Getting Started with Kiip – Welcome Guide

Modern Case Management for Community Programs

Last revised on: May 2026

Modern Case Management for Communities

Kiip helps community programs stay organized, track outcomes, and connect clients to critical resources.

Powered by **Findhelp**

Free

A lightweight CRM, without the price tag or complexity of other systems.

Easy to Use

Intuitive and ready-to-go so staff or volunteers can use it immediately.

Integrated

Incorporates the expansive open network of Findhelp social care programs

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Create an Account & Add Programs

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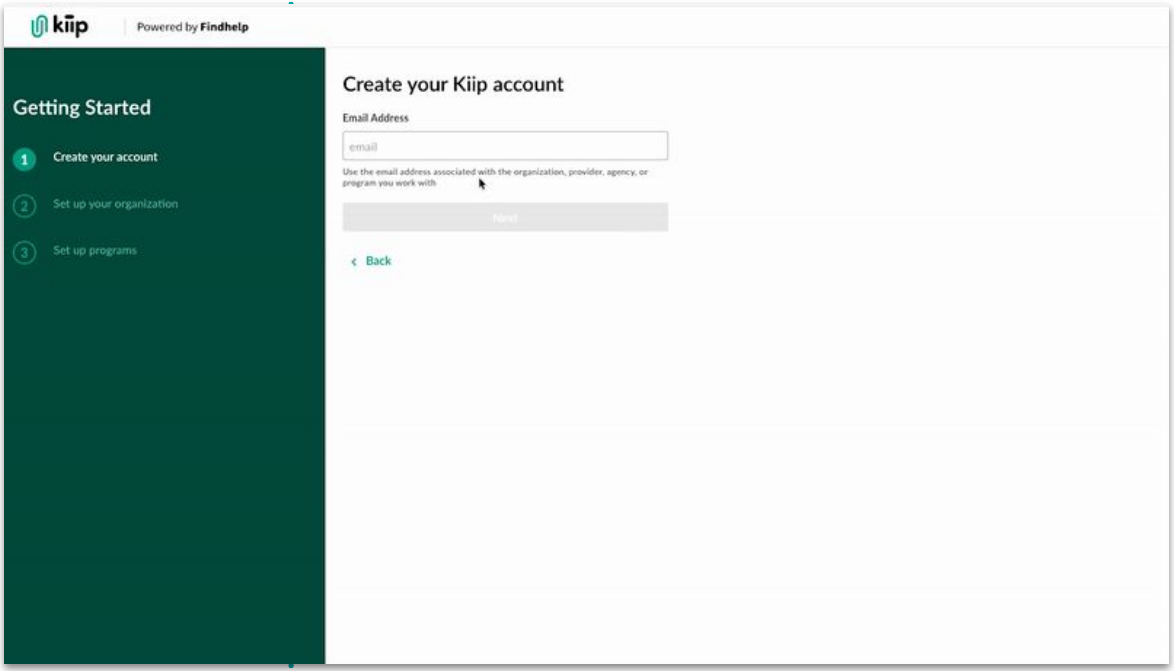
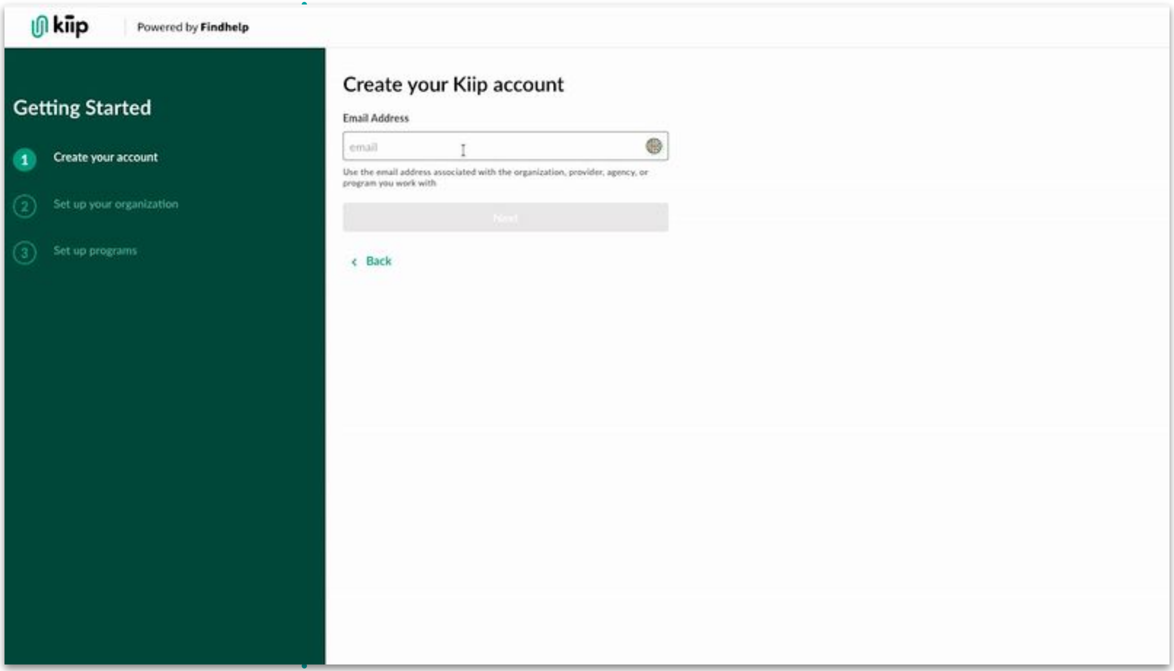
Program Setup (on Findhelp)

1. Create a free account at kiip.co/create-account
2. Select ‘My organization is already on Findhelp’
3. Add your programs from the Findhelp directory (as many as you want!)



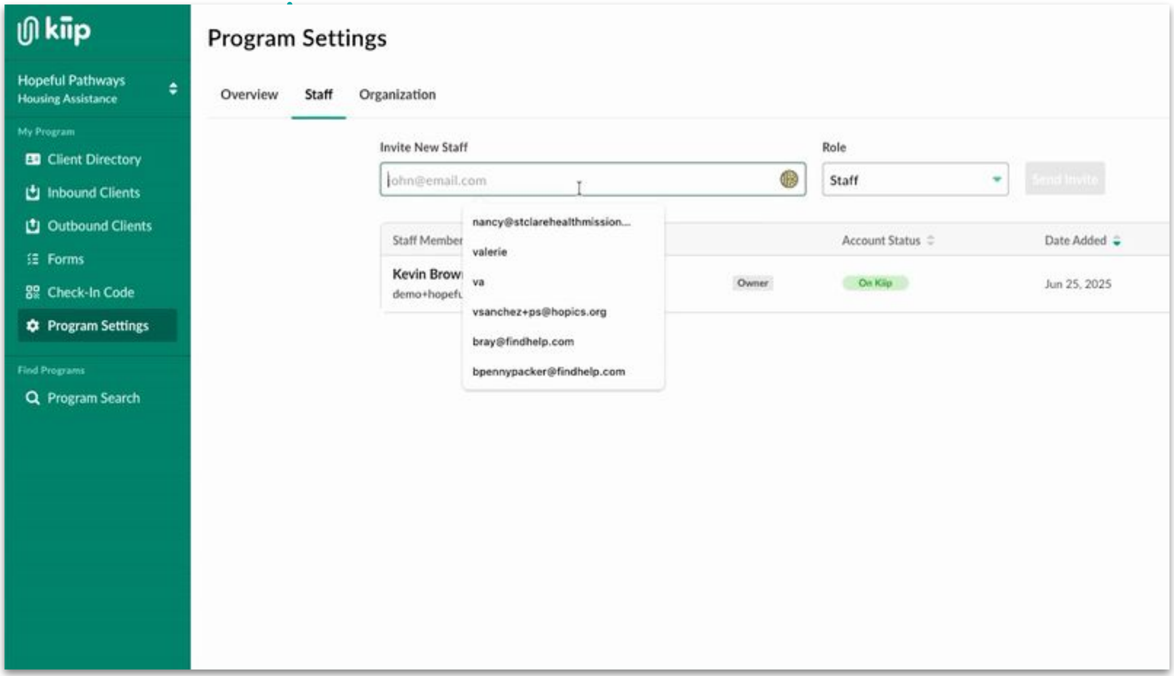
Program Setup (Not on Findhelp)

1. Create a free account at kiip.co/create-account
2. Select ‘I’d like to set up a new organization’
3. Enter organization’s name
4. Add your programs (as many as you want!)
5. Log into Kiip
6. Click ‘Program Settings’ and complete setup



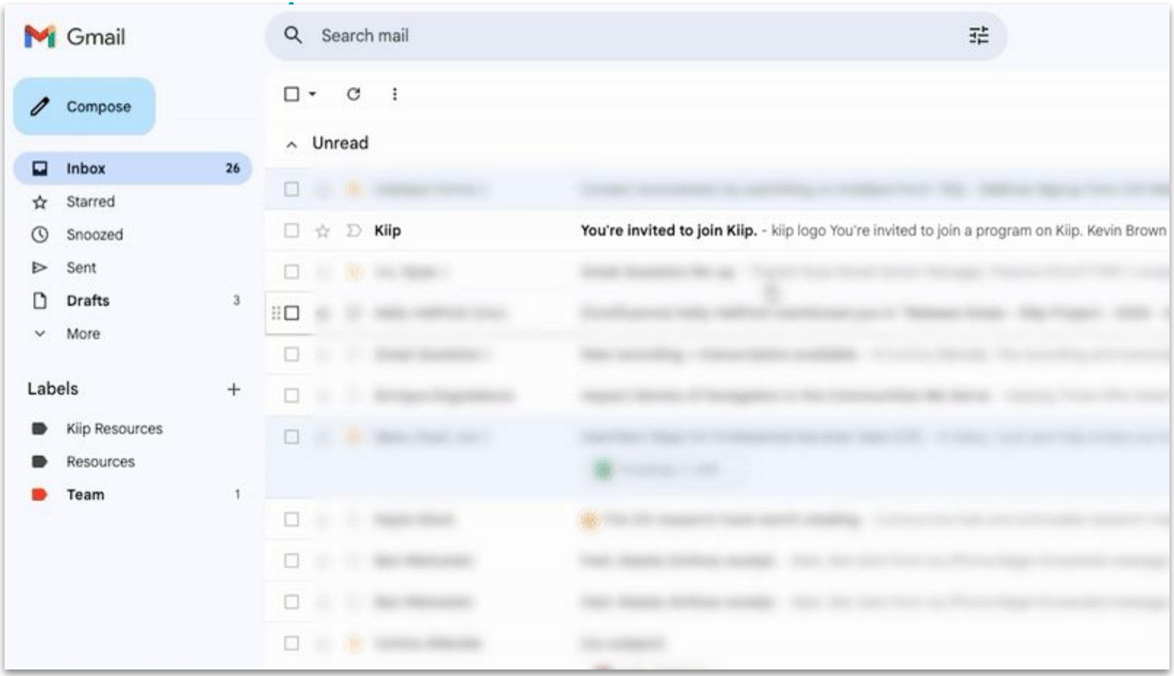
Managing Your Team

1. Go to ‘Program Settings’
2. Enter new staff’s email
3. Select role (admins can invite staff)
4. Send invite



Create Your Account: New Staff

1. Accept email invite
2. Enter first name, last name, and password
3. Click link in email to verify account
4. Accept terms of use



Add & Manage Clients

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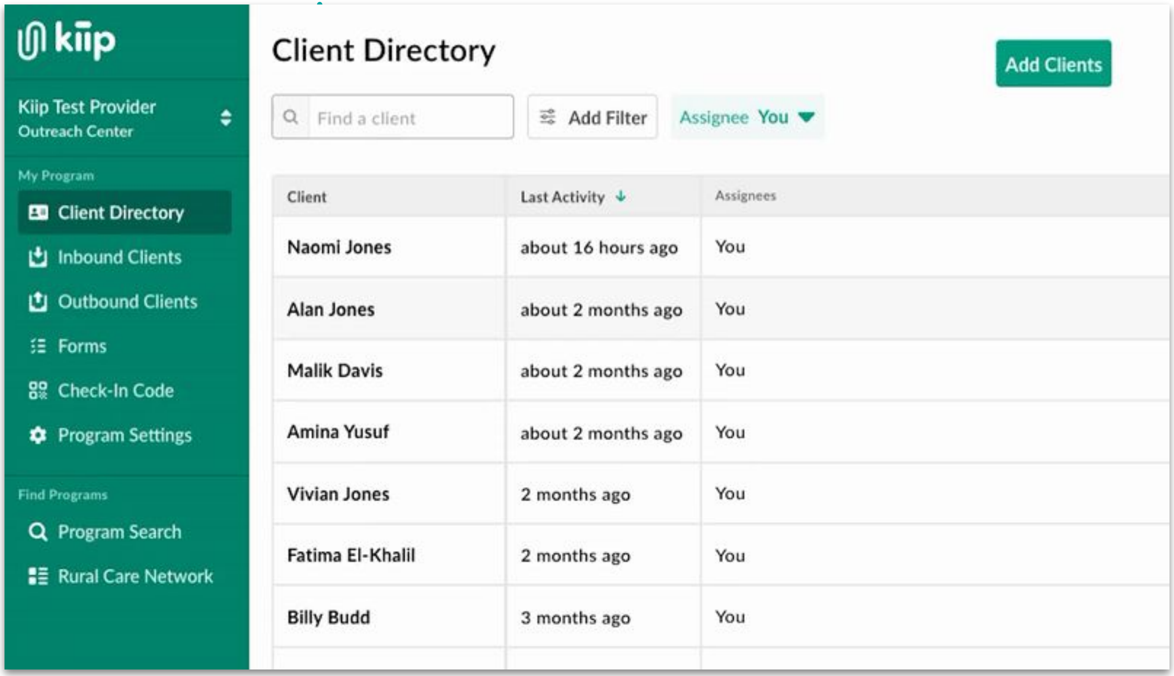
Add Clients

There are two ways to add clients:

1. **Invite Client *(Add Email)***
   Invite via email so clients can access their own "Client Room" and collaborate with you.

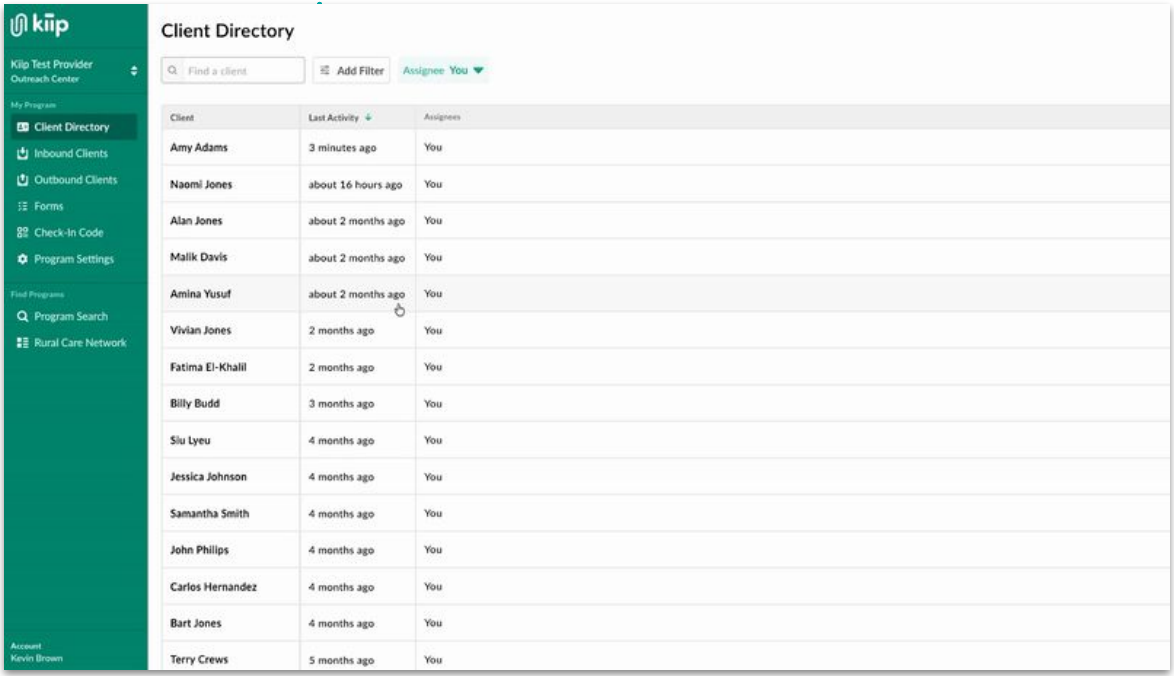
2. **No Client Invite *(No Email)***
   Add clients without an email address for internal tracking.



View, Filter and Assign Clients

- **Viewing & Filtering**
  Land on the directory page, sort by "Last Activity," and filter by profile attributes (ZIP Code, Gender, Language, etc.)

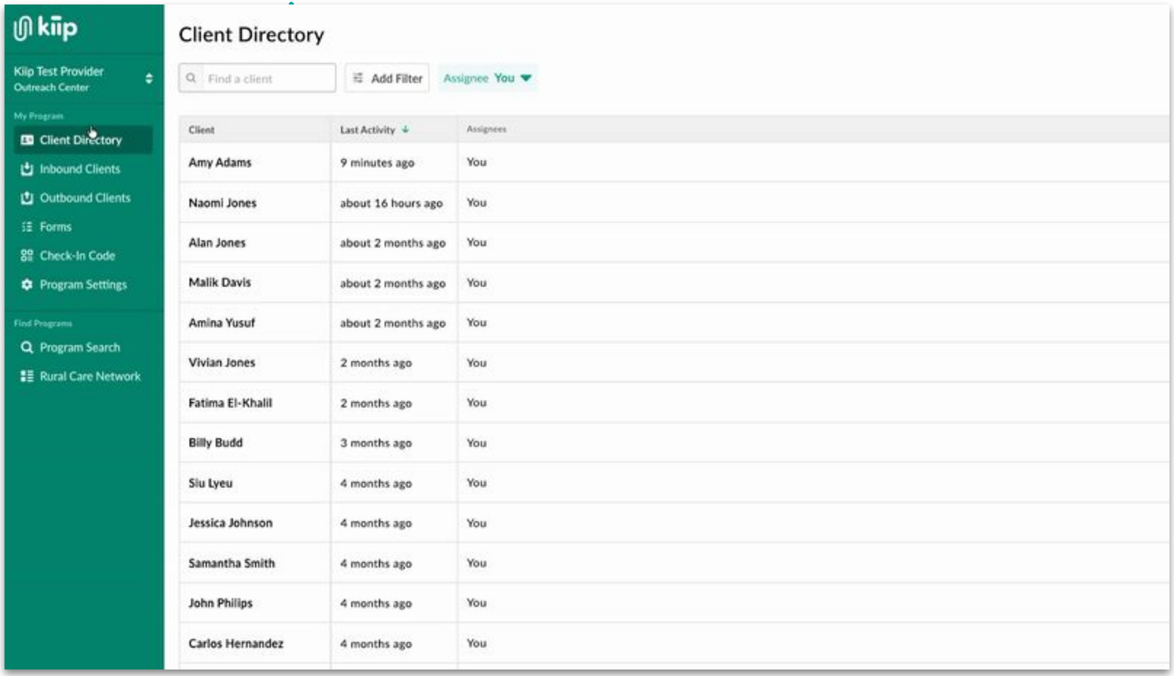
- **Assigning Staff**
  Select "Unassigned" to view unassigned clients and assign them to specific staff members.



Client Profile

- **Profile Info**
  Use the client profile to store contact, personal and household information.

- **What to Know**
  - Clients cannot view or edit the information saved in the profile.
  - At this time Kiip cannot accommodate custom fields.



Room Overview & Tools

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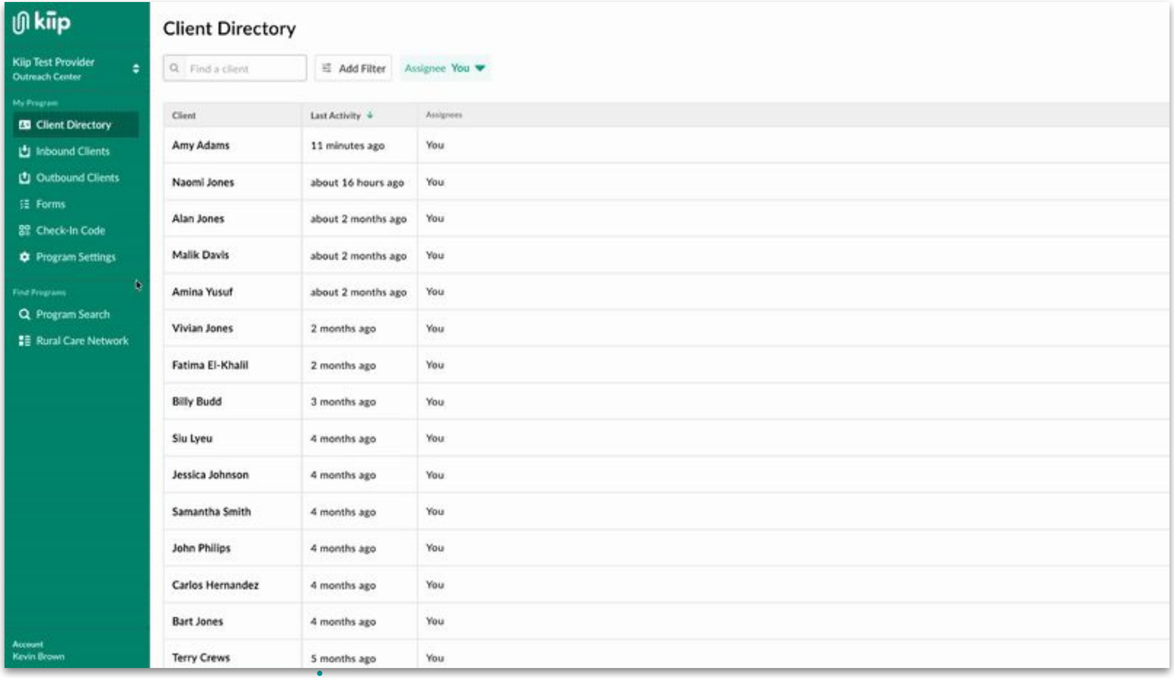
Room Overview

What's a Room? A private, secure space to interact and store information.

- **Working in Rooms**
  Use chat, documents, form filling, notes and referrals.

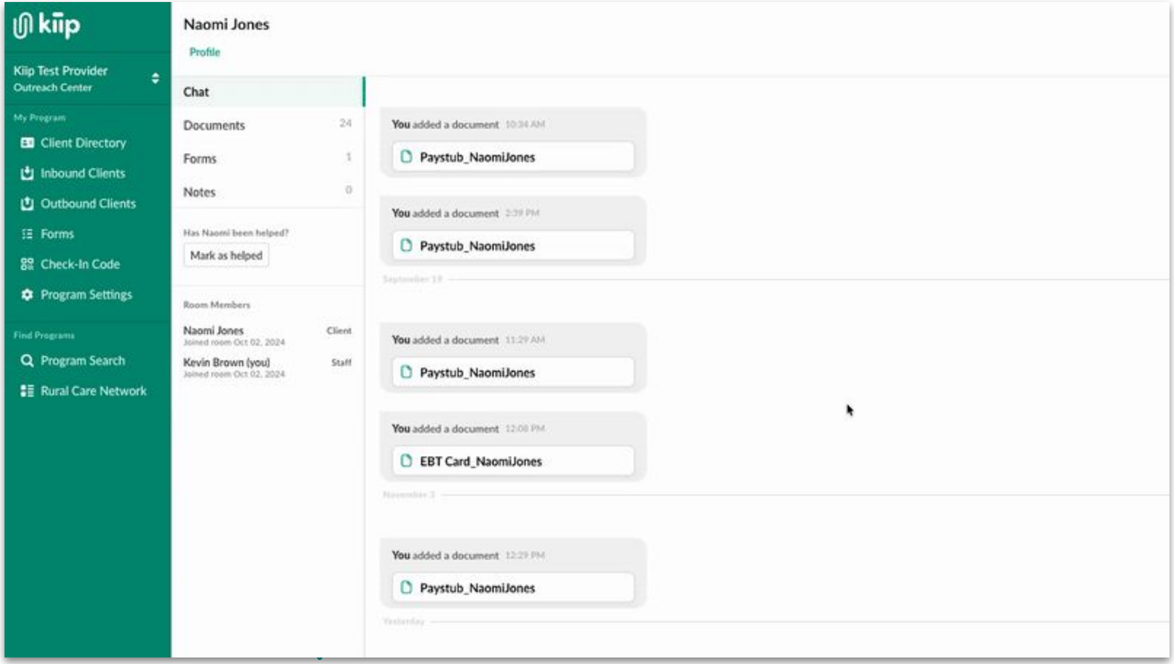
- **Mark as Helped**
  After helping a client, update their 'status' to share with referring provider.



Upload Document

Store and organize digital copies of essential client documents.

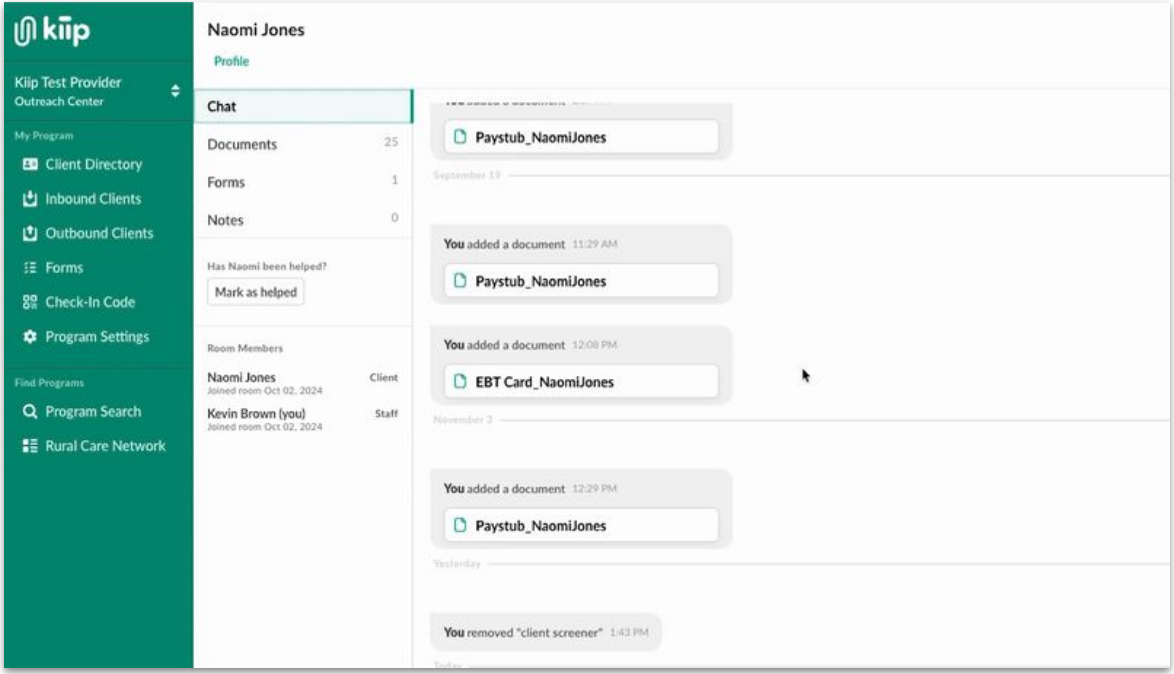
- **Upload**
  Click the '+' icon in the Room Chat to add files.
- **Auto-label**
  Kiip automatically assigns the Document Type (e.g., ID, utility bill).
- **Mobile Upload**
  Snap a photo to upload.



Filling out Forms

Use Kiip's **free** forms feature to digitally complete intake and application paperwork with clients and collect **legally binding e-signatures**.

1. Add a form to a room
2. Complete the client and/or staff sections
3. Find completed forms under the Documents menu

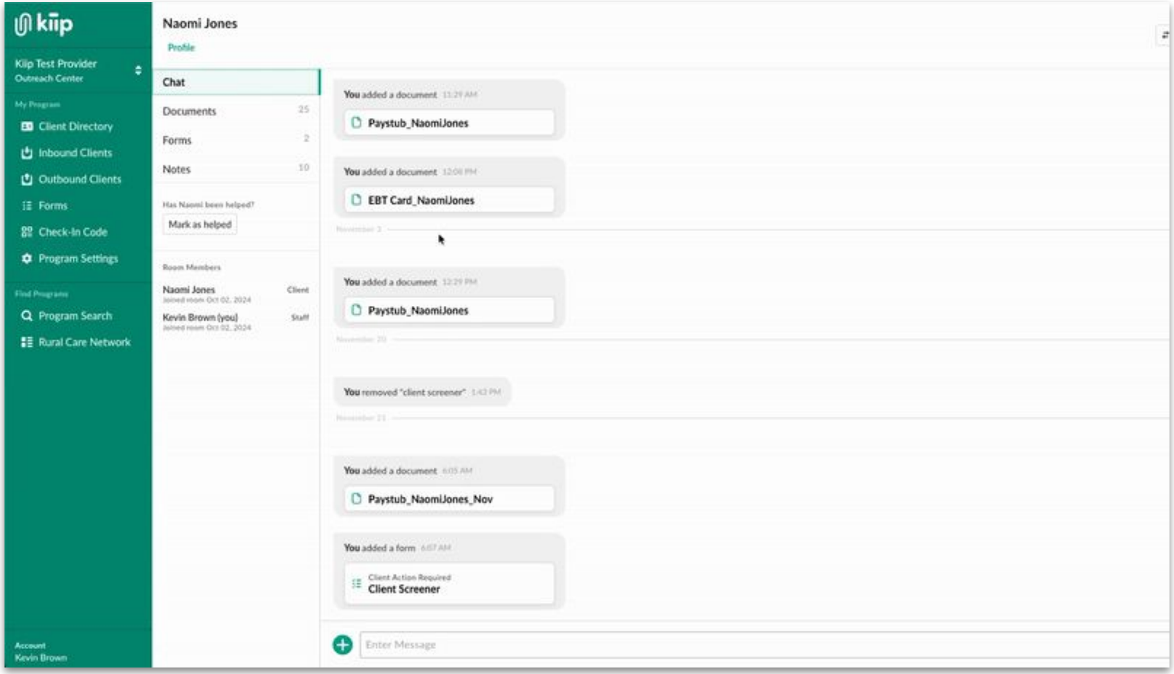


Email Helpdesk+kiip@findhelp.com to set up your forms.

View & Add Private Case Notes

Secure, end-to-end encrypted notes visible only to your team.

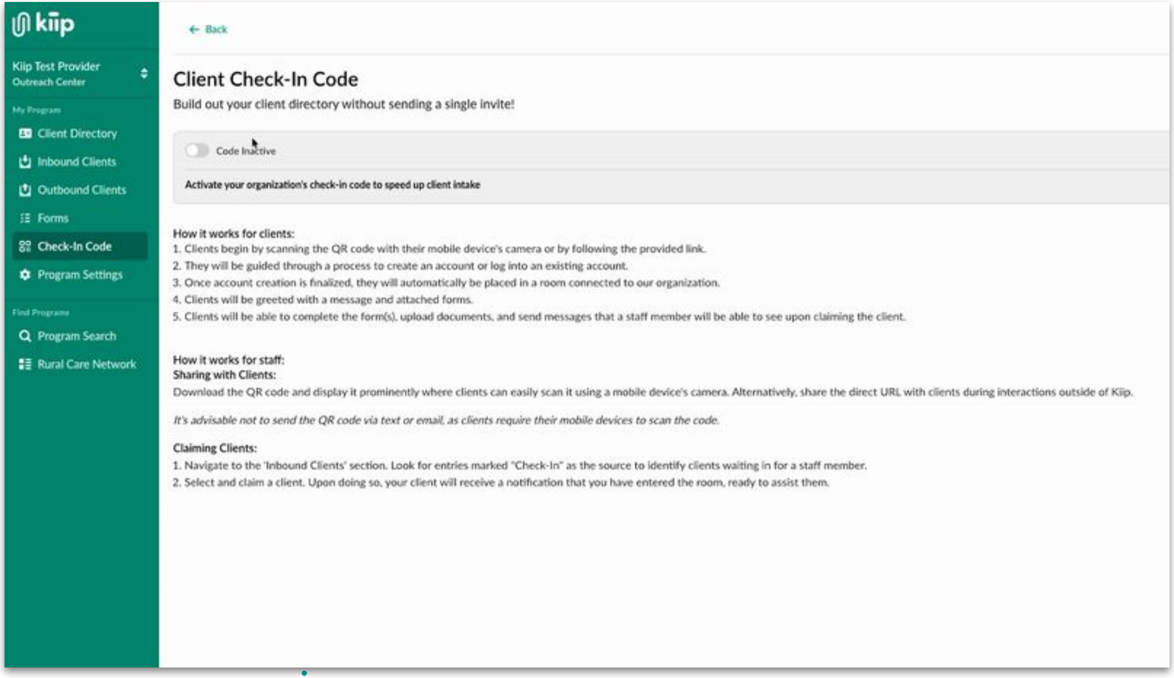
- **Comment**
  General notes / observations.
- **Service**
  Specific service provided.
- **Encounter**
  An unplanned interaction.
- **Meeting**
  A scheduled meeting.



QR Code Check-in Setup

Empower clients to initiate their own intake and account sign-up by scanning a code.

1. Enable code
2. Set welcome message and forms
3. Share QR code or URL
4. Client checks in
5. See Inbound Clients to review new check ins



Inbound & Outbound Clients

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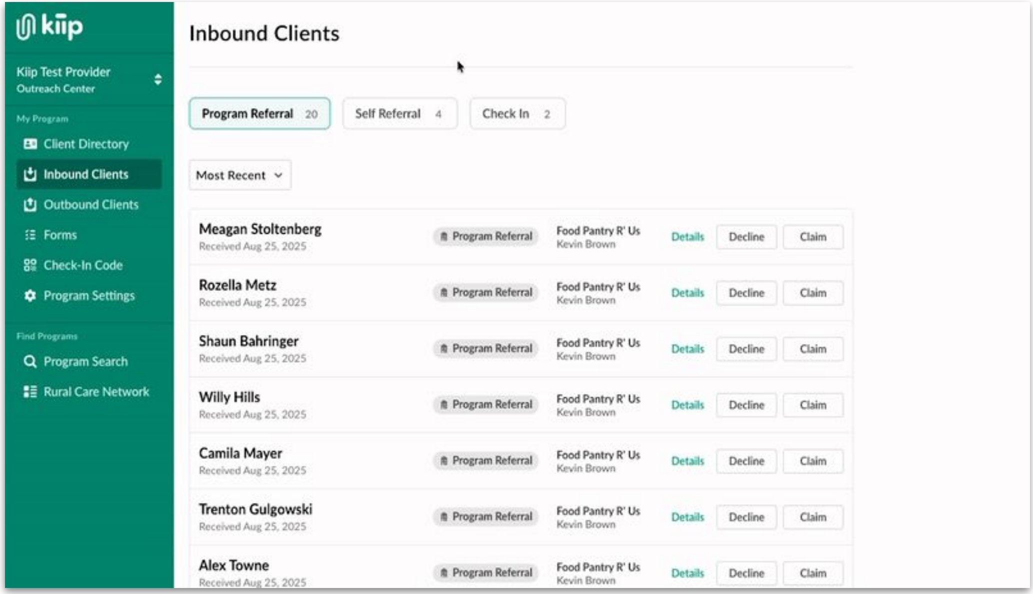
Inbound Clients

If your program is published on the Findhelp network and referrals are enabled—or if you use QR code intake—you will see clients in your **Inbound Clients** table. Review and claim or decline new clients.

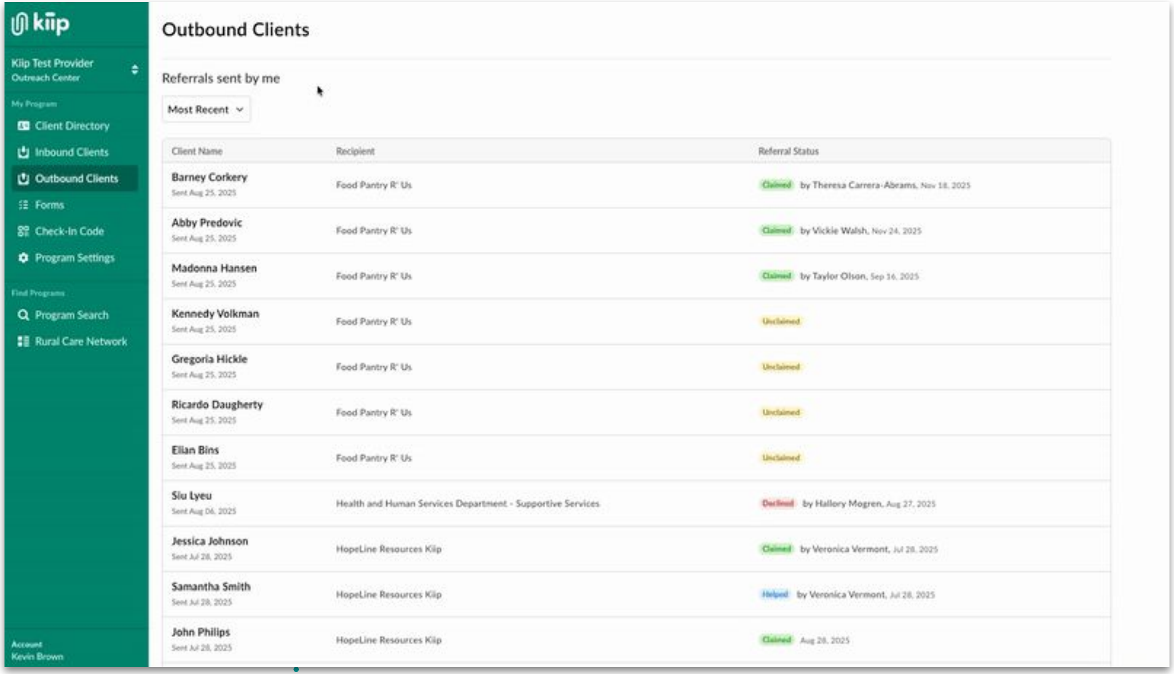
- **Program Referral**
  Another program referred a client
- **Self-Referral**
  An individual referred themselves
- **Check-in**
  A client used the QR code to check in



Outbound Clients

Track the referrals you send and their status in the **Outbound Clients** table.

- **Claimed**
  The receiving program has accepted the referral.
- **Unclaimed**
  The receiving program has not yet accepted the referral.
- **Declined**
  The receiving program is unable to provide services.
- **Helped**
  The client received assistance.



Program Search & Curated Networks

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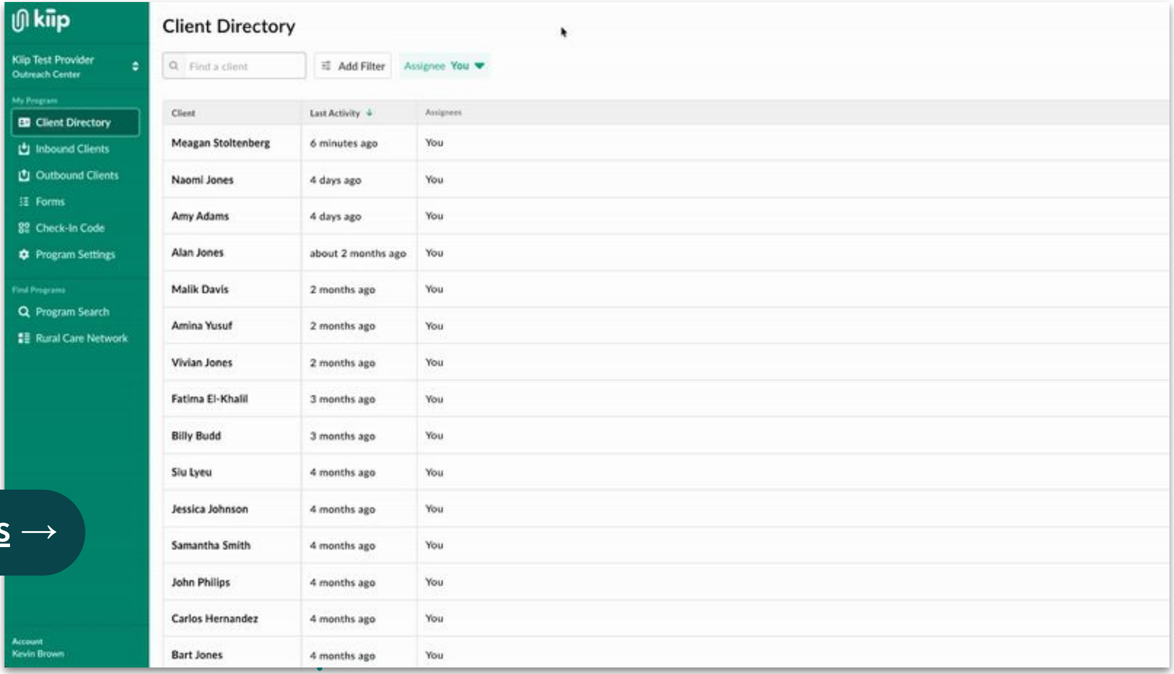
Curated Referral Network

Curated networks help our customers highlight programs within their custom site.

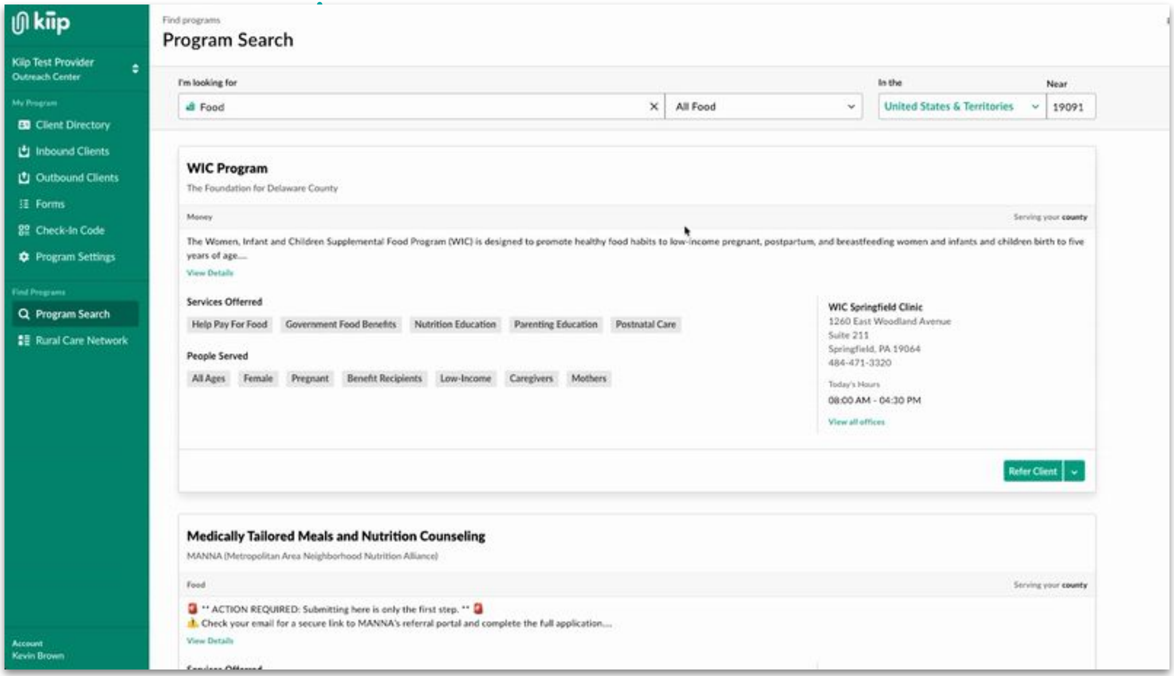
If you see an organization's name in the left navigation, it means your program has been included in their network.



[Learn more about Curated Networks →]

Share & Refer from Program Search

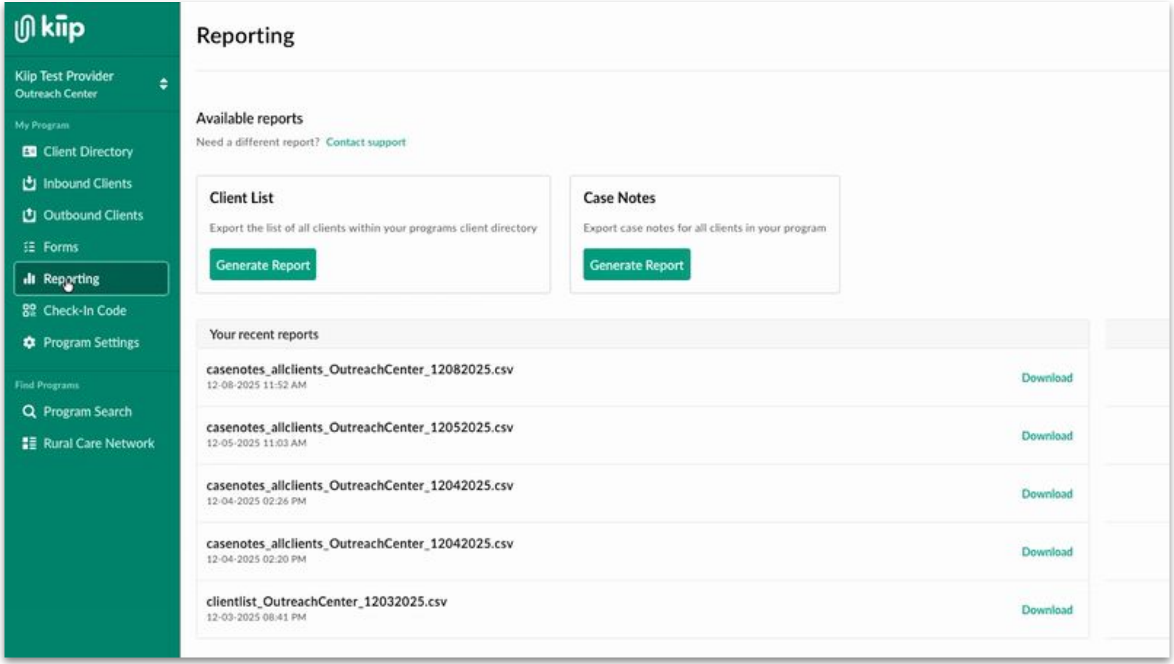
- Use **Program Search** to discover new programs.
- **Refer clients directly** when a program has electronic referrals enabled.
- Or **share a resource** in a client's room so they can follow up on their own.



Reporting

Reporting

1. **Select ‘Reporting’** from left-hand navigation.
2. **Generate a report** and get instant data about your clients or case notes.
3. **Export the data** as a .csv and easily plug it into your other tools and reports.



Questions about Kiip?

Visit our Help Center →

Helpdesk+Kiip@Findhelp.com