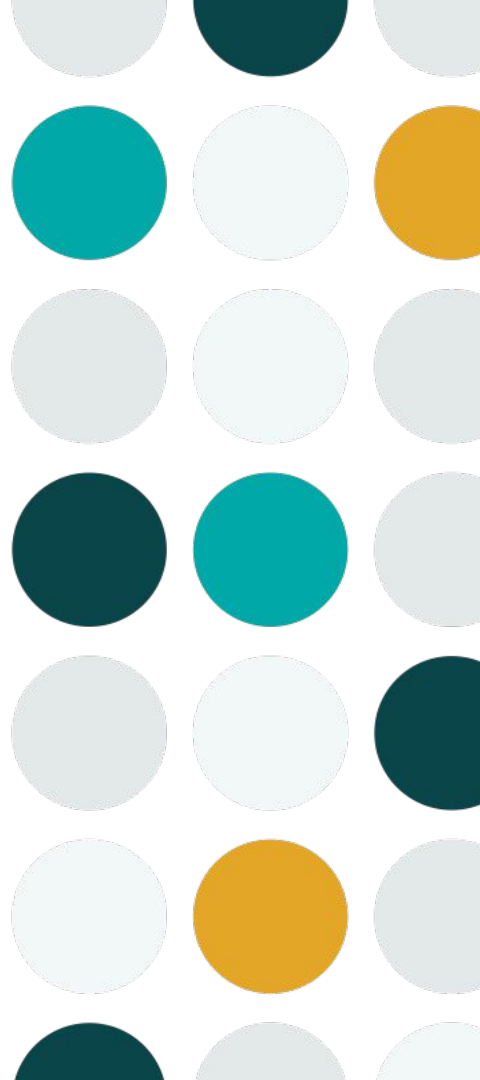




# Getting Started with Kiip – Welcome Guide

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





# Program Setup (on Findhelp)

1. Create a free account at [kiip.co/create-account](https://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!)

kiip Powered by Findhelp

## Getting Started

- 1 Create your account
- 2 Set up your organization
- 3 Set up programs

### Create your Kiip account

Email Address

Use the email address associated with the organization, provider, agency, or program you work with.

Next

< Back



# Program Setup (Not on Findhelp)

1. Create a free account at [kiip.co/create-account](https://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

kiip Powered by Findhelp

### Getting Started

- 1 Create your account
- 2 Set up your organization
- 3 Set up programs

### Create your Kiip account

Email Address

Use the email address associated with the organization, provider, agency, or program you work with.

Next

< Back



# Managing Your Team

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

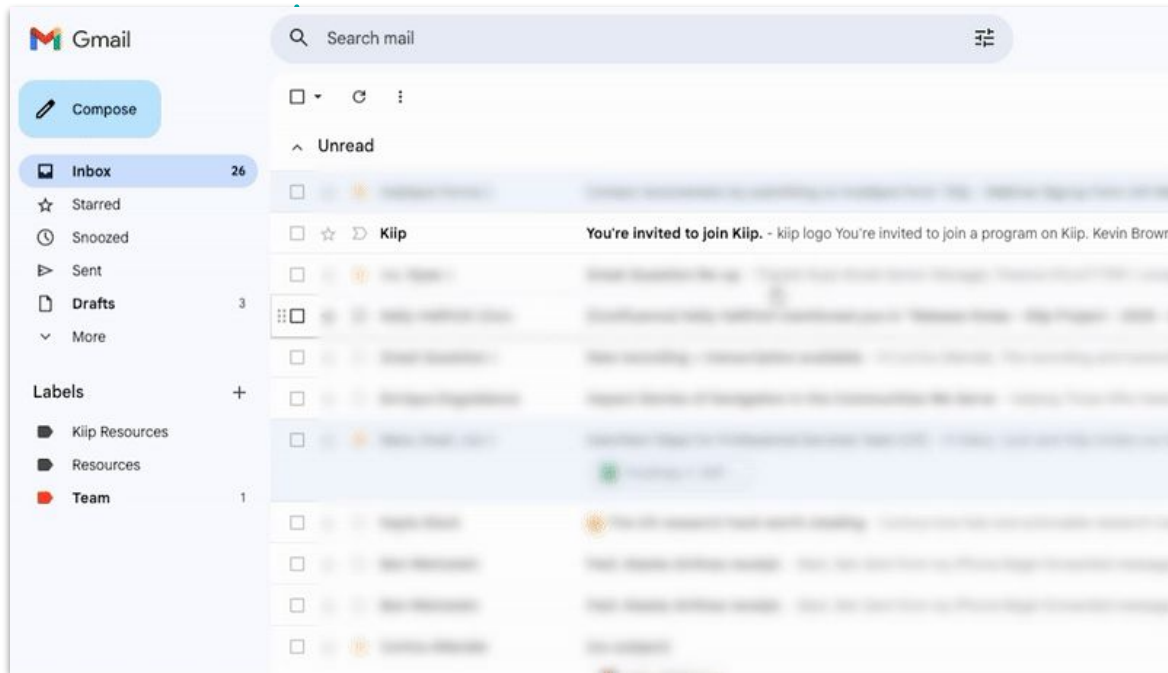
The screenshot shows the 'Program Settings' page in the KiiP system. The left sidebar is dark teal with the KiiP logo and navigation options: 'Hopeful Pathways Housing Assistance', 'My Program' (Client Directory, Inbound Clients, Outbound Clients, Forms, Check-In Code, Program Settings), and 'Find Programs' (Program Search). The main content area is white and titled 'Program Settings' with tabs for 'Overview', 'Staff', and 'Organization'. The 'Staff' tab is active. It features an 'Invite New Staff' form with an email input field containing 'john@email.com', a 'Role' dropdown menu set to 'Staff', and a 'Send Invite' button. A dropdown menu is open below the email field, listing suggestions: 'Staff Member', 'Kevin Brown demo+hopef...', 'nancy@stclarehealthmission...', 'valerie', 'va', 'vsanchez+ps@hopics.org', 'bray@findhelp.com', and 'bpennypacker@findhelp.com'. To the right, a table shows account status and dates.

	Account Status	Date Added
Owner	On KiiP	Jun 25, 2025



# 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





# 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.

The screenshot shows the Kiip Client Directory interface. On the left is a green sidebar with the Kiip logo and navigation options: "Kiip Test Provider Outreach Center", "My Program" (with sub-options: Client Directory, Inbound Clients, Outbound Clients, Forms, Check-In Code, Program Settings), and "Find Programs" (with sub-options: Program Search, Rural Care Network). The main area is titled "Client Directory" and includes a search bar, "Add Filter", "Assignee You", and an "Add Clients" button. Below is a table with columns for Client, Last Activity, and Assignees.

Client	Last Activity ↓	Assignees
Naomi Jones	about 16 hours ago	You
Alan Jones	about 2 months ago	You
Malik Davis	about 2 months ago	You
Amina Yusuf	about 2 months ago	You
Vivian Jones	2 months ago	You
Fatima El-Khalil	2 months ago	You
Billy Budd	3 months ago	You



# 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 Directory

Q Find a client Add Filter Assignee: You

Client	Last Activity	Assignee
Amy Adams	3 minutes ago	You
Naomi Jones	about 16 hours ago	You
Alan Jones	about 2 months ago	You
Malik Davis	about 2 months ago	You
Amina Yusuf	about 2 months ago	You
Vivian Jones	2 months ago	You
Fatima El-Khali	2 months ago	You
Billy Budd	3 months ago	You
Siu Lyeu	4 months ago	You
Jessica Johnson	4 months ago	You
Samantha Smith	4 months ago	You
John Philips	4 months ago	You
Carlos Hernandez	4 months ago	You
Bart Jones	4 months ago	You
Terry Crews	5 months ago	You



# 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.

**Client Directory**

Find a client | Add Filter | Assignee: You

Client	Last Activity	Assignees
Amy Adams	9 minutes ago	You
Naomi Jones	about 16 hours ago	You
Alan Jones	about 2 months ago	You
Malik Davis	about 2 months ago	You
Amina Yusuf	about 2 months ago	You
Vivian Jones	2 months ago	You
Fatima El-Khalli	2 months ago	You
Billy Budd	3 months ago	You
Siu Lyeu	4 months ago	You
Jessica Johnson	4 months ago	You
Samantha Smith	4 months ago	You
John Phillips	4 months ago	You
Carlos Hernandez	4 months ago	You

# Room Overview & Tools





# 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.

**Client Directory**

Find a client | Add Filter | Assignee: You

Client	Last Activity	Assignees
Amy Adams	11 minutes ago	You
Naomi Jones	about 16 hours ago	You
Alan Jones	about 2 months ago	You
Malik Davis	about 2 months ago	You
Amina Yusuf	about 2 months ago	You
Vivian Jones	2 months ago	You
Fatima El-Khalil	2 months ago	You
Billy Budd	3 months ago	You
Siu Lyeu	4 months ago	You
Jessica Johnson	4 months ago	You
Samantha Smith	4 months ago	You
John Phillips	4 months ago	You
Carlos Hernandez	4 months ago	You
Bart Jones	4 months ago	You
Terry Crews	5 months ago	You



# 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.

The screenshot displays the Kiip interface for a chat room with Naomi Jones. The left sidebar shows navigation options like 'Client Directory', 'Inbound Clients', and 'Forms'. The main chat area shows a list of documents with counts: Documents (24), Forms (1), and Notes (0). Below this, there's a section for 'Room Members' listing Naomi Jones (Client) and Kevin Brown (Staff). The chat history shows several document uploads, each with a timestamp and a preview of the document name, such as 'Paystub\_NaomiJones' and 'EBT Card\_NaomiJones'.



# 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

The screenshot displays the Kiip interface for a chat room with Naomi Jones. The left sidebar is a dark green navigation menu with the Kiip logo at the top. Below the logo, it lists 'Kiip Test Provider Outreach Center' and 'My Program' with sub-items: 'Client Directory', 'Inbound Clients', 'Outbound Clients', 'Forms', 'Check-In Code', and 'Program Settings'. Under 'Find Programs', there are 'Program Search' and 'Rural Care Network'. The main content area is titled 'Naomi Jones Profile' and has a 'Chat' tab selected. It shows a list of items: 'Documents' (25), 'Forms' (1), and 'Notes' (0). Below this is a section 'Has Naomi been helped?' with a 'Mark as helped' button. The 'Room Members' section lists 'Naomi Jones' (Client, joined Oct 02, 2024) and 'Kevin Brown (you)' (Staff, joined Oct 02, 2024). The chat history shows several messages: 'You added a document' (11:29 AM) with 'Paystub\_NaomiJones', 'You added a document' (12:08 PM) with 'EBT Card\_NaomiJones', and 'You added a document' (12:29 PM) with 'Paystub\_NaomiJones'. A final message says 'You removed "client screener"' (1:43 PM).

Email [Helpdesk+kiip@findhelp.com](mailto: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.

The screenshot displays the Klip software interface for a case profile. The left sidebar shows navigation options: 'Klip Test Provider Outreach Center', 'My Program' (Client Directory, Inbound Clients, Outbound Clients, Forms, Check-In Code, Program Settings), 'Find Programs' (Program Search, Rural Care Network), and 'Account Kevin Brown'. The main content area is titled 'Naomi Jones Profile' and includes a 'Chat' tab, 'Documents' (25), 'Forms' (2), and 'Notes' (10). A 'Mark as helped?' button is visible. Below, a 'Room Members' section lists 'Naomi Jones' (Client, joined Oct 02, 2024) and 'Kevin Brown (you)' (Staff, joined Oct 02, 2024). The right pane shows a chat history with messages: 'You added a document: 11:29 AM' (Paystub\_NaomiJones), 'You added a document: 12:08 PM' (EBT Card\_NaomiJones), 'You added a document: 12:29 PM' (Paystub\_NaomiJones), 'You removed "client screener": 1:43 PM', 'You added a document: 6:03 AM' (Paystub\_NaomiJones\_Nov), and 'You added a form: 6:07 AM' (Client Action Required Client Screener). An 'Enter Message' input field is at the bottom.



# 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

**Client Check-In Code**  
Build out your client directory without sending a single invite!

Code InActive

Activate your organization's check-in code to speed up client intake

**How it works for clients:**

1. Clients begin by scanning the QR code with their mobile device's camera or by following the provided link.
2. They will be guided through a process to create an account or log into an existing account.
3. Once account creation is finalized, they will automatically be placed in a room connected to our organization.
4. Clients will be greeted with a message and attached forms.
5. Clients will be able to complete the form(s), upload documents, and send messages that a staff member will be able to see upon claiming the client.

**How it works for staff:**

**Sharing with Clients:**  
Download the QR code and display it prominently where clients can easily scan it using a mobile device's camera. Alternatively, share the direct URL with clients during interactions outside of Kiip.

*It's advisable not to send the QR code via text or email, as clients require their mobile devices to scan the code.*

**Claiming Clients:**

1. Navigate to the 'Inbound Clients' section. Look for entries marked "Check-in" as the source to identify clients waiting in for a staff member.
2. Select and claim a client. Upon doing so, your client will receive a notification that you have entered the room, ready to assist them.

# Inbound & Outbound Clients





# 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

**KIP**  
Klip Test Provider  
Outreach Center

My Program

- Client Directory
- Inbound Clients**
- Outbound Clients
- Forms
- Check-In Code
- Program Settings

Find Programs

- Program Search
- Rural Care Network

### Inbound Clients

Program Referral 20 | Self Referral 4 | Check In 2

Most Recent ▾

<b>Meagan Stoltenberg</b> Received Aug 25, 2025	Program Referral	Food Pantry R' Us Kevin Brown	Details	Decline	Claim
<b>Rozella Metz</b> Received Aug 25, 2025	Program Referral	Food Pantry R' Us Kevin Brown	Details	Decline	Claim
<b>Shaun Bahringer</b> Received Aug 25, 2025	Program Referral	Food Pantry R' Us Kevin Brown	Details	Decline	Claim
<b>Willy Hills</b> Received Aug 25, 2025	Program Referral	Food Pantry R' Us Kevin Brown	Details	Decline	Claim
<b>Camila Mayer</b> Received Aug 25, 2025	Program Referral	Food Pantry R' Us Kevin Brown	Details	Decline	Claim
<b>Trenton Gulgowski</b> Received Aug 25, 2025	Program Referral	Food Pantry R' Us Kevin Brown	Details	Decline	Claim
<b>Alex Towne</b> Received Aug 25, 2025	Program Referral	Food Pantry R' Us Kevin Brown	Details	Decline	Claim



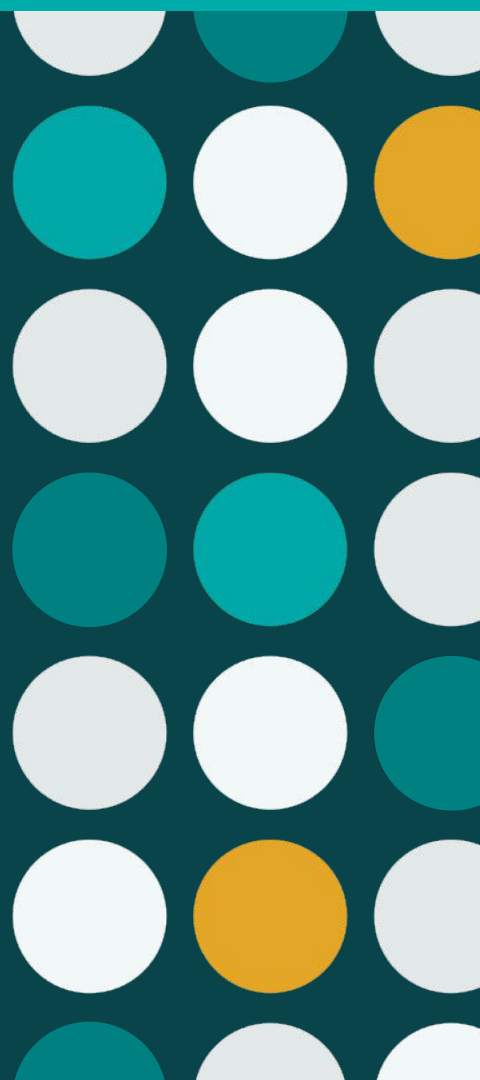
# Outbound Clients

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.

Client Name	Recipient	Referral Status
<b>Barney Corkery</b> Sent Aug 25, 2025	Food Pantry R' Us	<b>Claimed</b> by Theresa Carrera-Abrams, Nov 18, 2025
<b>Abby Predovic</b> Sent Aug 25, 2025	Food Pantry R' Us	<b>Claimed</b> by Vickie Walsh, Nov 24, 2025
<b>Madonna Hansen</b> Sent Aug 25, 2025	Food Pantry R' Us	<b>Claimed</b> by Taylor Olson, Sep 16, 2025
<b>Kennedy Volkman</b> Sent Aug 25, 2025	Food Pantry R' Us	<b>Unclaimed</b>
<b>Gregoria Hickie</b> Sent Aug 25, 2025	Food Pantry R' Us	<b>Unclaimed</b>
<b>Ricardo Daugherty</b> Sent Aug 25, 2025	Food Pantry R' Us	<b>Unclaimed</b>
<b>Elian Bins</b> Sent Aug 25, 2025	Food Pantry R' Us	<b>Unclaimed</b>
<b>Siu Lyeu</b> Sent Aug 08, 2025	Health and Human Services Department - Supportive Services	<b>Declined</b> by Hallory Mogren, Aug 27, 2025
<b>Jessica Johnson</b> Sent Jul 28, 2025	HopeLine Resources Kip	<b>Claimed</b> by Veronica Vermont, Jul 28, 2025
<b>Samantha Smith</b> Sent Jul 28, 2025	HopeLine Resources Kip	<b>Helped</b> by Veronica Vermont, Jul 28, 2025
<b>John Phillips</b> Sent Jul 28, 2025	HopeLine Resources Kip	<b>Claimed</b> Aug 28, 2025

# Program Search & Curated Networks





# 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](#) →

Client	Last Activity	Assignees
Meagan Stoltenberg	6 minutes ago	You
Naomi Jones	4 days ago	You
Amy Adams	4 days ago	You
Alan Jones	about 2 months ago	You
Malik Davis	2 months ago	You
Amina Yusuf	2 months ago	You
Vivian Jones	2 months ago	You
Fatima El-Khalil	3 months ago	You
Billy Budd	3 months ago	You
Siu Lyeu	4 months ago	You
Jessica Johnson	4 months ago	You
Samantha Smith	4 months ago	You
John Phillips	4 months ago	You
Carlos Hernandez	4 months ago	You
Bart Jones	4 months ago	You



# 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.

The screenshot shows the 'kiip' Program Search interface. On the left is a green sidebar with navigation options: 'My Program' (Client Directory, Inbound Clients, Outbound Clients, Forms, Check-In Code, Program Settings) and 'Find Programs' (Program Search, Rural Care Network). The main content area is titled 'Find programs Program Search'. It features search filters: 'I'm looking for' (Food), 'All Food', 'In the' (United States & Territories), and 'Near' (19091). Two program cards are visible. The first is 'WIC Program' by 'The Foundation for Delaware County', serving the county. It includes a description, 'View Details' link, 'Services Offered' (Help Pay For Food, Government Food Benefits, Nutrition Education, Parenting Education, Postnatal Care), 'People Served' (All Ages, Female, Pregnant, Benefit Recipients, Low-Income, Caregivers, Mothers), and contact info for 'WIC Springfield Clinic' (1260 East Woodland Avenue, Suite 211, Springfield, PA 19064, 484-671-3320, Today's Hours: 08:00 AM - 04:30 PM, View all offices). A 'Refer Client' button is at the bottom right. The second card is 'Medically Tailored Meals and Nutrition Counseling' by 'MANNA (Metropolitan Area Neighborhood Nutrition Alliance)', also serving the county. It includes an 'ACTION REQUIRED' message: '\*\* ACTION REQUIRED: Submitting here is only the first step. \*\*' and a note to check email for a secure link to MANNA's referral portal.

# 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.

**Reporting**

Available reports  
Need a different report? [Contact support](#)

**Client List**  
Export the list of all clients within your programs client directory  
[Generate Report](#)

**Case Notes**  
Export case notes for all clients in your program  
[Generate Report](#)

Your recent reports

casenotes_allclients_OutreachCenter_12082025.csv 12-08-2025 11:52 AM	<a href="#">Download</a>
casenotes_allclients_OutreachCenter_12052025.csv 12-05-2025 11:03 AM	<a href="#">Download</a>
casenotes_allclients_OutreachCenter_12042025.csv 12-04-2025 02:26 PM	<a href="#">Download</a>
casenotes_allclients_OutreachCenter_12042025.csv 12-04-2025 02:20 PM	<a href="#">Download</a>
clientlist_OutreachCenter_12032025.csv 12-03-2025 08:41 PM	<a href="#">Download</a>



# Questions about Kiip?

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[Visit our Help Center](#) →

*Helpdesk+Kiip@Findhelp.com*

