

## **DC Health's Diabetes Prevention and Management COP & Million Hearts Learning Collaborative October Meeting**

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DC Health

October 18, 2023

# Agenda & Learning Objectives

- Welcome and Introductions
- Overview and Introduction to LinkU Referral Platform
  - Learn about the portal interface
  - Understand assessment and referral pathways
- Discuss questions on LinkU

# Introductions

**Welcome!**

Please add your name, title  
and organization to the chat.

# LinkU Introduction

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Latrice Hughes, MPH, Public Health Analyst, DC Health

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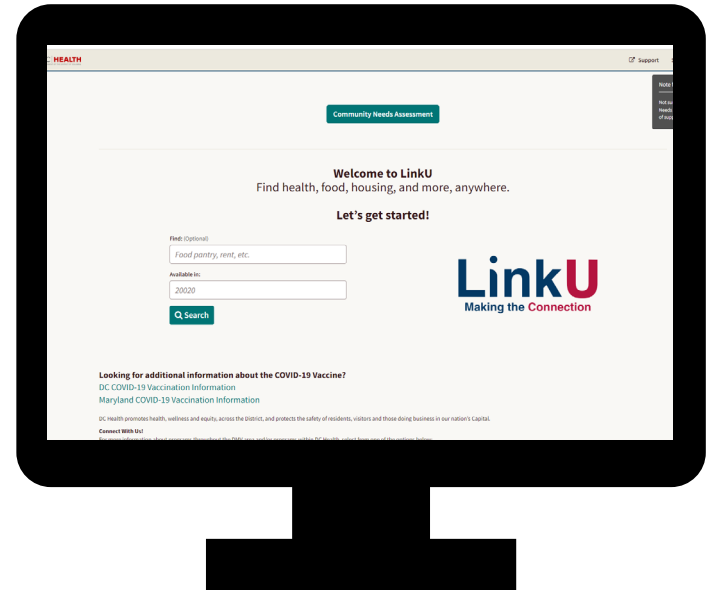
## Poll question

**Are you currently using LinkU for SDOH screening and referrals?**

- *Yes, we are using the LinkU SDOH screener only.*
- *Yes, we are using the LinkU SDOH referrals only.*
- *Yes, we are both the LinkU SDOH screener and referrals.*
- *No, we are not using LinkU.*
- *Unsure if we are using LinkU.*

## What is LinkU?

DC Health has identified and started promoting the increased use of **LinkU**, a *social needs screening and referral platform* with a robust database of *community resources* that can support residents in health seeking behaviors.



# Why LinkU?

## LinkU offers...

- Unified, district wide multidirectional e-referral system
- Screening and referring for free and reduced cost community resources
- Proven track record of serving the District's priority populations
- Partnership with DC Health ensures continuous access to training and support

# LinkU Overview

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Ryan Thieke, Customer Success Manager, Findhelp

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## What is LinkU?

LinkU is a **community resource portal** for clients and community-based providers across the DMV area.



## → Findhelp Mission:

To connect all people in need and the programs that serve them (**with dignity and ease**).



## Your Sites



These sites have been custom branded for the DC Dept. of Health. Please bookmark them for easy access!

### **Staff Site:** [staff.linkudmv.org](http://staff.linkudmv.org)

- Allows you to use additional tools
- Allows for collaboration between teams
- Facilitates data for reporting & analytics

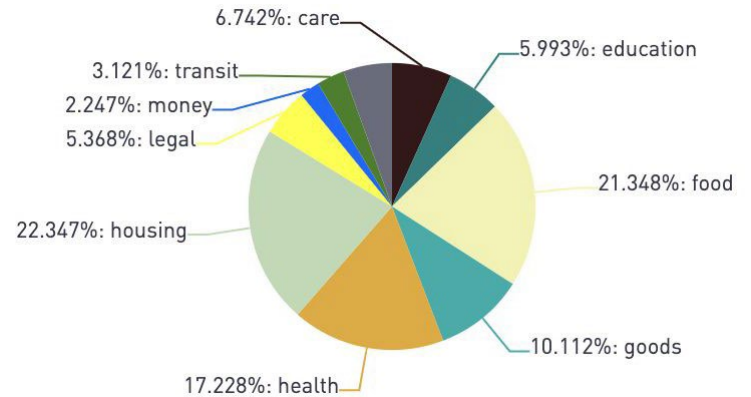
### **Community Site:** [linkudmv.org](http://linkudmv.org)

- Share this site with seekers
- Created for seekers to self-serve



## → Logging In

- Allows for the use of additional tools, team sharing, and more
- Facilitates good data for reporting & analytics





# Creating an Account

- Navigate to **staff.linkudmv.org**
- Click “Sign Up/Log in”
- Enter your work email address
- Create a password
- Select “I’m searching to help other people”
- Click “Get Started”
- Confirm your Access via confirmation email

## Sign Up

Already have an account? [Log in!](#)

First Name  Last Name

Email

Password

Min. 8 characters with 1 capital, 1 lowercase, and 1 special character.

I affirm that I have read, understand, and accept the Aunt Bertha [Terms](#) and [Privacy Policy](#).

I'm searching for me or my family

I'm searching to help other people



## → Important Terms

### Findhelp

- The company that creates, updates, and maintains LinkU
- Formerly known as Aunt Bertha

### Seeker

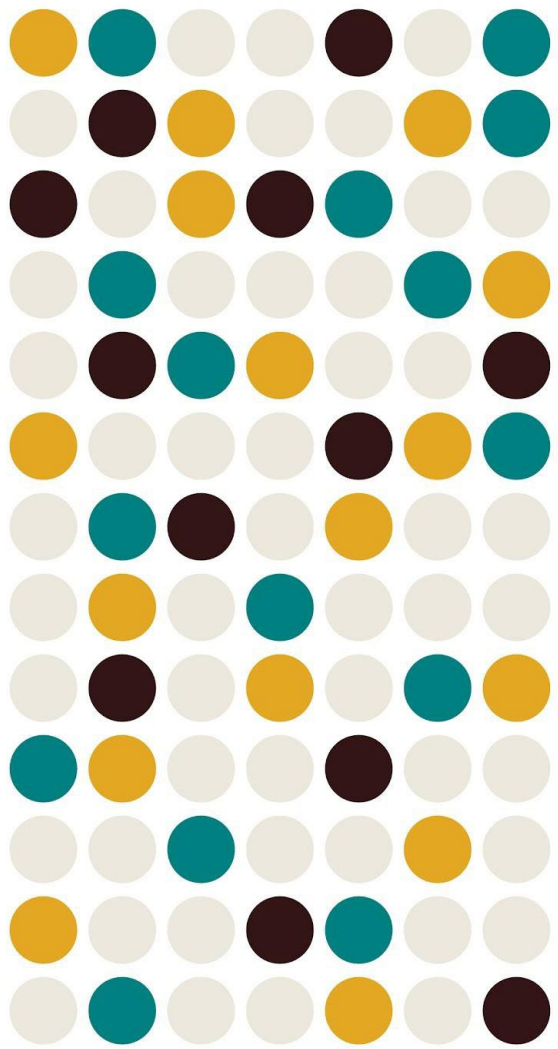
- The people you are navigating on behalf of

### Program

- A free or reduced-cost, direct social service

### Community Organization

- AKA nonprofit AKA community agency
- The organization providing the resource or program to which you want to refer your member



Live Demo



# Needs Assessment

Identify your client's needs by completing the **Standard Needs Assessment**.

The completed assessment will generate suggested programs to streamline referrals that fit their needs.

The answers will also be saved to the seeker's profile in LinkU so you can review them later.


## Standard Needs Assessment

Select Language ▼ [Translate](#)

### General Information

Are you completing this form on behalf of another person? \*

If you are completing this form on your own behalf, please respond "No"

Yes 

No





# Live Referrals vs. Logged Referrals

A **live referral will ALWAYS** ask for consent and you will **SEND**

Who is this for?  For myself or my family  
 I'm referring someone else

Your Name\*

Your Email Address


Your Phone Number

Best way to reach you\*  Email  
 Text message  
 Phone call

Comment [Add a comment...](#)

**My Consent\***  I agree to:

- Send my contact info and additional info through this system to this agency, and
- Receive info **about this program** from the Aunt Bertha Enterprise Demo site (like steps to contact them, or messages sent to you from the program). [Learn how we keep your info safe.](#)



A **logged referral will NOT** ask for consent and you will **SUBMIT**

Helping someone else?

**i** The form below is **NOT** sent to the program. Please follow the program's "Next Steps" to get help. [Learn more...](#)

This form:

- Sends you "Next Steps" to contact this program, if email/text selected as the "Best Way to Reach You."
- Records the program's information in your [Referrals For Me](#) dashboard.
- Creates an account if you don't have one.

**Eligibility** This program serves homeless residents of Travis County.

Who is this for?  For myself or my family  
 I'm referring someone else

Your Name\*

Your Email Address

Your Phone Number


Best way to reach you\*  Email  
 Text message  
 Phone call

Comment [Add a comment...](#)

**The form above is NOT sent to the program.**

This form:

- Sends you "Next Steps" to contact this program, if email/text selected as the "Best Way to Reach You."
- Records the program's information in your [Referrals For Me](#) dashboard.
- Creates an account if you don't have one.





# What Happens When I Submit a Referral?

- The **Person** that you are sharing the resource with will receive an email or text with information about the program and next steps
- The **community organization** providing the program will also receive an email with the contact information of the person you're referring
  - *If the program has been claimed by the community organization, they will also see the referral on their Referrals Dashboard*
- **You** will see the referral (and all updates) on your “People I’m Helping” dashboard



# What Happens When I Submit a *Logged* Referral?

- The **Person** that you are sharing the resource with will receive an email or text with information about the program and next steps
- The **community organization** providing the program will **NOT** receive an email with the contact information of the person you're referring.
  - *Receiving an email does not follow the community organization's process for receiving referrals*
- **You** will see the referral (and all updates) on your "People I'm Helping" dashboard



# What Does the Referral Email Look Like for Person you are helping?

Referral from Candace S. at Aunt Bertha Enterprise Demo >

**Candace S. Aunt Bertha Enterprise Demo** <bertha@berthamail.com>  
to candace+milton ▾

10:09 PM (12 minutes ago)

Hi there,

Candace S. referred you to [Bertha Child Care](#) at Bertha Success

## What's Next?

Please contact the agency directly:

- Email: [customer@auntbertha.com](mailto:customer@auntbertha.com)

Thanks,

- The team at [Aunt Bertha Enterprise Demo](#)

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Already got in touch? Let Candace S. know how it went!

Thank you, they were helpful!

They referred me to another program.

They couldn't help, any other ideas?

I'm not interested in this program.

Want to keep track of your referrals?

Sign up to check your [My Referrals](#) folder. **Note: this is an automatic message, which is unable to receive replies. If you need emergency help, please call 911.**

 Enterprise Demo  
Questions? Contact [support@auntbertha.com](mailto:support@auntbertha.com)



# What Does the Referral Email Look Like for the community organization?

Referral to Bertha Child Care » Inbox x

**Aunt Bertha Enterprise Demo** [bertha@berthamail.com](mailto:bertha@berthamail.com) via [auntbertha.com](mailto:auntbertha.com)  
to customer, tristau ▼

10:10 PM (13 minutes ago)

Hi Bertha Success team,

Candace S. referred someone to your program, Bertha Child Care!

**Please reach out to:**

- **Molly Member**
- [candace+milton@auntbertha.com](mailto:candace+milton@auntbertha.com)

**Candace sent you this contact info because Molly is looking for services or more information.** You can respond by replying to this email, or Molly said email is the **best** way to reach them.

**Already reached out to Molly? Let Candace know what happened, so they can follow up:**

We need more info, please reach out!

We got in touch, we'll try to help!

We referred them elsewhere.

Sorry, they weren't eligible.

We couldn't reach them.

We don't have capacity.

We'll let them know, and keep track of what happened. See all past inquiries in the [inbound referral dashboard](#), or tell the story of your program's impact in the community with free reports about your programs usage.

As a reminder, [Aunt Bertha Enterprise Demo](#) lists free and reduced cost social services programs so that people in need can find them.

Thank you for the work you do!

The Aunt Bertha Enterprise Demo Team

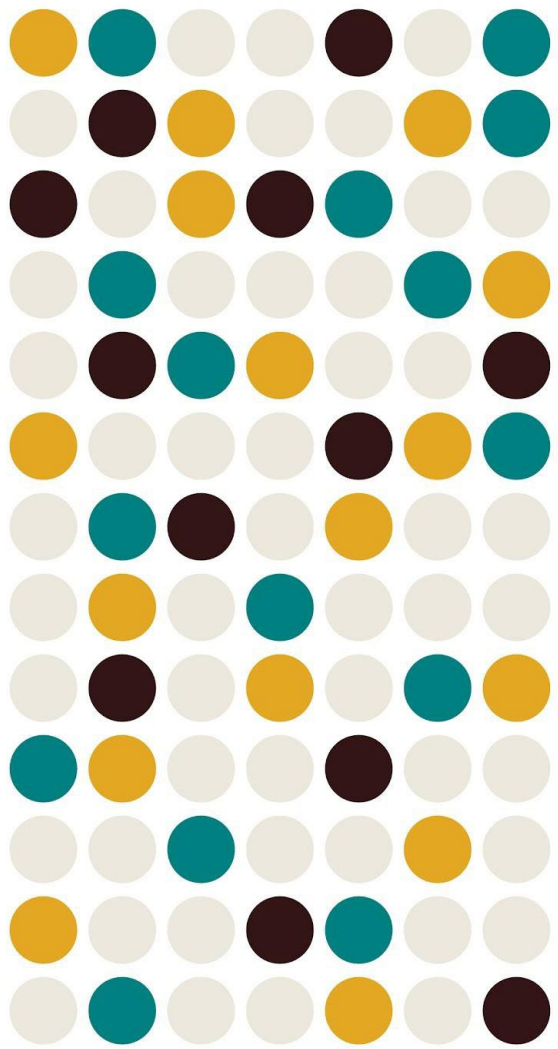
Questions? Contact [community@auntbertha.com](mailto:community@auntbertha.com)



## → Best Practices

### LinkU Works Best When You...

- **Login** to your [Staff site](#), and **Share** the [Community site](#) with your clients
- **Assess** your clients for SDOH needs
- **Search** for programs that fit their needs
- **Refer** them directly to the program(s)
- **Follow Up** to ensure they receive assistance
- **Analyze** trends in client needs, referrals, and CBO engagement
- **Grow** our shared network of engaged CBOs to facilitate high-quality care

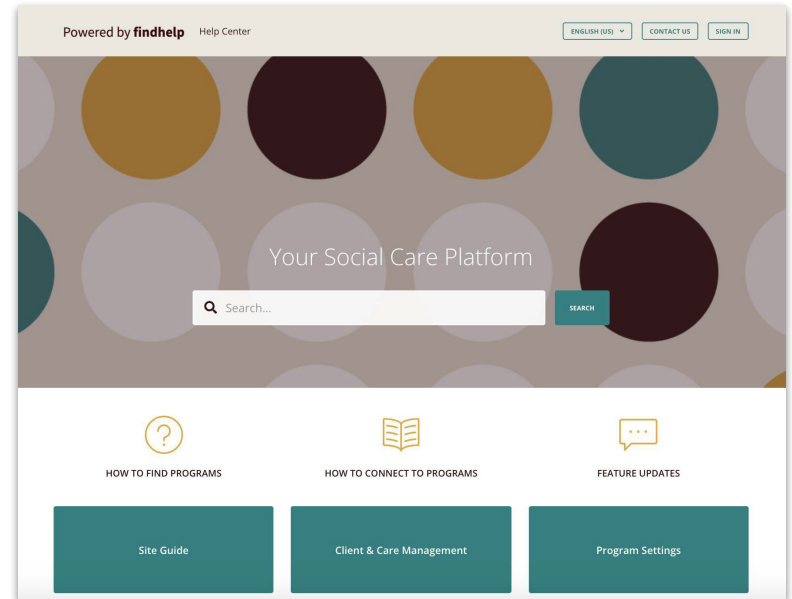
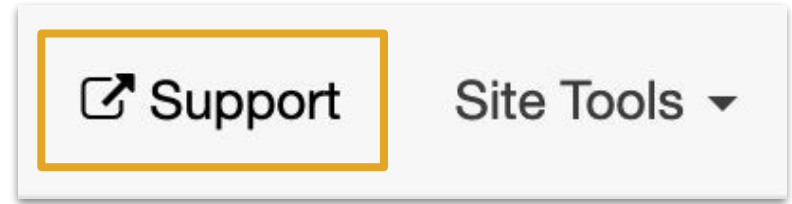


# Support Portal



# Support Portal

- Links to How-To Articles
- Training and Marketing Materials
- Site Feature Updates
- Connect with findhelp support team
- Ability to search for articles as well!







# Contact Us

Connect with findhelp's support team!

Let us know if you're experiencing site issues or have a question directly through the Support Portal!





# Contact Us

All end users can connect with findhelp's support team!

- Types of issues they can help with:
  - Login difficulties
  - Help claiming programs
  - Help editing and suggesting programs
  - Making updates to landing pages
  - Updating/creating flyouts and sticky notes
  - Technical issues on the site
  - Updating assessments
  - General how-to and navigation questions
- Please be prepared to send us details about the issue you're having:
  - Relevant screenshots
  - Workflow steps
  - Error messages
- All other questions can be routed through your CSM!

ENGLISH (US) ▾ CONTACT US SIGN IN

## Contact Us

Your email address

Your name

Your URL (optional)

This is the URL you use to search for community resources. If you are using findhelp.org you can leave this field blank

I'm looking for help with

Subject

Briefly describe your question

Description



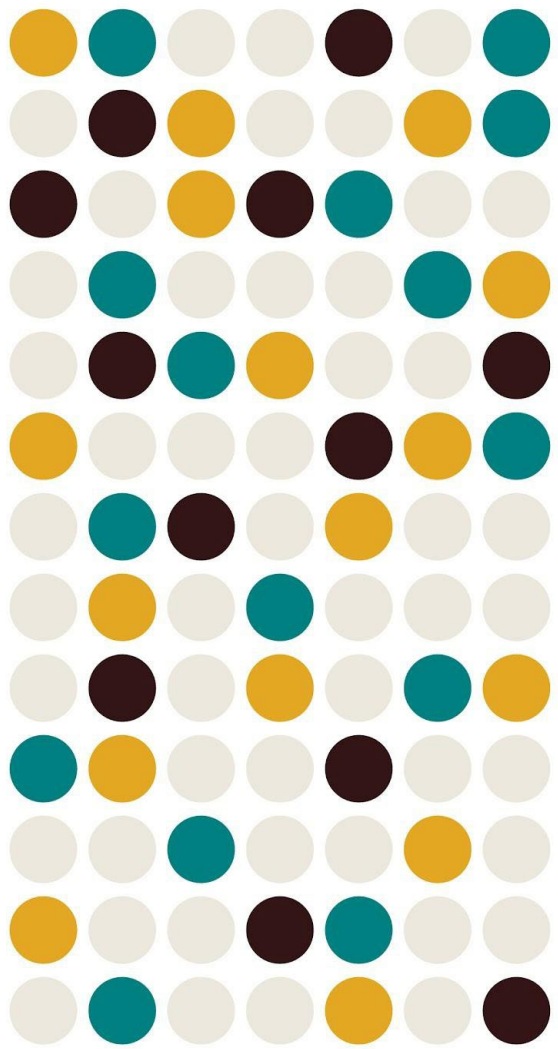
## → Future Enhancements

### Upcoming Integrations

- CRISP
- eCW
- Cerner
- RedCap
- Salesforce

### Other Initiatives

- Growing our claimed CBO network
- Marketing LinkU for external users
- Updated Social Needs Screening
  - READY Center
  - *Additional options available*



# Q&A

# Upcoming LinkU Trainings

- November MHLC Meeting- Part 2
- November 1, 2023 at 1pm - Cancer and Chronic Disease Prevention Bureau Hosting a Bureau Wide LinkU Training Meeting- [Click here to join the meeting](#)
- Training videos to be posted on [LivingWell.dc.gov](https://LivingWell.dc.gov)
- 1 on 1 Technical Assistance opportunities can be scheduled directly with Chronic Disease Division Staff

## Discussion Questions

What are your initial thoughts about the integration of LinkU into your workflow?

**Please enter into the chat box.**

# Quick Evaluation Poll

1. How confident are you to be able to integrate LinkU in your overall referral workflow – including screener, referral tracking, and reporting?
  - *Completely confident – We feel comfortable and/or are already implementing LinkU.*
  - *Fairly confident*
  - *Somewhat confident*
  - *Slightly confident*
  - *Not at all confident*
2. How would you rate the session overall?  
*(1 - not at all to 5 - met all objectives)*
3. To what extent did the session address the stated objectives?  
*(1 – poor to 5 - excellent)*

# DC | HEALTH

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 [dchealth.dc.gov](https://dchealth.dc.gov)



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