



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**.

Log In

New here? Sign up: **2**

EMAIL TEXT MESSAGE USERNAME GOOGLE

Email

Password
First-time user? Forget your password?

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)

Sign Up

Already have an account? Log in!

EMAIL TEXT MESSAGE GOOGLE

First Name **3** Last Name

Email

Username (Optional)

Password
Min. 8 characters with 1 capital, 1 lowercase, and 1 special character.

4
5
6

☐ I affirm that I have read, understand, and accept the findhelp.org Terms and Privacy Policy.
☐ I'm searching for me or my family
☐ I'm searching to help other people

Get Started!

Search for Services

1. Enter member **zip code** to search for local services.
2. Service categories can include food, housing, goods, transit, health, etc.

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

ZIP **Search**

1,966 programs

Choose from the categories above and browse local programs.

FOOD HOUSING GOODS TRANSIT HEALTH MONEY CARE EDUCATION WORK

Help Find Housing

Help Pay For Housing - All (102)

- help pay for internet or phone (38)
- help pay for utilities (35)
- housing vouchers (1)

Housing Advice

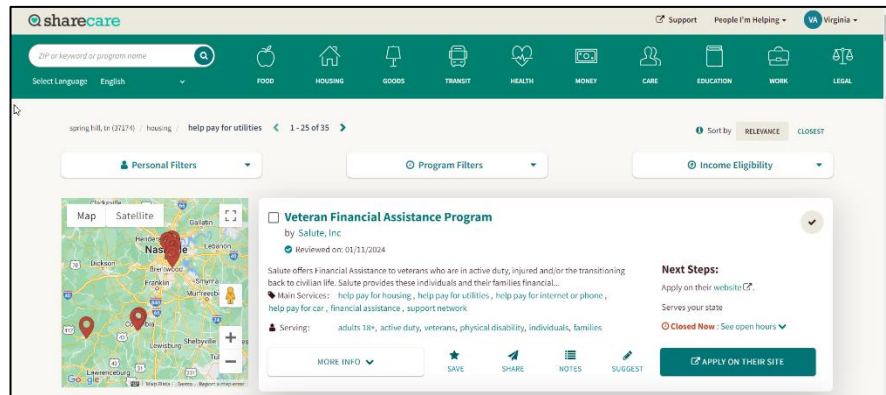
Maintenance & Repairs

Residential Housing

Temporary Shelter

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:

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

Directly Connecting	
Button	Next Step
 APPLY	Create a referral for the member and then complete a screener within the platform to collect eligibility information. This information is sent directly to the CBO so they can follow up with the member.
Apply Through Platform	
 REFER	Create a referral for the member. This information is sent directly to the CBO so they can follow up with the member.
One-Step Referral	
Logging a Referral for Internal Tracking	
Button	Next Step
 APPLY	A new tab in your browser will open, taking you to the organizations screener on their website.
External Apply	
 CONTACT	Contact the organization through their external website. Then log a referral in the system for internal tracking.
External Contact	
 SCHEDULE	Scheduling an appointment is the next step. A new tab in your browser will open, taking you to the scheduling tool. Return to the platform and log a referral for internal tracking.
Schedule	
 NEXT STEPS	The best way to reach a program is to call, email, or go in person. Log a referral for internal tracking.
See Next Steps	

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

Referral from Candace S. at Aunt Bertha Enterprise Demo 🔍

Candace S. Aunt Bertha Enterprise Demo <bertha@berthamail.com> 10:09 PM (12 minutes ago)
to candace+milton

Hi there,

Candace S. referred you to [Bertha Child Care](#) at Bertha Success

What's Next?

Please contact the agency directly:

- Email: customer@auntbertha.com

Thanks,

- The team at [Aunt Bertha Enterprise Demo](#)

Already got in touch? Let Candace S. 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.

Want to keep track of your referrals?

Sign up to check your [My Referrals](#) folder. Note: this is an automatic message, which is unable to receive replies. If you need emergency help, please call 911.

 Enterprise Demo
Questions? Contact support@auntbertha.com

Agency Email

Referral to Bertha Child Care 🔍 Inbox x

Aunt Bertha Enterprise Demo bertha@berthamail.com [via](#) auntbertha.com 10:10 PM (13 minutes ago)
to customer, tristau

Hi Bertha Success team,

Candace S. referred someone to your program, Bertha Child Care!

Please reach out to:

- Molly Member
- candace+milton@auntbertha.com

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

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

We need more info, please reach out!

We got in touch, we'll try to help!

We referred them elsewhere.

Sorry, they weren't eligible.

We couldn't reach them.

We don't have capacity.

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.

As a reminder, [Aunt Bertha Enterprise Demo](#) lists free and reduced cost social services programs so that people in need can find them.

Thank you for the work you do!

The Aunt Bertha Enterprise Demo Team

Questions? Contact community@auntbertha.com

Logging Referrals

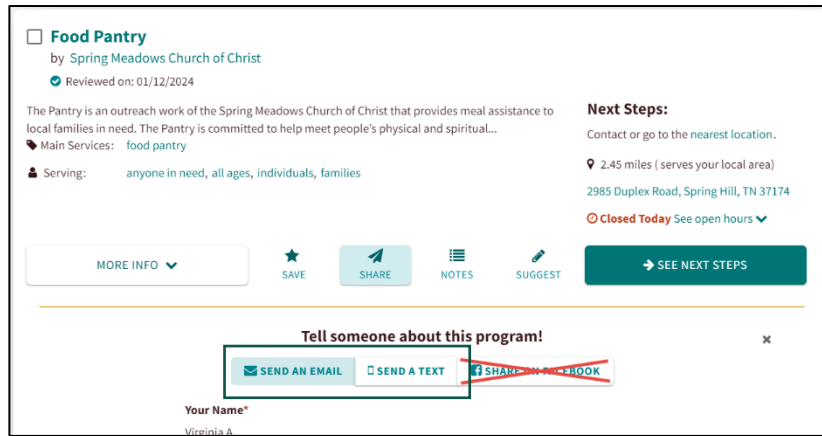
When the agency/program does not accept live referrals:

- **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.



☐ **Food Pantry**
by Spring Meadows Church of Christ
Reviewed on: 01/12/2024

The Pantry is an outreach work of the Spring Meadows Church of Christ that provides meal assistance to local families in need. The Pantry is committed to help meet people's physical and spiritual...

Main Services: [food pantry](#)

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

Next Steps:
Contact or go to the [nearest location](#).
2.45 miles (serves your local area)
2985 Duplex Road, Spring Hill, TN 37174
Closed Today See open hours

MORE INFO SAVE SHARE NOTES SUGGEST SEE NEXT STEPS

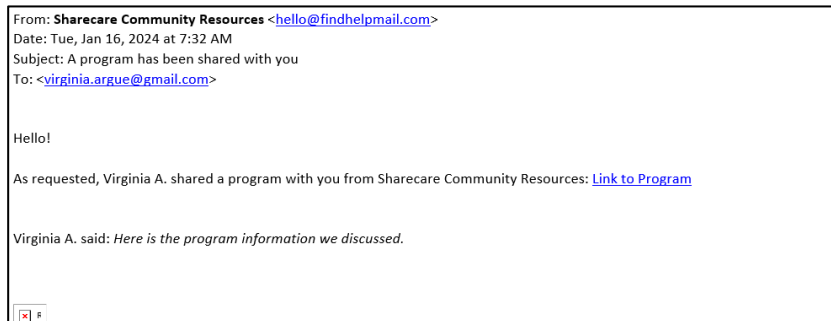
Tell someone about this program!

SEND AN EMAIL SEND A TEXT SHARE BOOKMARK

Your Name*
Virginia A

Text Messages

- Programs shared via text will incur message and data rates.
- Programs shared via text:
 - Come from a generic number supported by our system
 - Include a link to the program card and essential information for next steps
 - Can be shared in more than 100 different languages



From: Sharecare Community Resources <hello@findhelpmail.com>
Date: Tue, Jan 16, 2024 at 7:32 AM
Subject: A program has been shared with you
To: <virginia.argue@gmail.com>

Hello!

As requested, Virginia A. shared a program with you from Sharecare Community Resources: [Link to Program](#)

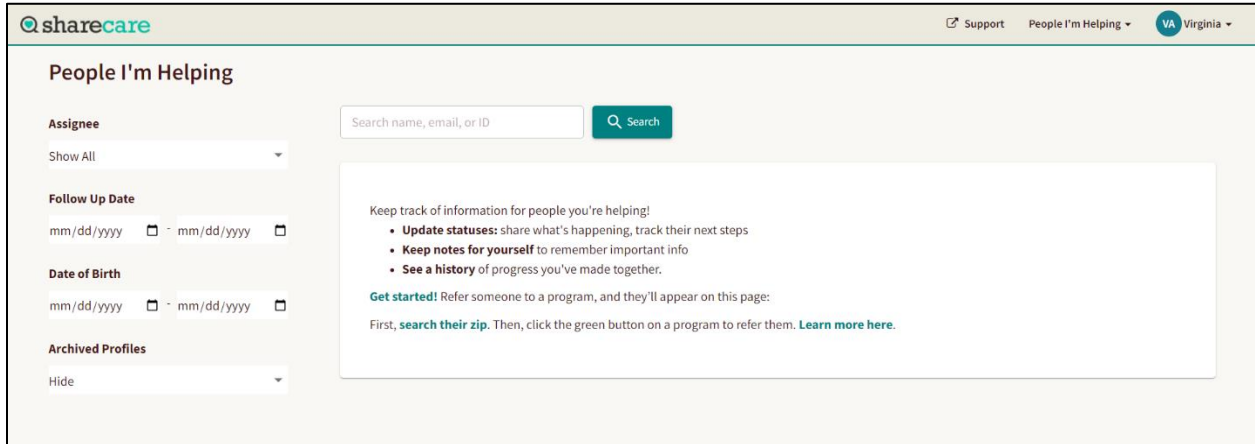
Virginia A. said: *Here is the program information we discussed.*

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.



The screenshot shows the 'People I'm Helping' dashboard. On the left, there are filters for 'Assignee' (a dropdown menu), 'Follow Up Date' (two date pickers), 'Date of Birth' (two date pickers), and 'Archived Profiles' (a dropdown menu). In the center, there is a search bar with the placeholder text 'Search name, email, or ID' and a green 'Search' button. To the right of the search bar, there is a white box with instructions: 'Keep track of information for people you're helping!' followed by a bulleted list: 'Update statuses: share what's happening, track their next steps', 'Keep notes for yourself to remember important info', and 'See a history of progress you've made together.' Below this, it says 'Get started! Refer someone to a program, and they'll appear on this page: First, [search their zip](#). Then, click the green button on a program to refer them. [Learn more here](#).'

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

