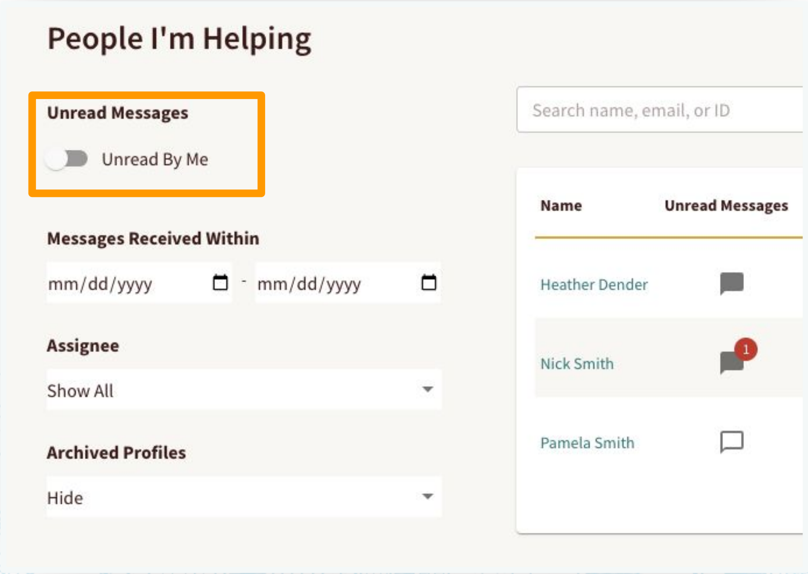
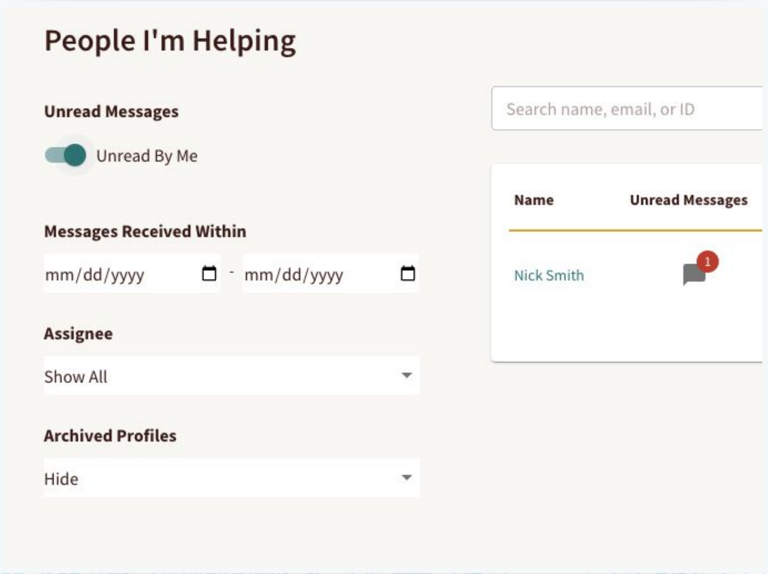
Filtering by Unread Messages

Inside the **"People I'm Helping"** dashboard is a filter you can use to only see Participant profiles who have messages that haven't been read yet.





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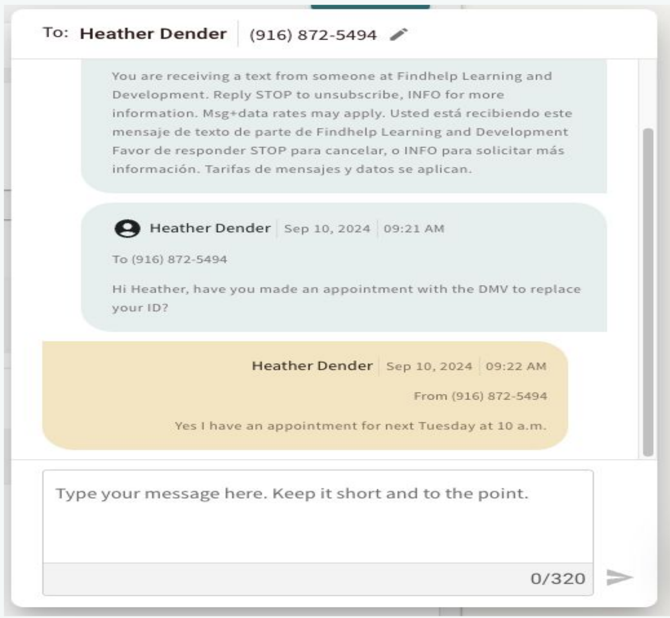
Participant's SMS Response

You can use their response to update a goal, leave a note for a referral or update that referral's status.



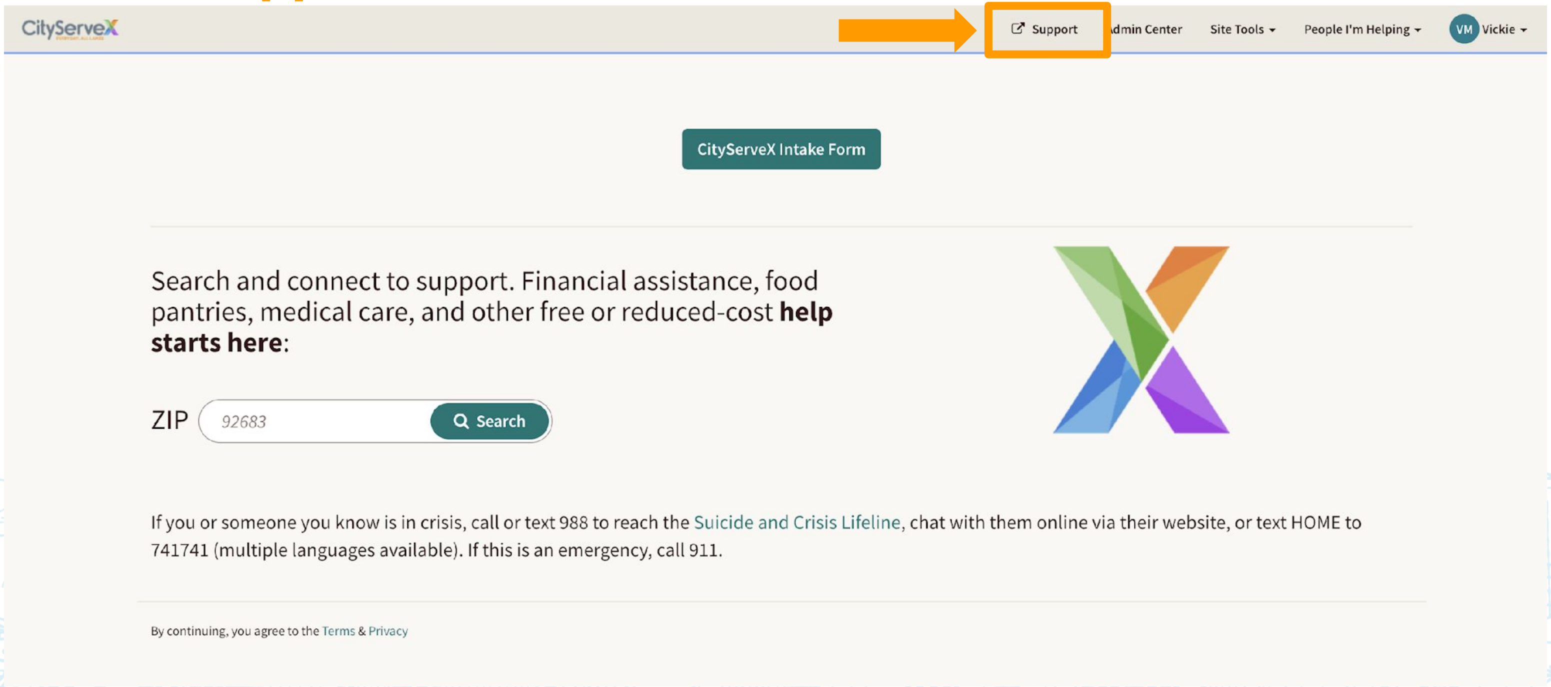
Important Things to Note

- A phone number has to be added for the SMS widget to send a message
- If the Participant changes their phone number, their history will still be attached to their profile.
- You can see other Participant SMS messaging threads within your group

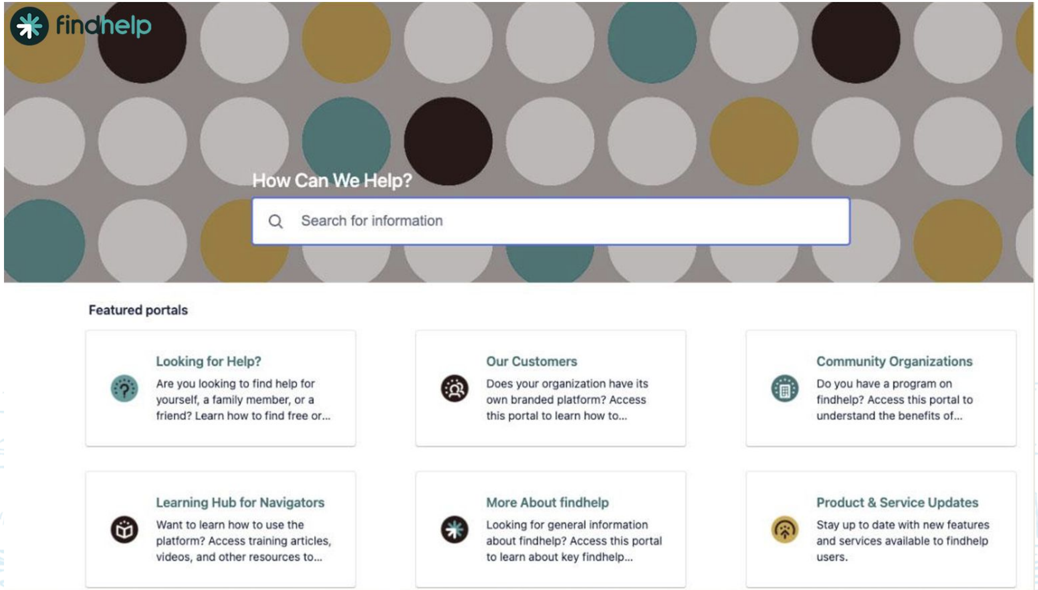
The Support Portal

Accessing the Support Page

Click on **Support** in the toolbar.



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

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Comprehension Questionnaire

Before moving forward, complete the provided questionnaire to review what you've learned about utilizing the Participant Database within the CSX/Fh platform.

Click on the link to get started, and upon submission, your answers will be sent to your CityServeX Liaison.

👉 Click here to begin!