

CAREPORTAL REQUEST REFERENCE GUIDE: 1:1 project

When should I enter a CarePortal request?

- The item being requested is a case need, not a want & significant to the case goals or empowering to client
- Other resources have been exhausted
- A supervisor has reviewed your request
- You've gathered needed information. Item details/sizes, directions for delivery, family approval, etc.

How do I enter a CarePortal request? Visit: <https://careportal.org/partners/login/#agency-partner-portal/>

There's a short, very helpful training video linked at the top of the page

Best Practices for Submitting a Request: Enter KK number or reference number (essential for DHS tracking purposes) & Zip Code of where assistance is needed. We want to connect local churches to local needs.

Request Urgency & Radius: Be honest. Enter a reasonable amount of time in which the request can be met. Do not put "Urgent" if the request does not need to be met urgently. On radius, put 15-mile radius or less for smaller items. 30-mile radius should only be used for items more than a \$500 cost. Please do not use 60 miles or more now in the state of Oklahoma. If request can only be met by finances and not donated goods or services please mark "YES" on the ****Exclusively Financial Need Section****

Children Served & Estimated Value: Always enter how many children are impacted even if the item is for parents. Do not enter 0 children unless a prayer request. Always enter a dollar amount. Do not enter \$0. Even donated items still have an estimated value attached. Estimate based on cost to purchase used or new.

Need Description:

- No Confidential Info!** Don't share identifying info - addresses, names, case details that may be in the news.
- State clearly what is needed!**
- Connect!** Provide opportunities for church and family to connect when appropriate and family approves it.
- Tell the story!** What has your client done well? Where can you brag on their progress? How will the physical items make a difference? What have they overcome already?
- Be honest.** If case is not going well, it's ok to share that too but tell why the items are still important in bringing case to closure.
- Don't Ask for Cash!**
- Spellcheck and Proofread!** This is a mass email so make sure to represent your agency well.

Once You've Submitted a Request: If/when a church responds, you will receive an email. Try to respond promptly. Contact the church member in a separate email at the email address or phone number provided in the body of the email. When appropriate, allow church members to deliver items to the family. Remember, you are representing your agency! Be a good partner. Do your best to respond in a professional timely manner. Remember you are part of educating the church in providing impactful help to your clients.

When & How to Close a Request: - ***use hyperlink in original request email or response emails***

Close Request when church has committed to meeting a need, time has passed, or need is no longer relevant

Leave Feedback!: Your feedback helps us know what we're doing well and how we can improve.

Share a story!: Even just a few sentences of how the family responded/has been affected encourages our church partners to continue giving generously. A word of encouragement from you goes a long way!

Say Thanks!: when and if you have time send a short email saying thank you to responding churches

Final Thoughts: These requests are being met by regular people giving from their personal belongings or finances. They are not receiving a tax break, they are not part of a non-profit organization. They are simply people who believe in the work you are doing and want to help you and these children and families succeed.

There is no guarantee that any request will be met. There are continuous efforts to recruit new church partners. You can help ensure that more CarePortal requests are met by doing your best to submit good, well-vetted needs, communicate promptly, graciously, and close non-relevant requests. Families assisting may have little exposure to children and families in crisis so we are all part of educating the community together.