Key Terms

- **CUCTeam: The s**ite that CommUnityCare's staff uses.
- **C**ommUnityCareTX:** The site that patients and community members use.
- **Community Based Organization (CBO):** A social resource institutions that offer free or reduced-cost assistance to those meeting program eligibility requirements.
- **Client:** A person seeking a social resource within the findhelp network.
- **Searches:** Activity that indicates a user is trying to find a program. This includes postal searches as well as category, text, and other activity that return a list of programs.
- **Interactions:** Activity that indicates a user is trying to find a program. This includes postal searches as well as category, text, and other activity that return a list of programs.
- **Connections:** Activity that indicate a user contacted a program, which could be an electronic referral or appointment (for oneself or for someone else), direct contact by clicking a phone or email, or an external connection by clicking through on a program that has its own application form or scheduling.
- **Referrals:** Connections that are tracked on the site, including logged referrals, screeners, and appointments.

Referral Status Definitions

The intention is to create a shared language with Community Based Organizations (CBO) and staff with the goal of ensuring that the client's needs are being met.

Status Options:

- Not Updated
- Needs Client Action
- Pending
- Eligible

Open Referrals

- Got Help

Successfully Closed

- Referred Elsewhere
- Couldn't Contact
- Not Eligible
- No Capacity
- Couldn't Get Help
- No Longer Interested

Unsuccessfully Closed

Open Referrals

Require action from the client, organization, or staff member.

Not Updated
- The referral was submitted successfully, but the CBO has not yet reviewed the referral.

Needs Client Action
- The CBO has contacted the individual and is awaiting to hear back from the client.
- The Client needs to reach out to the organization.
- The Client needs to fill out paperwork before getting access to the resource.

Pending
- The CBO tried contacting after one attempt with no response from the client, will attempt additional times, per the organization's standard procedures.
- The CBO acknowledges that they received the referral and will be reaching out to the client soon.
- The CBO has a waitlist and added the client to the list.
  - Highly encouraged to add comments with the length of time they anticipate the client will be on the waiting list.

Eligible
- The CBO contacted the client, it was determined that they were eligible to receive services, but the CBO has not initiated services.

Successfully Closed Referrals

Require no further action from the staff member, but may require action from the client or organization.

Got Help
- The client began receiving services, no further action needed.
- The client's need was met and received services from the CBO.
- The client is in direct contact with organization, even if they have not fully completed the services.

Unsuccessfully Closed Referrals

Require action from the client or staff member.

Referred elsewhere
- The client did not qualify for services therefore the CBO referred to another program within findhelp or their network that was a better fit for the client's needs.

Couldn't contact
- The CBO was unable to contact the client after several attempts, following their standard procedures.

Not eligible
- The client did not meet the CBO or program's eligibility criteria.

No capacity
- The CBO spoke with the client, but it was communicated that the CBO did not have the capacity to meet the client's needs and no further steps can be taken.
  - Ran out of funding
  - Limited staff
  - High volume of clients
  - Other

Unsuccessfully Closed Referrals

Couldn't get help
- The CBO spoke with the client, determined they were eligible, but the CBO was unable to help them.
  - Lack of technology (e.g. computer, cellphone, etc.)
  - Lack of/No Documentations
  - Language barriers
  - Lack of transportation
  - Barriers due to digital literacy
  - Barriers due to reading literacy
  - Not a good fit due to timing
  - Hours of operation did not align
  - Other

No longer interested
- The client is eligible to receive services, but they are no longer interested in receiving services.
  - The client got help from another organization for the specific need.
  - The client no longer has the need.
  - The client does not feel comfortable receiving services from this particular CBO.
  - The CBO cannot meet the needs of the client in the client's preferred method.
  - The client did not arrive for their agreed appointment to receive services.