



# Reduce Redundancies and Improve Outreach: A Toolkit for CBOs to Streamline Intake Through Closed-Loop Referrals

Developed June 2026

## Introduction

### Purpose

Increasing access to client data through referrals helps community-based organizations improve outreach, care coordination, and intake.

Who Is This For	What Does This Toolkit Do
<ul style="list-style-type: none"> <li>• Organizations claiming their FindHelp program for the first time</li> <li>• Organizations already active in FindHelp</li> <li>• New GetHelpOC users</li> <li>• Existing GetHelpOC users</li> </ul>	<ul style="list-style-type: none"> <li>• Increases access to valuable data by leveraging existing Closed-Loop Referral systems (FindHelp and GetHelpOC)</li> <li>• Improves care coordination between health and social services</li> <li>• Streamlines intake processes for community-based organizations</li> </ul>

This toolkit supports community-based organizations (CBOs) in collecting key information from families and patients through closed-loop referrals (CLRs) to enable client-centered intake processes. It was developed by BluePath Health in partnership with Rady Children's Health and Orange County United Way, with input from the Orange County Data Exchange Framework Collaborative and Orange County CBOs. FindHelp and/or GetHelpOC users can use this toolkit to streamline access to data elements that support CBOs to confirm eligibility, understand the patient's needs, and conduct appropriate outreach. Consistent and actionable data sharing across Orange County providers will promote strong care coordination as families are referred from clinical settings to community-based social services.

*No technical expertise is required to access or request additional data through your platform.*

## Recommended Priority Data Elements

Through community stakeholder engagement through the Orange County Data Exchange Framework Collaborative with local Orange County CBOs and Rady's Social Services team, the following data elements were identified as both highly valuable for CBO eligibility screening and feasible for a care coordinator to share from a clinical setting. Prioritizing a small, high-impact

set of fields over attempting to capture all patient data helps reduce burden on referring staff while still giving CBOs the information they need most. **Organizations can also request other data to support eligibility determination and intake through their CLR platform.**

### Suggested Questions And Response Formats

Data Element	Suggested Screener Question	Response Format
Language Preference	Preferred language for communication	<ul style="list-style-type: none"> <li>- Dropdown with the following options:               <ul style="list-style-type: none"> <li>- Arabic</li> <li>- Cantonese</li> <li>- English</li> <li>- Farsi</li> <li>- Japanese</li> <li>- Korean</li> <li>- Mandarin</li> <li>- Spanish</li> <li>- Tagalong</li> <li>- Vietnamese</li> <li>- Other (please specify)</li> </ul> </li> <li>- Multi-select</li> </ul>
Health Plan & Network Enrollment	<p>Does the patient have Medi-Cal?</p> <p>Health Plan (e.g. CalOptima, Anthem Blue Cross, Memorial Care):</p> <p>Health Network (e.g. CHOC Health Alliance):</p> <p>Medi-Cal CIN (if applicable; e.g. 91234567A) OR Insurance ID Number:</p>	<ul style="list-style-type: none"> <li>- Yes/No (for Medi-Cal)</li> <li>- Open text field</li> </ul>
Preferred Contact Time(s)	Best days and/or time(s) to reach the family	<ul style="list-style-type: none"> <li>- Open text field</li> </ul>
Preferred Contact Method(s)	Preferred contact method(s) for outreach	<ul style="list-style-type: none"> <li>- Dropdown with these options:               <ul style="list-style-type: none"> <li>- Email</li> <li>- Text Message</li> <li>- Mobile Phone</li> </ul> </li> </ul>
Additional Information	Additional notes for [name of CBO] <i>(optional)</i>	<ul style="list-style-type: none"> <li>- Open text field</li> </ul>

## Access These Data Points Through Your Closed-Loop Referral Platform

### FindHelp

The resources below support FindHelp users in creating a short intake form called an eligibility screener directly into their FindHelp profile to gather data from referral partners:

- FindHelp: <https://www.findhelp.org/>; *FindHelp landing page to learn about the platform, what types of organizations can be found on it, and what their capabilities are as a closed-loop referral service.*
- Setting up FindHelp Program: <https://go.findhelp.com/support/join-our-network-by-claiming-your-program>; *Learn about how a CBO can claim and verify their FindHelp program and find what tools FindHelp equips CBOs to customize their program card.*
- Creating your FindHelp Eligibility Screener: <https://go.findhelp.com/support/grow-creating-a-screener>; *Guide for CBOs to learn how to create an eligibility screener, includes an outline of different types of questions and options CBOs have to create their screener.*

### GetHelpOC

For organizations using GetHelpOC, no additional setup is required. The above recommended data elements, with the exception of some health plan details, exist automatically within GetHelpOC client profiles when available. If your organization receives referrals through GetHelpOC, check the client profile to access available information.

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## Using This Data In Your Workflows

The data elements in this toolkit are most impactful when they are used to support how your organization serves families day-to-day. Building a workflow to check for available information in the client profile of your closed-loop referral platform can help reduce duplicative intake questions, shorten the time between referral and first contact, and support staff in personalizing outreach.