Powered by **FindHelp**

STAFF USER GUIDE

Getting Started with Kiip

Last updated Oct 22, 2024

Welcome to Kiip!

Kiip (powered by Findhelp) enables community and care organizations to efficiently manage clients, referrals, and information. At the same time, our software platform empowers individuals to control and store their personal data to more easily connect with local services and resources.

Table of Contents

Key Terms

Roles

- **Staff** — Individuals who work at an organization and use Kiip with their clients. Staff members can include Navigators, Case Managers, Social Workers, and other roles.
- **Program Admin** — Staff members with the ability to manage the organization's settings on Kiip and add new team members.
- **Clients** — Individuals who receive support from organizations using Kiip.
- **Assistant** — A trusted friend or family member that an individual can add to their account to assist on their behalf.

Product

- **Room** — A shared collaborative workspace between an organization and client.
- **Referral** — When an organization sends or receives a client from another organization through Kiip.
- **Inbound Clients** — New clients to your organization who may be waiting to receive services or have a staff member assigned to help them.
- **Outbound Clients** — Clients who have been referred outside of your organization and may already be receiving services or are waiting to receive them.
- **Notes** — A private log of information attached to each room.

Getting Started

Account management

Activate your account

Program admins will receive an invitation directly from Kiip to activate their accounts. For now, Kiip is being launched exclusively for a small group of selected organizations.

Create your account

Once the program admin activates their Kiip account they can begin to invite other team members.

To start using Kiip, first accept the invite from your program's admin. If you don't see the email and your admin can't resend it, please reach out to helpdesk+kiip@findhelp.com to request a new invite.

Update program info

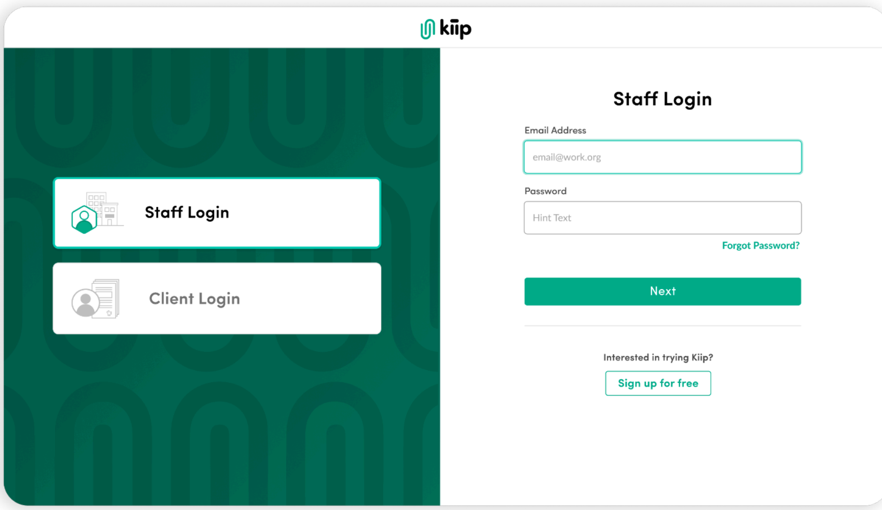
To see updates to your program in Kiip, you first need to make those changes in Findhelp. In the future, you'll be able to update directly in Kiip.

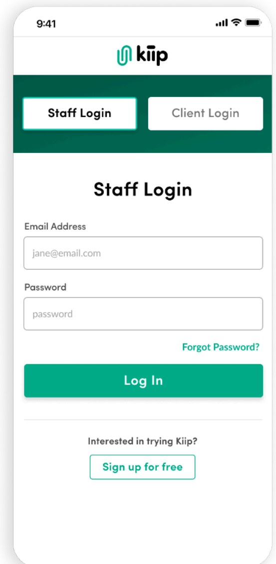
- **Change program name** — If your program name is incorrect, login to Findhelp and follow these steps to update it.
- **Turn on referrals** — To receive referrals for your program, log in to your Findhelp account and follow these steps to choose how programs and individuals can contact you.

Did you know? *For organizational users and their clients who choose to create an account, we are committed to protecting your privacy and personal information. You can review our privacy policy here.*

Log into account

Once you have completed the setup of your Kiip account, you are ready to log in! After creating your account, you will be directed to kiip.co to log in through the staff portal.





Account security *If you use Kiip on a shared device, such as a tablet, to collaborate with clients, be sure to log out of each client account before starting to work with a new client.*

Additionally, always log out of your own account after each use on a shared device. Do not store your password in a keychain to protect the information in your account.

Account settings

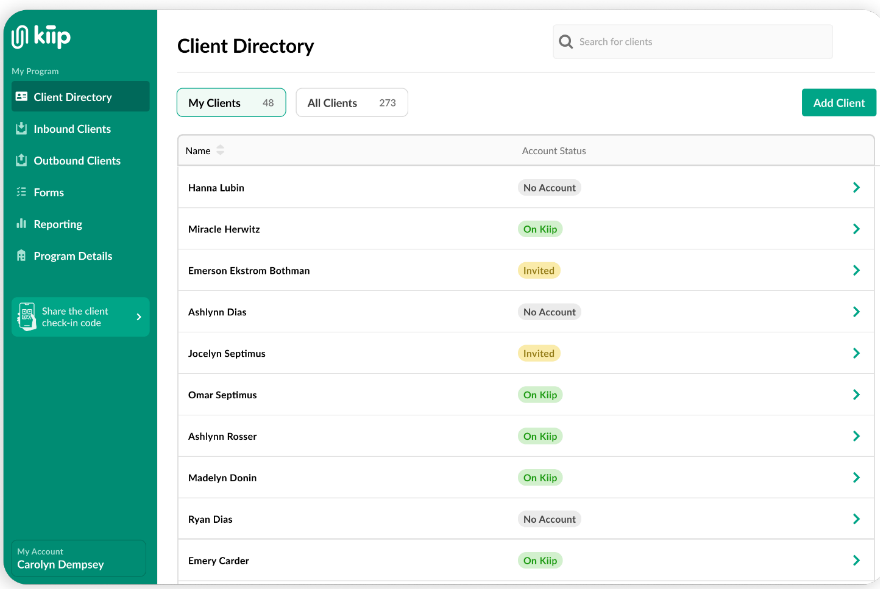
Program Admins can navigate to 'My Program' in the left hand navigation to open Program Settings. From there, they can add new team members or contact support to request a program update.

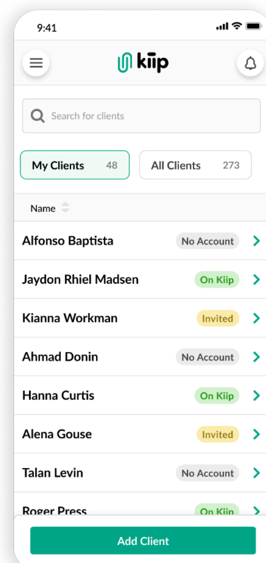
Client Management

Client directory

When you first log into Kiip, you will land on your client directory. The client directory contains two sections: 'My Clients' and 'All Clients.'

Under 'My Clients,' you will find all the clients you have added to Kiip or client rooms (shared workspaces) you have joined. 'All Clients' is a list of all the clients added to Kiip by any staff member in your program.





Add client

We encourage clients to add an email address to manage their own Kiip account. This enables them to fully utilize Kiip, accessing digital copies of their documents and chatting with providers like you. If your client needs help creating an email address, follow the steps in the appendix (page 18) to help them create a Gmail account.

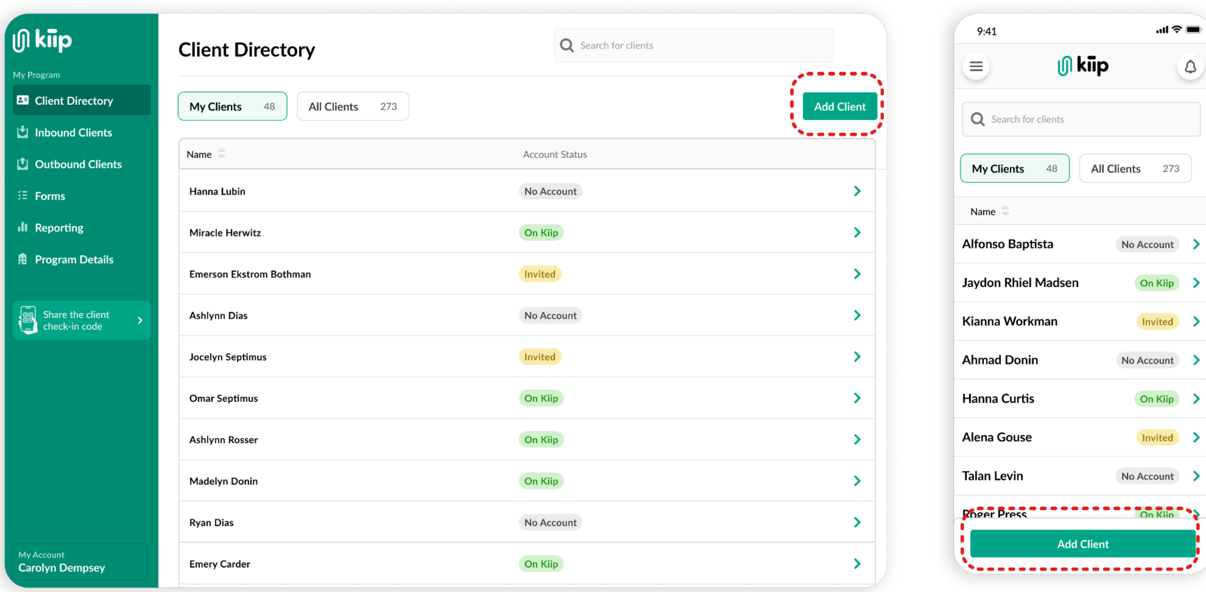
You can work with clients in two ways:

- Invite them via email (preferred).
- Add a client to the Kiip system without an email address.

Add client (with email)

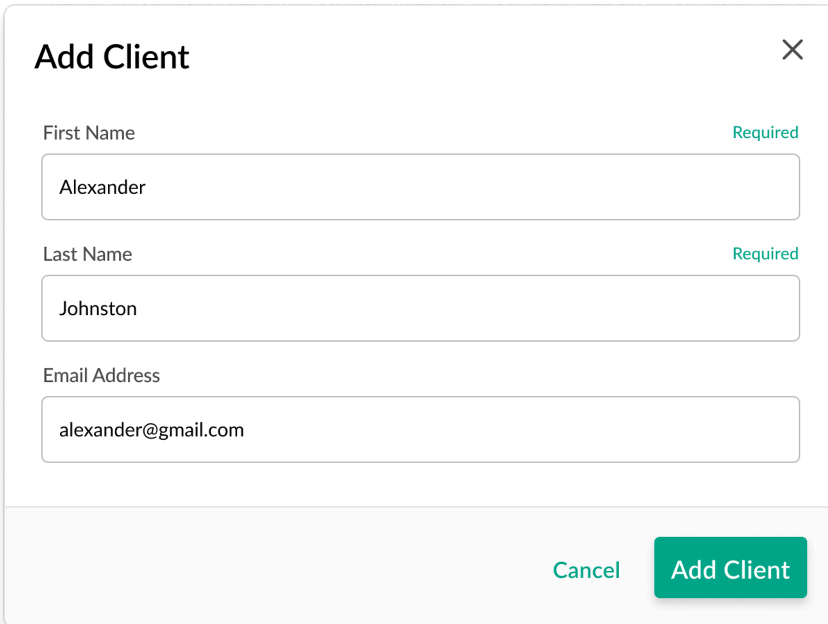
Step 1

Click the 'Add Client' button in the top right of the client directory.



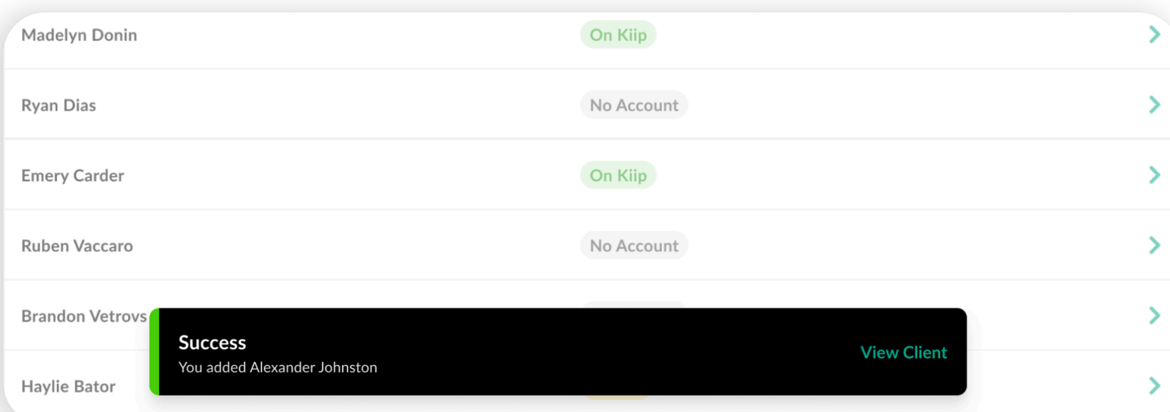
Step 2

Fill in client info and send invite.



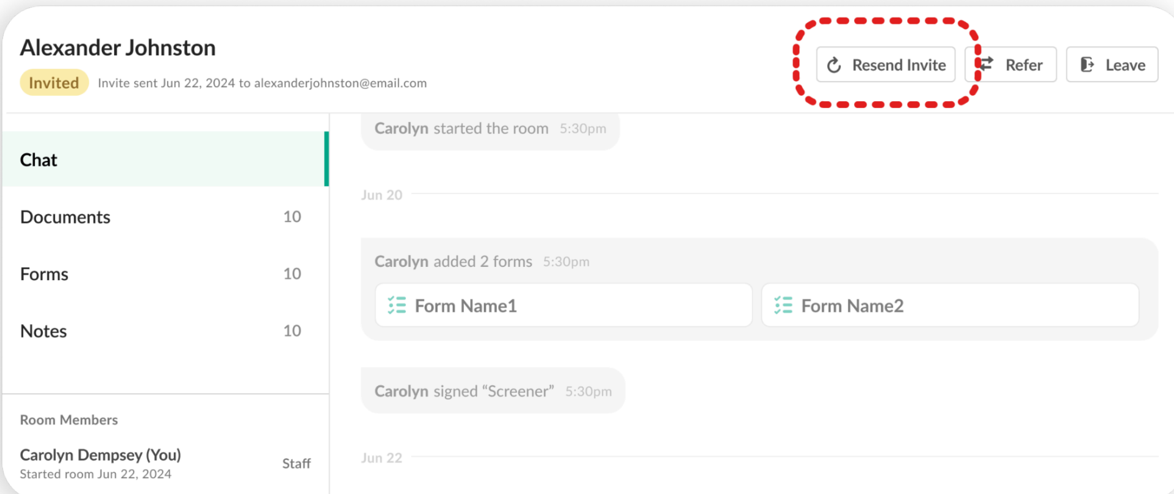
Step 3

After you click the 'Add Client' button, the client's name will appear in your client list under 'Client Directory.' You can go straight to the client's secure room by clicking 'View Client' in the confirmation message.



Resend an invite

To resend a client invite, first navigate to the client's room from the Client Directory. Enter the client's room and click the 'Resend' button in the header or under the menu on mobile.



Add client (without email)

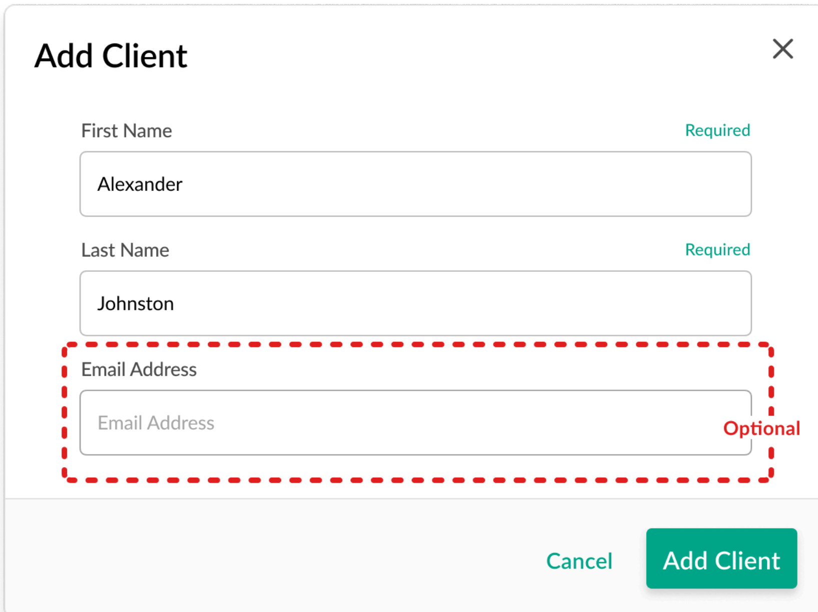
In the event someone refuses to create an email address, you can still use Kiip to store their documents or complete their paperwork digitally.

Step 1

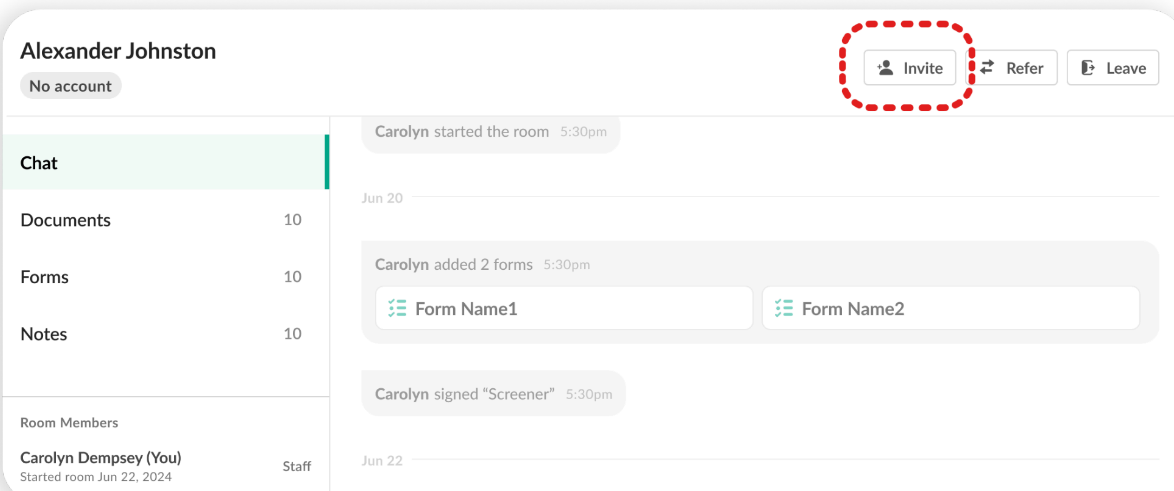
Click the 'Add Client' button in the top right of the client directory.

Step 2

The email field is optional if a client does not provide an email address.



If they decide to access Kiip in the future, click 'Resend' in the room header or menu on mobile and add an email address to invite them to create an account.



Client account status

Clients will appear in the client directory table with one of three statuses:

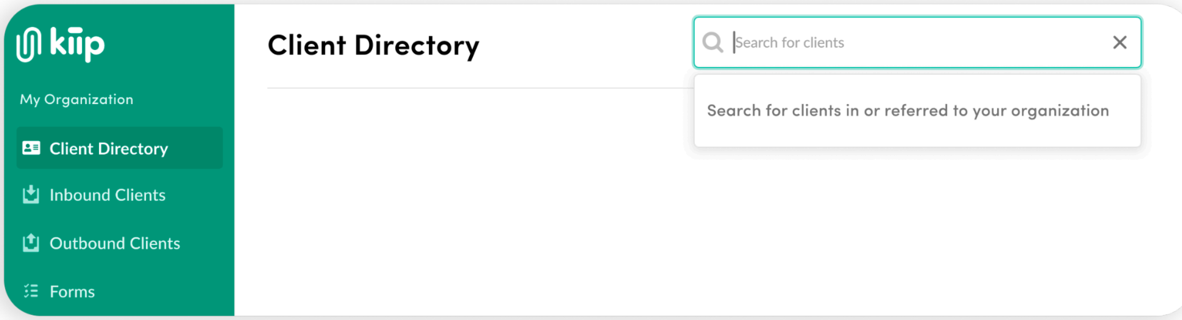
- **'On Kiip'** if they have accepted the invite to join.
- **'Invited**' until they accept the invite to join.

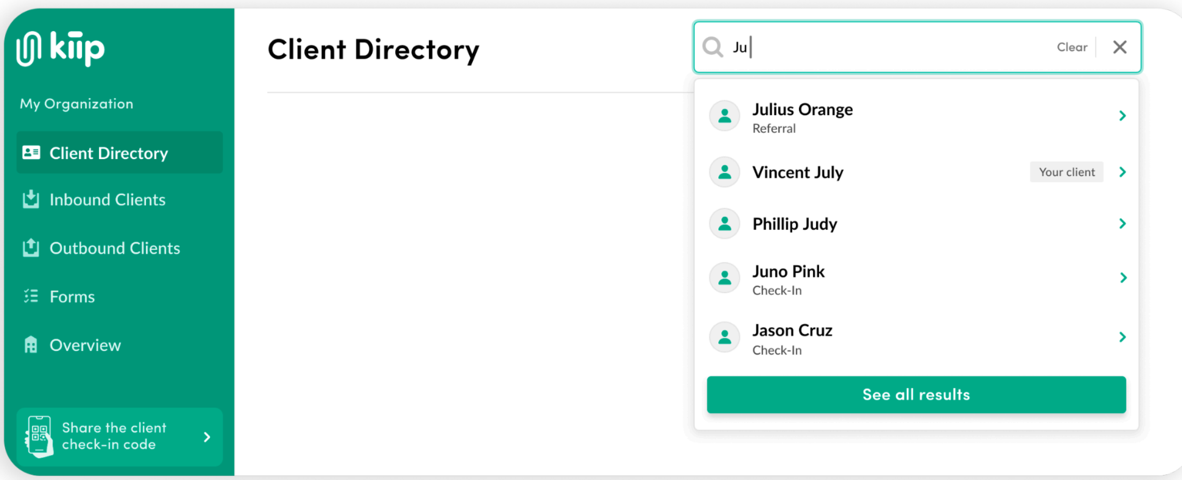
- **'No Account'** if they were added to Kiip without an email address

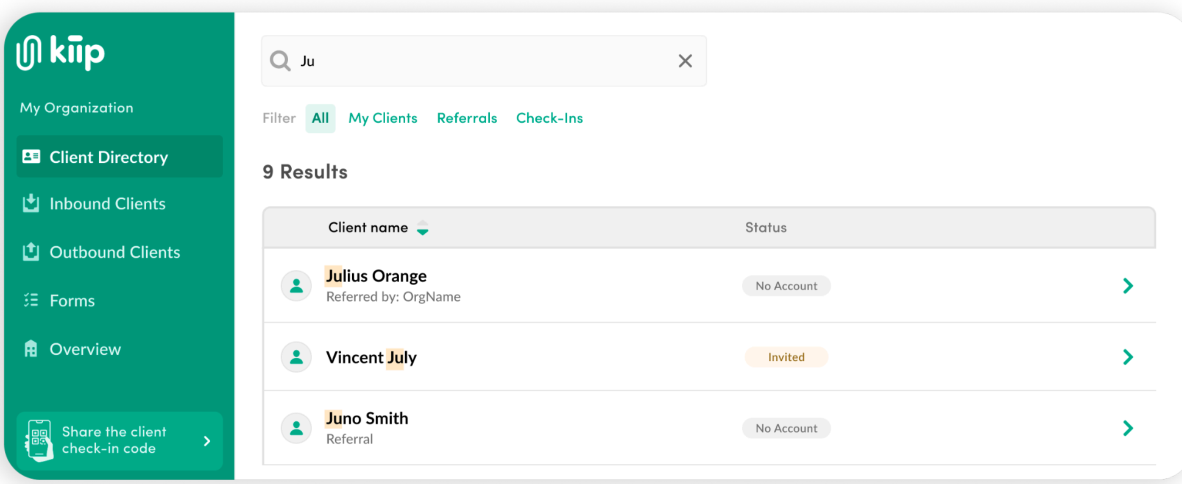
Name	Account Status
Hanna Lubin	No Account
Miracle Herwitz	On Kiip
Emerson Ekstrom Bothman	Invited

Client search

In the Client Directory, you can quickly use the search function to find any client you or your program serves, as well as all inbound and outbound referrals.







Remove a client from Kiip

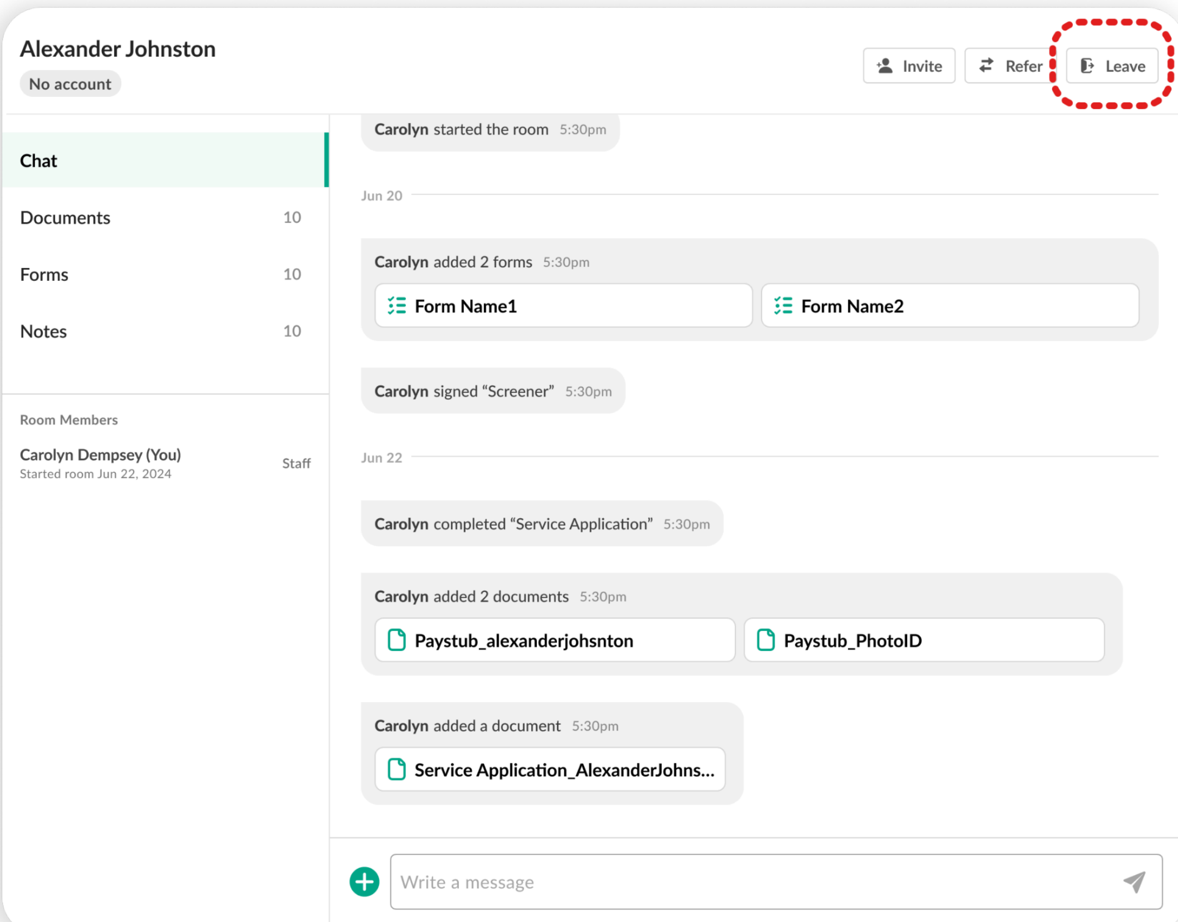
In Kiip, we call removing a client leaving a room. When you leave a room, the client no longer appears on your list of clients.

Step 1

Enter the client's room under 'My Clients'.

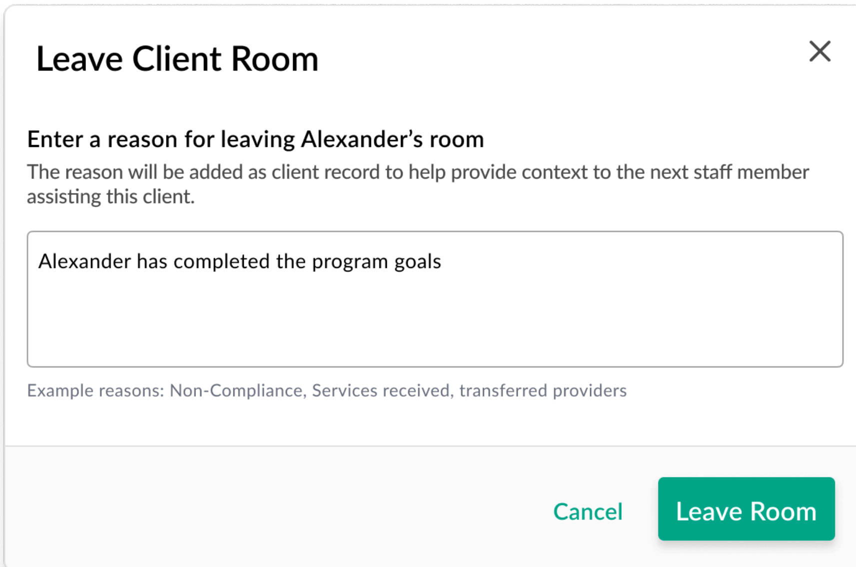
Step 2

Click on 'Leave' in the room header to remove the person from your client list.



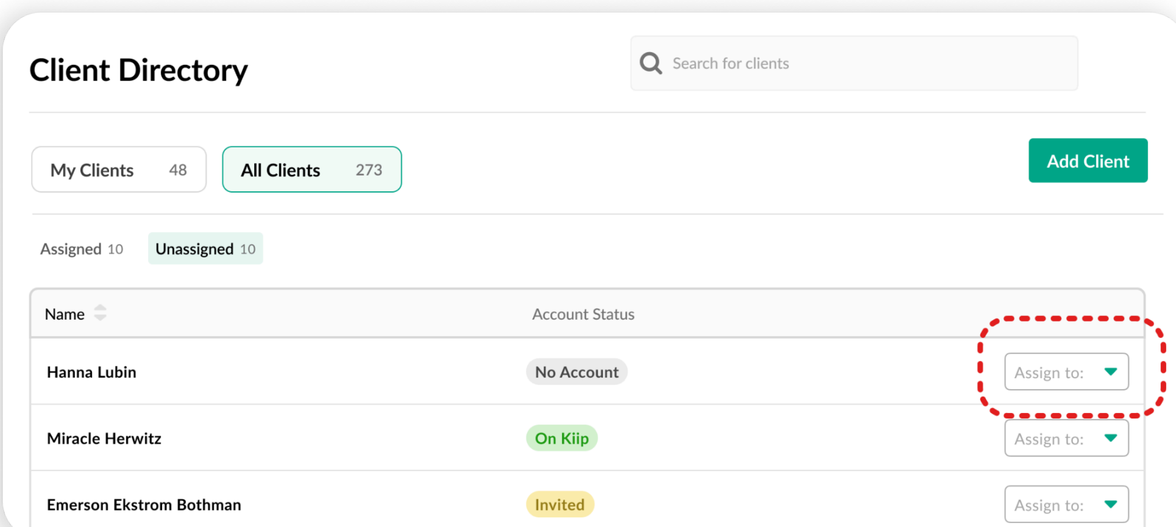
Step 3

Enter the reason you're leaving the client room. This note will be added to client notes and is visible to all staff members that enter the room.



Rejoin room

When you're the last staff member to leave a room, the client becomes unassigned. You can find unassigned clients on the 'All Clients' tab and 'Unassigned' filter. Enter the room to assign yourself to the client if they require services again. All of the documents saved in the room will be there when you rejoin it.



Permanently delete a client

To permanently delete a client from Kiip, follow these steps:

- Send a support request with the client's first and last name to helpdesk+kiip@findhelp.com.
- Include the client's email if you provided it.

Note: If the client signed up using the email you invited them with, they will need to request account deletion themselves at helpdesk+kiip@findhelp.com.

Inbound Clients

Inbound clients are clients that enter your program through referrals or check in. Any staff member within the program will be able to claim or decline an inbound client.

In addition to directly adding clients to Kiip, your program can receive new clients in three ways:

- **Check in** — When a client scans a program's QR code (or clicks a program's url) to check in and wait for a navigator to assist them.
- **Program Referral** —When a referral from a different program on Kiip or Findhelp.
- **Self Referral** —When a seeker uses findhelp.org to discover a program and refer themselves without the assistance of a navigator.

View Client Details & Screener

Click 'Details' from your client directory. Review the information in the referral including any attached screeners and determine whether you will claim or decline the client.

After claiming a client, the screener will be displayed within the client room as a "document"

Claim or Decline

You have the option to Claim or Decline inbound clients. If you claim the client you will automatically be added to their room where you can begin to assist them. If you decline the client they will not be added to your client directory and the sending program will be notified that the referral was declined.

Inbound Referrals

Any inbound referrals will appear in your Inbound Client table with the status 'Program Referral' of 'Self Referral' depending on the source of the referral.

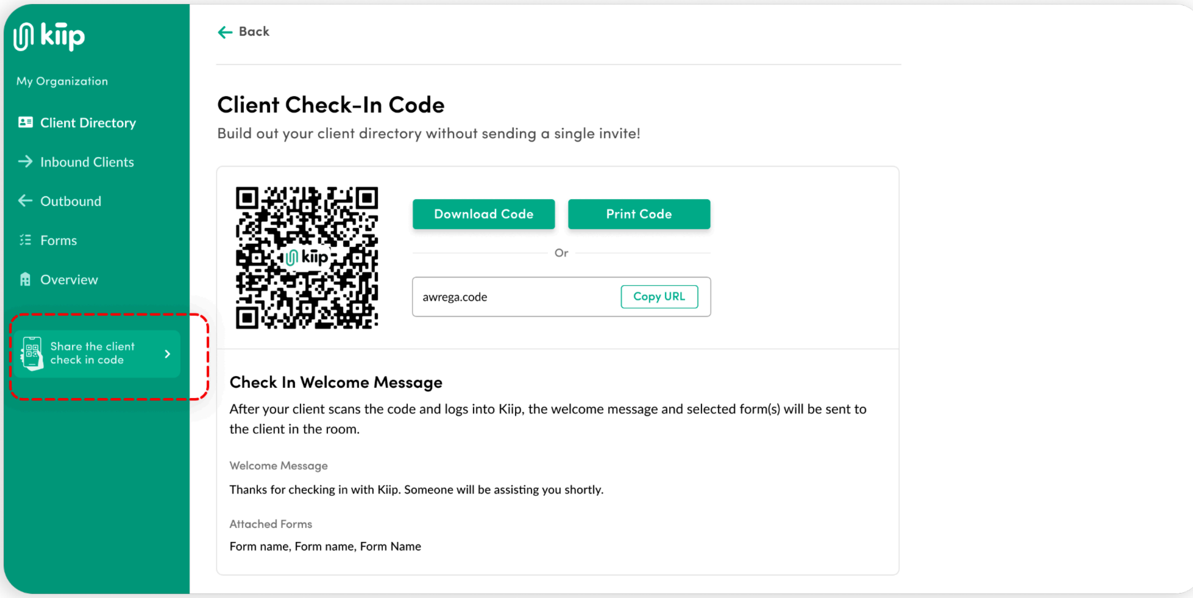
Go to the Referrals section of the guide to learn more about managing and sending inbound and outbound referrals.

Check-in clients

Check-ins help clients initiate the Kiip account sign-up process on their own to expedite intake with your program.

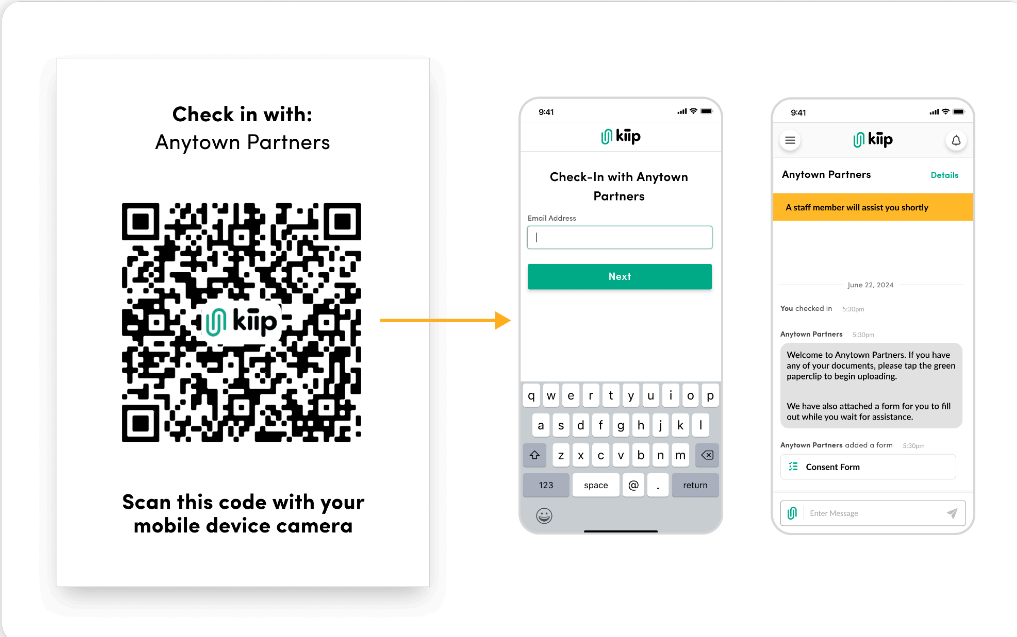
Step 1
Click on 'Share the client check-in code' in the left-hand navigation. You can download and/or print a QR code or copy a URL to send directly to clients.

Note: Sending a URL of the QR code is best for email or text communication. If you digitally send the QR code, the recipient won't be able to scan it with their phone.



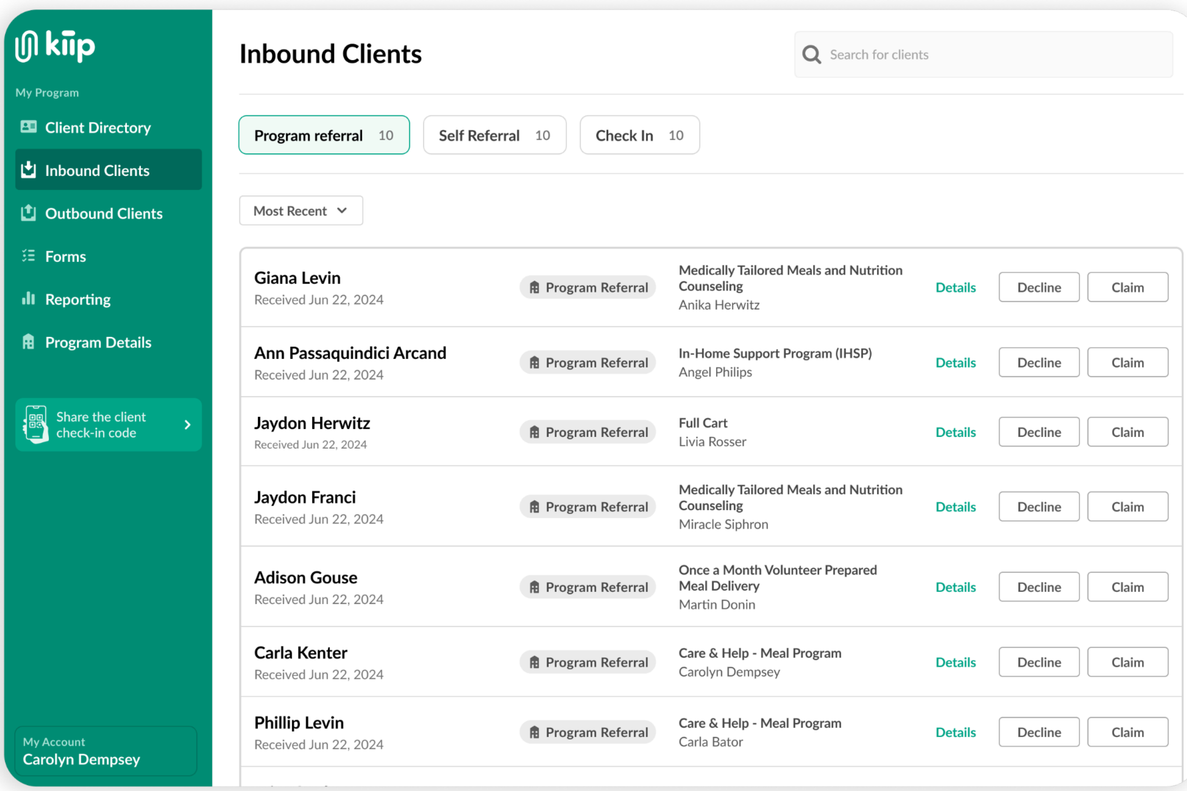
Step 2

Your clients scans the QR code or clicks the URL leading to a custom signup page. Upon account creation, they're instantly added to a secure room. Your admin has the ability to customize this room with a personalized welcome message and any required forms.



Step 3

Clients who create an account using the QR code or URL will be listed under the 'Check-in' tab on the inbound clients page.



Working with Clients

What's a room?

A room is a collaborative workspace where you can fill out forms, exchange documents, and communicate with your clients.

A room for every client

Every client added to Kiip gets a room. Even before a client accepts their invite to Kiip, you are able to work on their behalf in their room. That way, you can use Kiip to complete paperwork with a client or upload documents for them before they have a chance to accept their invite.

Note: Once they do accept their invite, all documents, forms, and messages will be waiting for them in the room.

Enter a room

You can join the room of any client working with your program from the 'Client Directory' page in Kiip. That way, you can provide coverage for a team member who isn't available to help one of their clients. Click the client row to enter the room and begin helping the client.

Leave room

You can leave a room when you are done helping that client. When you're the last staff member to leave a room, the client becomes unassigned. You can find unassigned clients on the 'All Clients' tab and 'Unassigned' filter. Enter the room to assign yourself to the client if they require services again.

Chat with clients

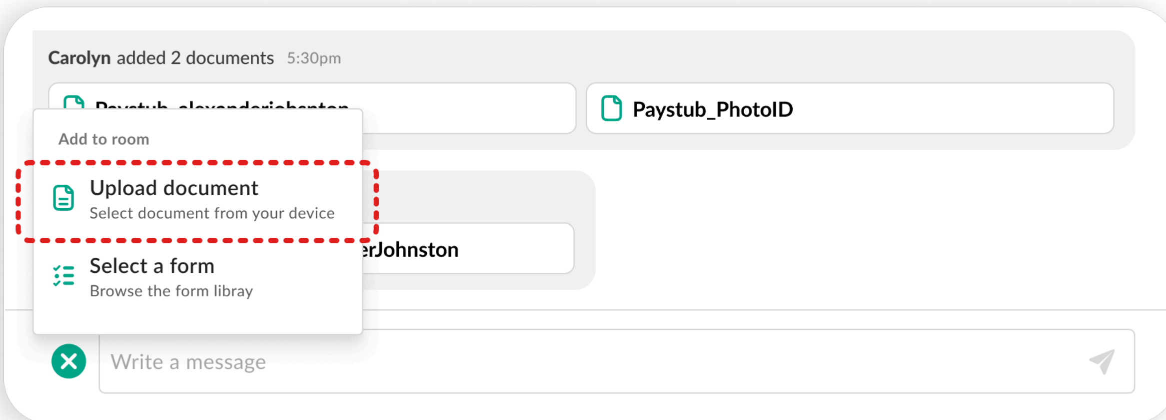
You can chat with clients and other members of the room. Simply enter a message, click send, and wait for a reply. The room tracks all conversation history.

Manage documents

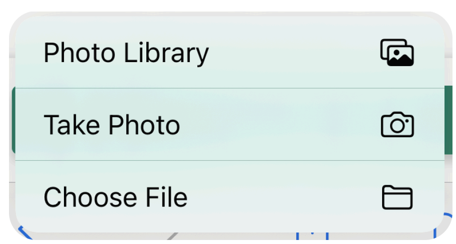
Upload a document

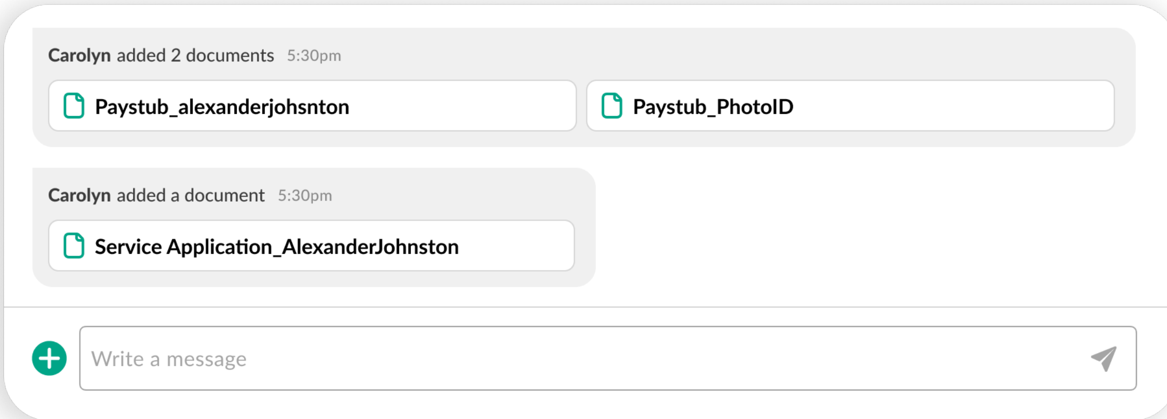
You or your clients can upload documents directly to a room.

Click the paperclip in the chat box, then select 'Upload New Document.' Alternatively, from the right-hand side of the room, in the documents module, click the "Add Document" button. If you are on a desktop computer, you will be prompted to select a document on your local device.



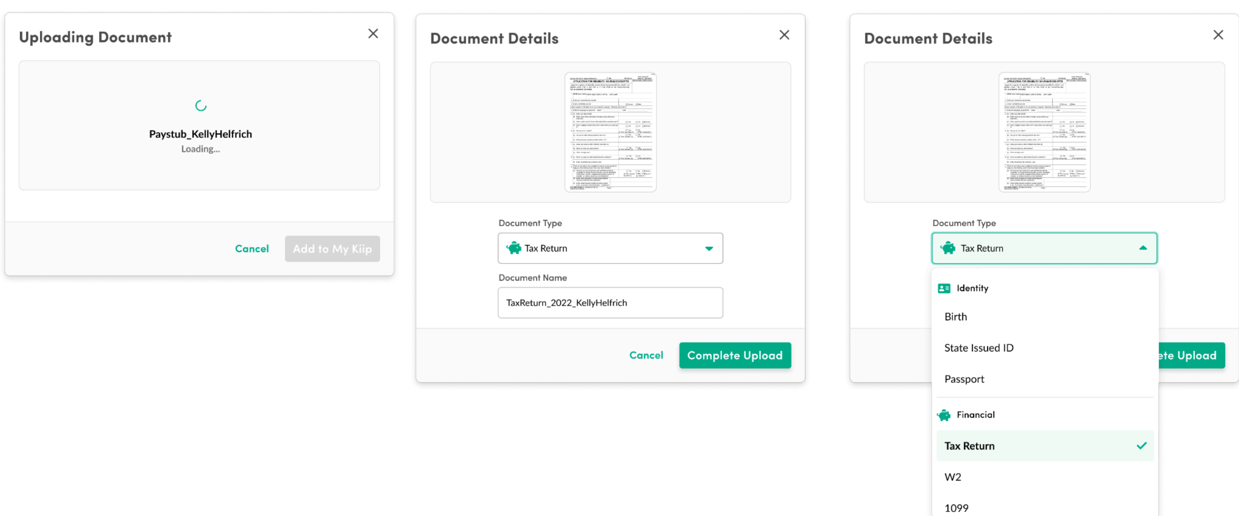
If you are using a cell phone or tablet, you will also have the option of taking a photo or selecting one from your camera roll. Your clients will see the same options.





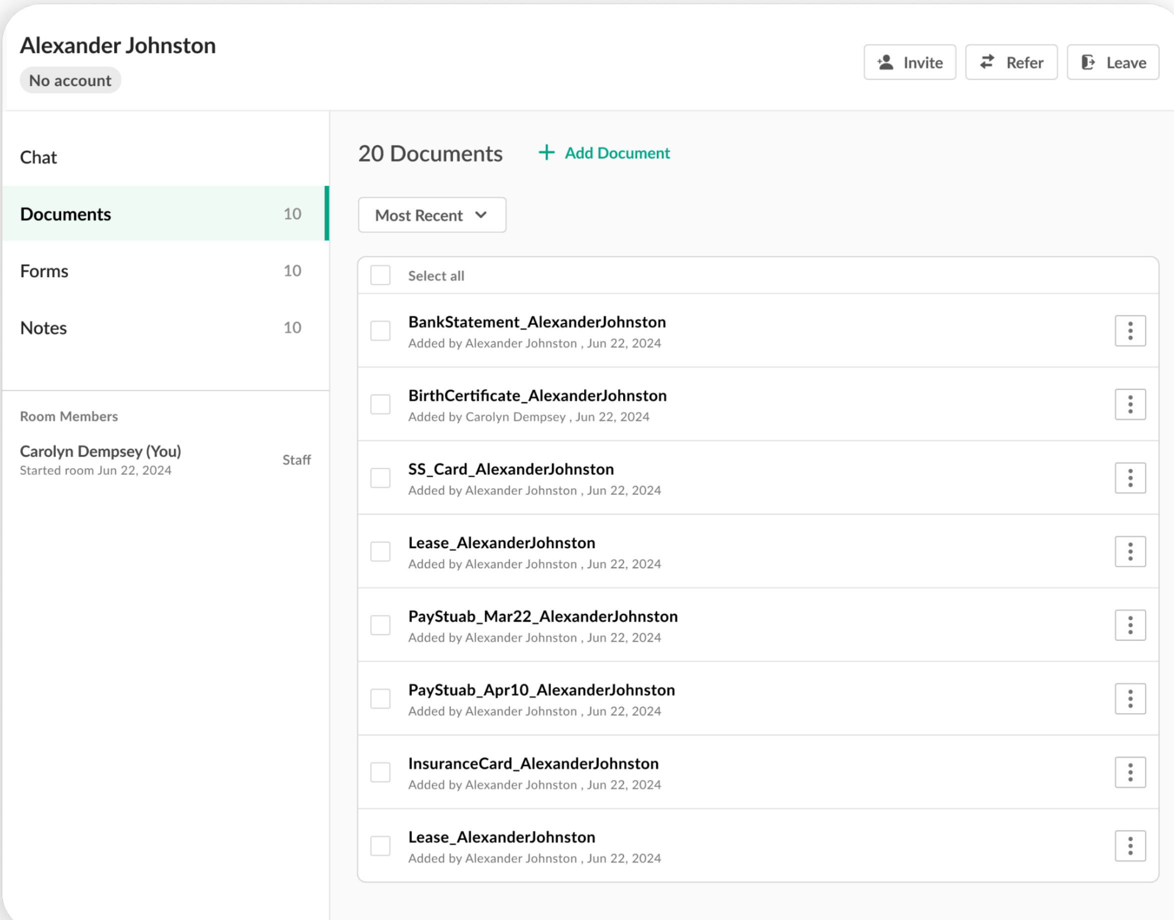
Add Document Category

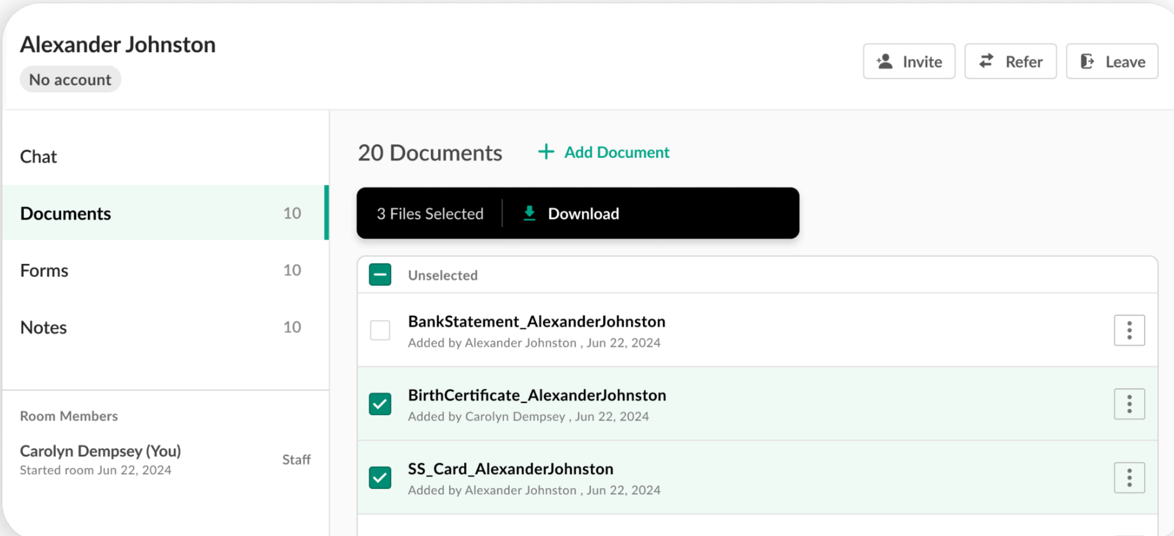
When you or your client uploads a new document, you will be prompted to add 'Document Details.' AI-powered document tagging will automatically assign a type to the document. If necessary, you can select a new document type and retitle the document.



View or download documents

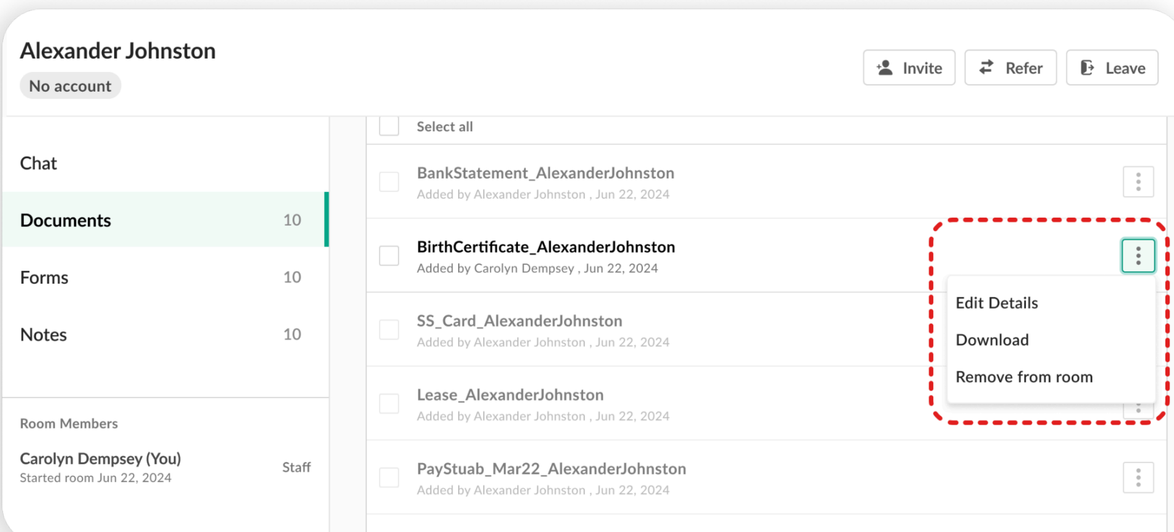
To view all documents in a room, click the documents link in the room navigation. From there, it's easy to download an individual document or select all and download them all at once.





Delete documents

Anyone who has uploaded a new document to a room is also able to delete it.



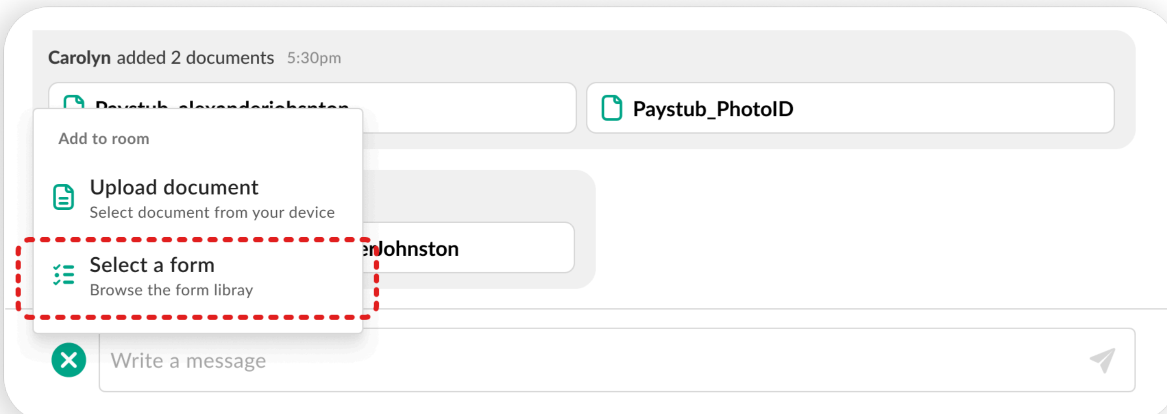
Filling out forms

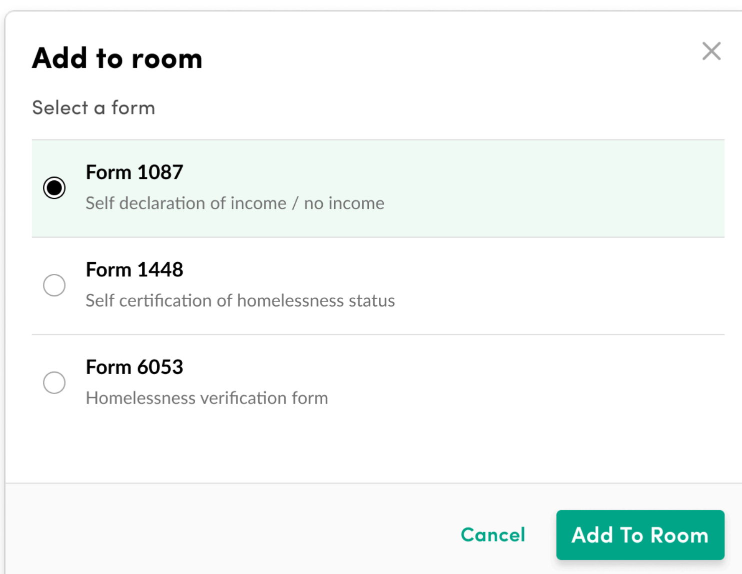
Your program's admin will work with us at helpdesk+kiip@findhelp.com to get all of the forms you use regularly with clients added to a template library.

Note: If you are using the free version of Kiip, you have access to the basic intake form which will automatically appear in your forms library. To add to your program's form library, please contact helpdesk+kiip@findhelp.com to upgrade.

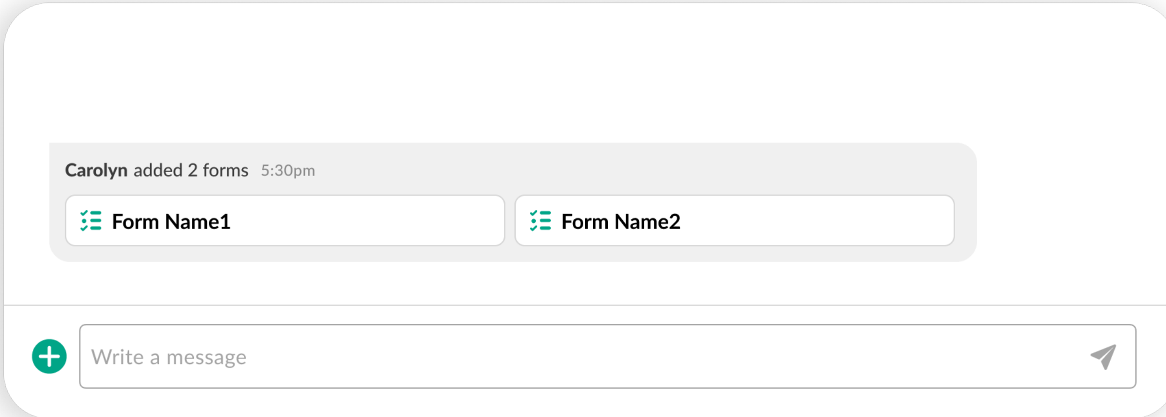
Add form to room

Click the paperclip in the chat box, then select "Select a form." You will then select a form from the template library.



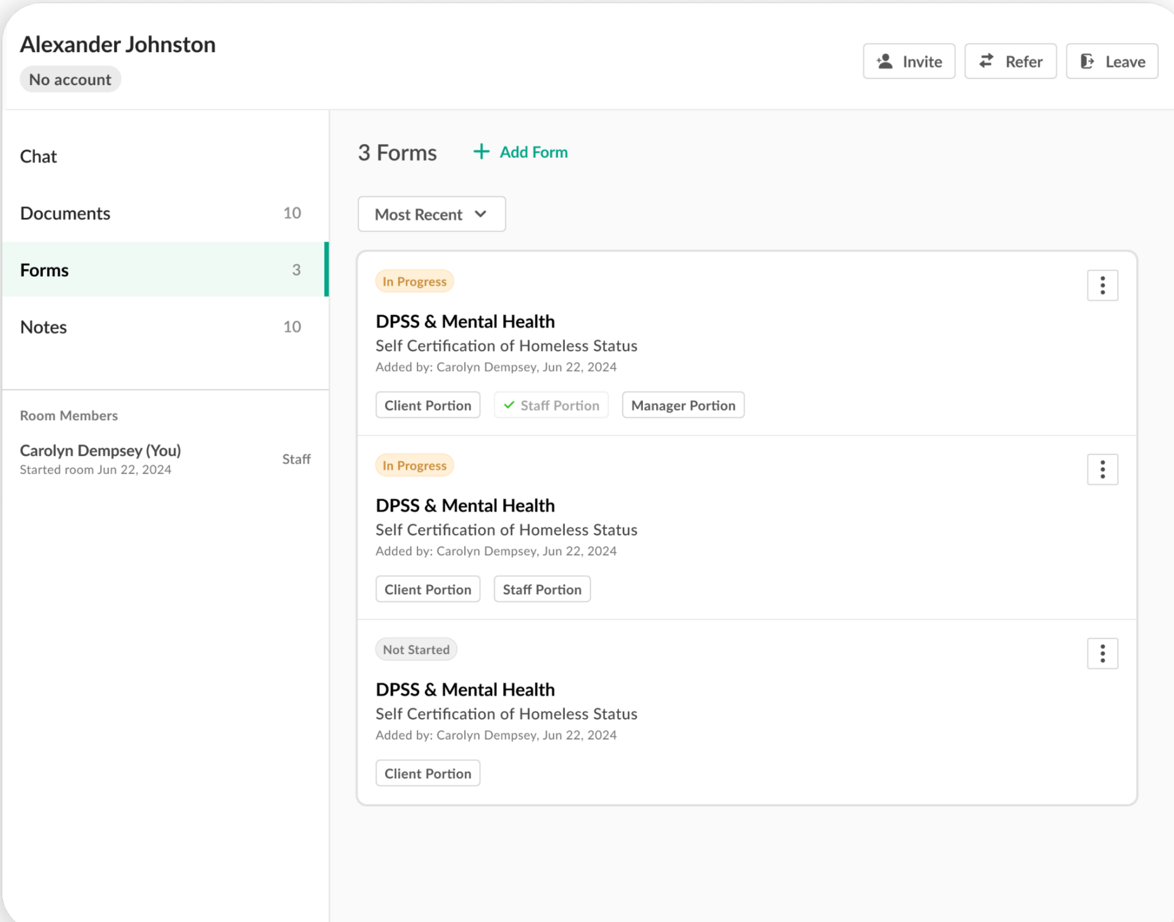


Once you select the form, it will take a few seconds to populate the room. When the form appears, you will see a link to the form in chat or you can see all forms in the room by clicking "forms" in the room navigation



Sign a form

As you assist your clients, you can click into either portion of the form. This means you can assist a client using a shared device, like a tablet, without asking the client to log into their account. Simply take turns clicking on each portion of the form to fill it out and sign.

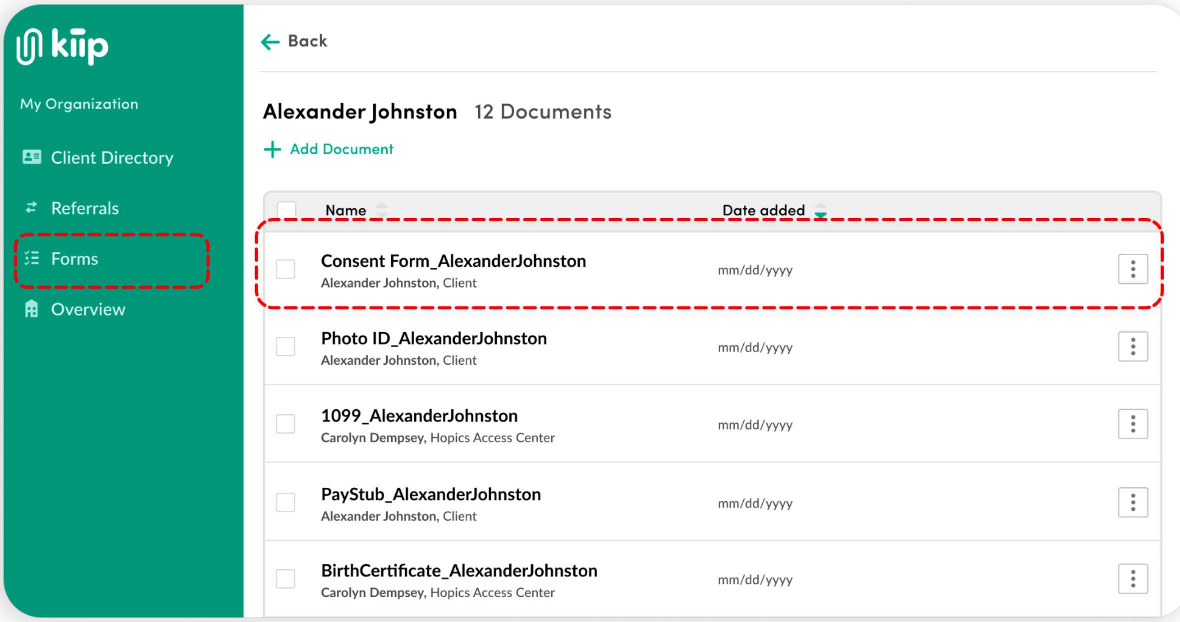


You can also complete the client information yourself and hand it over to them for a final signature.

Note: A document cannot be edited after it is legally signed. If you want to review and edit your client's work on a form before finalizing it, make sure to do so before the document has been signed and the "Complete" button is pressed.

Completed Forms

When the document has been completed, a final PDF will be saved in the room under 'Documents' and in the left-hand navigation under 'Forms.'



Delete a form

If you do discover a mistake on a signed form, you can go ahead and complete the form, delete the final PDF, and then add a fresh copy to the room for all parties to fill out again.

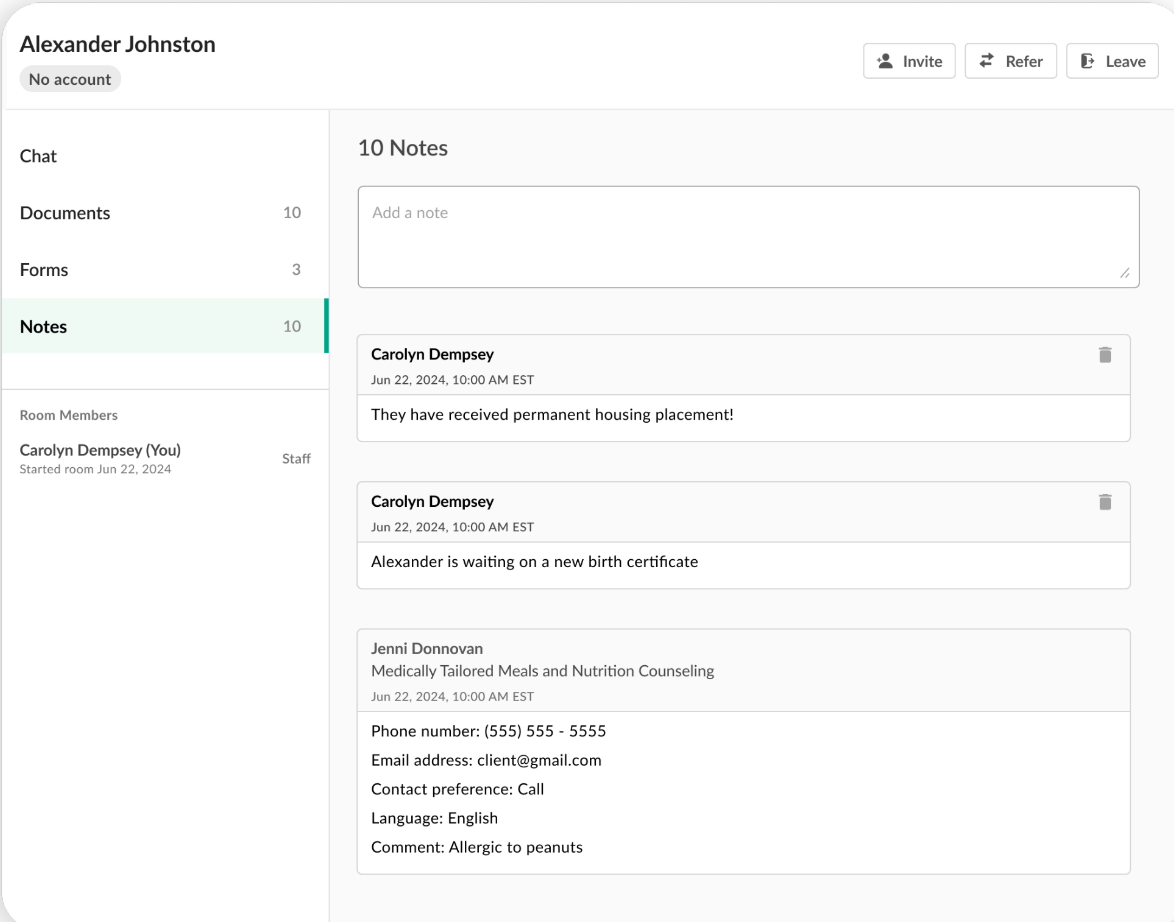
Did you know? *All form information is saved if you accidentally close out of a form. You can also monitor a client's progress on a form in real-time and provide guidance even if you aren't in the same physical space.*

Private client notes

It's important to keep confidential notes on clients and cases. Kiip offers private notes inside each client's room, where you work. Any team member can use this space to jot down important client details only visible to your program.

Add a client note

Click on 'Notes' in the left-hand navigation of a client room. Leave a note and click 'Add Note' to save it for future reference.



Referrals (Inbound and Outbound)

You can send referrals to programs listed in the Findhelp referral network and receive referrals from programs using Kiip or Findhelp. Clients can refer themselves to your program if they discovered it on Findhelp.com.

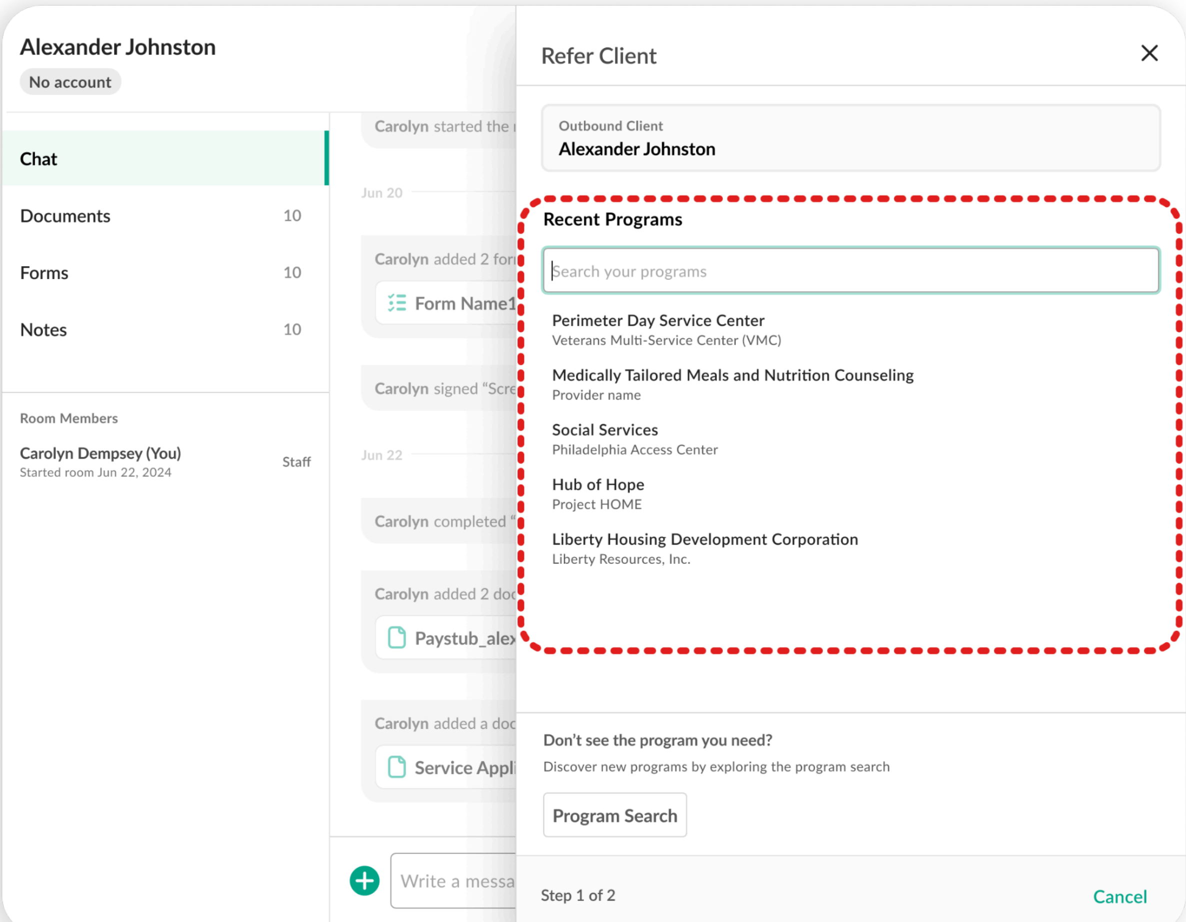
Send a referral (Outbound)

Step 1

Enter your client's room on Kiip and click "Refer Client"

Step 2

To begin a new referral click 'Program Search' to discover a new service. Identify the service for your client, click 'Refer' on the program card and fill out the information to complete the referral. While the fields are not mandatory for streamlining referral processing, obtaining the client's consent before sending each referral is essential.



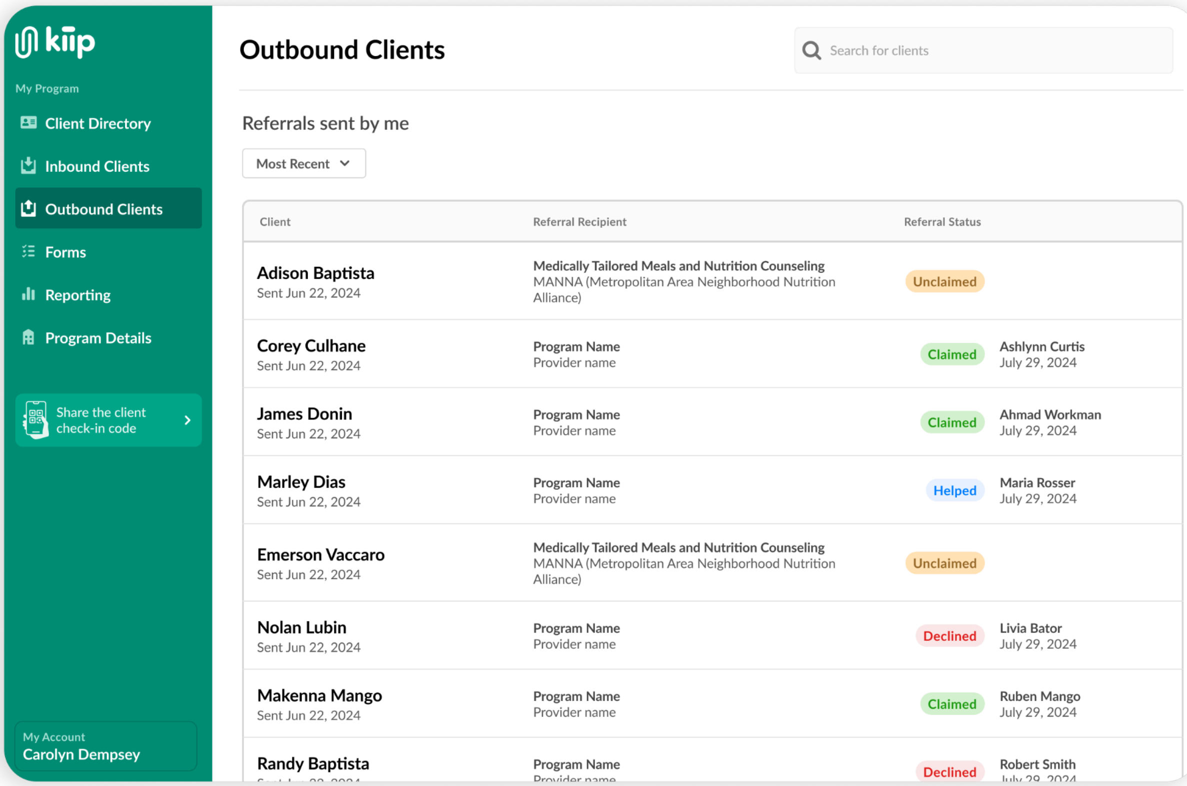
Note: Your "Recent Programs" list will remain empty until you send your first referral. Once you refer to a program by searching for it, it will be automatically saved in your "Recent Programs" list for easy access in the future.

Step 3

You will see a record of the referral saved to your client's room with the date and time it was sent. Navigate to outbound clients to track your referral.

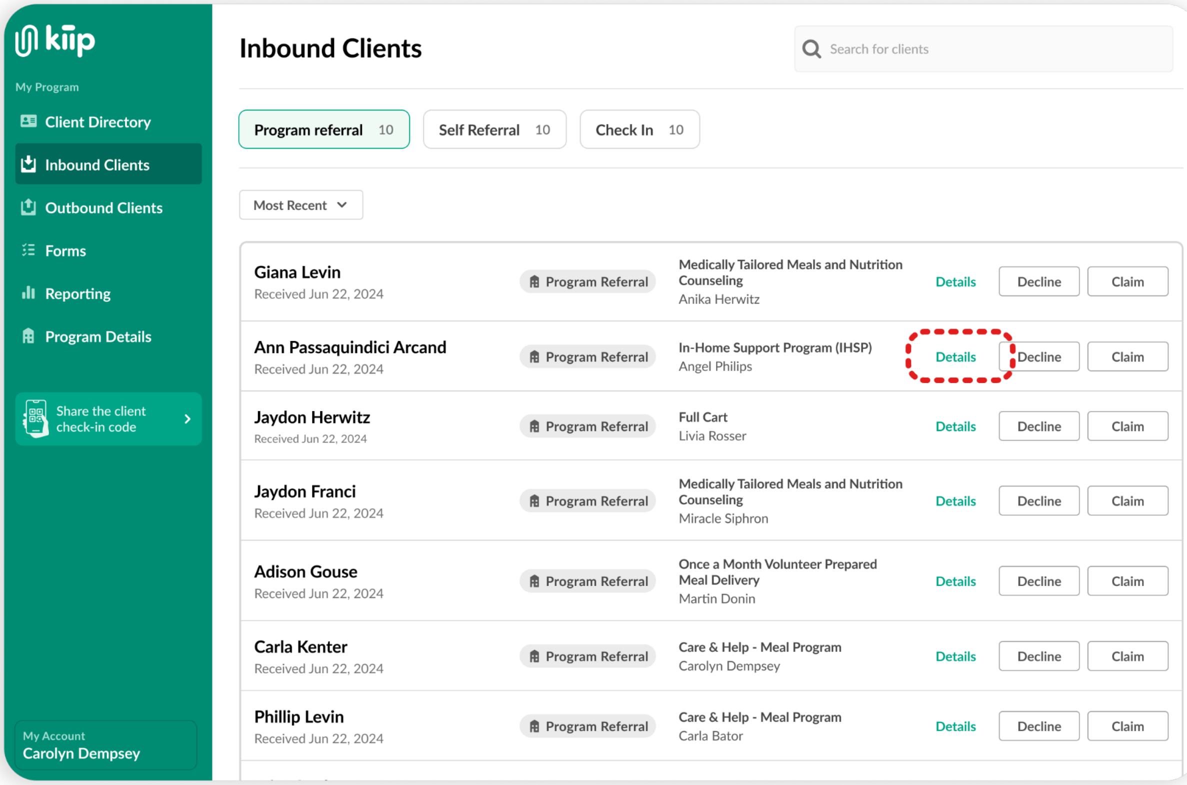
Step 4

Track the status of your referrals for updates on acceptance. Referrals will appear as ‘Claimed,’ ‘Unclaimed,’ ‘Denied’ or ‘Helped’ so you know when to follow up and how to track the success of the referral. You can see who took the action on the referral for additional transparency.

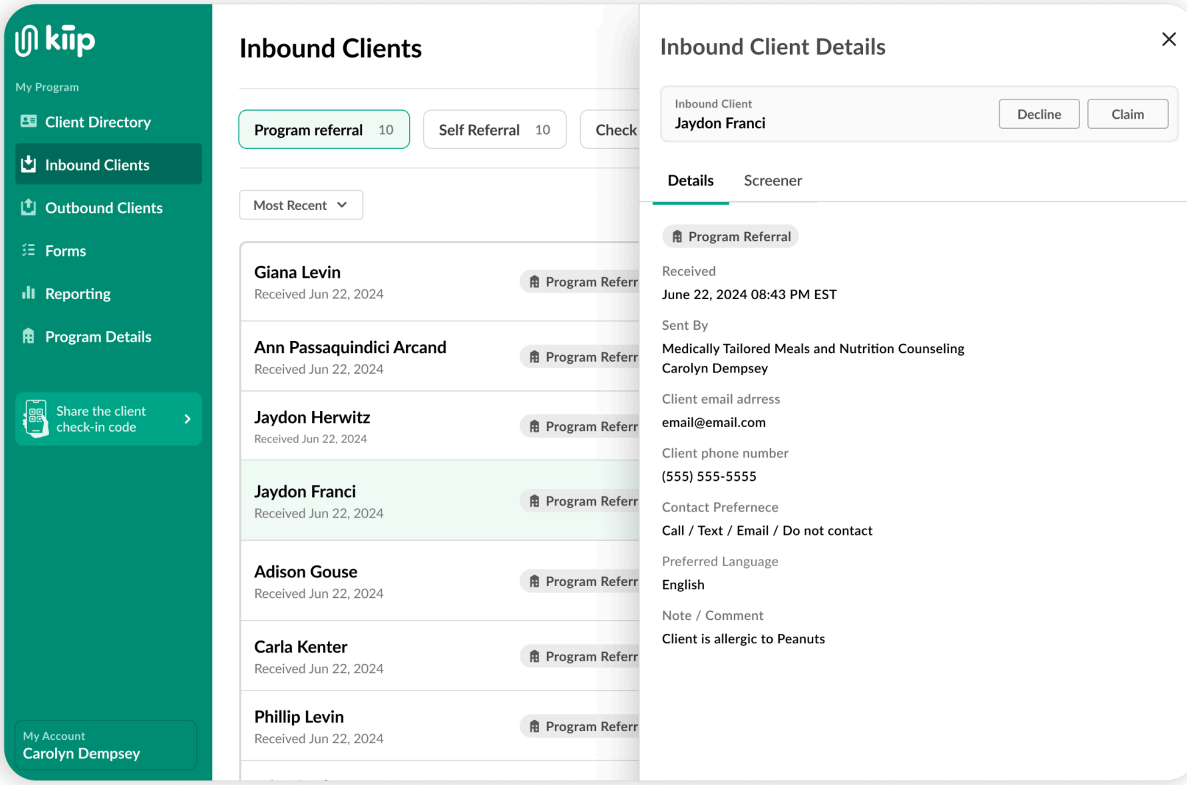


Receive a Referral (Inbound)

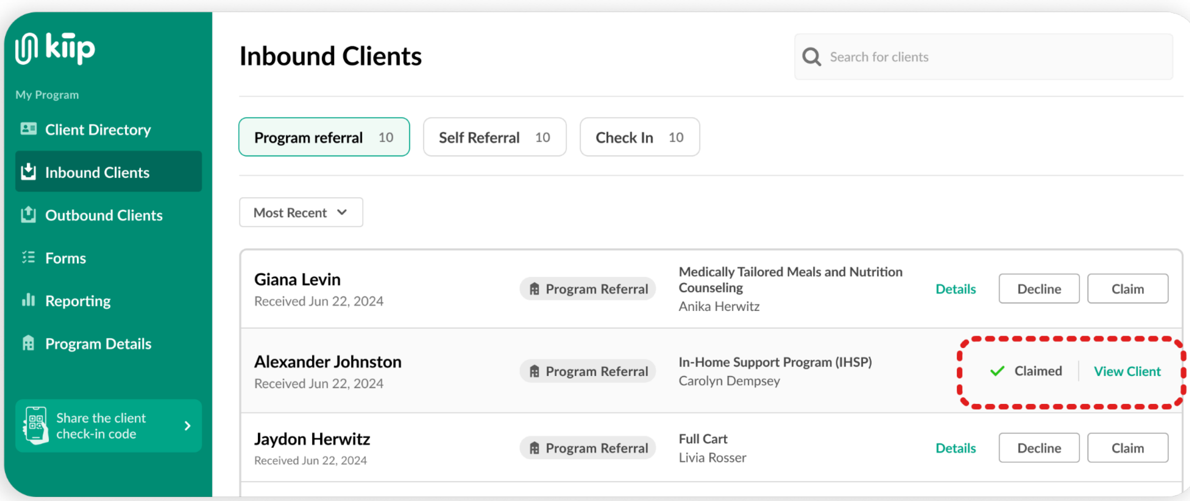
New referrals will appear in your Inbound Clients tab in the left hand navigation. You can view and sort by the source of the referral. As a program on Kiip, you can receive referrals from other programs using Kiip or Findhelp. You can decide whether or not to claim the referral, which adds the client to your Client Directory.



Click Details to view the client’s contact information and any accompanying intake screeners, if your program has a screener enabled.



Once you claim a client you are automatically added to a room with them where you can begin to provide assistance. Click 'View Client' to enter the room.



If your program is at capacity or the client isn't a good fit you can always click 'Decline' which will automatically update the status of the referral for the program sending it.

Note: We do not require you to receive referrals in order to send them.

Turn on Inbound Referrals

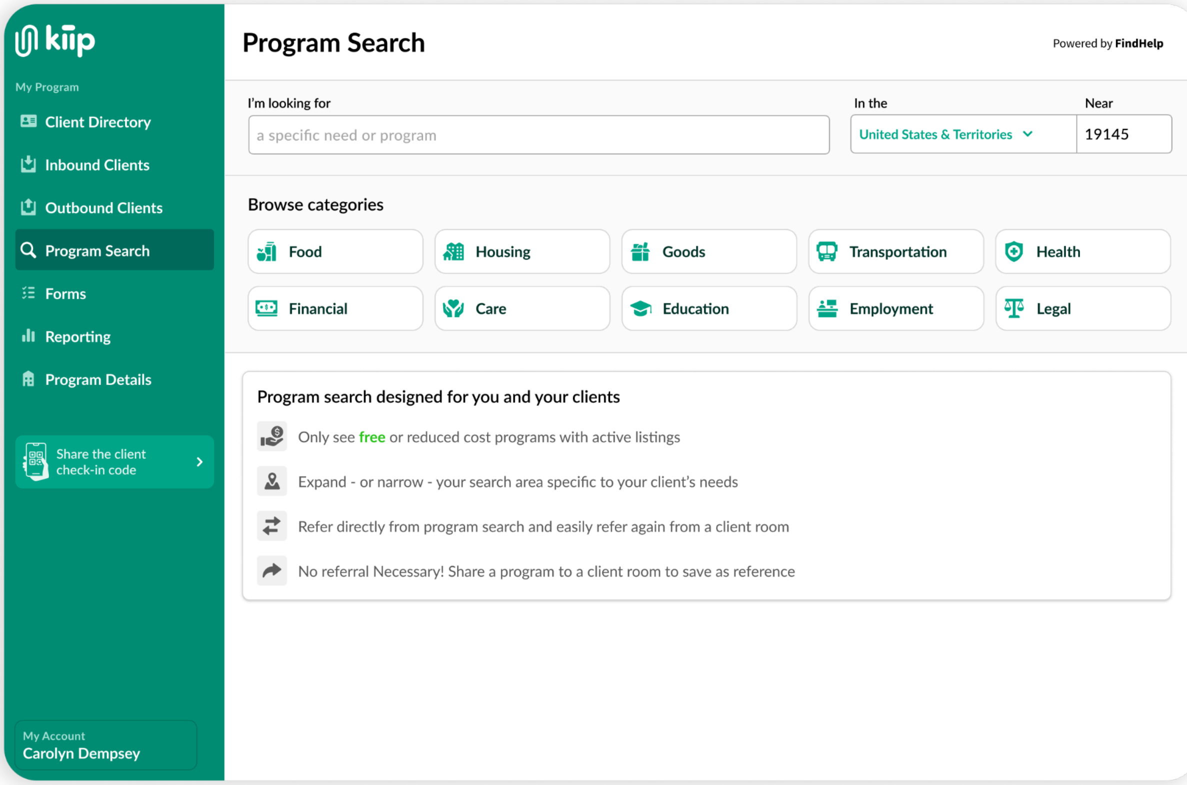
To enable inbound referrals for your program, follow these steps:

1. Visit Findhelp.org.
2. Log into your account using your Findhelp credentials.
3. Navigate to Contact Settings.
4. Choose the 'Refer' option for your connect button.
5. This will activate the inbound referral feature for your program.

To read more about turning on inbound referrals, please reference the Findhelp knowledge base or contact us at Helpdesk+Kiip@findhelp.com.

Program Search

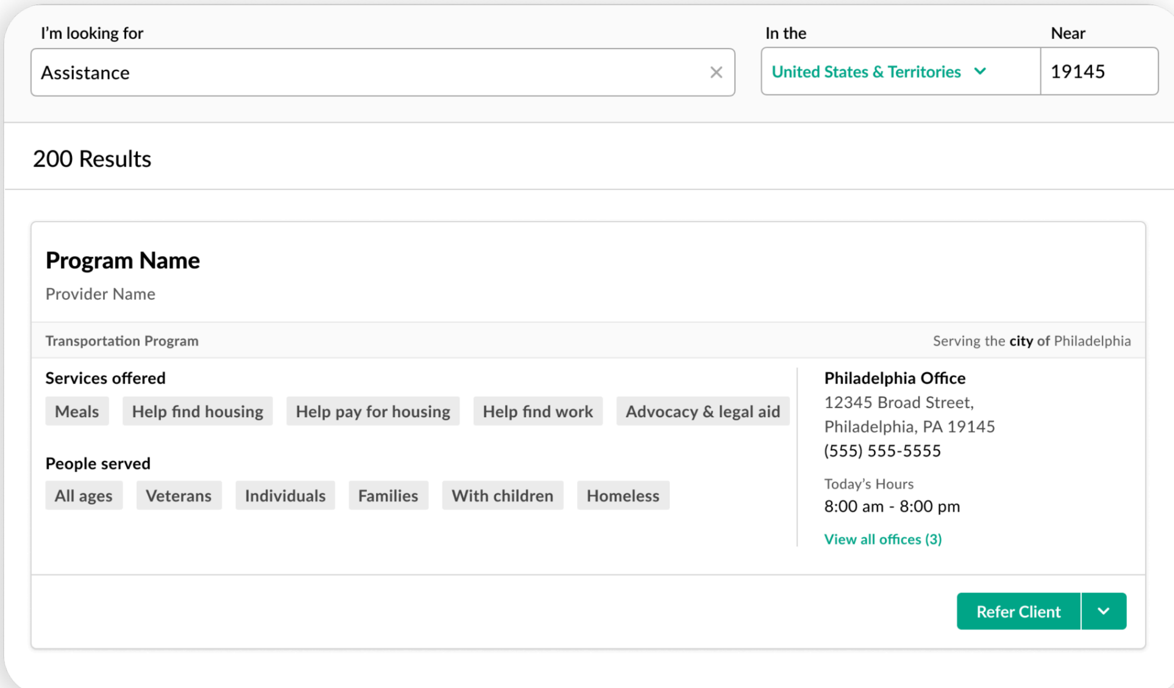
Program Search is designed to help you find new services for clients, so they can get extra care that your program might not offer. You can use Program Search to find local providers that offer free or low-cost services.

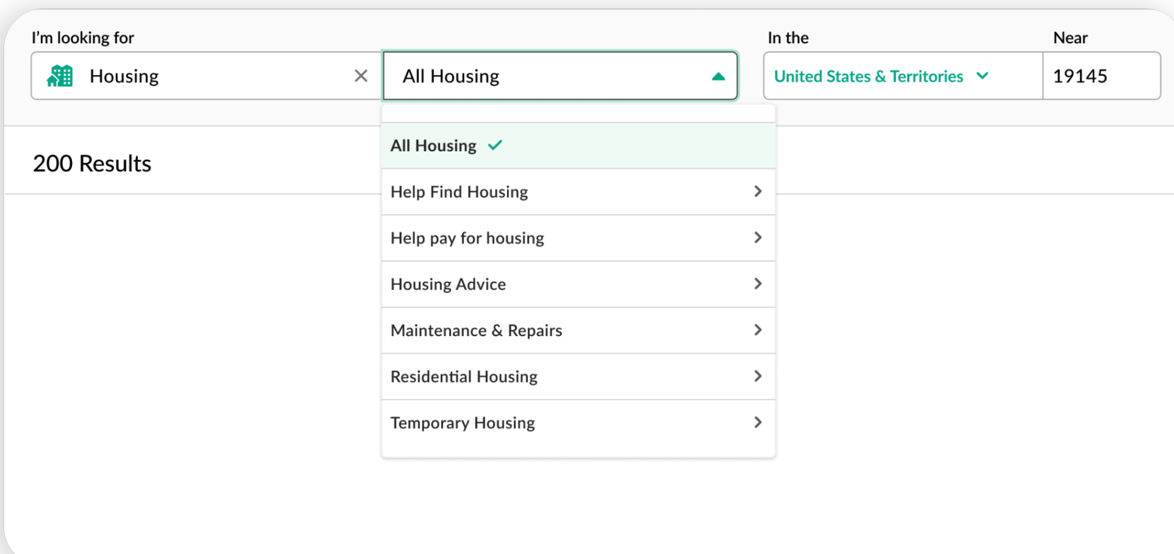


Step 1

There are two ways to begin your search:

1. **Keyword Search** — Type in a specific keyword related to a need or the name of a program, along with a geographic area. You'll need to enter a zip code to start the search, but it doesn't have to be your client's exact zip code.
2. **Category Search** — Select one of the provided categories. After selection of a category you'll be able to narrow results with sub categories.





Step 2

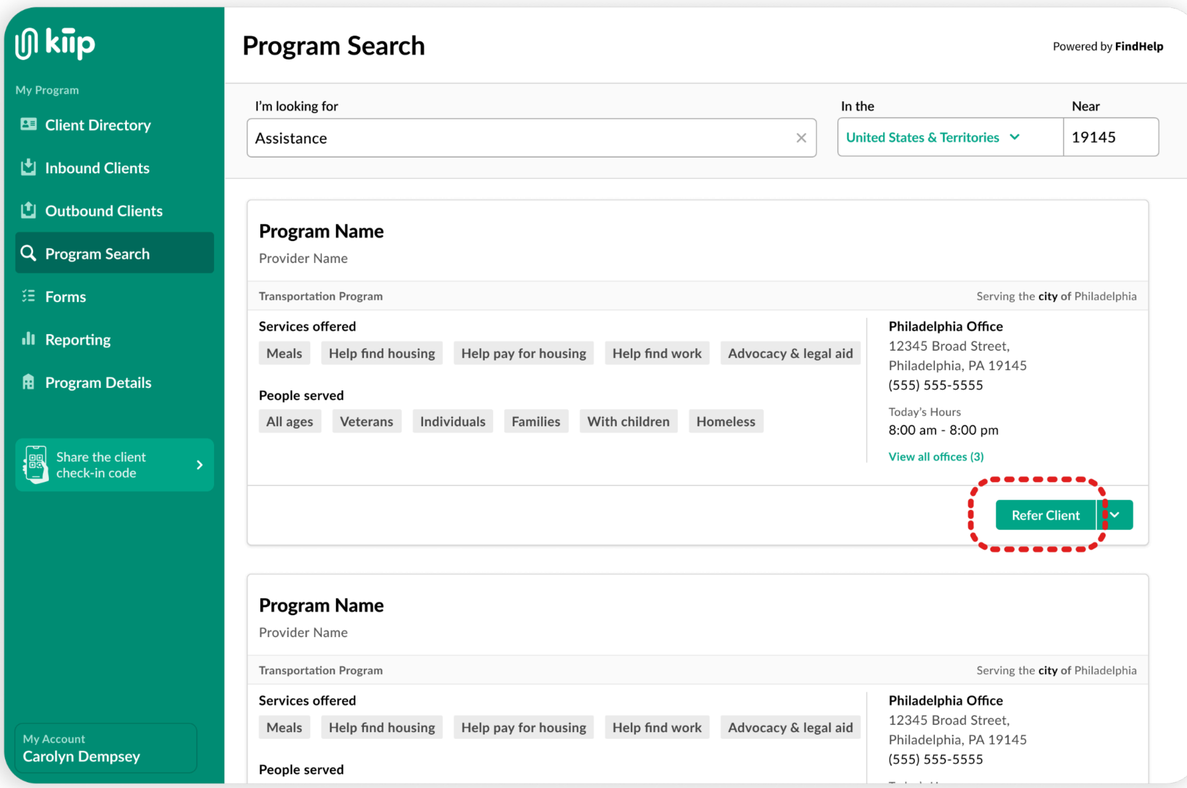
Review the list of results and click anywhere on the program card to open up the program details. Pay special attention to eligibility and document requirements which can be helpful for clients to bring ahead of time to appointments.

Step 3

You can click 'Refer' directly from the program card or click 'Share to Room' to give a client a resource directly without making a formal referral or to save as a reference for later.

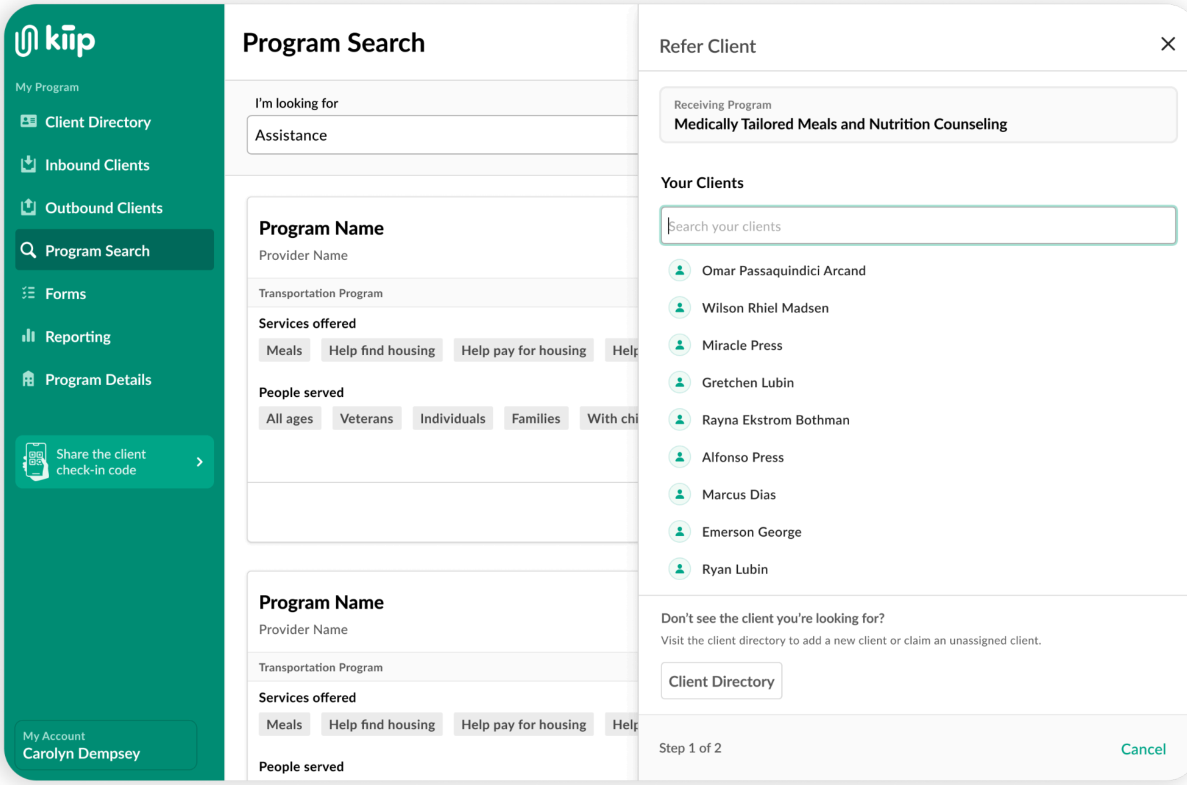
Referring from Program Search

A staff member can initiate the referral flow after selecting a program on program search. By clicking the refer client button, the referral form will display.



Step 1

The navigator will be prompted to select a client from their client list.



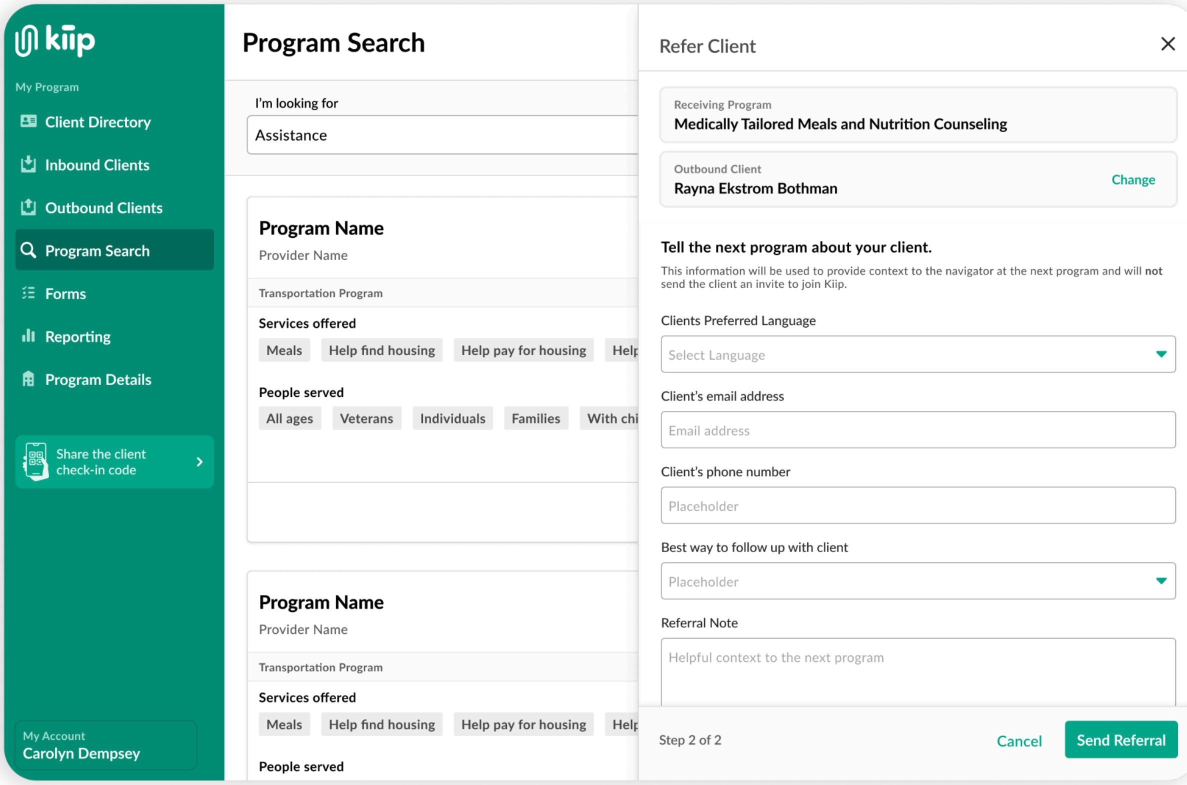
Step 2

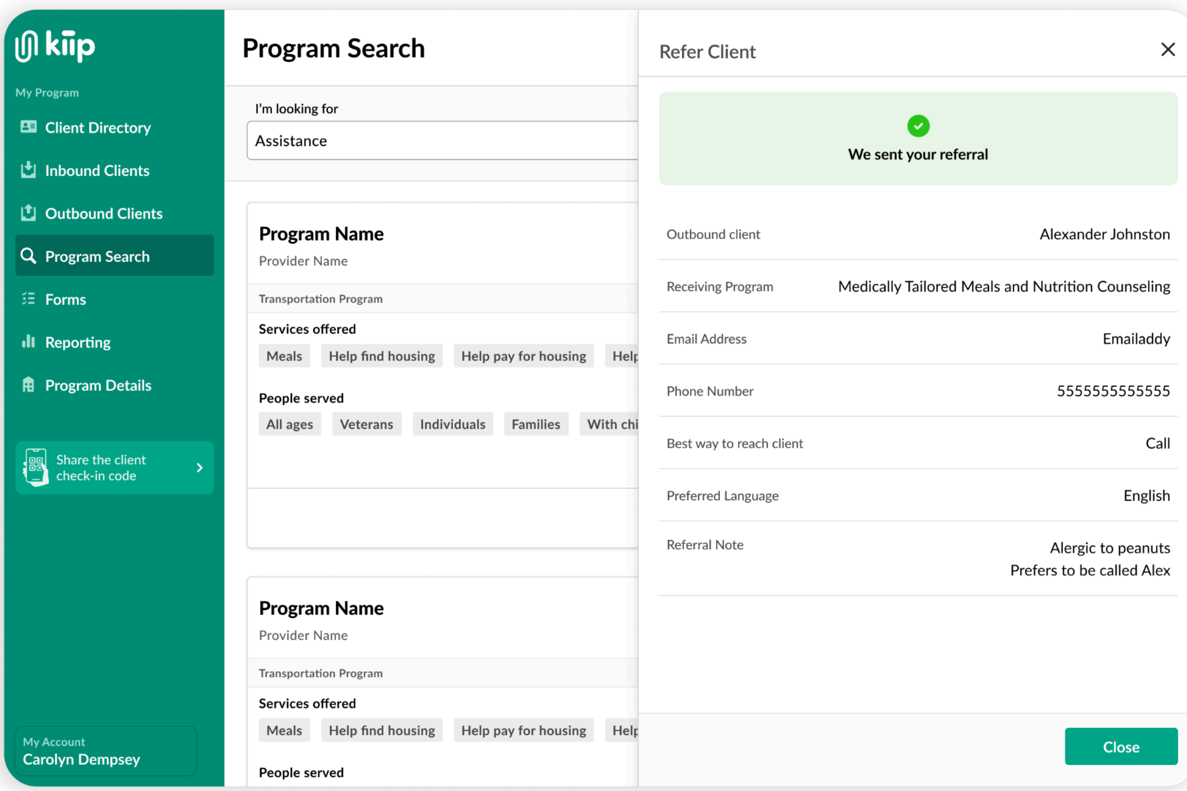
After selecting a client, the referral modal will show the program that was selected from program search, and their contact form fields.

Step 3

The referral confirmation screen will show the filled out content from the referral. A navigator can click 'View Client' to navigate to the client page or 'Done' to go back to the program search results.

After selecting a client, the client can be changed. If any fields were filled out prior to selecting a different client, the fields will be cleared.


kiip
My Program
Client Directory
Inbound Clients
Outbound Clients
Program Search
Forms
Reporting
Program Details
Share the client check-in code
My Account
Carolyn Dempsey
Program Search
I'm looking for
Assistance
Program Name
Provider Name
Transportation Program
Services offered
Meals
Help find housing
Help pay for housing
People served
All ages
Veterans
Individuals
Families
Program Name
Provider Name
Transportation Program
Services offered
Meals
Help find housing
Help pay for housing
People served
Refer Client
Receiving Program
Medically Tailored Meals and Nutrition Counseling
Outbound Client
Rayna Ekstrom Bothman
Change
Tell the next program about your client.
This information will be used to provide context to the navigator at the next program and will not send the client an invite to join Kiip.
Clients Preferred Language
Select Language
Client's email address
Email address
Client's phone number
Placeholder
Best way to follow up with client
Placeholder
Referral Note
Helpful context to the next program
Step 2 of 2
Cancel
Send Referral


kiip
My Program
Client Directory
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Program Search
Forms
Reporting
Program Details
Share the client check-in code
My Account
Carolyn Dempsey
Program Search
I'm looking for
Assistance
Program Name
Provider Name
Transportation Program
Services offered
Meals
Help find housing
Help pay for housing
People served
All ages
Veterans
Individuals
Families
Program Name
Provider Name
Transportation Program
Services offered
Meals
Help find housing
Help pay for housing
People served
Refer Client
We sent your referral
Outbound client
Alexander Johnston
Receiving Program
Medically Tailored Meals and Nutrition Counseling
Email Address
Emailaddy
Phone Number
5555555555555
Best way to reach client
Call
Preferred Language
English
Referral Note
Alergic to peanuts
Prefers to be called Alex
Close

Reporting

Reporting tools are available to track program and productivity statistics. In Kiip you can track:

Client Management

- Client Account Status (No account, Invited, On Kiip)
- Client Source (Added manually, Check-in, Referral)
- Client Assignment (Assignment, Unassigned)

Referrals

- Inbound Clients (Check-in, Program Referral, Self Referral)
- Outbound Clients (Unclaimed, Claimed, Declined, Helped)

Forms

- Completed Forms
- Incomplete Forms
- Not Started Forms
- In Progress Forms

Documents

- Total Documents
- Document Types

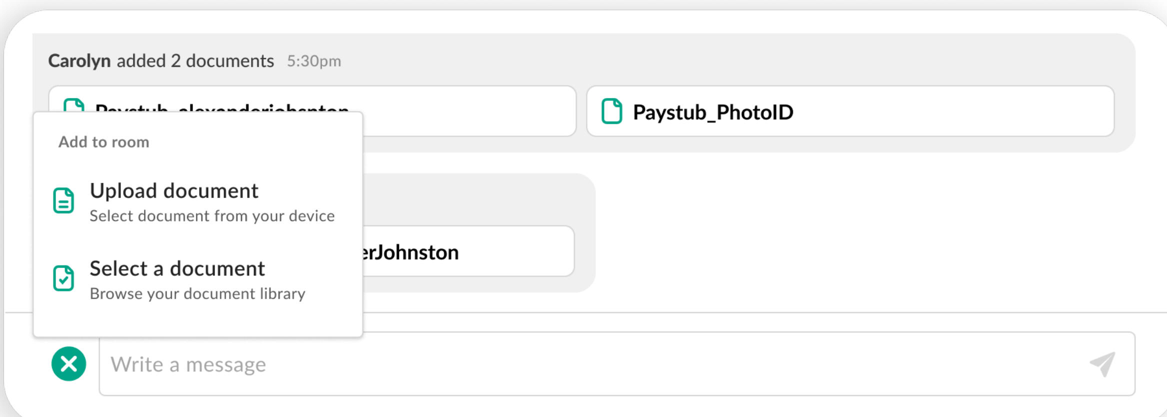
Troubleshoot with clients

Your clients may have questions about using Kiip that you're asked to help answer. We've included some common scenarios below. If you need help answering a specific question, please reach out to helpdesk+kiip@findhelp.com.

How does a client share documents with me?

Add document to a room

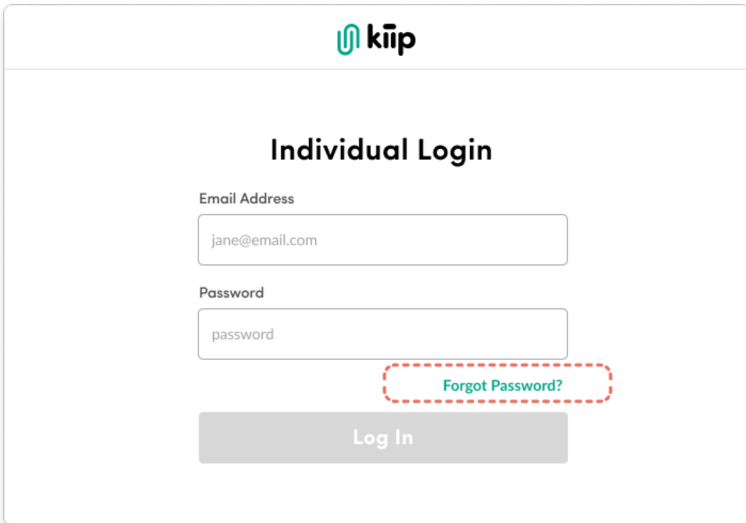
Clients can upload into the secure workspace following the same steps as you. They can select a Kiip document which is a document they have already uploaded to their personal documents, or Upload a New Document. If your client is using a mobile phone, they have the option of taking a picture of their document and uploading it directly to Kiip.



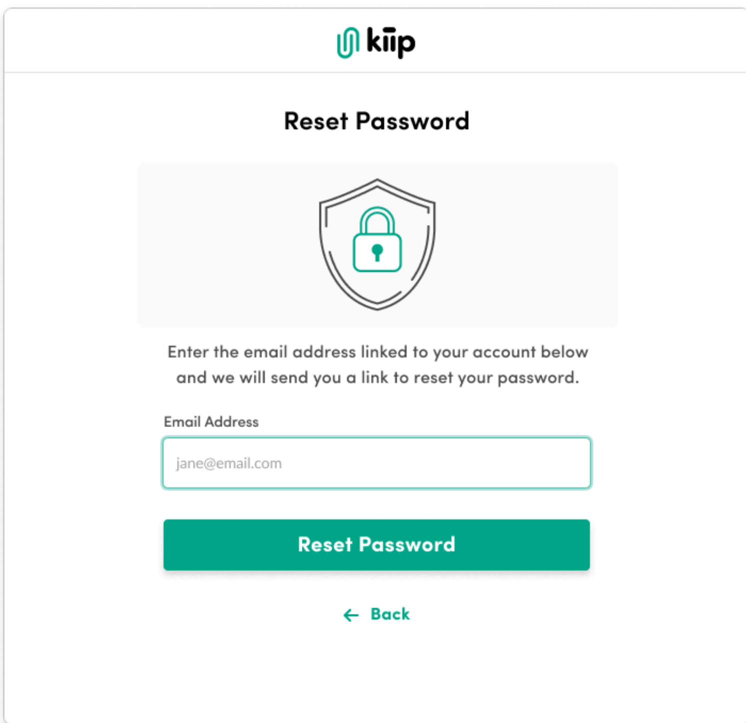
What happens if a client forgets their password or email?

If your client can't remember their password, they can reset it on [Kiip.io](https://kiip.io).

- Click the Forgot Password



- Enter the Email Address that was used to sign up for their Kiip account
- They will receive an email for password recovery
- They can now reset their password and log back into Kiip



Helpful hint *If you think a client might forget their password AND email, we recommend asking them to write the login info down, take a picture, and share a copy of it with you in Kiip for safekeeping.*

How does a client add an assistant to their account?

Your clients can invite anyone with a valid email address to be an Assistant on their account. We recommend they only invite Assistants they know and trust to access their account.

To help a client invite an Assistant have them:

- Log into their Kiip account at kiip.io
- Click the Assistants tab on their dashboard
- Click the Invite An Assistant button, and enter an email address
- The Assistant will need to accept the invite before they can begin acting on behalf of your client

Get help

For more information and specific questions about using Kiip, please email us at helpdesk+kiip@findhelp.com.

Appendix

Help Clients Create a Gmail account

There may come a time when you need to help your client create a new email address. Follow the steps below to help them create their free Gmail account.

To create an account:

Step 1

Open a web browser (we recommend using incognito mode) and go to www.gmail.com.

Step 2

Click on "Create account."

Step 3

Fill out the sign-up form with your name, desired username, strong password (one that is difficult for someone else to guess), and other required information. Make sure to note this password down as you'll need it to sign in to Gmail.

Step 4

Add your email as the recovery email address if you think your client will need help recovering their account later.

Step 5

Verify your phone number (skip this step if your client doesn't have one).

Step 6

Review the account email address (copy and paste it since you'll need to use it to invite your client to Kiip).

Step 7

Agree to the Privacy and Terms.

Step 8

Welcome to Gmail! Start using your new email address.