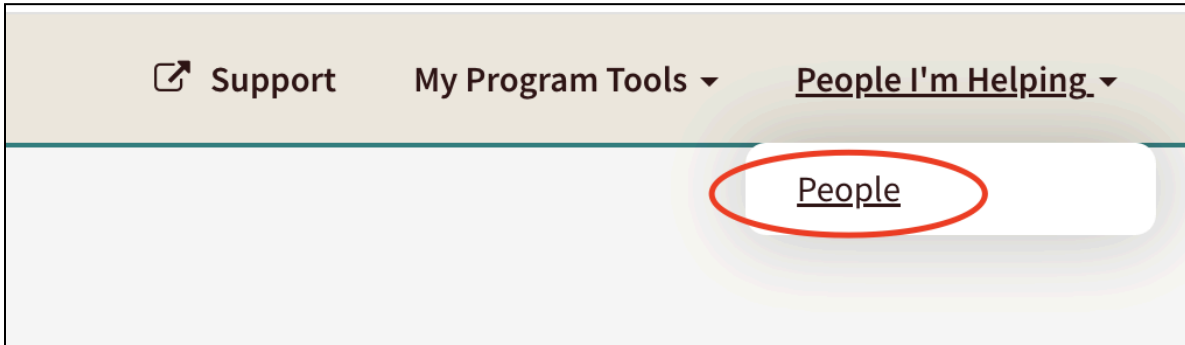


# REFERRAL STATUS CHEAT SHEET

## How to check the status of a referral; step by step snapshots

**Step 1:** Go to findhelp.org

**Step 2:** Log in



**Step 3:** Click on People I'm Helping

**Step 4:** Then click on the subheading People

**People I'm Helping**

Assignee:

Show All

**Date of Birth**  
mm/dd/yyyy - mm/dd/yyyy

**Follow Up Date**  
mm/dd/yyyy - mm/dd/yyyy

**Archived Profiles**  
Hide

Name	Refer	Summary	Assignee	Email	Phone	Flagged
Lauren Wolk	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>	Travis Singley	lauwolk@gmail.com	(440) 050-3943	Yes
Dolly Parton	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>	Jane Kelly	aspencer+dp@findhelp.com	(555) 867-5309	Yes
Chris Healthstatdemo	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>		cdouglashealthstatdemo@auntbertha.com		Yes
Ann Perkin	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>	Kalli Brelsford	srobinson+annperkins@findhelp.org		Yes
Karl Healthstatdemo	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>		cdouglas+healthstatdemo@auntbertha.com	(512) 859-3684	Yes
Test Test	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>		test+cnaval@findhelp.com		

**Step 5:** Click on the person you are following



## People I'm Helping Dashboard

**People I'm Helping**

Assignee: Willie

Show All

Follow Up Date: mm/dd/yyyy  - mm/dd/yyyy

Archived Profiles: Hide

Name	Refer	Summary	Assignee	Email	Phone	Flagged	Medical Record Number (MRN)
Willie Findit	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>		cnaval-williefndit@findhelp.com	(843) 513-8856		

1-1 of 1 < >

- From here, you can search for the patient by name, MRN, or ID.
- Click the patient name and it will open the patient's profile.

## People I'm Helping

Assignee: Test Test

Show All

Date of Birth: mm/dd/yyyy  - mm/dd/yyyy

Name	Refer	Summary	Assignee	Email	Phone	Flagged
Test Test	<input type="button" value="Refer"/>	<input type="button" value="Summary"/>		test+cnaval@findhelp.com		



## People I'm Helping Profile

MedStar Health | Support | My Program Tools | People I'm Helping

People I'm Helping / Willie Findit

**Personal Info**

Willie Findit  
Name  
cnavalwilliefndit@findhelp.com  
Email Address  
Phone Number

**Goals**

Food  
Make sure Willie receives at least 2 pounds of produce each week.  
7/28/23  
Status: In progress

**Navigation History**

You have referred Willie to 12 programs.

**Community Food Pantry**  
by Sertha Engagement  
Status:

- 8/23/23 Status set to 'got help'  
Cotton Knoll
- 7/23/23 Status set to 'not updated'  
Cotton Knoll
- 8/23/23 Referred by Cotton N. (Find Help Admin)

- You will be able to view all the referrals you have made for your patient, and check or directly update status of each referral.

People I'm Helping / Test Test Flag Arch

**Personal Info**

Test Test  
Name

test+cnaval@findhelp.com  
Email Address

[EDIT PERSONAL INFO](#)

**Assignment**

[ASSIGN TO ME](#)

**Household**

Household information has not been added.

[CREATE](#)

**Test's Team**

Doula Services Group

**Goals** [ADD GOAL](#)

Test has no goals added yet.

**Navigation History**

You have referred Test to 3 programs. ^

Referrals and Notes [START A REFERRAL](#) [ADD NOTE](#)

**Women, Infants and Children (WIC)**  
by Community Of Hope, Inc. (COH)

Status: No longer interested Primary Service:  

[ADD NOTE](#)

3/26/24 Status set to 'no longer interested'  
Colton Naval

3/26/24 Status set to 'not updated'  
Colton Naval

3/26/24 Referred by Colton N (Find Help Admin)

Flag

You have referred Test to 3 programs. ^

Referrals and Notes [START A REFERRAL](#) [ADD NOTE](#)

**Children (WIC)**  
(COH)

Primary Service:  

No longer interested

Status set to 'not updated'

3/26/24 Referred by Colton N (Find Help Admin)

⋮ Not updated

▶ Needs client action

⏸ Pending

✓ Referred elsewhere

✓ Got help

+ Eligible

✗ Couldn't get help

! Couldn't contact

— Not eligible

▲ No capacity

■ No longer interested

**Step 6:** This will show a summary of referrals, and whether the person got help, couldn't contact or if the status is pending