FindHelp.org
Account Creation Job Aid

Summary: This Job Aid will assist in the account creation, navigating the dashboard, and other basics with using a FindHelp.org account.

Account Creation

1. Navigate to the **Sign Up** screen.

2. Click **Sign Up**.

3. Enter information in the appropriate field (use Sharecare email address).

4. Check box to **accept** terms and conditions.

5. Select **I am searching to help other people**.

6. Click **Get Started**.

7. Click **link in activation email** to complete account creation. (**NOTE**: Check spam/junk email folder)

Search for Services

1. Enter member **zip code** to search for local services.

2. Service categories can include food, housing, goods, transit, health, etc.

Connecting with Services

- **Community Based Organizations** (CBO) have different preferences for managing their intake. This is communicated through the Connect button (aka teal green button)

- Organizations are **not required** to accept emailed referrals, so in some cases, you'll need to log a referral for your own tracking purposes
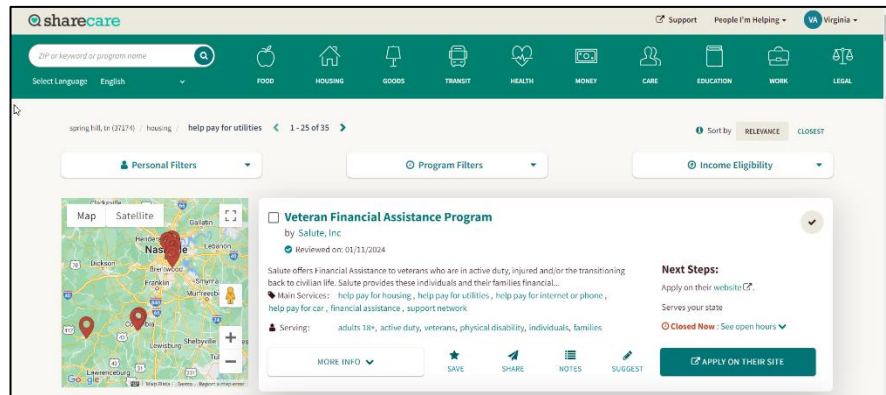
There are two types of referrals:

A. **Live Referrals** - accepts emailed referrals. (can appear as "**Refer**" or "**Apply**" buttons)

B. **Logged Referrals** - when an organization does not accept live referrals, be sure to "**Log a Referral**" to be able to view and track.

The **green button** in each section indicates the type of referral available.

Live Referrals

When live referrals are completed/logged:

- **Member** will receive an email or text with information about the program and next steps.

- **Agency** providing the program will also receive an email with the contact information of the member.

- Referral (and all updates) listed on **People I'm Helping** dashboard.

Member Email

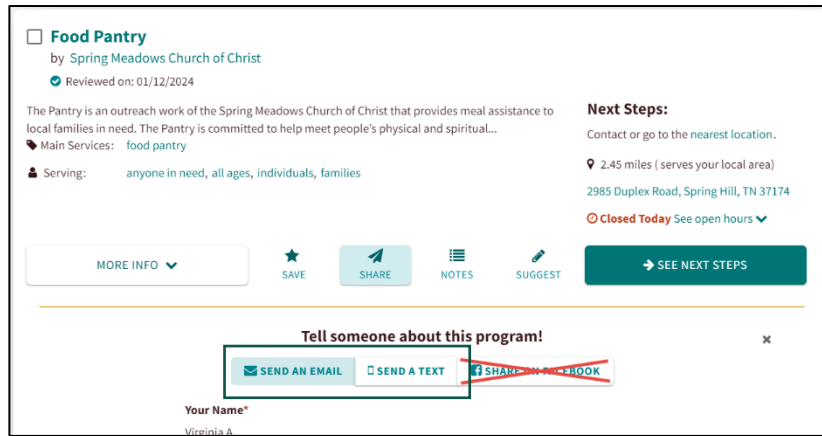**Agency Email**

Logging Referrals

When the agency/program does not accept live referrals:

- **Member** will receive an email or text with information about the program and next steps.

- **Agency** providing the program will NOT receive an email with the contact information of the member.

- Referral (and all updates) listed on **People I'm Helping** dashboard.

Sharing Information

Findhelp.org platform supports sharing programs by **email** or **text message**.
Never share information on social media.

Text Messages

- Programs shared via text will incur message and data rates.

- Programs shared via text:

    o Come from a generic number supported by our system

    o Include a link to the program card and essential information for next steps

    o Can be shared in more than 100 different languages
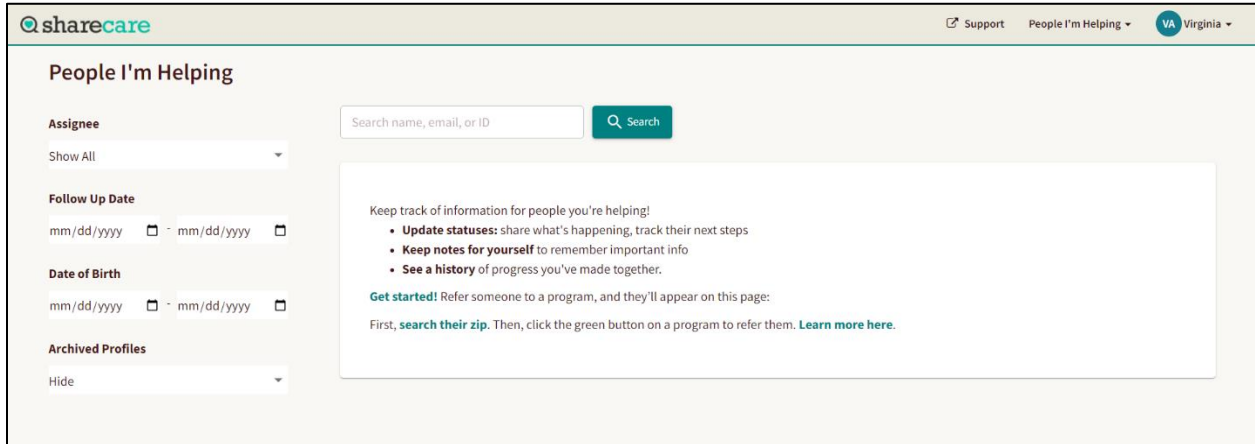
Email

- Programs shared via email include message and program link

- Come from hello@findhelpmail.com

- Can be shared in more than 100 languages

Dashboard

From the **People I'm Helping** Dashboard, you can search users by assignee, follow up date, birthday, and archived profiles.

From the **Search History** Dashboard, you can see your recent activity and searches.