HOLIDAY GIVING PROJECT
ONLINE REFERRAL PLATFORM

2020 GUIDE: HOW TO MAKE REFERRALS

For over 30 years, The Montgomery County Holiday Giving Coalition has provided Thanksgiving and December holiday assistance to low-income households. A network of social workers, school counselors, and other human service professionals refer families and individuals in need of holiday assistance using our online referral platform. Local non-profit agencies, faith-based organizations, service organizations and government agencies come together each year to form the Holiday Giving Project (HGP) Coalition. Member agencies of the HGP Coalition work collaboratively and independently as neighborhood coordinators (ZCC), splitting the county into small areas for distribution of assistance.

DHHS
MONTGOMERY COUNTY

Welcome to the Holiday Giving Project of Montgomery County!

Enclosed in this packet you will find detailed, step by step instructions for how to request access to the Holiday Giving Project (HGP) online referral platform and how to enter referrals for families in need. We are excited to partner with you to provide assistance to Montgomery County families in need.

To provide as much assistance as possible to the users of the system, we have created this step by step instruction manual. Contained in this packet should be the answers to most of your questions, but if for some reason you are unable to find an answer, please don't hesitate to contact the HGP coordinators at:

HolidayGivingProject@montgomerycountymd.gov

Please note, that all users will need to request access and be given a set of log-in credentials to access the online referral platform. If you were registered for an account last year, your account is still active. Your username is your email address and your password remains the same from last year. If you do not remember your password, you can request it by clicking "forgot password" on the online platform's sign-in screen. If you are unable to remember your log-in credentials and have not moved to a new organization, please send an email to HolidayGivingProject@montgomerycountymd.gov and you will receive your credentials via email within 3 business days.

If you were registered for an account last year and have moved to a new organization, you will need to re-register through the platform as if you are a new user. If you have moved to a new organization, please do not use your prior year credentials.

Every new user will need to request access through the online platform. This is an easy process: simply click on the "Applying for User Account Registration" link, complete the necessary information, and submit. We will create your account and log-in credentials and send you an email to confirm your access. This process may take up to three business days, so please do not wait until the last minute to request access to the system. Note that every person who makes referrals must have a unique set of log-in credentials; you must not share your log-in credentials with anyone.

Included throughout this document are many screenshots to provide a visual guide; tips to make tasks easier; and important points to remember. Your screen may look slightly different than the screenshots based on your browser.

- Tips will be marked like this

- Important points to remember will be marked like this

On behalf of the Holiday Giving Project Coalition, welcome and we look forward to working with you!

Requesting Access to the HGP Online referral platform

Step 1. Open an internet browser

Step 2. You can access the online referral platform at:

bit.ly/mc-hgp

✔️ If you are viewing an electronic version of this instruction manual you can press control and left click on the address to automatically open a browser window.

Step 3. Every **new user** will need to request access through the online platform. This is an easy process: simply click on the "Applying for User Account Registration" link, complete the necessary information, and submit. You must register with your professional organization's e-mail address and not your personal account. We will create your account and log-in credentials and send you an email to confirm your access.

> ⚠️ Please note that this may take up to 3 business days, so don't wait until the last minute to request access.

> ⚠️ Do NOT give your User ID and password to anyone else. Each user must agree to the privacy agreement to use this database. If you disregard this rule your access to the database may be restricted.

Please note that one of the requested items is a backup contact name, phone and email. This is a person who will be able to answer questions about referrals you make in the event that you are out of the office. This person would only be contacted in cases when you, as the referring party, are away for an extended period of time (e.g. vacation, medical leave) and additional information is needed in order to get the requested assistance to the families (for example, the phone numbers listed do not work). This is a new requirement, as in the past we have not been able to serve many families due to incorrect information and/or an inability to reach the referring party.

How to log into the HGP Online Referral Platform

Step 1. Once you receive your log-in credentials you will need to log-in, read the confidentiality agreement and project guidelines, and affirm your agreement by clicking on the "yes" button prior to gaining full access.

I Agree: ○ Yes ○ No

After clicking the "yes" button you will be taken to the Welcome screen showing your name and the role to which you have been assigned. Most users will only have one role available and this will automatically populate into the box at the top labeled "My login agency, location, role is".

Click "continue" to proceed.

Welcome **JOHN DOE** to Holiday Giving Project.
Please select your role, then click on the Continue button.

My login agency, location, role(s) is *
ABC: 111 Main Street (REFERRING SOURCE) ▾

Holiday Giving Project Coalition members and Montgomery County are committed to protecting the privacy of the residents they serve. Identifying information (names, addresses and other information) of residents who are referred to receive assistance through the Holiday Giving Project should be considered confidential and may only be used for the purpose of this holiday project.

I understand that family information is confidential in all formats, including written, verbal, and electronic. Even what I observe about referred families is confidential.

Access to this information is limited to coalition staff and volunteers/contributors who have a legitimate need for this information in their work with the project.

[Continue]   [Cancel]

Step 2. You will now be taken to the main menu screen and will see several pull-down menus at the top of your screen in a blue bar. You will also notice your information is listed above the blue bar, including your name, the role you have been assigned, your agency, and the agency location.

Logged: **HAJA CANDE** | Role: **REFERRING SOURCE** | Agency: **HHS** | Location: **401 HUNGERFORD DRIVE,ROCKVILLE,MD 20850**
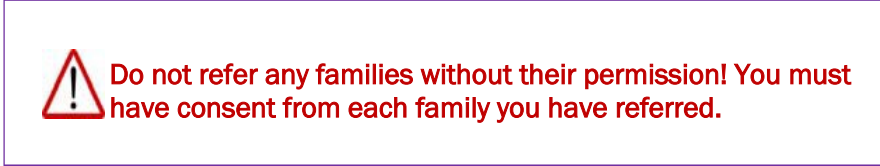
| Home | Search ▾ | Registrant ▾ | Contact | Logout |

Home	Clicking on this will always return you to this first page.
Registrant	Clicking on this allows you to: "Add new registrant", view "my Registrant List", and "Compare Registrants."
Contact	Clicking on this takes you to the e-mail address of the HGP Coordinators.
Logout	Clicking on this will immediately log you out of the system.

Exploring the Menu Functions of the HGP Referral Platform

Registrant

Add New Registrant

> ⚠️ **Do not refer any families without their permission! You must have consent from each family you have referred.**
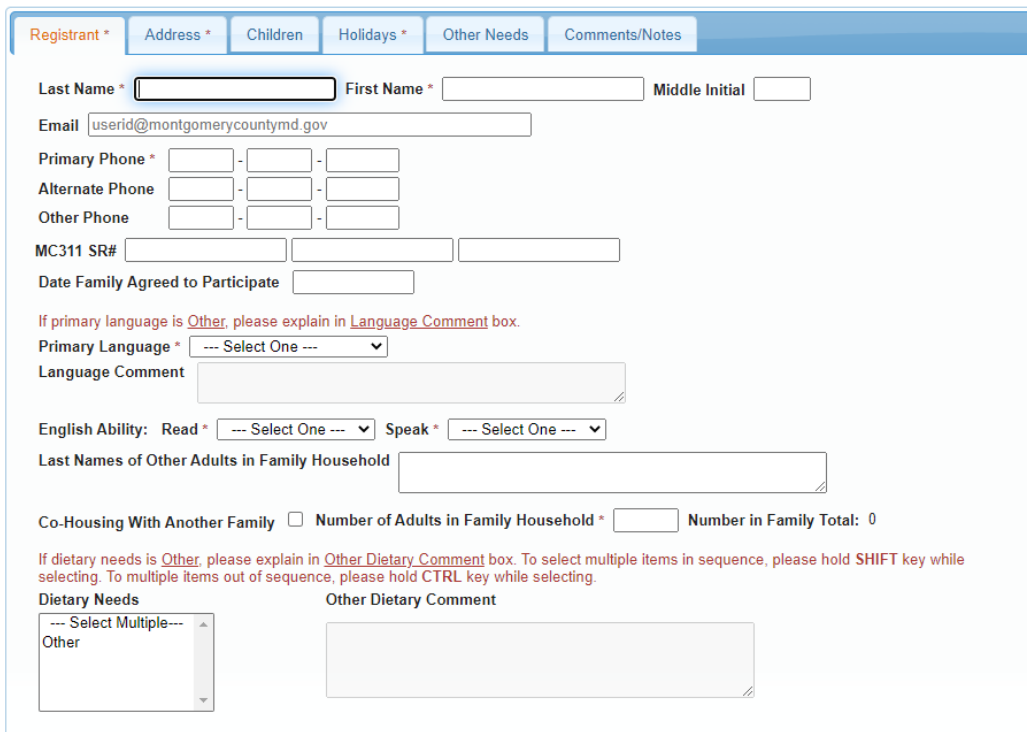
Step 1. Hover your cursor over Registrant, scroll down and left click on the "Add New Registrant" option.

Step 2. You will now see a window with multiple tabs across the top. Each of these tabs allows you to enter specific information about the family being referred. We will explore each tab below.

Step 3. The Registrant tab should be the first one that is available.

Step 4. Enter the information for the family being referred. This includes the following (Items on the form with a * are required fields):

- Adult Last Name
- Adult First Name
- Middle Initial

> ⚠ The referrals are made under the name of the responsible adult in the household. This is the person to whom correspondence about gift pick-up will be addressed. This needs to be the person most likely to do the pick-up as they will need to show identification at the time of pick-up.

- Adult Email (this is used to send confirmation e-mail to family)
- Primary Phone number for the Named Adult
  - Type of Phone (cell, home, work, other)
- Alternate Phone number for the Named Adult (if none, leave blank)
  - Type of Phone (cell, home, work, other) (if no alternate number was entered, leave blank)
- Other Phone number for the Named Adult (if none, leave blank)
  - Type of Phone (cell, home, work, other) (if no other number was entered, leave blank)
- Primary Language for the Named Adult
- Language Comment (If you chose Other as Primary Language, please note the primary language here)
- English Ability:
  - Ability to Read English
  - Ability to Speak English
- Last Names of Other Adults Living in the Family Household

> ⚠ This includes anyone age 18 or older who is part of the family unit. Do NOT include adults in a second family who may be sharing the living space or unrelated other adults in the home. The second family may also be eligible for a referral, but do not intermingle the families in one referral.

- Co-Housing with Another Family

> ⚠ check this box if the family shares their address with another family - even if they are related, as would be the case of two sisters living together to share expenses. We use this information only to help us resolve duplicate referrals for the same address.

- Number of Adults Living in the Family Household

> ⚠ Include anyone age 18 or older who is part of the family unit. Do NOT include adults in a second family who may be sharing the living space or unrelated other adults in the home.
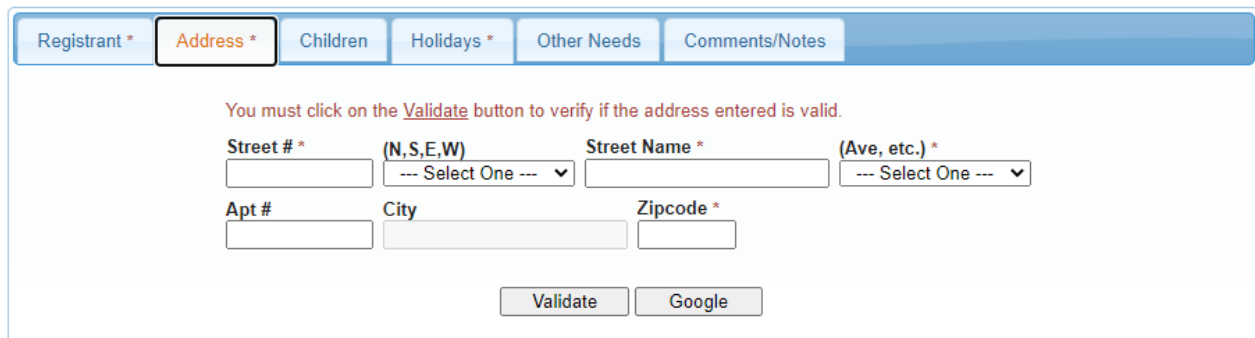
- Number in Family Total

> ✅ This will auto-populate based on the number of adults you enter and the number of children included in the referral

- Dietary Needs

> ⚠️ It is important that families understand that in many cases the HGP is unable to modify the food packages being distributed, however, we ask for dietary needs for those instances where a change may be available.

Step 5. Once you have entered all of the Registrant information, left click on the Address tab.

| Registrant * | Address * | Children | Holidays * | Other Needs | Comments/Notes |

You must click on the <u>Validate</u> button to verify if the address entered is valid.

Street # *   (N,S,E,W)   Street Name *   (Ave, etc.) *
[   ]   --- Select One --- ▾   [   ]   --- Select One --- ▾

Apt #   City   Zipcode *
[   ]   [   ]   [   ]

[Validate]   [Google]

Step 6. Enter the complete address information for the family being referred. This includes the following:

- Street Number
- Street Direction N, S, E, W – if applicable, if none, leave blank)
- Street Name
- Street Type (This is a pre-populated list that should include all street type sin the County)
- Apartment or Unit Number (if applicable – if none, leave blank)
- Zip Code

> ✅ The City will auto-populate when you have completed the address validation.

Step 7. Click the "Validate" button. The address verification system will verify the address entered and if there are any problems will provide a pop-up box to indicate the error.

> ⚠️ **Families must reside in Montgomery County to participate in the Holiday Giving Project**. Please do <u>not</u> refer individuals/families residing in a shelter or foster care, as both of these services have their own sources of holiday support. If a client is living in a hotel, please contact the Holiday Giving Project Coordinator for instructions.

Step 8. Once you have entered all of the Registrant Address information, left click on the Children tab.

Step 9. Left click on the "Add Child" button and you will see a pop-up window.

⚠️ Registrant must have custody of, or be parenting, all children referred. **Do not include extended family members (e.g., nieces, nephews, grandchildren) or roommate's children on this referral.**

Step 10. Add the information for each child individually. Required information includes the Child's last name, first name, age, and gender.

✅ The system will auto-populate the adult last name for each child, if the children have different last names simply click in the last name box and make the change.

Step 11. Click the "Add" button after filling in all of the information about each child to ensure that they get entered into the referral.

✅ Repeat steps 9 – 11 for all children age 17 or younger in the family.

Holiday Giving Project of Montgomery County - How to Make Referrals

Step 12. Once you have entered all of the Child information, left click on the Holidays tab.

		Holiday	Agency (First Assign)	Second Assignment	Holiday Deactivate Reason	Holiday Deactivate Other Reason	Status
1	☐	Thanksgiving					
2	☐	December					

Select holiday(s) for this request: *

5 ⌄

Step 13. Select the Holiday(s) you are referring the family for – Thanksgiving and/or December assistance—by checking the small box to the left of the event

Step 14. Use the other needs tab to select options as appropriate based on the consent of the family. Note that selecting a service is not a guarantee of service, but efforts will be made to identify these resources and communicate them to the family when possible.

☐ Food Assistance
☐ Housing/Rental Assistance
☐ Information On Free COVID-19 Testing
☐ Unemployment Assistance
☐ Childcare Support

Step 15. Select the Comments/Notes tab and enter any additional notes about the family that are important for the agencies providing the donations to know in the appropriate comment box. Please be brief and only include necessary details. Use the "Thanksgiving" and "December" comments for details specific to each of those distribution periods. Use the "family notes" field for information that is relevant to both distribution periods and/or any other relevant information that will help the HGP to better serve the family (e.g., client cannot read, please call instead of sending a letter).

Step 16. After entering all information for the family being referred, review for accuracy and press the "Submit" button to enter the family in the online referral platform. You will see a confirmation message.

From the confirmation page, you will be able to e-mail a confirmation page for each holiday at any time after it has successfully saved into the online referral platform—provided that you have entered an email address for the registrant. If you referred the family for both holiday events (Thanksgiving and December), you will need to click the "Click Here for December" button at the bottom of the confirmation page to see the confirmation for the second referral confirmation. To return to the first confirmation, use your browser's back button.

> ✔️ From this page:
> E-Mail the Registrant Confirmation by clicking the
> "Send Email Confirmation" button (you will need to
> do this for each event)
> - Add another family referral by clicking the Add Registrant button
> - Return to the list of referrals you have made by clicking Done

Registrant Confirmation

Created Date:	9/18/2019
Date Family Agreed to Participate:	9/18/2019
Contact Agency:	DEPARTMENT OF HEALTH AND HUMAN SERVICES
Contact Person:	HAJA CANDE
Contact Email:	~~███████████~~
Contact Phone:	~~███████~~

-------------------- Registrant Information For Thanksgiving --------------------

Registrant ID:	14029	**Dietary Needs:**	
Registrant Name:	BUGS BUNNY	**Other Dietary Comment:**	
Registrant Address:	401 HUNGERFORD DR	**Primary Language:**	English
	ROCKVILLE MD 20850	**Language Comment:**	
Registrant Email:	~~██████████~~	**Read English Ability:**	Good
Address Last Modified Date:		**Speak English Ability:**	Poor

Primary Phone:	202-555-5555 **Ext.:** **Phone Type:** Cell
Alternate Phone:	
Other Phone:	
Holiday Selected:	Thanksgiving
Agency (First Assign):	CRM (COMMUNITY REACH OF MONTGOMERY COUNTY)
Co-Housing With Another Family:	
Last Names of Other Adults in Family Household:	
Number of Adults in Family Household:	4
Number of Children in Family Household:	3
Number in Family Total:	7

Children:

First, Last	Age	Gender	Salvation Army	Status
ZOE BUNNY	0 YEARS	Female		A
DAFFY BUNNY	3 YEARS	Male		A
SISSY BUNNY	10 YEARS	Female		A

Comments for Thanksgiving:
Comments for December:
Family Notes: Unable to read. Please call with distribution information.

It is recommended that you now print this page for your records. Click **Add New Registrant** button if you wish to continue adding another registrant.

Send Email Confirmation	Print	Add New Registrant	Click Here For December	Done

Holiday Giving Project of Montgomery County - How to Make Referrals

The referred family will receive an e-mail confirmation as follows:

Email Notifications of Registration

N noreply@app.montgomerycountymd.gov
To   Cande, Haja A.

↩ Reply   ↩ Reply All   → Forward   ⋯

Wed 9/11/2019 6:04 PM

Dear Angelina Jolie Smith,

Thank you for enrolling in the Montgomery County Holiday Giving Program for the 2019 season. Your referral form has been entered by Haja Cande at Department Of Health And Human Services Campus and your household has been assigned ID#14034. Please maintain this ID number for your records and for any future contact with the HGP team.

Below are the details of your enrollment:
    Angelina Jolie Smith
    401 Hungerford Dr
    Rockville MD 20850
    240-777-7777 (Cell)
    Number of Adults in Household: 3
    Number of Children in Household: 3
    Total Number in Family: 6
    Thanksgiving: Yes | December: Yes

If the information above is correct, you will be receiving more detail instructions for your distribution pick up by your assigned ZCC within the next few weeks. If any of the listed information is incorrect, please contact your referral source with any updated changes. Thank you so much and we look forward to serving you and your family during this holiday season.

HGP
holidaygivingproject@montgomerycountymd.gov
(240) 777-1825

My Registrant List

Step 1. Hover your cursor over Registrant, scroll down and left click on the "My Registrant List" option.

This will give you a list of every referral you have successfully entered into the HGP online referral platform.

From this screen you can:

1. See the First and Last Name of the Responsible Adult in the Family
2. See the Family Address
3. See the status of each referral (Active/Inactive)
4. Click on the Pencil Icon to edit the referral
5. Click on the Printer Icon to print the registrant confirmation
6. If your referral has been deactivated, you can see the reason why on the "Deactivate Reason" tab. This will likely happen if there is a duplicate referral for your family from another agency.
7. See the number of families you have referred

		Registrant ID	Created Date	Agency (First Assign)	Holiday Selected	Last Name	First Name	Address	Zipcode	Primary Phone	Alternate Phone	Number of Adults in Family Household	Number of Children in Family Household	Number in Family Total	Status	Deactivate Reason
1		14029	09/18/2019	CRM (COMMUNITY F	Thanksgiving	BUNNY	BUGS	401 HUNGERFORD DR ROCKVILLE MD 20850	20850	202-555-5555		4	3	7	A	
2		14029	09/18/2019	BOOTSIE FOUNDATI	December	BUNNY	BUGS	401 HUNGERFORD DR ROCKVILLE MD 20850	20850	202-555-5555		4	3	7	A	

Page 1 of 1   100 ▼   View 1 - 2 of 2

Logout
Clicking on this will immediately log you out of the system and return you to the login screen.

Other Functions
Edit a Referral

> ✅ You are able to edit the information in referrals you have entered.
> You can begin the edit process from any of these starting points:
> * My Registrant List
> * Compare Registrants
> * Search Registrant

Step 1. From any of the above identified starting points, click the Pencil Icon in the left column. The sample below is starting from the "My Registrant List."

My Registrant List

		Registrant ID	Last Name	First Name	Address	Status
1		83	FAMILY 13	JANE	▬▬▬▬▬▬▬▬	A

Page 1 of 1   100 ▼   View 1 - 1 of 1

From whichever starting point you have chosen ("My Registrant List," "Compare Registrants," or "Search Registrant") the process for making edits will be the same.

Step 2. If you need to make changes to the Registrant tab, Address tab, or Comments tab, simply click on that tab (as you did when first entering the referral), enter the new information and click the "Update" button. You will see a confirmation message that the record successfully saved.

Step 3. If you need to make changes to the Children tab, click on that tab (as you did when first entering the referral).

- If the change is for a child previously included, click on the pencil to the left of the child's last name, make the changes and click the "Save" button, then click the "Update" button.

- If you need to inactivate a child previously included, click on the pencil to the left of the child's last name. Then:
    1. Change the Status
    2. Indicate the reason the child is being inactivated from the pull down menu And
    3. Click the "Save" button Then
    4. Click the "Update" button

- If need to add a child not previously included, click on the "Add Child" button, enter the child's information as instructed above. Remember to click the "Update" button to save your changes.

> ⚠ **If you do not click the "Update" button and get the confirmation that the record successfully saved message, your changes will not be saved into the database.**

Step 4. If you need to make changes to the Event tab, click on that tab (as you did when first entering the referral).

- If you need to add an event, click "Add Event" at the bottom left side of the events tab, choose the event to be added and click Yes. Remember to click "Update" to save your changes to the online referral platform.

- If you need to change an event (for example, the family notifies you that they will be out of town for Thanksgiving after you referred them for both holiday seasons), check the checkbox at the bottom of the events screen.

- Pencils will appear to the left of each event title.

- Click the pencil next to the event that requires changes. The event will pop-up and you can activate or inactivate as necessary. Please note: if you inactivate an event, you will need to enter a reason for the change.

- Click "Update" on the pop-up window.
- Remember to click "Update" to save your changes to the online referral platform .

⚠ If you do not click the "Update" button AND get the confirmation that the record successfully saved message, your changes will not be saved into the database.

Important Points to Remember

- Referrals are not a guarantee of service. The ability of the Holiday Giving Project to provide assistance to families in need is dependent on donations.

- Referring parties should never refer themselves, their family members, or close friends to avoid any potential appearance of a conflict of interest. If you need a referral, please request one via the appropriate channels (i.e. child's school; social service agency; faith-based organization; etc.).

- Referring parties can AND should make updates to the referral information (addresses, phone numbers, etc.) as they become aware of changes so the families can be contacted.

- Even though the HGP database asks about dietary, this is not a guarantee that we will be able to meet those requests. If the agency providing the food donation is able to adjust the packages they may try to meet dietary requests. However, it is important for referring parties and families to understand that the families must maintain responsibility for meeting their own dietary needs.