LinkU SSO Training

Learn how to access and share nonprofit and social care resources.

What is LinkU?

LinkU, powered by Findhelp, is a free online community resource directory and e-referral platform for DC residents, clients and community providers. LinkU is now integrated with the DC Designated HIE, CRISP DC.

LinkU connects the DC community with social care resources across the DMV region, and is also used to track client outcomes for various programs within the DC Department of Health and DC Department of Corrections (READY Center).

Findhelp is the software technology that powers LinkU.

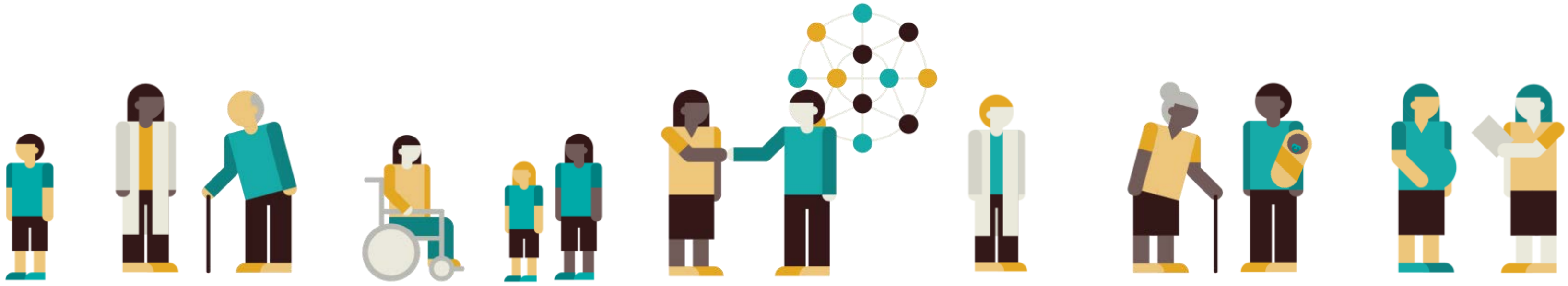
DC HEALTH

LinkU Make the Connection.

CRISP DC

Findhelp's Mission

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



→ Important Roles on Your Site

Navigator

A person looking for programs on behalf of the seeker.

Seeker

A person looking for help on the site.

Site Administrator

A person or persons designated by your organization who can add users and create groups. They can also make updates to the site and give analytic reporting access.

→ Important Terms

Program Card

A resource on your site that houses all of the program specific information that is important to help a seeker get access to that resource or service.

Community Based Organization (CBO)

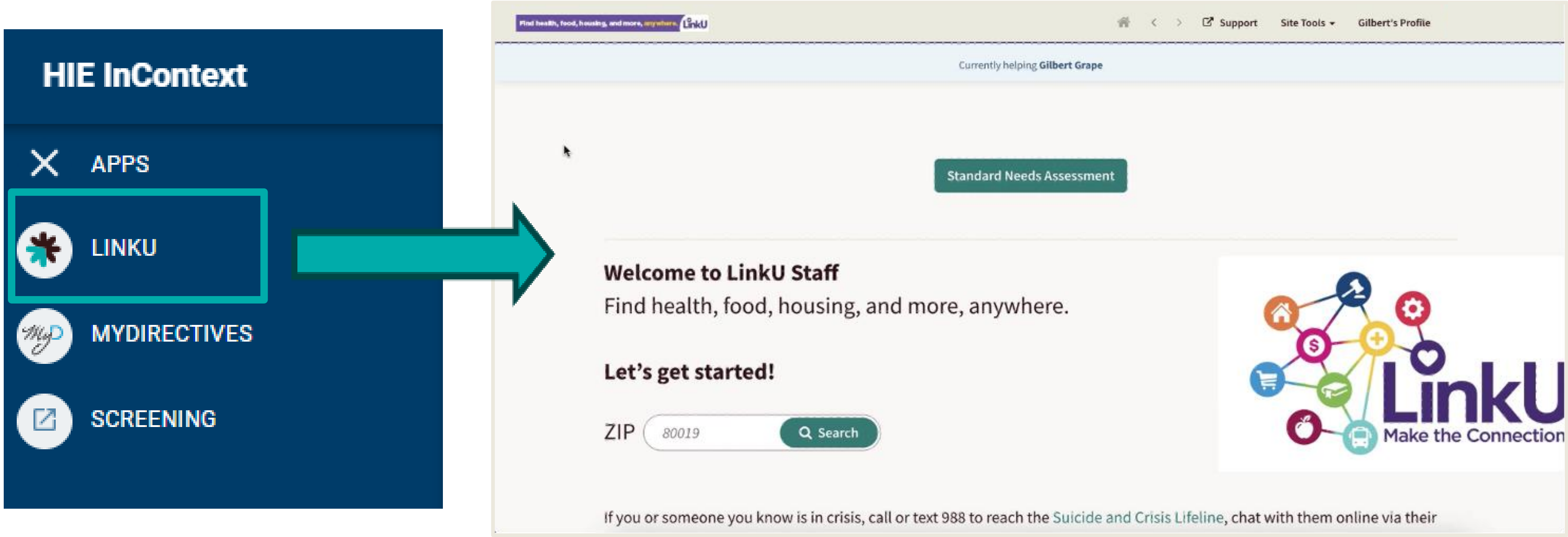
The organization providing the resource or program you want to refer a Seeker to.

Connect Button

The button on a program card that connects a navigator or seeker with the organization providing the service. This button starts the referral process.

Accessing LinkU

You can launch LinkU inside of CRISP DC from the LinkU Tile in the patient search or from Additional Applications. Once you launch LinkU, the site administrator will be able to assign you to a group with your other team members.



Your Sites

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

Staff Site: SSO through CRISP DC

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

Community Site: linkudmv.org

- Share this site with community
- Created for individuals to self-serve

Learning Objectives

- Using the Assessment
- Searching for Programs
- Connecting to Programs
- Managing Client Profiles
- Live Demo
- The Support Portal

Using the Assessment

The Benefits of Using Assessments

Assessments are a powerful tool for identifying a seeker's social needs and quickly connecting them to the right support.

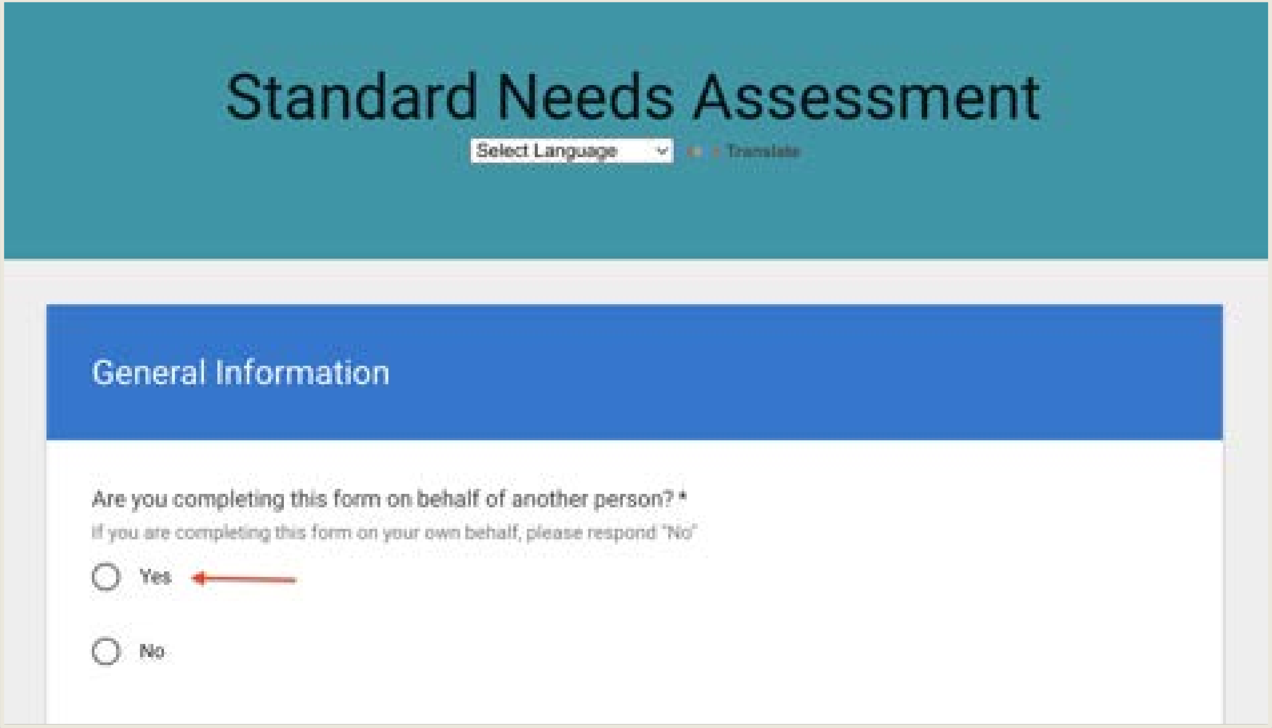
They not only help assess individual needs, but also recommend programs that match those needs—making it easier and faster to get seekers the help they need.

They also provide useful data for your organization.

Starting an Assessment

You might have a custom assessment built for your organization. You will use this inside of your system of record with your seekers. We also have a social needs assessment you can access inside of LinkU!

Filling Out the Assessment



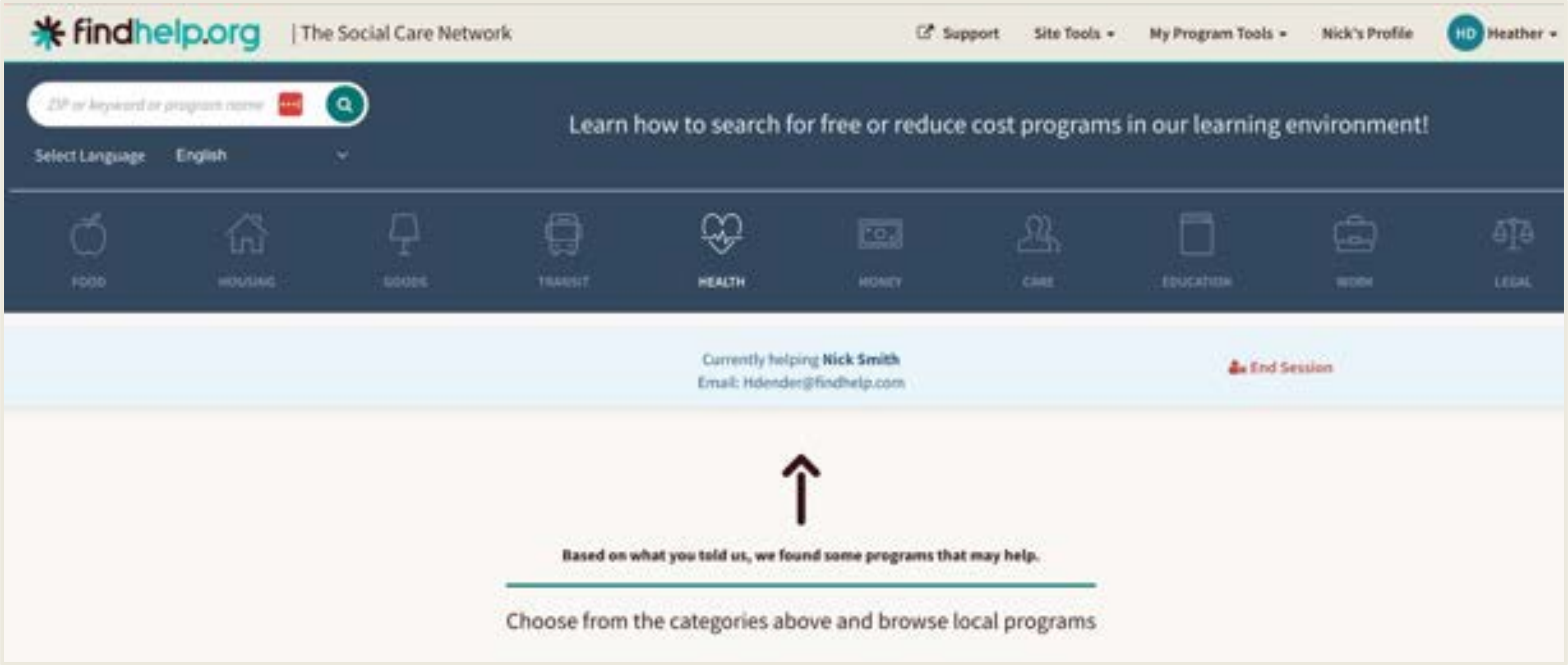
Use the questions to identify your seeker's needs.

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.

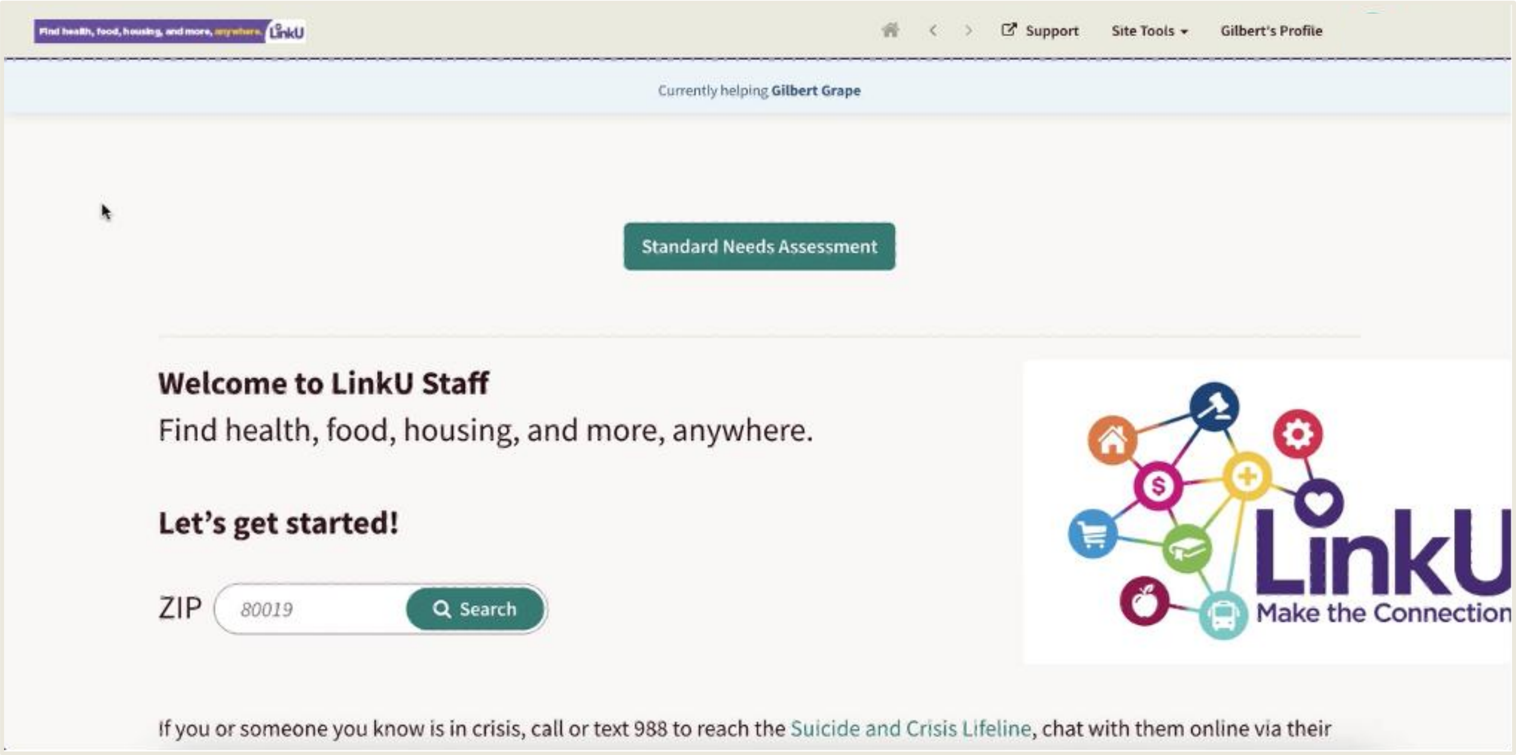
Tailored Search Results

Relevant categories will be highlighted based on the answers the seeker provided.



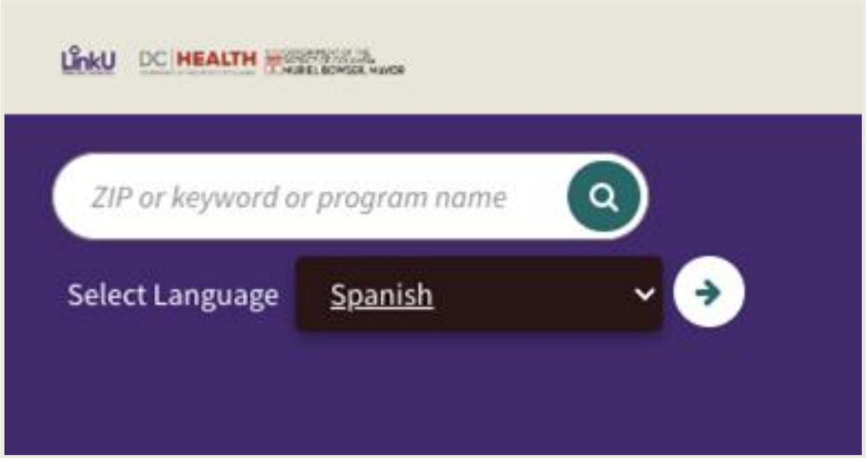
Searching for Programs

Starting a Search



Changing the Preferred Language

You can translate the page into any language supported by Google. Select the preferred one for your seeker and then click on the arrow. The entire site will be translated in that language!

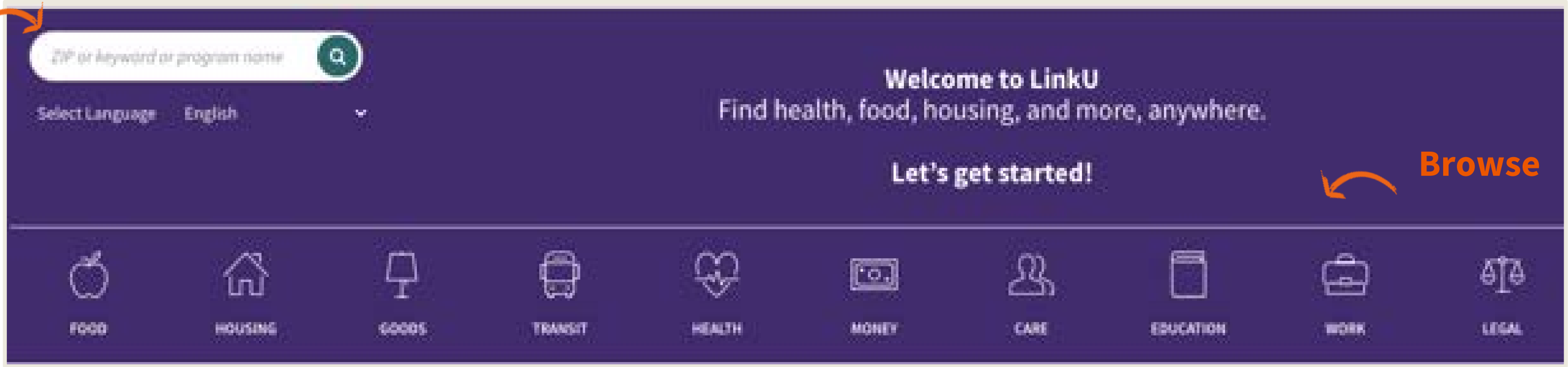


Search for Programs

Once you have entered a Zip Code to start your search, you can look for programs in a couple different ways:

- **Type** a search term
- **Browse** categories, subcategories, and sub-subcategories

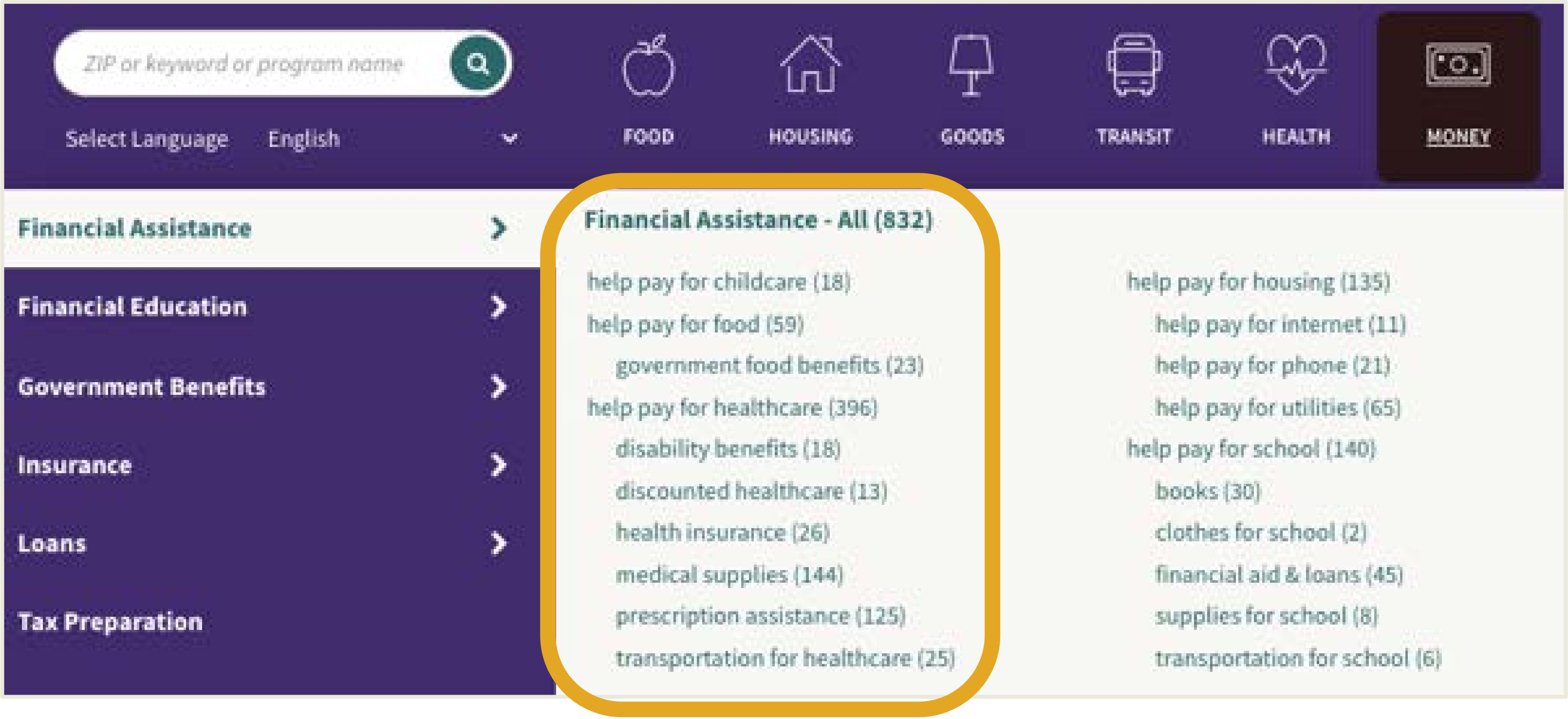
Search Terms



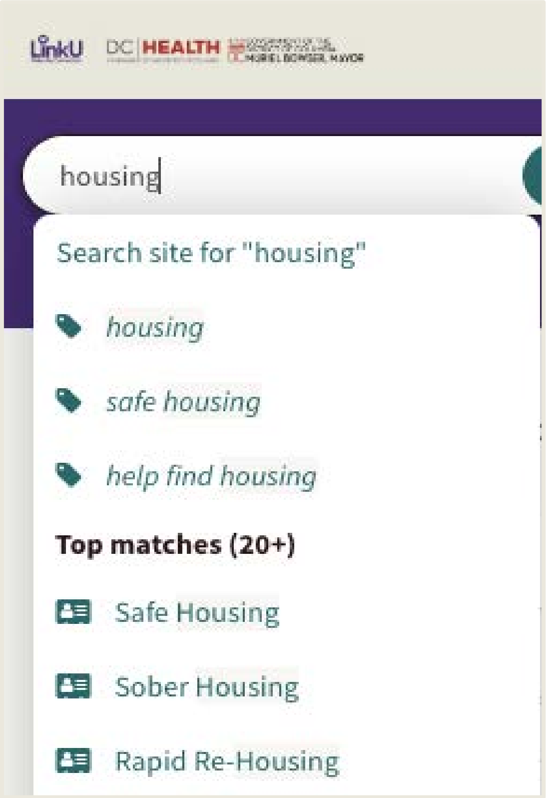
Browse

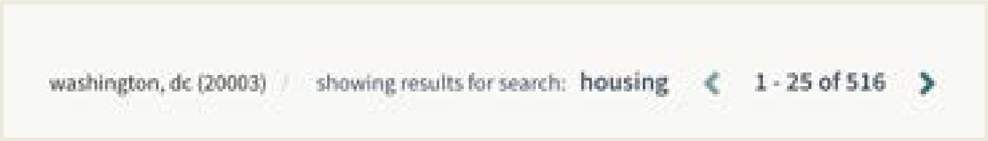
Browse

Every category has an array of subcategories. The number next to the category name indicates how many programs match that specific category



Search Terms vs. Browsing





If a seeker has a housing need, your first instinct may be to type ‘housing’ in the search field.

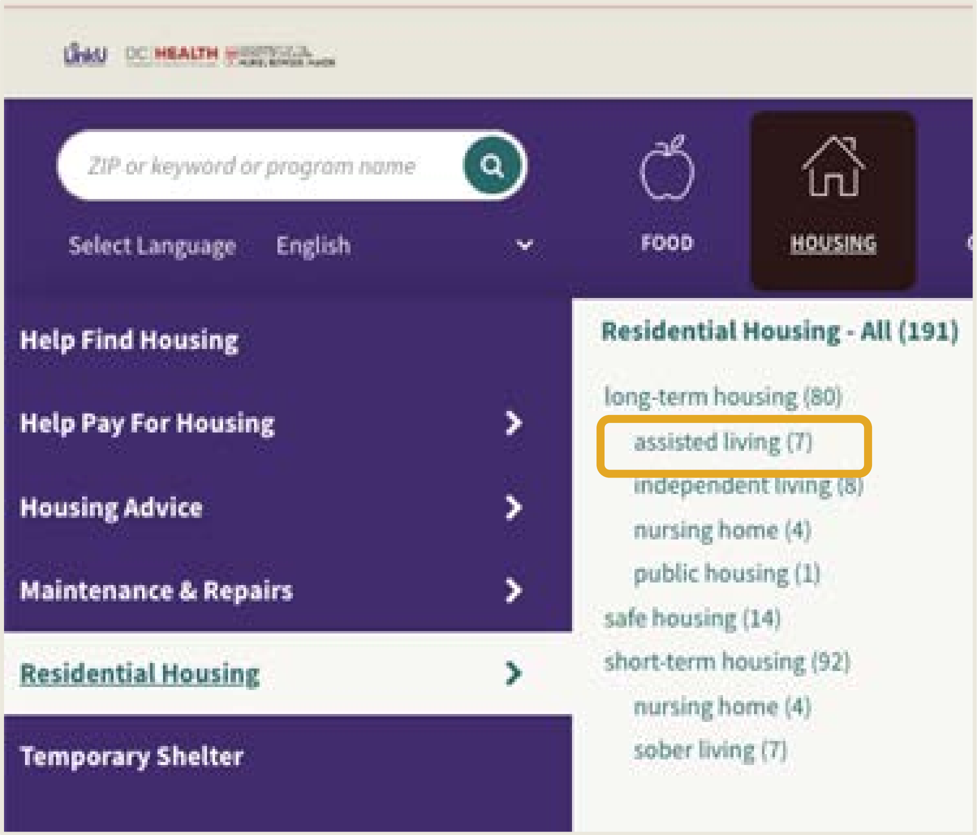
This search, however, has 516 results in this search area:

Search Terms vs. Browsing

Instead, if you know the specific housing need of your seeker, for example assisted living, you can use sub categories to narrow that down.

Clicking on Housing, and then Residential Housing, there is a subcategory for assisted living you can select.

This now gives you **7** programs to choose from.

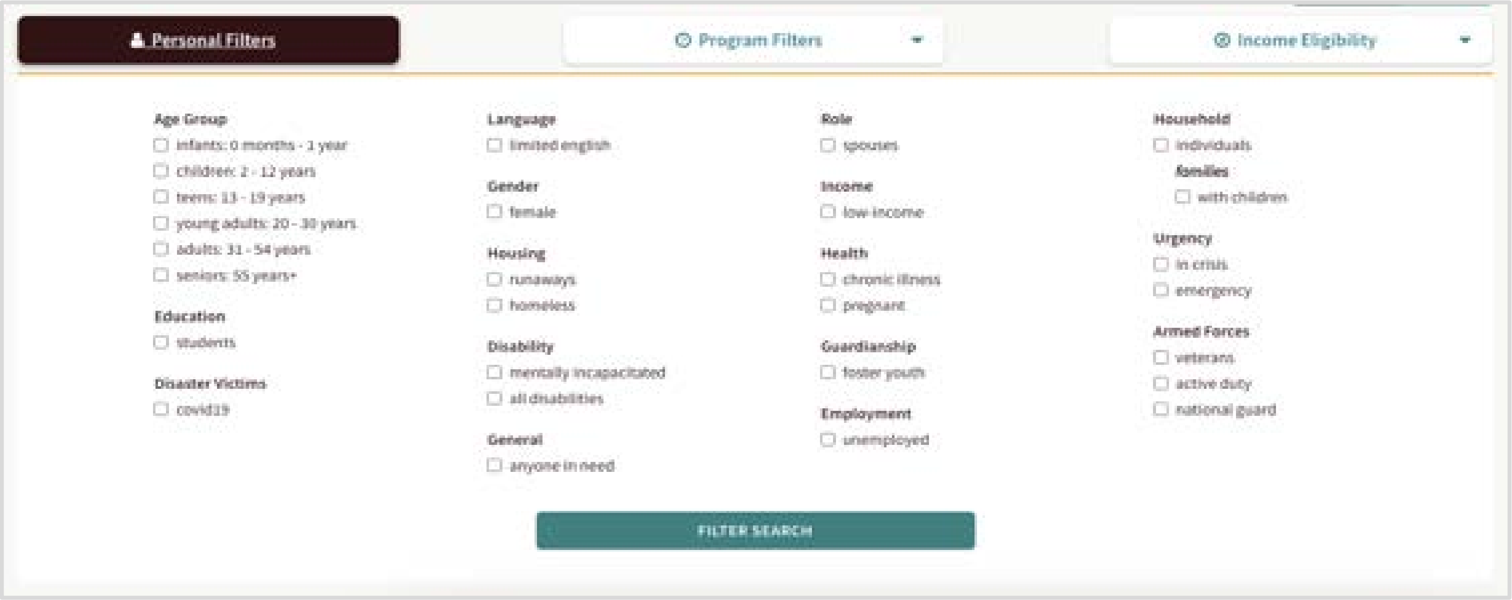


How do I narrow programs to meet seeker's needs?

Using Filters

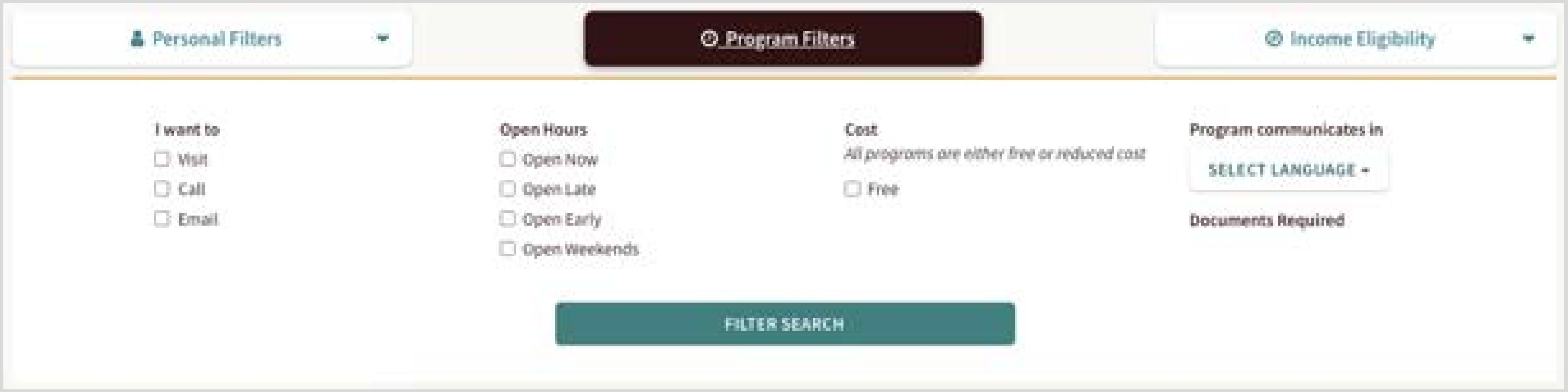
Personal Filters

Filter by situations that are **specific to the person** you're helping, such as age group or armed forces status. The filters are dynamic and will change based on the category chosen and program availability.



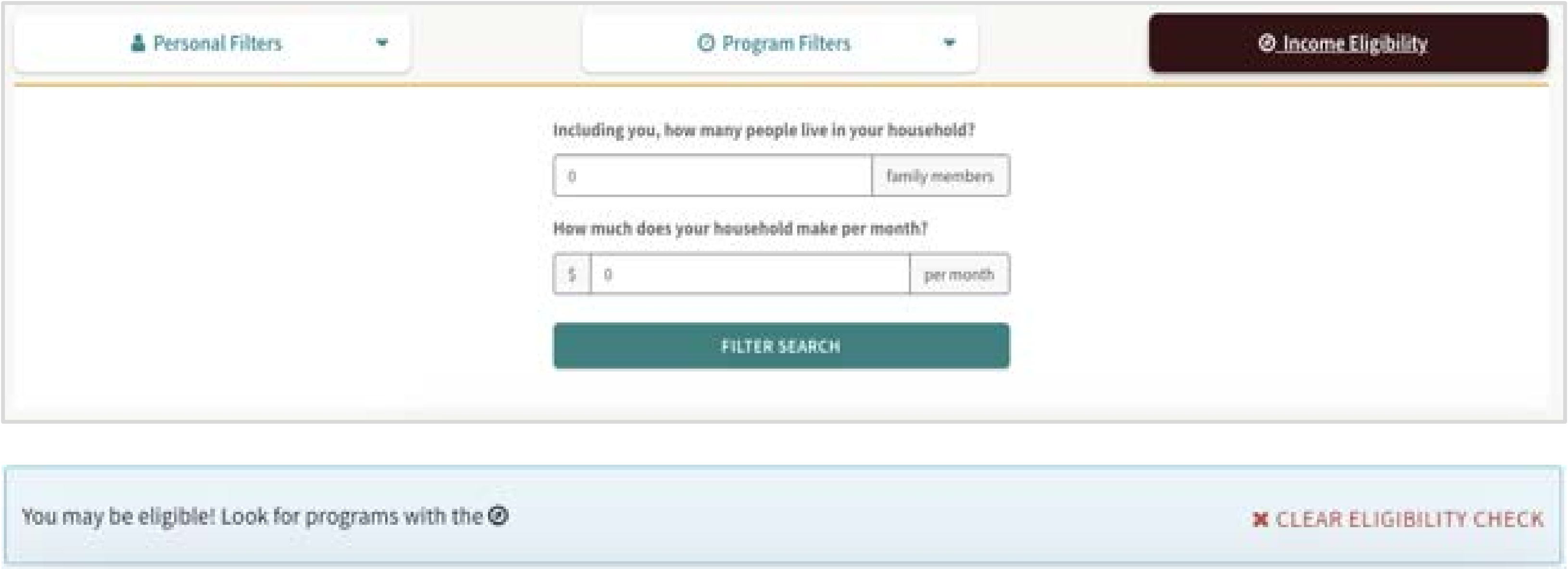
Program Filters

Filter by items that are **specific to the program** you're trying to find, including hours or operation or language. Filters correspond to the tags that are associated with the program.



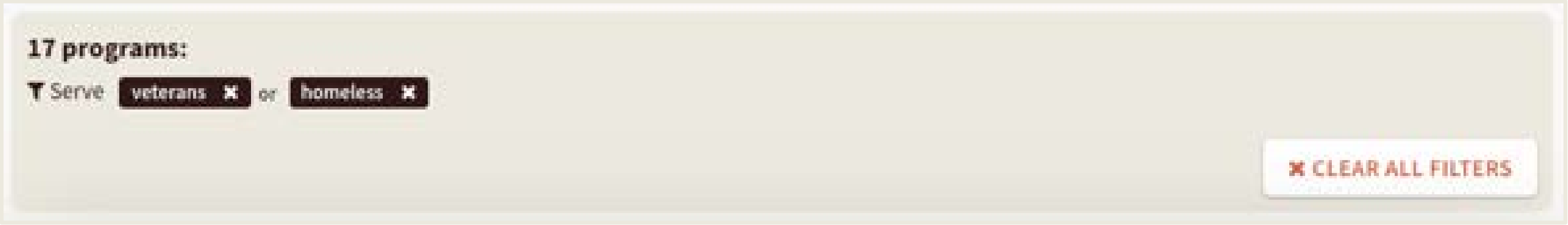
Income Eligibility

Narrow resource by **household and income eligibility** -- a new header and program label will appear.



Clear Filters

Remove Filters by clicking the ‘x’ on the tags or by clicking ‘CLEAR ALL FILTERS’



Filters are dynamic, so they will remain active as you move between categories. Make sure to clear them when you start a new program search!

Connecting to Programs

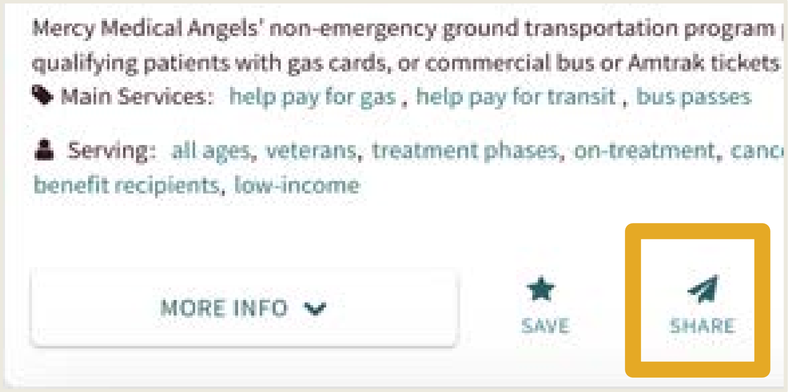
Difference Between Sharing and Referral

Sharing a resource allows the seeker to follow up on the information in their own time. This can come from email, text, or through Facebook.

Referring a seeker to a program is directly connecting them with the next step to get the support or resource that program provides. This happens through live and logged referrals.

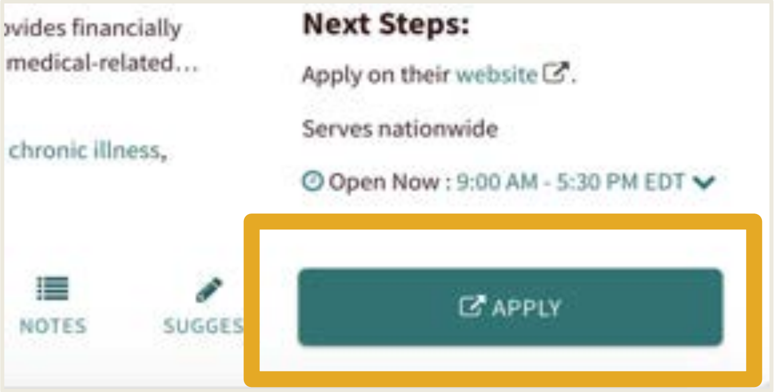
Sharing a Program vs. Connecting

Sharing



- The community member can contact the organization directly to move forward.
- These shared programs won't be tracked in their profile.

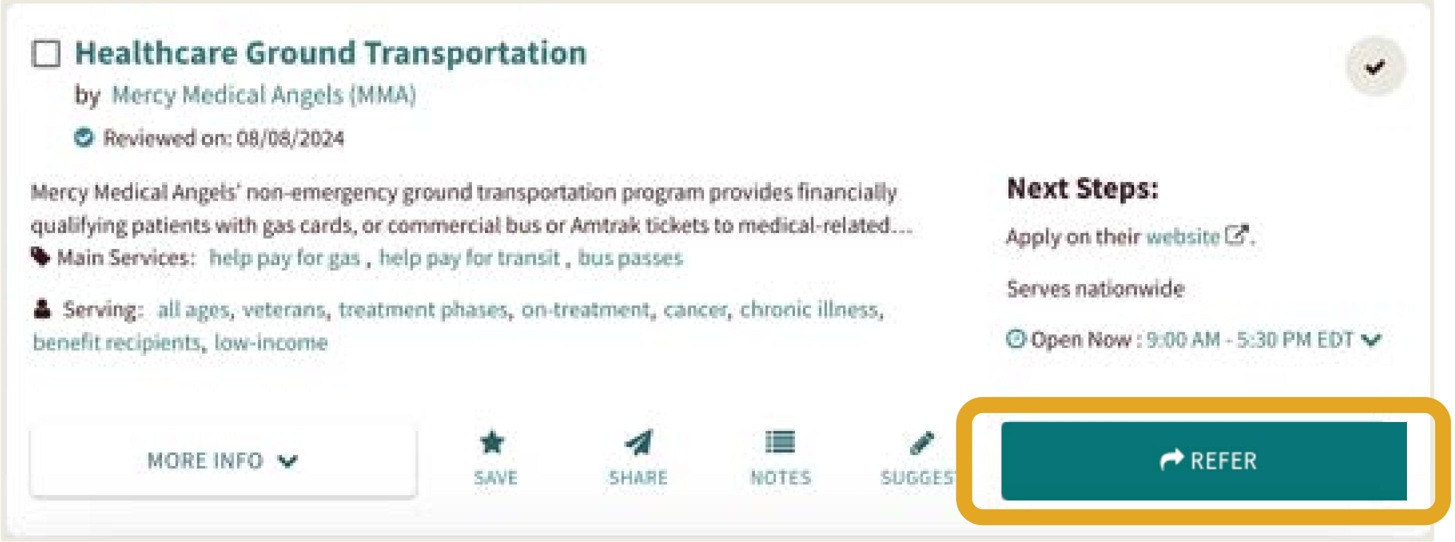
Connecting/Referring



- The community member can contact the organization, or for live referrals, the organization can contact them.
- These referrals are automatically tracked in the member's profile.

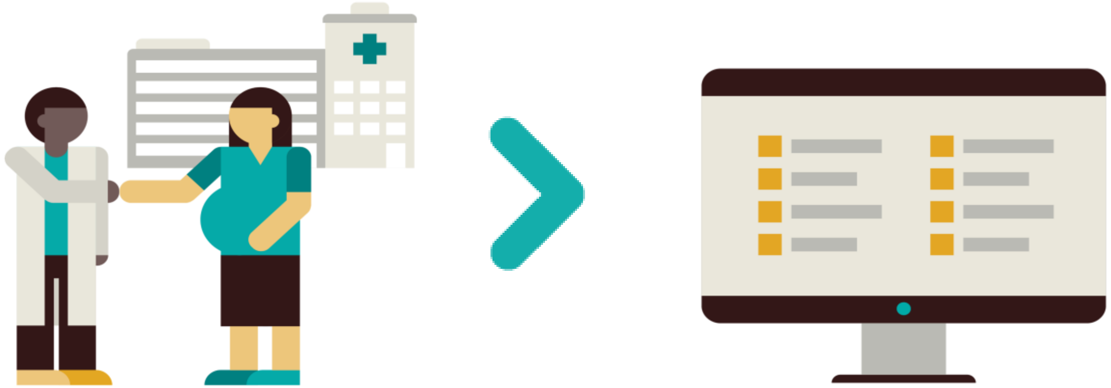
Starting a Referral

Referrals are started by clicking on the connect button inside of a program card. There are two types of referrals: **live** and **logged**.



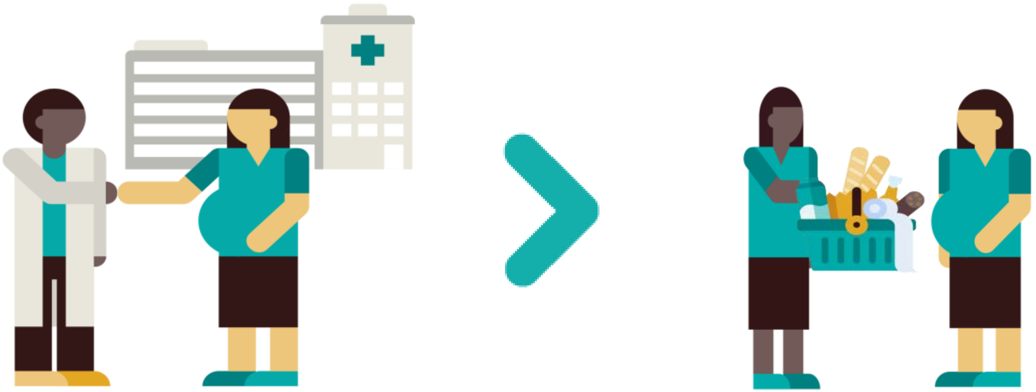
What is a Logged Referral?

A logged referral is one that is documented to the seeker's profile but is not sent to the organization providing the service. Updating the referral status is owned by the navigator.



What is a Live Referral?

A live referral is one that is sent to the organization providing the service. It is also saved to a seeker's profile. The organization receives a **notification** of the referral and updates the status.



Type of Contact Button

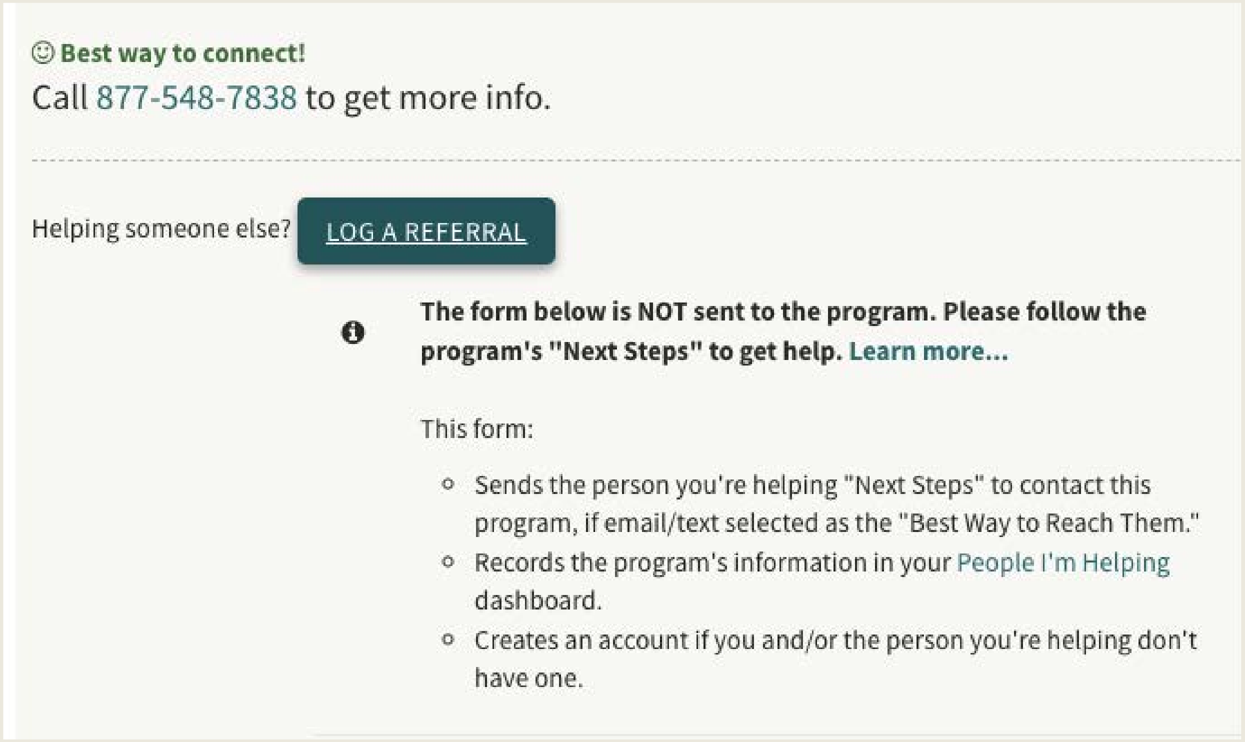
Live Referrals

Button	Next Step
APPLY HERE **Apply through platform**	Create a referral for the seeker and then complete a screener within the platform to collect eligibility
REFER **One-step referral**	Create a referral for the seeker
SCHEDULE **Schedule**	Schedule an appointment for the seeker within the platform to create the referral

Logged Referrals

Button	Next Step
APPLY ON THEIR SITE **External Apply**	A new tab in your browser will open, taking you to the organizations screener on their website
CONTACT ON THEIR SITE **External Contact**	Contact the organization through an external website
SCHEDULE ON THEIR SITE **External Schedule**	A new tab in your browser will open, taking you to the organizations scheduling tool
SEE NEXT STEPS **See Next Steps**	The best way to reach a program is to call, email or go in-person.

Starting a Logged Referral


☺ Best way to connect!

Call 877-548-7838 to get more info.

Helping someone else? LOG A REFERRAL

The form below is NOT sent to the program. Please follow the program's "Next Steps" to get help. Learn more...

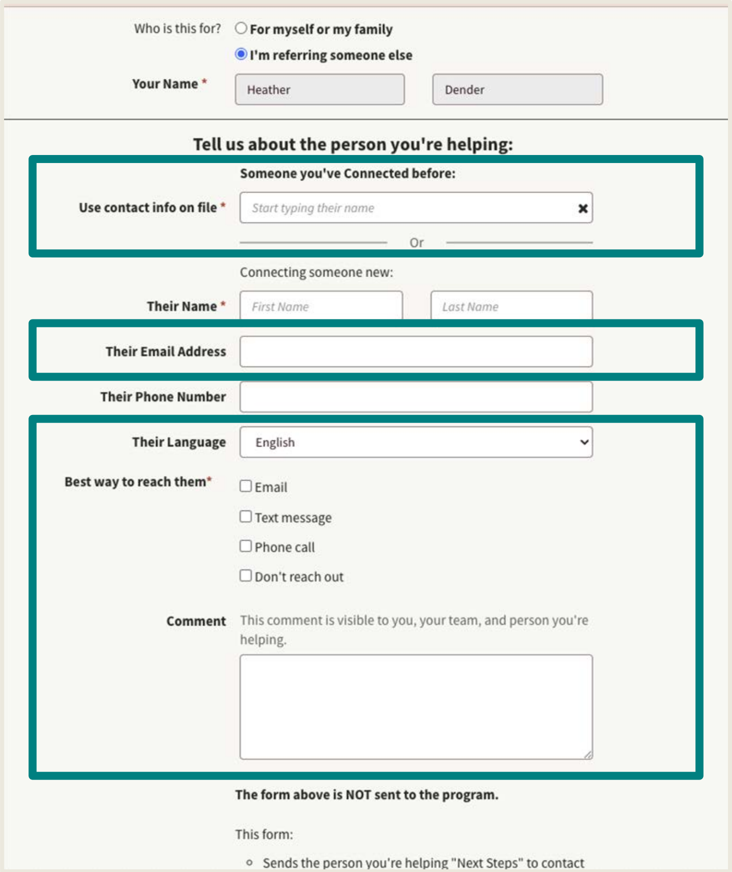
This form:

- Sends the person you're helping "Next Steps" to contact this program, if email/text selected as the "Best Way to Reach Them."
- Records the program's information in your People I'm Helping dashboard.
- Creates an account if you and/or the person you're helping don't have one.

Click on the connect button and share the next steps with your seeker.

Then click on the **Log A Referral** button and fill out the form so it saves to their seeker profile.

Filling Out A Logged Referral Form

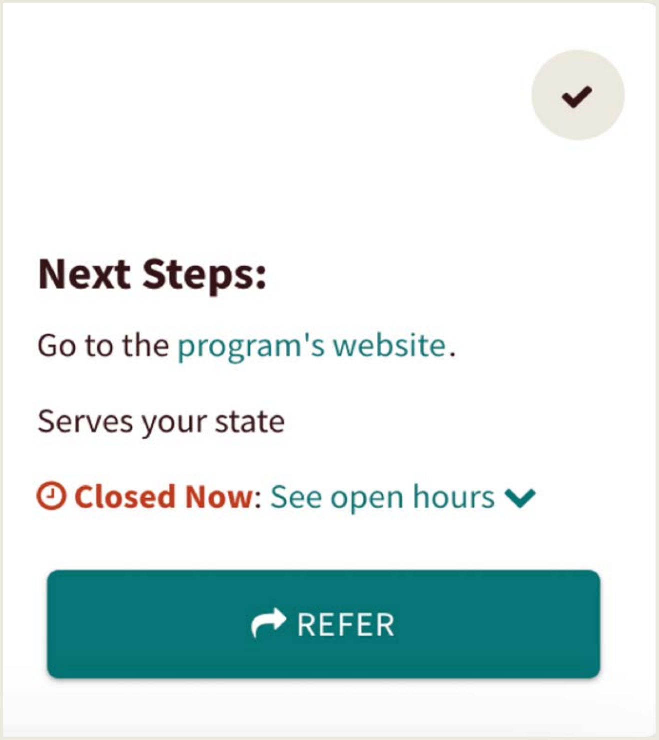


This type of referral isn’t sent to the organization, but it can be saved to the seeker’s shared care record.

Here’s what you can do:

- Check if you’ve helped this person before by searching their name. If you have, their info will auto populate into this form!
- Add their contact info (not your own).If they don’t have contact details, leave a note or create contact info for them.
- Select their preferred language — this will translate the notification.
- Choose how they want to be contacted. This is just for notifications, since the referral won’t go to the organization.
- Add a note. It will be visible to the seeker and anyone else who can see their record.

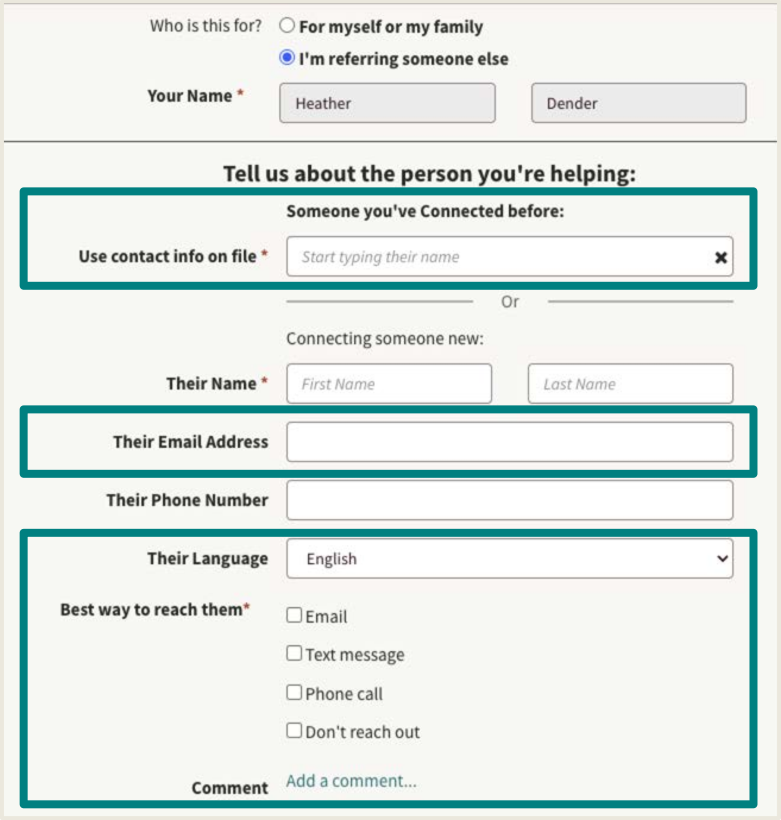
Starting a Live Referral



Programs that have live referrals turned on will be claimed and have the check mark badge in the upper corner.

Clicking on the connect button leads to a referral form to fill out.

Filling Out A Live Referral

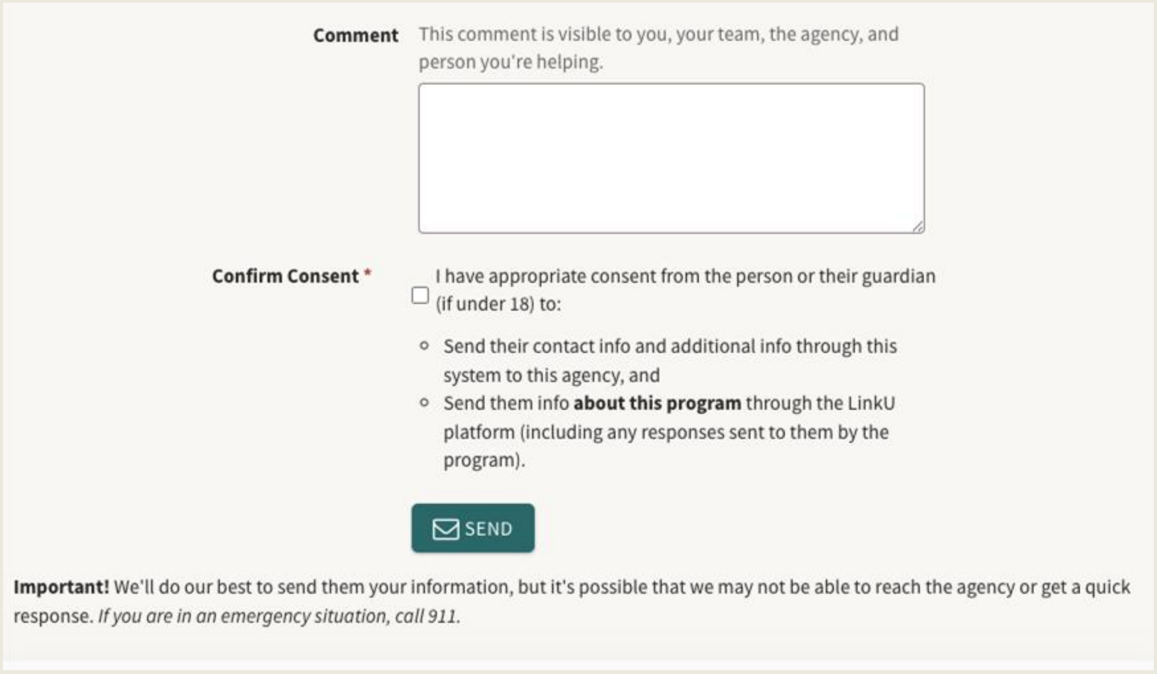


This referral **<u>is</u>** going to the organization supporting the program.

Like with a logged referral form, you will:

- Check if you've helped this person before by searching their name.
- Add their contact info (not your own).
- Select their preferred language — this will translate the notification and send a note to the organization so they can better support this seeker
- Choose how they want to be contacted. This includes both notifications as well as how the organization will reach out:
  - Phone, text, or email
  - Do not reach out is used when the seeker doesn't have the other methods to reach

Gaining Consent



Comment This comment is visible to you, your team, the agency, and person you're helping.

Confirm Consent * I have appropriate consent from the person or their guardian (if under 18) to:

- Send their contact info and additional info through this system to this agency, and
- Send them info **about this program** through the LinkU platform (including any responses sent to them by the program).

SEND

Important! We'll do our best to send them your information, but it's possible that we may not be able to reach the agency or get a quick response. *If you are in an emergency situation, call 911.*

Because we are sending the seeker's information to another organization, we have a consent checkbox to confirm before the referral is sent.

Organizations receiving these referrals will only see the information provided in the form.

What Happens When a Referral is Sent?

Live Referrals

The seeker receives a notification about the program and next steps.

The CBO will receive a notification a new referral has been made. They will reach out to the seeker directly to provide help.

You can check the status of the referral you made in the People I'm Helping dashboard.

Logged Referrals

The seeker receives a notification about the program and next steps.

The CBO **does not** get a notification of the referral. The seeker reaches out to the organization to start the process.

You will **update** the status of the referral you made in the People I'm Helping dashboard.

Seeker Referral Notification

Hi there,

Heather D. referred you to Pay for Books Online at Learning and Development with the following comment:

"Matt needs to replace his ID"

What's Next?

Please contact the agency directly:

- **Website**: http://www.findhelp.org
- **Phone**: 800-757-1800

Thanks,

- The team at Findhelp Learning and Development

Already got in touch? Let Heather D. 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?

Log in to your account and check your "Referrals for Me" folder!

Note: this is an automatic message, which is unable to receive replies. If you need emergency help, please call 911.

If your seeker chooses **email** or **text** as their preferred contact method, they will receive one of these notifications.

Today 11:49 AM

Someone on Connecting the Dots Demo referred you to Food Pantry. Call at 512-555-0518. More contact info: https://bit.ly/3YeyCQH

Community Based Organization New Referral Notification

Hi Learning and Development team,

Heather D. referred someone to your program, Pay for Books Online!

Please reach out to:

- **Matt Smith**
- hdender@findhelp.com

Heather left the following comment about Matt: "Matt needs to replace his ID".

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

Already reached out to Matt? Let Heather know what happened, so they can follow up:

Needs client action : More client information is needed

Pending : We are processing the referral.

Referred elsewhere : Referred somewhere else that could help.

Got help : We were able to provide help.

Eligible : They are eligible.

Couldn't contact : We were unable to reach them.

Not eligible : They are not eligible for our services.

No capacity : We do not have the capacity at this time.

Couldn't get help : We could not provide them with our services.

No longer interested : They were no longer interested in our services.

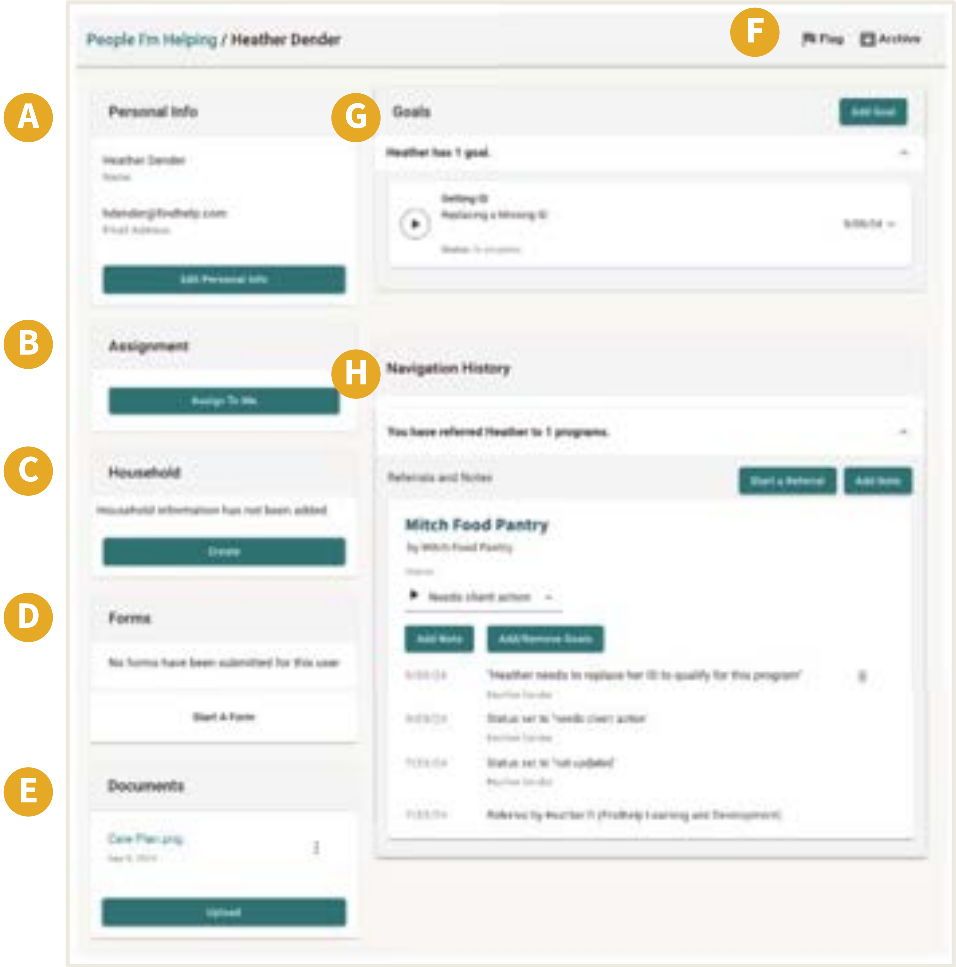
Managing Client Profiles

→ How Seeker Profiles are Created

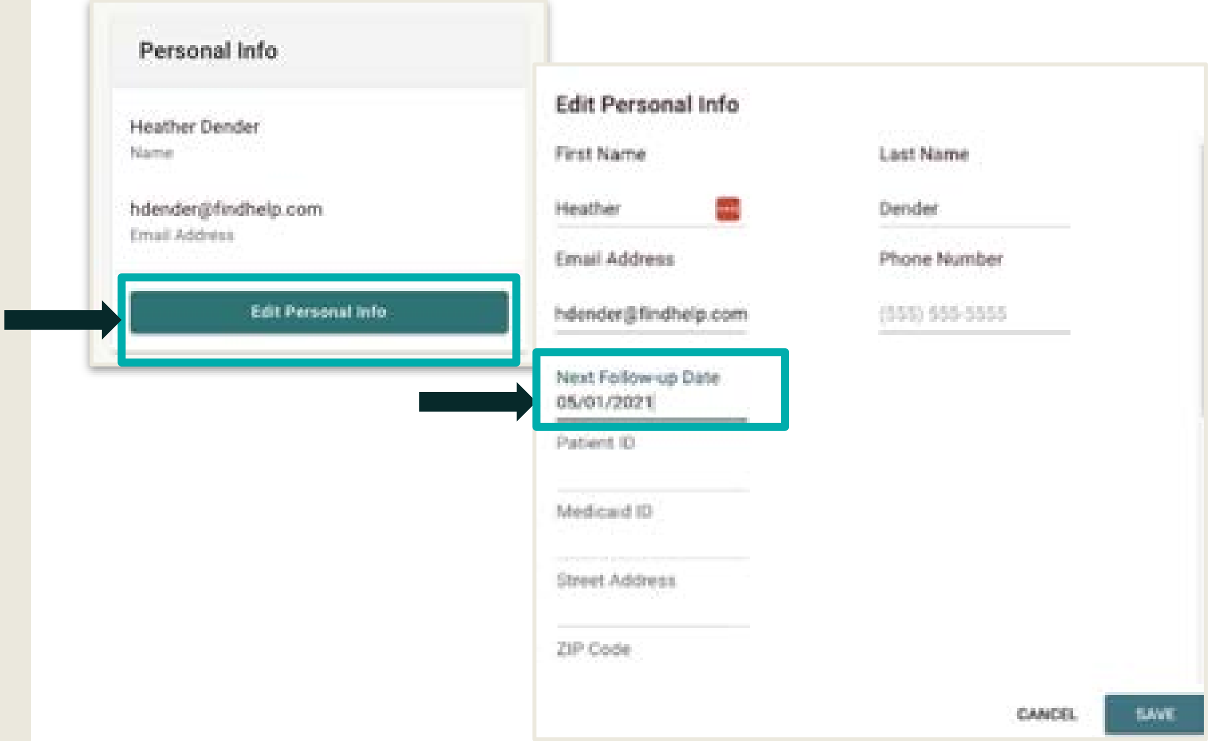
- Seeker profiles are automatically created any time a referral or assessment has been made for a seeker by a navigator.
- If users are in a group with **Team Navigation** enabled, all seeker profiles will be visible and accessible to all members of the group.
- Seeker profiles are **NOT** created for self-referrals or self-assessments. Additionally seeker profiles are not created when a you share a program with someone.

Seeker Profile Overview

A. Personal Info
B. Assignment
C. Household
D. Forms
E. Documents
F. Flag and Archive
G. Goals
H. Navigation History



Personal Info



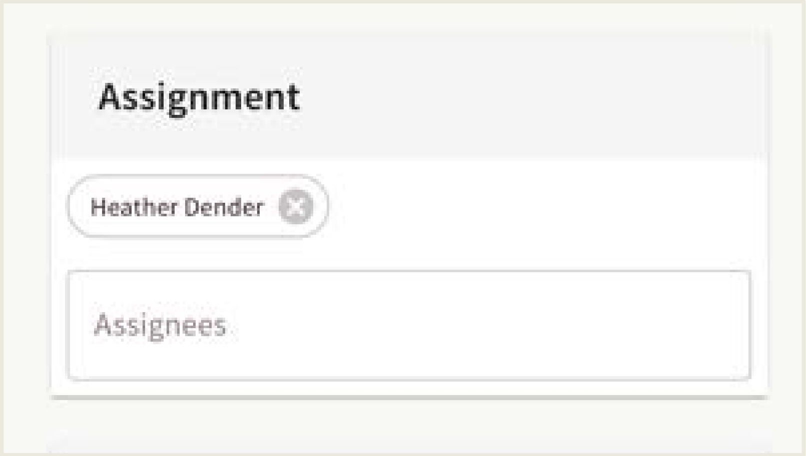
You can add the seeker's information into this section.

You can also add a follow up date here which is a filter used in the **People I'm Helping dashboard**.

Assignment

You can assign yourself or another navigator to a seeker profile. This will give you an additional filter you can use in the **People I'm Helping** dashboard.

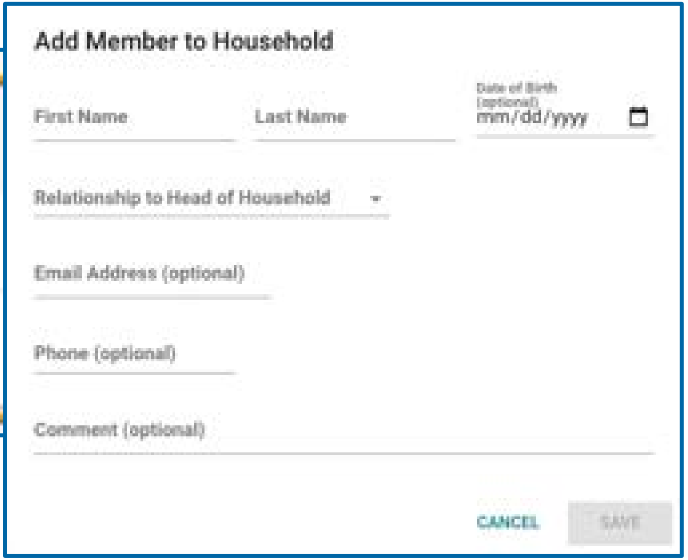
This can also help your group see who on your team is working with a specific seeker.



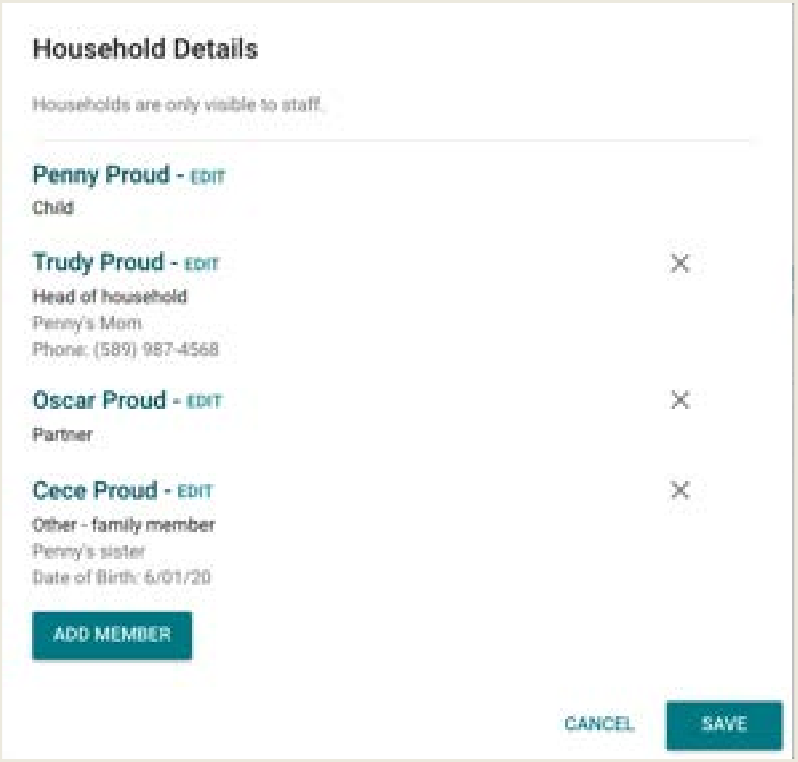
Households

You can add household details to help you when you are working with families and groups of seekers. This lets you add in relationships important to your seeker's care.

This is visible to navigators who have access to these profiles.

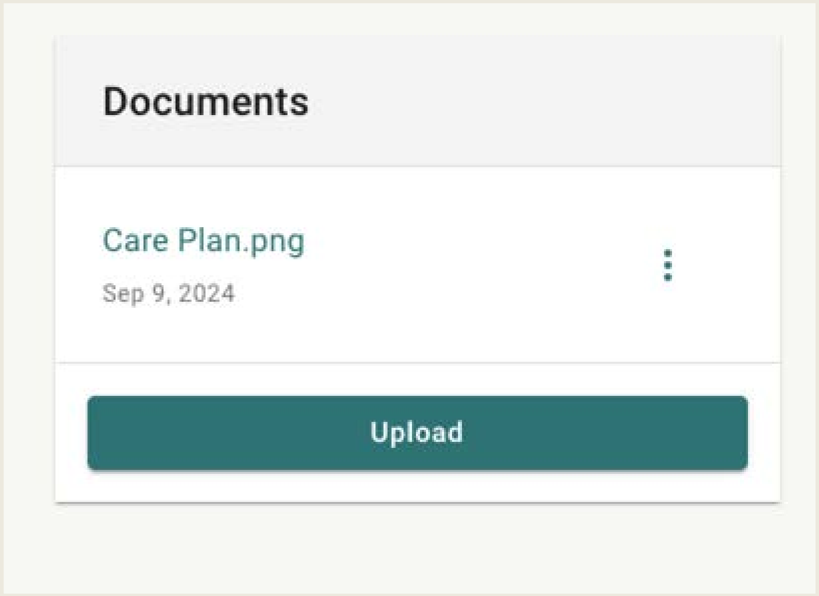


Household Important Details



- Household member names are not direct links to seeker profiles.
- Adding a member to a household does not create a seeker profile for that member.
- Household members will not be matched to preexisting seeker profiles.

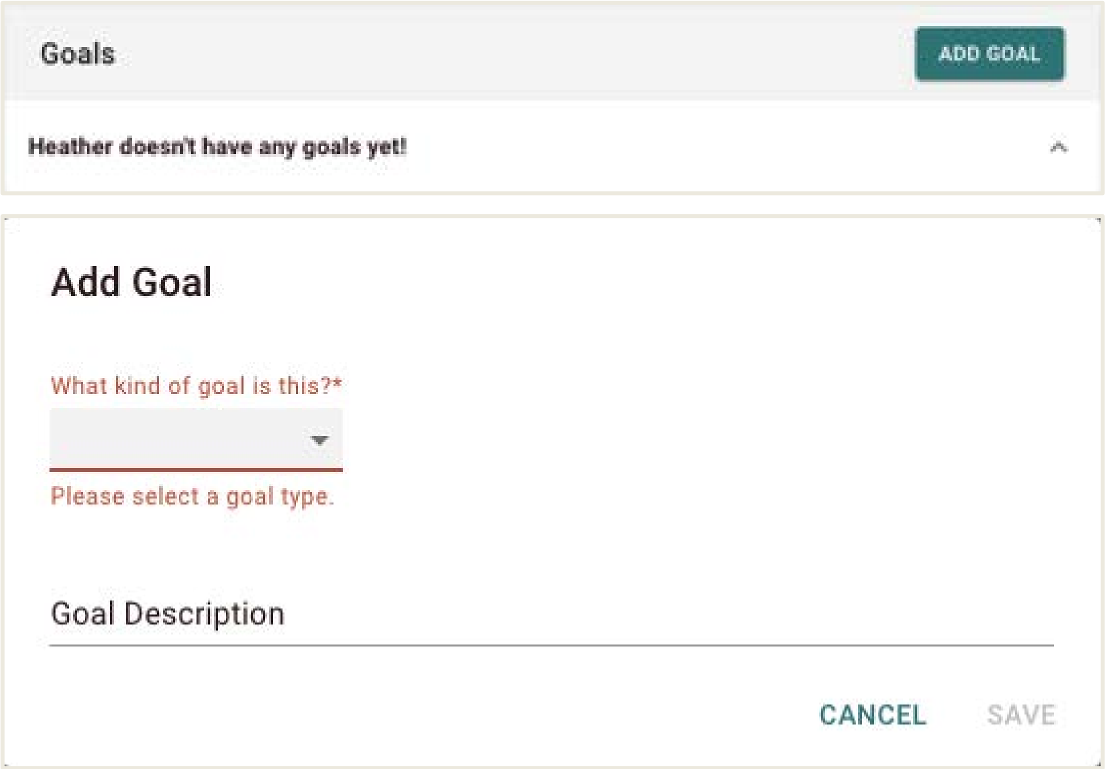
How do I upload a document?



Select upload and then choose the document you wish to attach to the seeker profile.

Documents are viewable by any team member who is a part of your group when team collaboration is enabled.

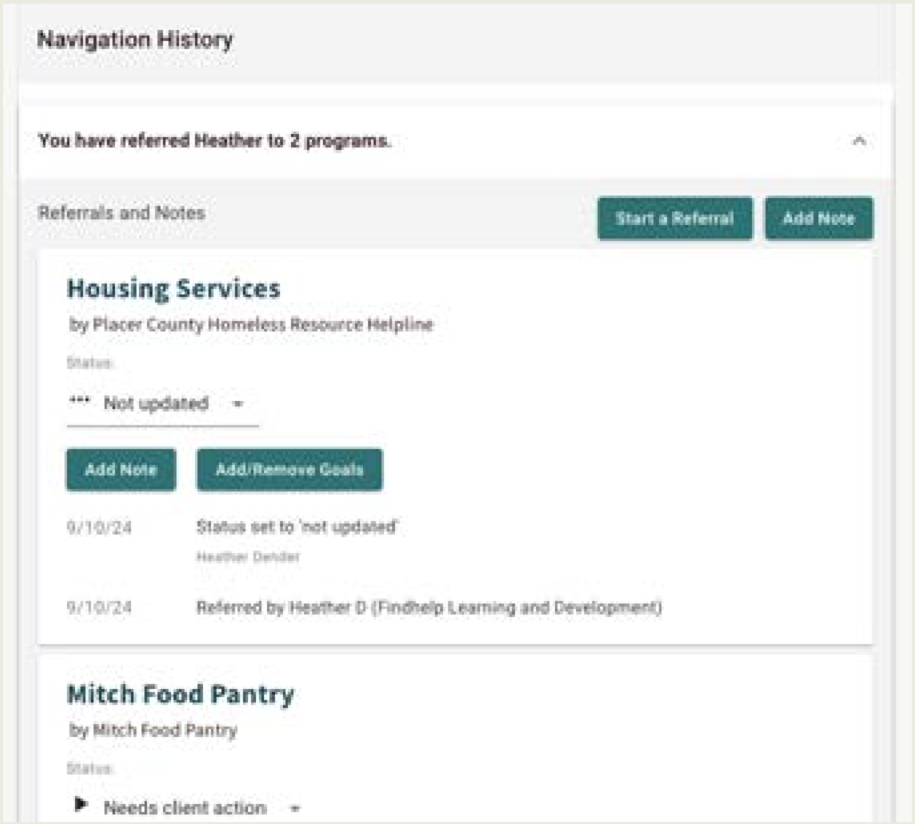
Adding a Goal



In the goals section, you can see previously created goals, add new goals, and view or update the status and notes associated with a goal.

If you have an assessment created for your site, filling it out will also create relevant goals.

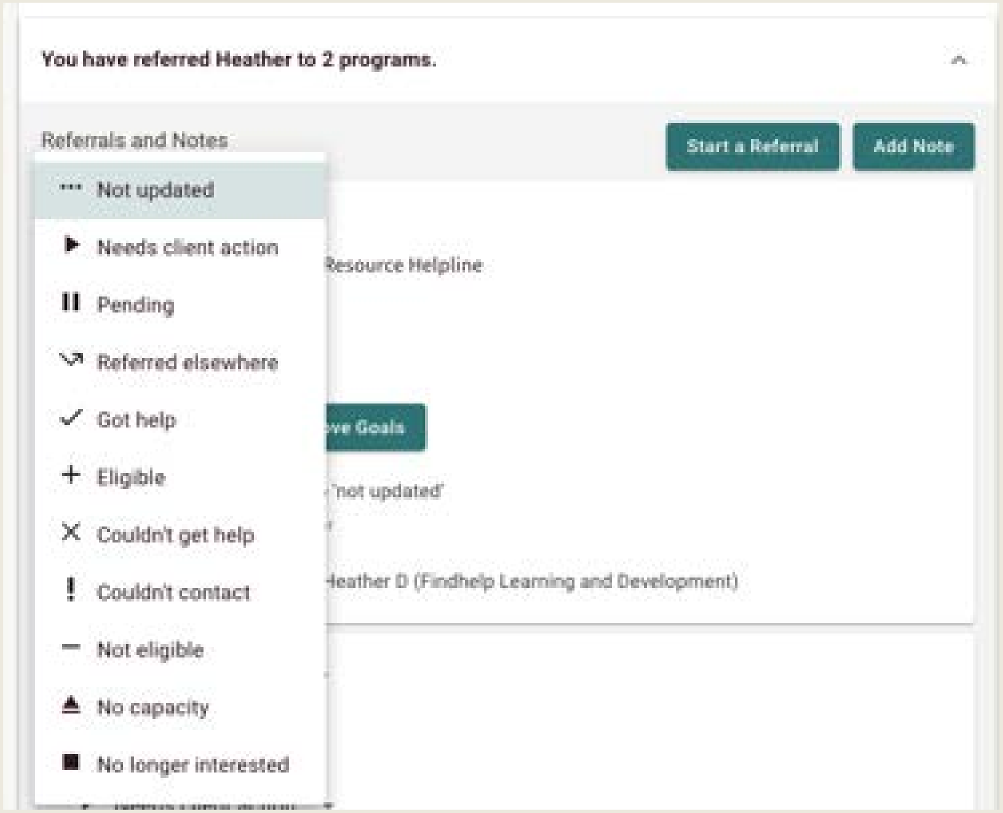
Navigation History



All referrals made for an individual and their current status will automatically appear under Navigation History.

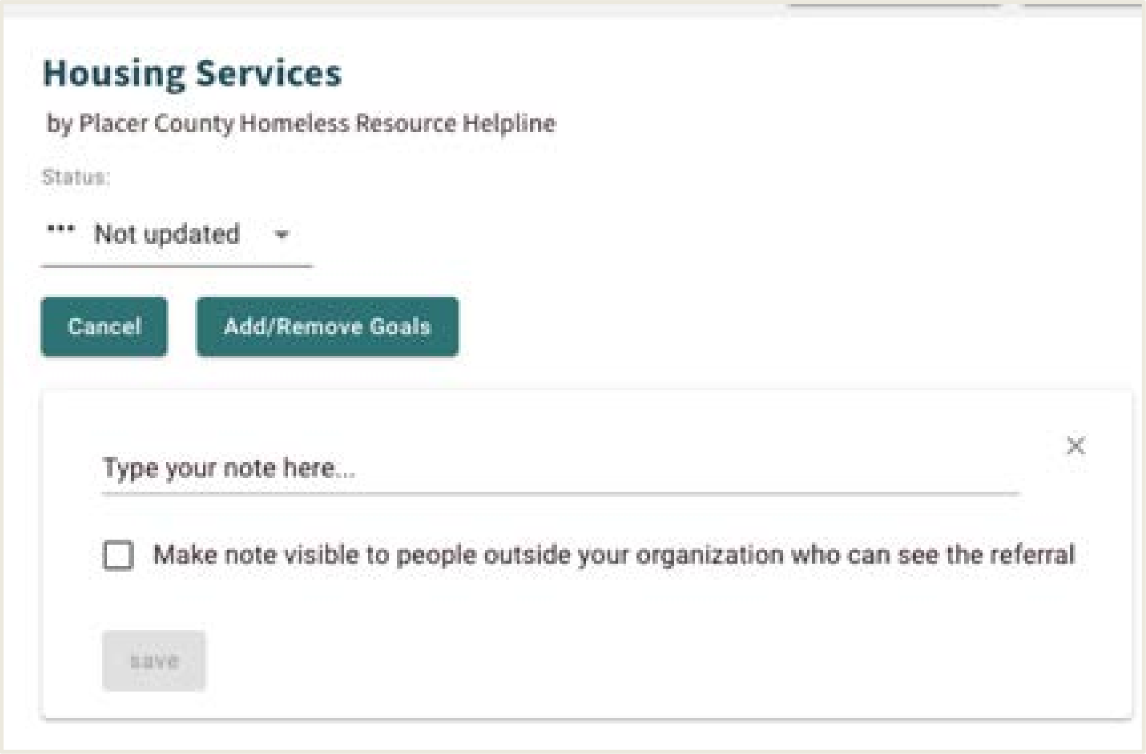
Self referrals will not appear here.

Updating Referral Statuses



In the Navigation History you can see the status of the referral and update the status yourself of any **logged referrals** you have made.

Referral Notes



You can add a note to a referral that can be shared with the community organization!

Click the checkbox next to the **"Make the note visible"** option.

The note will be visible to staff and community organizations with access to the referral.

Live Demo

LinkU Resources

CRISP DC Resources on the LinkU Platform

Resources & Videos

User Guides & One Pagers

Training Videos & Webinars

1. LinkU User Guide
2. Screening One Pager
3. Searching for Resources in LinkU
4. Sending Referrals Through LinkU
5. LinkU Quick Guide
6. Getting Started with LinkU via CRISP DC
7. CRISP DC LinkU Training Slides
8. How to Launch LinkU from the CRISP DC Portal
9. How to Launch LinkU from the InContext Application

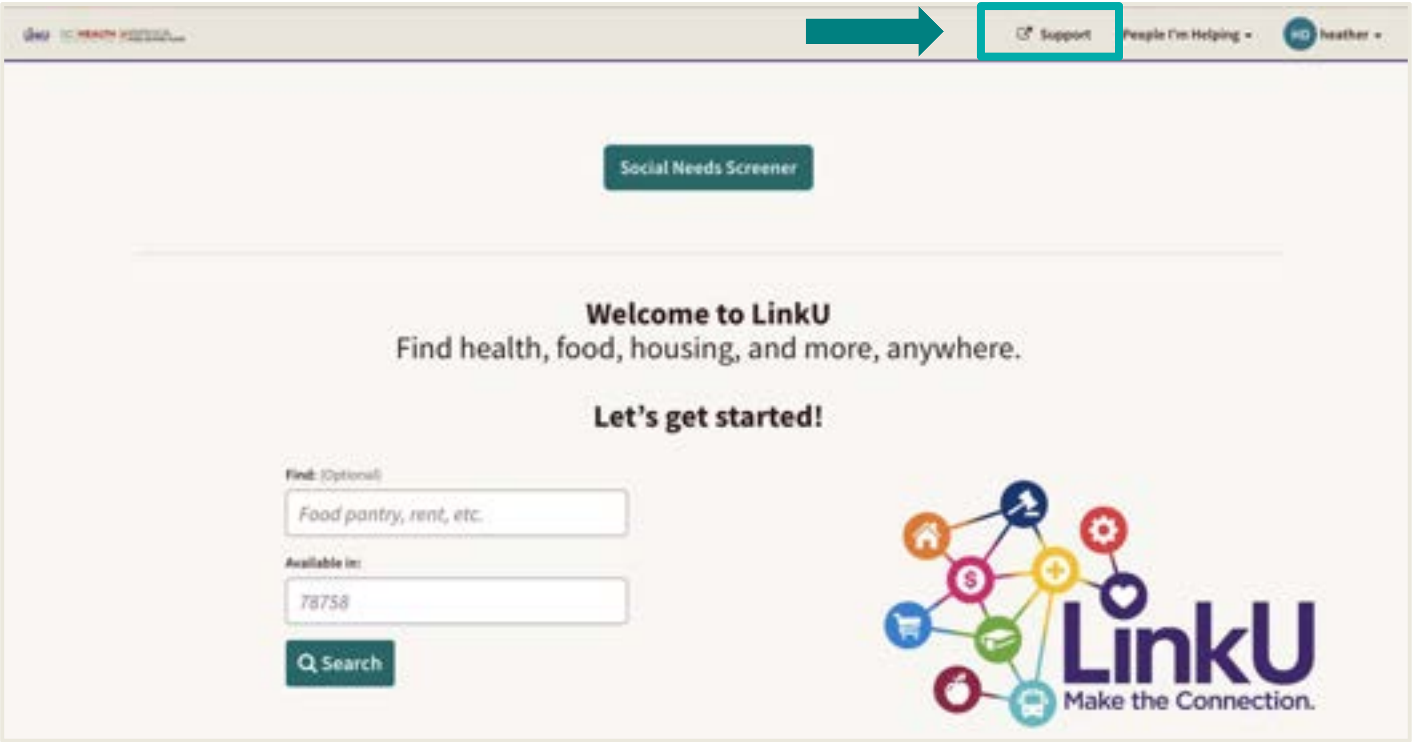
- CRISP DC, in partnership with the eHealth DC Team, has created user guides and one-pagers to better support your team in using the LinkU platform.
- CRISP DC also has an interactive portal live on our website so that you can see what LinkU would look like within CRISP DC
- Coming Soon: Video Library!

→ LinkU 1:1 Training Sessions

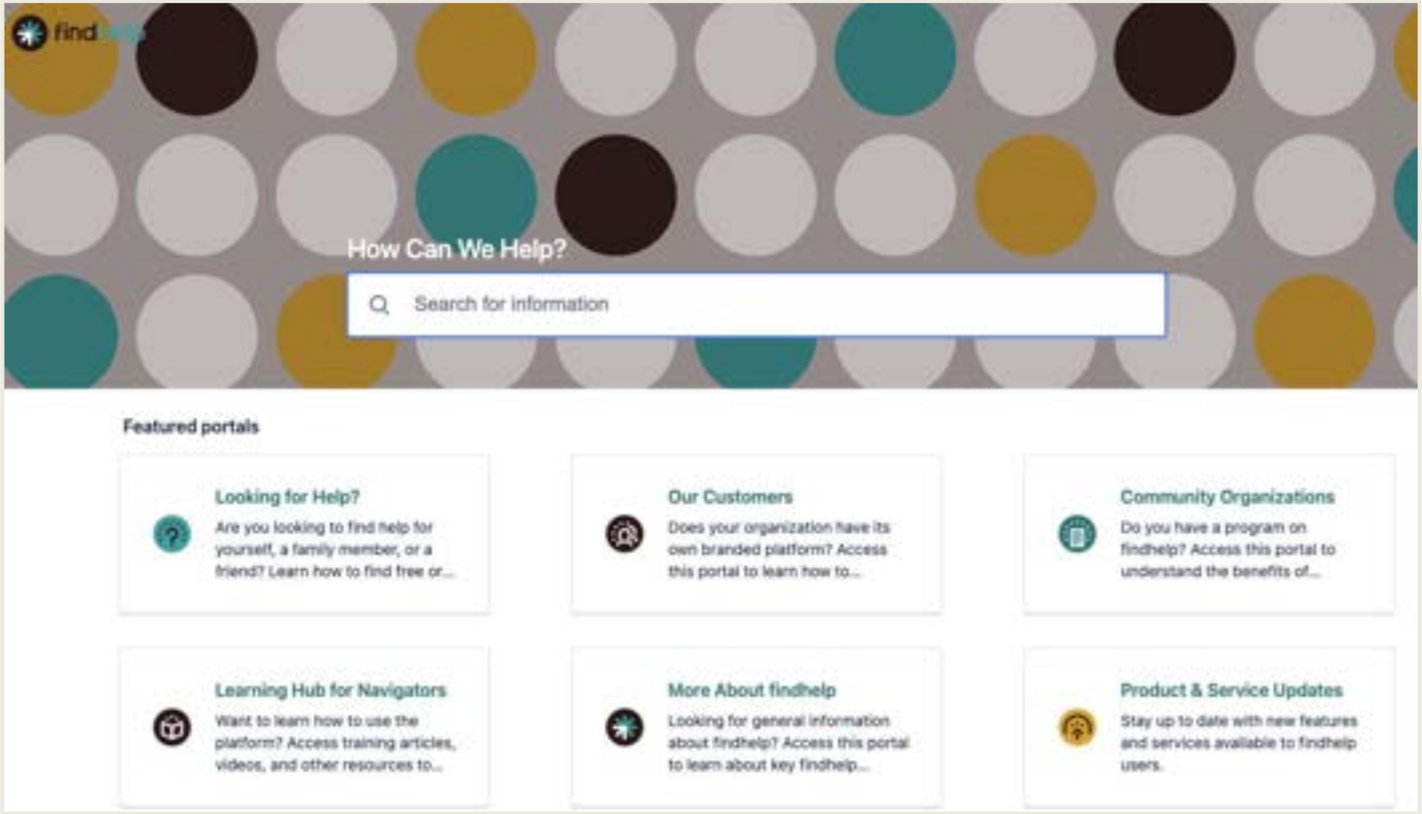
If you would like CRISP DC and eHealth DC to provide 1:1 training with your entire team, please reach out to Abby Lutz at abby.lutz@crisphealth.org.

Accessing the Findhelp Support Portal

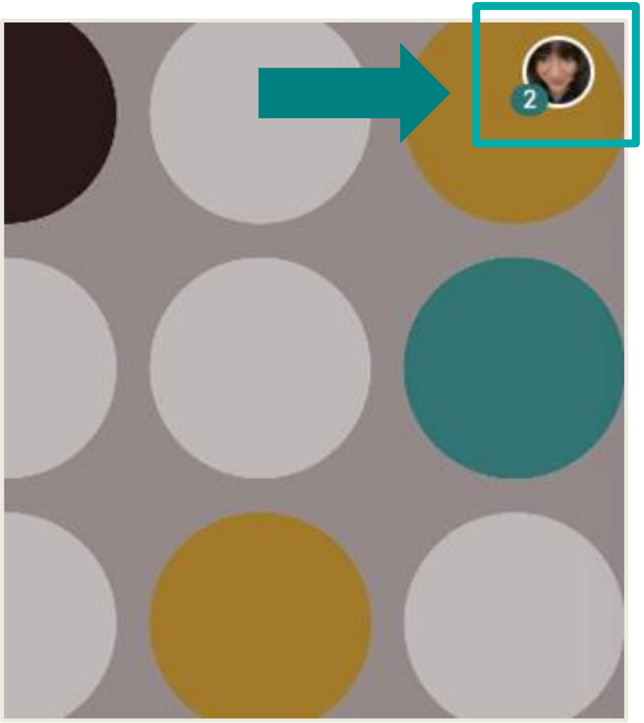
Click on **Support** in the upper corner of your site toolbar to access the support portal.



Access to updated resources to go further



Check on updates to your requests



If you submitted a request for help, a new program suggestion, or an edit to an existing program, you can check on the status by clicking on the icon in the upper corner of the page.

Questions?

Appendix

→ What tools do I have to manage the referrals I am making?

The People I’m Helping Dashboard

A dashboard of all the seekers you have helped through the platform with filters to help you organize your workflow!

The Seeker Profile

A record that holds data relating to your seeker such as personal information, referral navigation history, goals, documents, and more!

Groups Connected with Team Collaboration

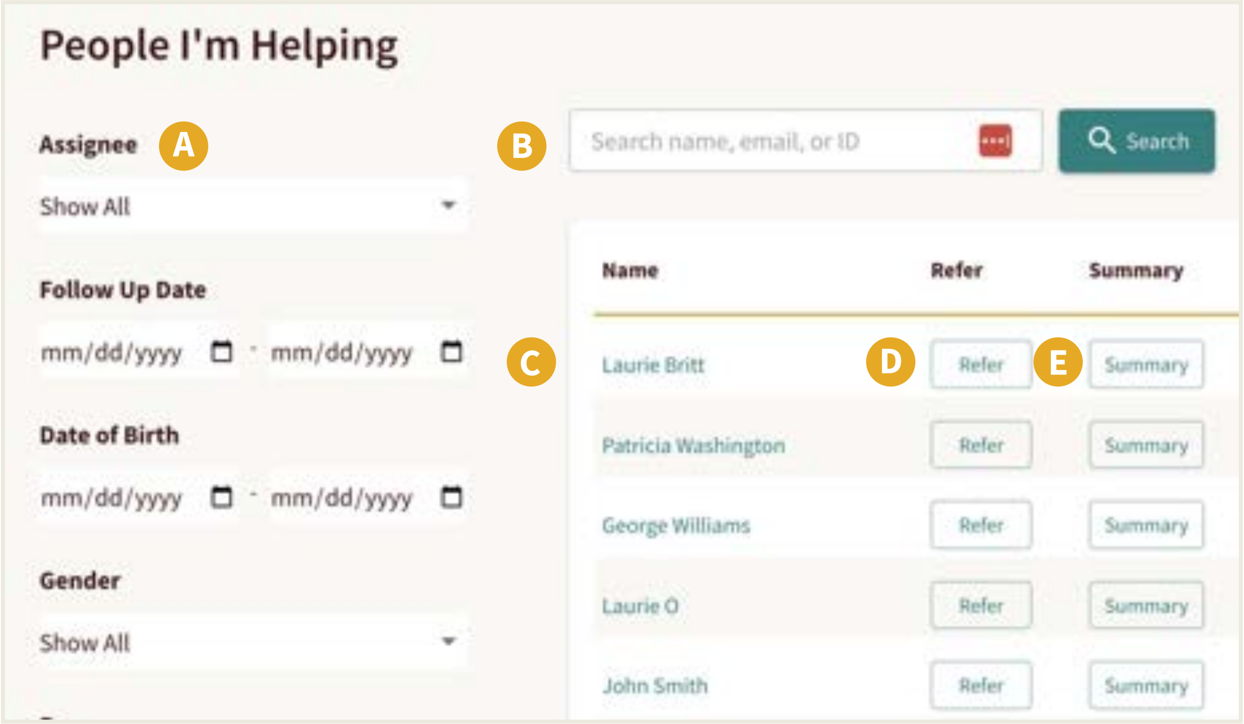
When added to a group, navigators can share and collaborate over program information and seeker care!

Accessing the People I'm Helping Dashboard

When you are signed into the site, you can click on **People I'm Helping** from the top menu bar and click on **People**.

“People I’m Helping” Dashboard

A. Dashboard Filters
B. Keyword Search
C. Link to a Seeker Profile
D. Quick Start Referral Button
E. Referral Summary Button



Team Collaboration

Team Collaboration

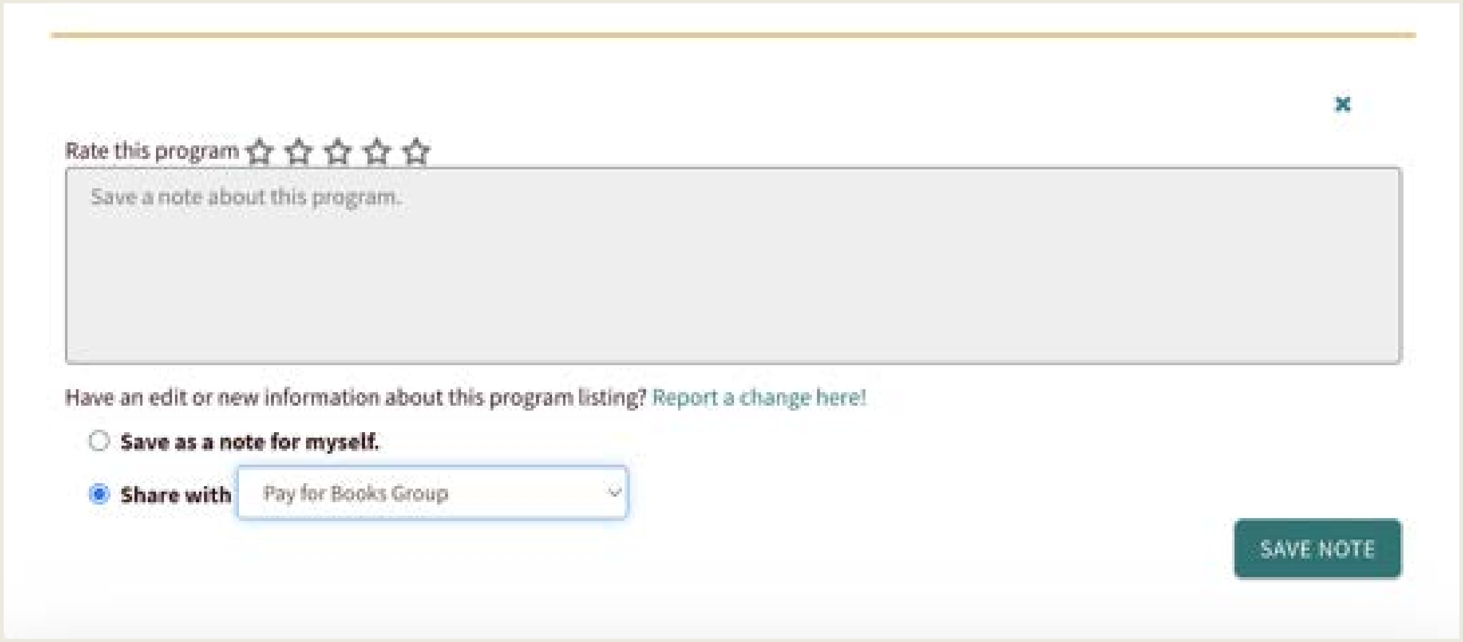
Being added to a group with team collaboration turned on gives you a lot of ways to interact within your organization.

- You can share **Notes** added to program cards.
- You can collaborate in the **People I'm Helping Dashboard**.
- You can share **Favorites Folders**.

Talk to your designated **Site Administrator** if you want to collaborate with a certain group!

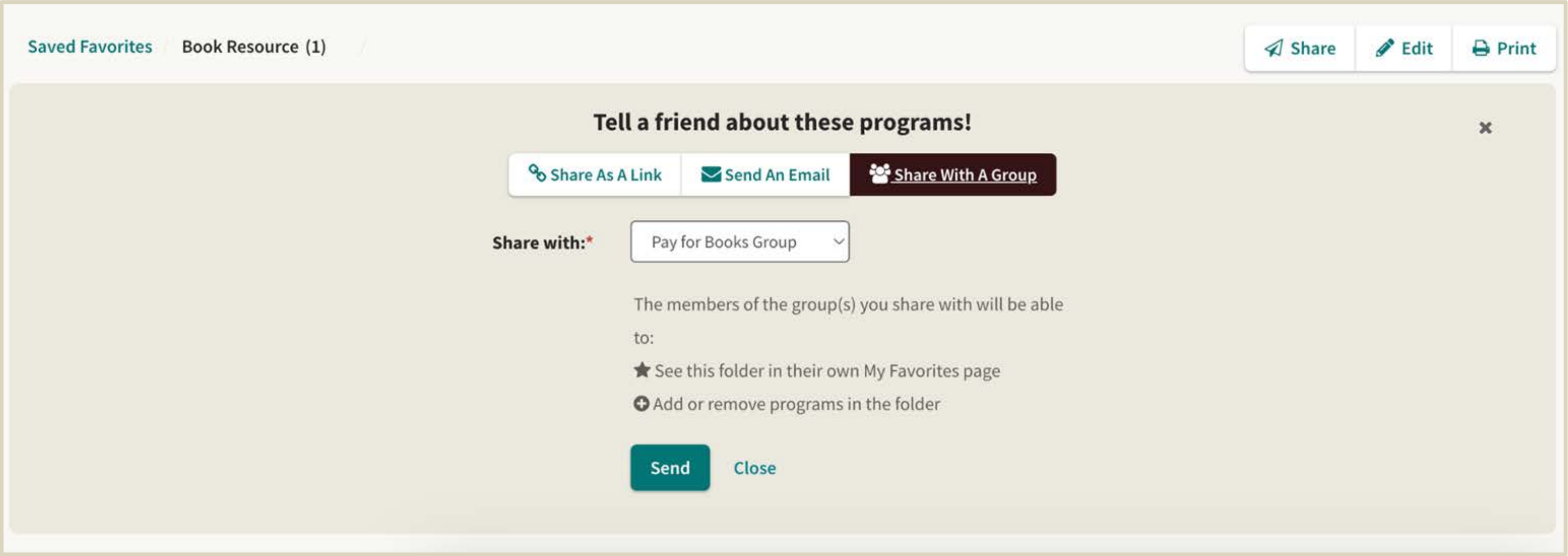
Sharing Notes

Inside of the program card you can leave a note you can share with your team. This can be really helpful if you have a tip or note about a program that is often referred to by your organization.



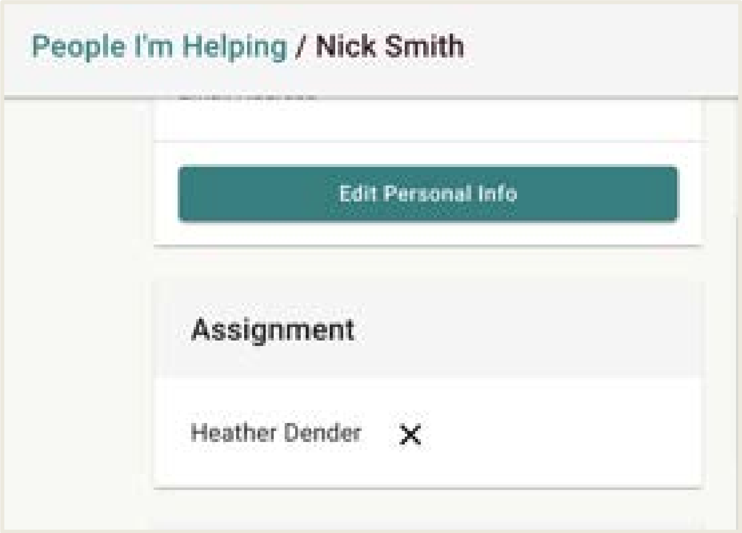
Sharing Favorites

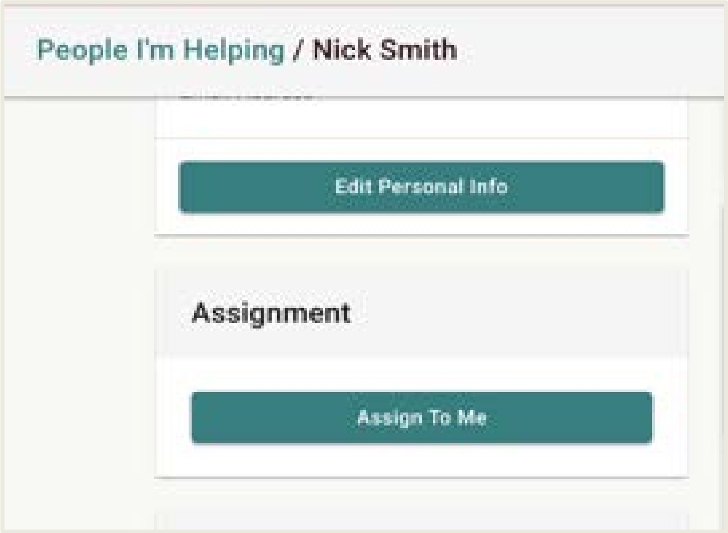
You can share a favorite folder resources with your group. This puts the favorites folder created in their favorites!



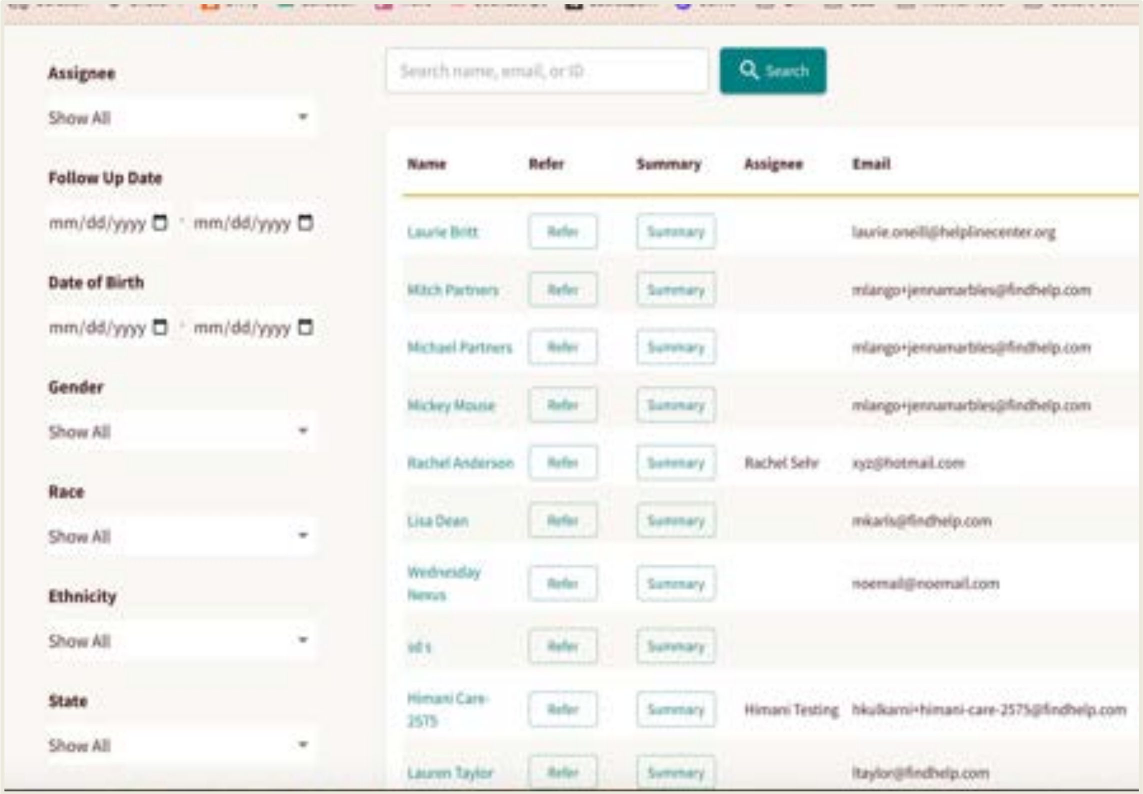
Navigation History

You can do handoffs by accessing seeker profile records shared with your group and changing the assignment. This also gives you access to notes, goals, and referrals done by your team.





People I’m Helping



You have access to People your group has also helped in the People I’m Helping dashboard.

This can support collaboration on the same member or help when you might need to take on a team member’s task.