

LinkU Staff Quick Start Guide

Logging In

1. Navigate to staff.linkudmv.org
2. If you are logging in for the first time, please click the link to “Sign Up” and follow these steps:
 - a. Enter your first name, last name, work email, and create a password
 - b. Accept the terms and conditions
 - c. Select the radial button indicating that “I’m searching to help other people”
 - d. You will receive a confirmation email to confirm your account
 - e. Click the link in the confirmation email and you will be signed up
3. Otherwise, log in with your previously entered email and password

Overview of Tools

- **Searching for Programs**
 - All searches start with a zip code
 - Results can be seen by selecting a category or typing a term in the free text search box
 - To switch zip codes, enter a new zip code in the free text search box
- **Referring Programs to a Client**
 - To connect a client to a resource, click the green button on a program list to Refer
 - Some programs might require an application or appointment in addition to the referral
 - The referral only shares the name and contact information with the program
 - For privacy conscious clients, use the “Send” button to send them the resource without notifying the program of the client’s need or information
- **Favorites Folders**
 - Use the “Save” button to save programs into Favorites Folders
 - To access your favorites folder, click your name in the top right of the page and click the link to go to “My Favorites”
 - From the Favorites page, you can update a folder and share it via email, link, or printing
 - You can also share Favorites with a group to allow for collaboration with others
- **Needs Assessment**
 - You can start the needs assessment from the home page by clicking the “Standard Needs Assessment” button that appears above the zip code search box
 - The assessment will recommend resources to refer to the client based on responses
- **People I’m Helping**
 - You can see any work done on behalf of a client by a member of your team by navigating to the “People I’m Helping” menu which appears as an option next to your name in the top right of the page
 - Any referrals, notes, goals, and assessments created by a member of your team will be visible to you. Any updates you make will be visible to others on your team.
- **My Program Tools**
 - If you run your own programs, you can manage those programs from the “My Program Tools” menu which appears as an option next to your name in the top right of the page
- **Additional Support / Training**
 - Please visit our [Learning Hub](#) to learn more about how LinkU can support your clients!