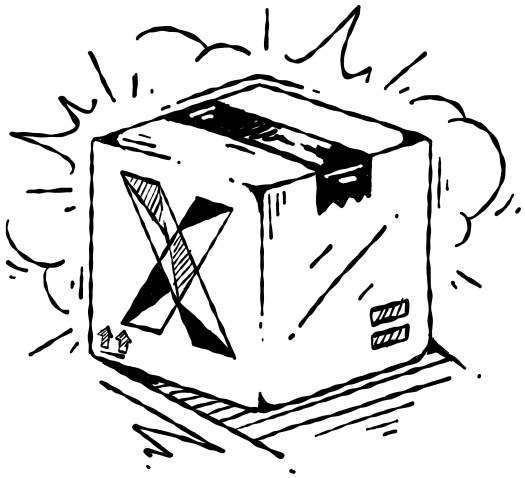

CityServeX "Box"

Resource Coordinator Fast Facts

Section 05, PARTICIPANT DATABASE

Table of Contents

5.1 Participant Database - Recording Activity, **page 2**

5.2 Why Use the People I'm Helping Dashboard, **page 2**

5.3 Slide Summary, **page 3**

5.4 Where the Instructions Are, **page 3**

5.5 Remember the Questionnaire, **page 3**

5.6 What Comes Next, **page 4**

© 2026 CityServeX

Participant Database - Recording Activity

5.1 Resource Coordination is the service that helps people find what they need and is conducted by a team of Resource Coordinators. Also on the team are one or more Community Advocates, and the team is led by a Care Champion. The people served are called Participants.

Anyone interacting with a Participant, or making any effort to do so, needs to record their activity in one central location. We refer to the location where this activity will be recorded as the Participant Database, a place to keep information, "data" on a Participant (a person being served).

The **CityServeX/Findhelp platform** provides a location to keep Participant data. Findhelp refers to it as the **"People I'm Helping Dashboard"**, and the following training materials will reference it as such.

Why Use the "People I'm Helping Dashboard"

5.2 CityServeX has chosen to fully utilize the **"People I'm Helping Dashboard"** within the **CityServeX/Findhelp platform** for multiple reasons -

- It does not require an additional login or software platform
- It is easily accessible and easy to use
- Assessment Forms (the **CSX** Inquiry and Intake Forms) are integrated within the "Dashboard"
- Some features can be customized by **CityServeX**
- It meets the needs of record-keeping for Resource Coordination
- It provides a way for all team members to view the activity with a Participant
- Findhelp maintains the "Dashboard" and makes improvements to it

With this explanation, you can learn how to access and use the "People I'm Helping Dashboard" as your Participant Database and the tools within it by following the instructions on the pages provided.

© 2026 CityServeX

Slide Summary

5.3 The pages provided are copies of slides that include instructions and screenshots of the features you will use. Trying out each feature is recommended. For additional help, ask your **CityServeX Liaison** or access the Findhelp Support Portal *(covered in Slides 55 - 58)*.

Here is a summary of the order of the pages and their content -

Slide 1 - The Title Slide
Slide 2 - Findhelp's Mission
Slide 3 - Mission of **CityServeX**
Slide 4 - Important Roles
Slide 5 - Overview
Slide 6 - Your Team Site
Slides 7 - 54 - Training Slides
Slides 55 - 58 - The Support Portal
Slide 59 - Comprehension Questionnaire

Where the Instructions Are

5.4 Ready to get started? Click **the Slides icon** next to 06 - Participant Database on CSXU. All your training slides are there for you to access and are ready to print out if you so choose .

Remember the Questionnaire

5.5 When you have completed your review of the information provided **click the Quiz icon** next to 05 - Participant Database on CSXU to access the **Comprehension Questionnaire**. Complete this before moving forward. Your answers are sent to your **City ServeX Liaison**.

What Comes Next

5.6 When you are ready to move from documenting information to finding resources for a Participant, continue to **step 6 - Resource Directory Platform.** You will learn how to connect people in need with resources and programs that could serve them well.

© 2026 CityServeX