



findhelp DC | **HEALTH**



→ LinkU 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**



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.

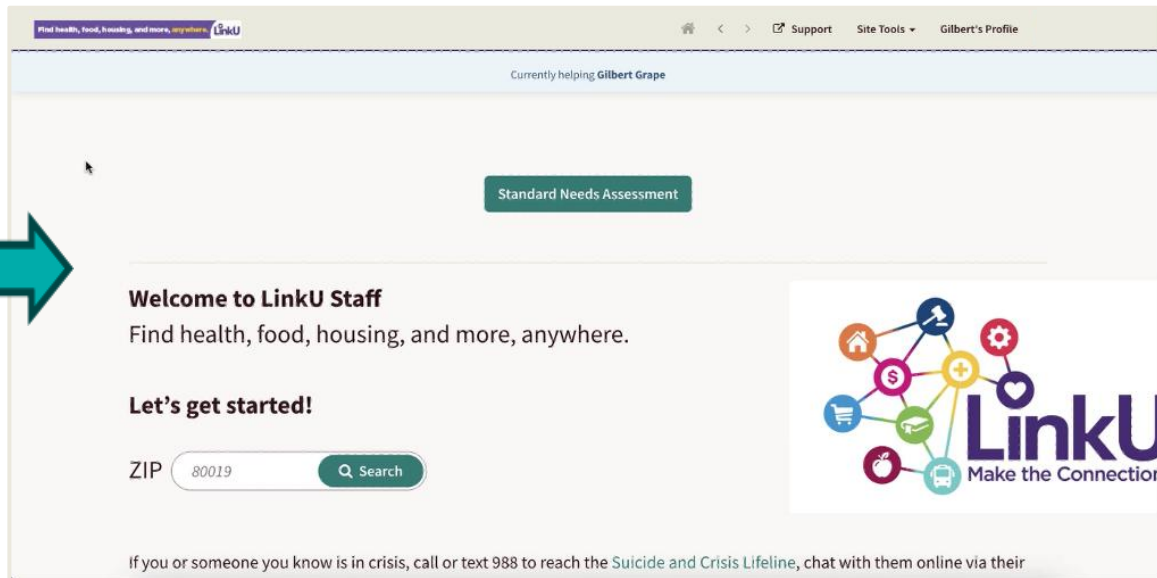
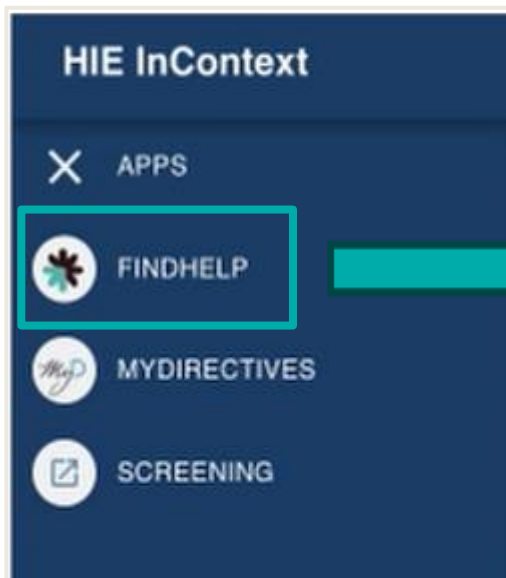
Connect Button

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 additional APPS tab within HIE InContext. Click the “FindHelp” app to launch directly into the LinkU platform.





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.

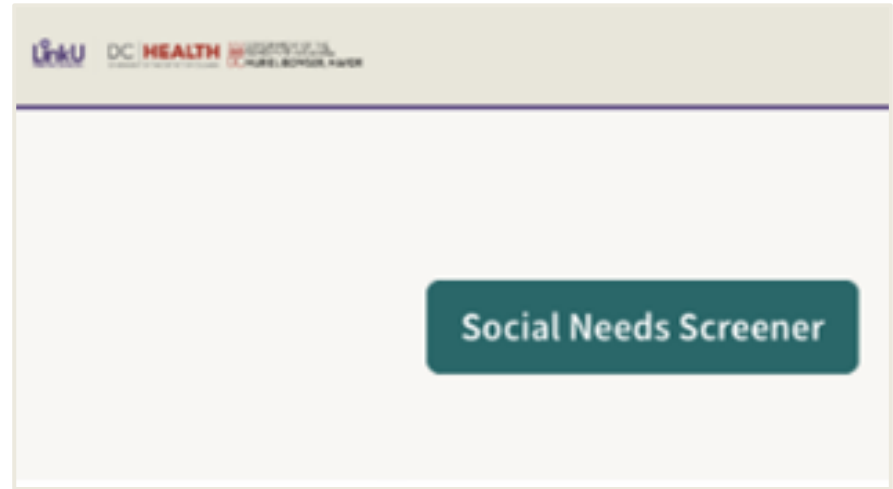
They not only help assess individual needs, but also recommend programs that match those needs—making it easier and faster to get seekers the help they need.

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


Standard Needs Assessment

Select Language ▼ [Go](#) [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

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.


 | The Social Care Network

 Support



Site Tools

My Program Tools

Nick's Profile


 HD Heather


ZIP or keyword or program name





Select Language


English


FOOD


HOUSING


GOODS


TRANSIT


HEALTH

MONEY


CARE


EDUCATION

WORK

LEGAL

Currently helping **Nick Smith**
Email: Hdender@findhelp.com

 End Session



Based on what you told us, we found some programs that may help.

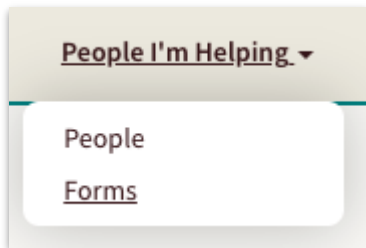
Choose from the categories above and browse local programs



Viewing Past Assessments

You can view previously submitted assessments by clicking on **People I'm Helping** and selecting **Forms**. Here you can:

- View all forms submitted by you or your team for a seeker
- See a summary of identified needs
- Open and review the full assessment
- Access the seeker's full care profile directly



My Forms						Start new form
Show <input type="text" value="10"/> entries		Search: <input type="text" value="HRSN"/>				
Form Name	Form About	Summary	Date	Completed By	Actions	
HRSN Assessment	Lavender Seeker jkelly+lavenderseeker@findhelp.com 6082222222		3/19/2024 10:12 AM	Jane Kelly	View Form Lavender's Profile	
Showing 1 to 1 of 1 entries (filtered from 11 total entries)						Previous 1 Next



Viewing Past Assessments

Forms

Findhelp Learning and Development Assessments

Geminus Family Needs Assessment

Jul 15, 2024

[View](#)

Start A Form

Inside of the Forms section in the seeker profile, you can click on any previously filled out assessments for this seeker that you want view.



Searching for Programs



Starting a Search

Find health, food, housing, and more, anywhere. **LinkU**

Support Site Tools Gilbert's Profile

Currently helping **Gilbert Grape**

Standard Needs Assessment

Welcome to LinkU Staff
Find health, food, housing, and more, anywhere.

Let's get started!

ZIP **Search**

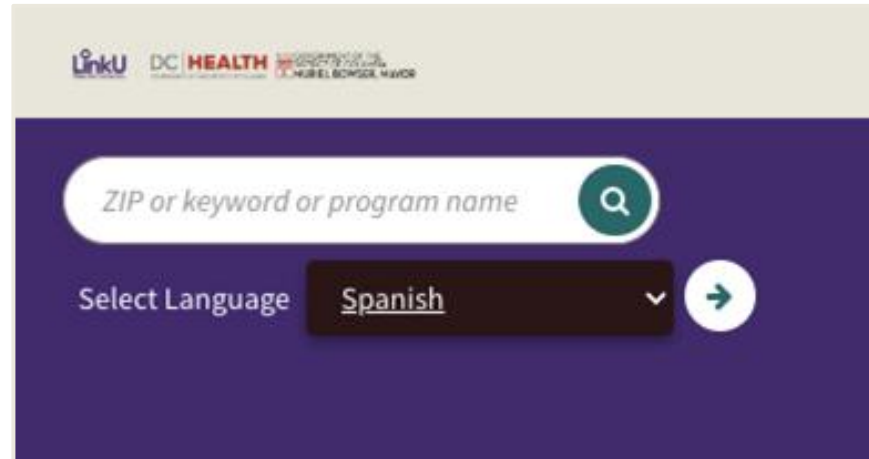
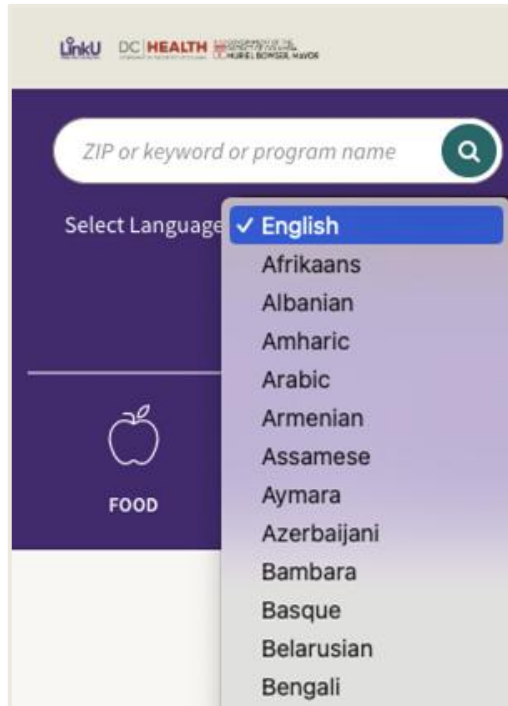
If you or someone you know is in crisis, call or text 988 to reach the [Suicide and Crisis Lifeline](#), chat with them online via their

LinkU
Make the Connection



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**











ZIP or keyword or program name 

Select Language English 

Welcome to LinkU
Find health, food, housing, and more, anywhere.

Let's get started!

Browse

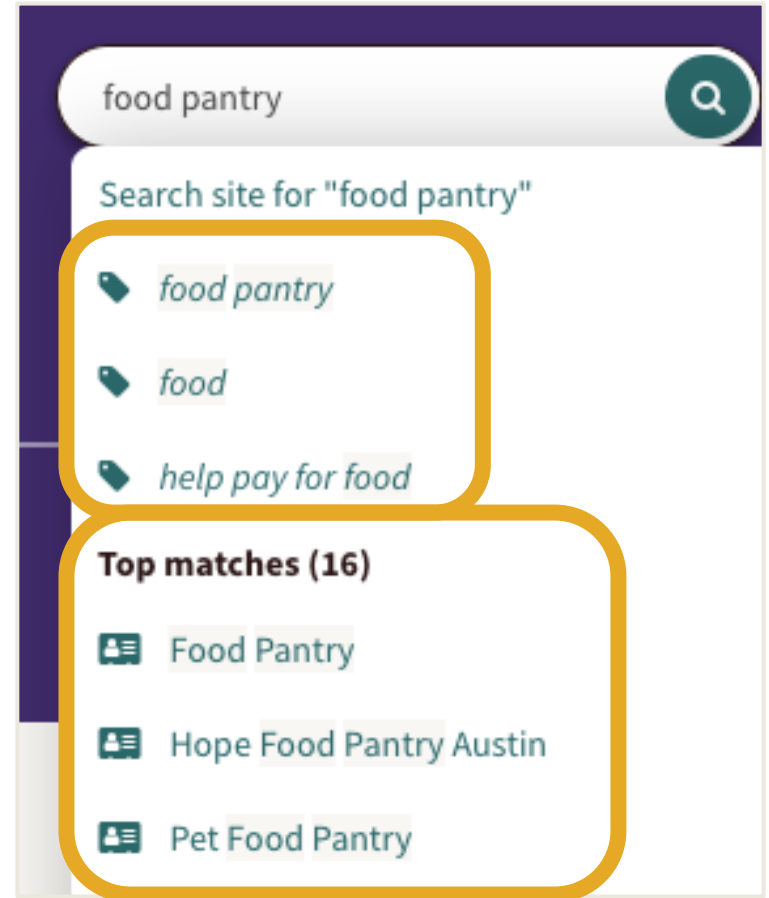
									
FOOD	HOUSING	GOODS	TRANSIT	HEALTH	MONEY	CARE	EDUCATION	WORK	LEGAL



Type a Search Term

As you type, various suggestions will appear:


- **Tags:** These correspond to related categories and subcategories
- **Matches:** These are specific programs whose name matches the phrase you typed





Browse

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



Select LanguageEnglish▼

FOOD

HOUSING

GOODS

TRANSIT

HEALTH

MONEY

Financial Assistance >

Financial Education >

Government Benefits >

Insurance >

Loans >

Tax Preparation

Financial Assistance - All (832)

help pay for childcare (18)

help pay for food (59)

government food benefits (23)

help pay for healthcare (396)

disability benefits (18)

discounted healthcare (13)

health insurance (26)

medical supplies (144)

prescription assistance (125)

transportation for healthcare (25)

help pay for housing (135)

help pay for internet (11)

help pay for phone (21)

help pay for utilities (65)

help pay for school (140)

books (30)

clothes for school (2)

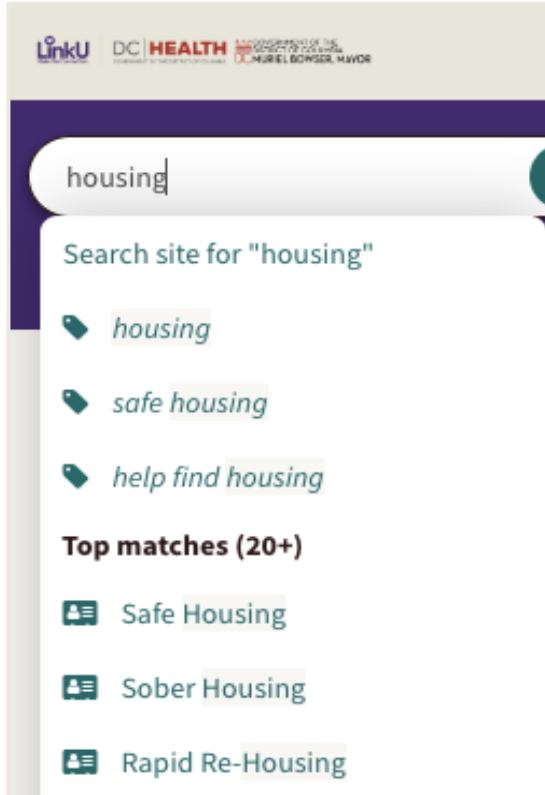
financial aid & loans (45)

supplies for school (8)

transportation for school (6)



Search Terms vs. Browsing



washington, dc (20003) / showing results for search: **housing** < 1 - 25 of 516 >

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:

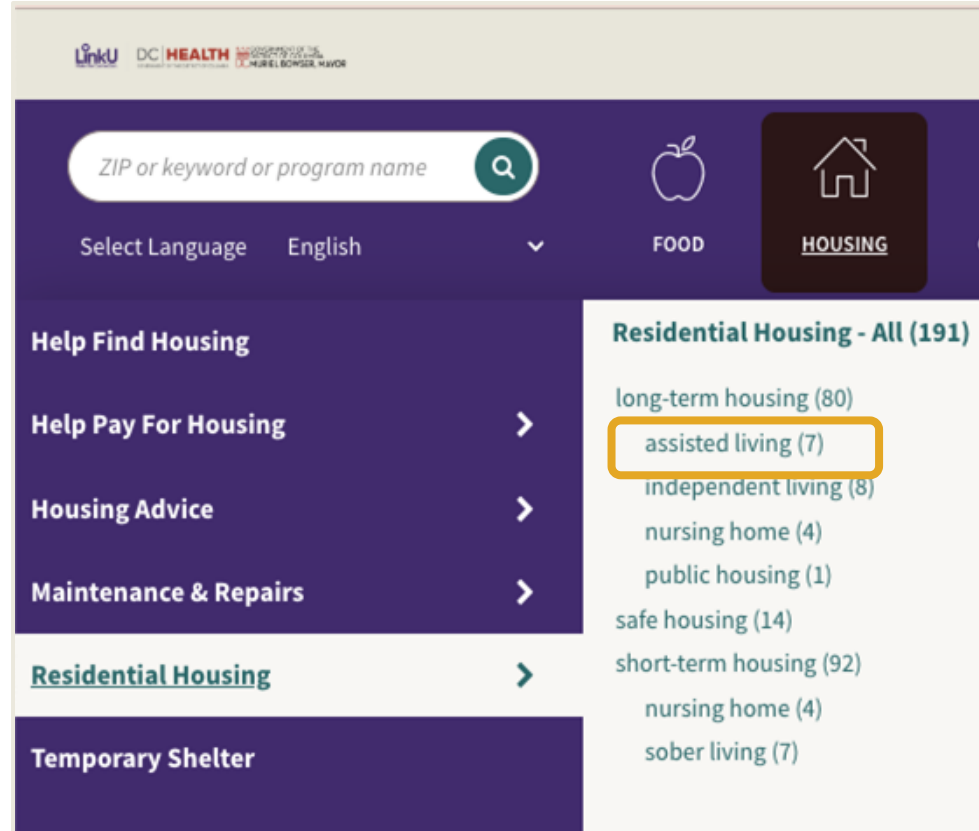


Search Terms vs. Browsing

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.





Search Results

By default, program results are listed in order of **relevancy**. However you can sort by distance using the sort by buttons located above the program listings.



Items that impact relevancy:

- Keyword search match to program or provider name
- Keyword search match to words in program description
- If program is featured
- Program location



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.

Personal Filters

Program Filters

Income Eligibility

Age Group

☐ infants: 0 months - 1 year

☐ children: 2 - 12 years

☐ teens: 13 - 19 years

☐ young adults: 20 - 30 years

☐ adults: 31 - 54 years

☐ seniors: 55 years+

Education

☐ students

Disaster Victims

☐ covid19

Language

☐ limited english

Gender

☐ female

Housing

☐ runaways

☐ homeless

Disability

☐ mentally incapacitated

☐ all disabilities

General

☐ anyone in need

Role

☐ spouses

Income

☐ low-income

Health

☐ chronic illness

☐ pregnant

Guardianship

☐ foster youth

Employment

☐ unemployed

Household

☐ individuals

families

☐ with children

Urgency

☐ in crisis

☐ emergency

Armed Forces

☐ veterans

☐ active duty

☐ national guard

FILTER SEARCH



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.

Personal Filters

Program Filters

Income Eligibility

I want to

☐ Visit

☐ Call

☐ Email

Open Hours

☐ Open Now

☐ Open Late

☐ Open Early

☐ Open Weekends

Cost

All programs are either free or reduced cost

☐ Free

Program communicates in

SELECT LANGUAGE

Documents Required

FILTER SEARCH



Income Eligibility

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

Personal Filters

Program Filters

Income Eligibility

Including you, how many people live in your household?

family members

How much does your household make per month?

\$

per month

FILTER SEARCH

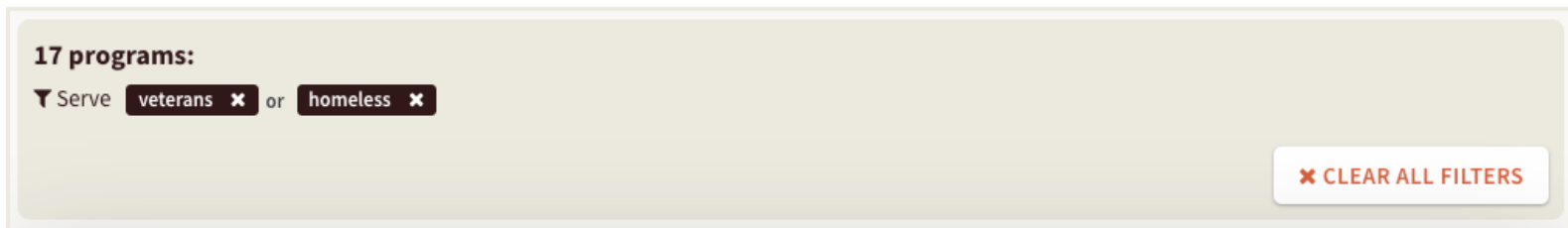
You may be eligible! Look for programs with the

CLEAR ELIGIBILITY CHECK



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!



→ Are you **not** **receiving** results?

- Check to see if you applied any **filters**, and if so, clear them
- Check your search term to make sure it's **accurate and spelled correctly**
- If your **search is too specific**, try broadening the search (e.g. 'medical devices' instead of 'respirators')
- Try searching in a **nearby ZIP** code



→ Are you not finding **relevant** results?

- Try finding a **category tag** that better matches the need
- If results are too broad or numerous, **try filtering** the results to better target the right program.
- Try searching for synonyms or **related terms**
- Try searching in a **nearby ZIP** code



**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

Mercy Medical Angels' non-emergency ground transportation program qualifying patients with gas cards, or commercial bus or Amtrak tickets

🔑 Main Services: [help pay for gas](#) , [help pay for transit](#) , [bus passes](#)

👤 Serving: [all ages](#), [veterans](#), [treatment phases](#), [on-treatment](#), [cancer benefit recipients](#), [low-income](#)

MORE INFO ▼

★ SAVE

📄 SHARE

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

Connecting/Referring

Provides financially medical-related...

chronic illness,

Next Steps:

Apply on their [website](#) ↗.

Serves nationwide

🕒 Open Now : 9:00 AM - 5:30 PM EDT ▼

☰ NOTES

✎ SUGGEST

📄 APPLY

- 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**.

☐ **Healthcare Ground Transportation**
by [Mercy Medical Angels \(MMA\)](#)
✓ Reviewed on: 08/08/2024

Mercy Medical Angels' non-emergency ground transportation program provides financially qualifying patients with gas cards, or commercial bus or Amtrak tickets to medical-related...

🔑 Main Services: [help pay for gas](#) , [help pay for transit](#) , [bus passes](#)

👤 Serving: [all ages](#), [veterans](#), [treatment phases](#), [on-treatment](#), [cancer](#), [chronic illness](#), [benefit recipients](#), [low-income](#)

[MORE INFO](#) ▼

★
SAVE

📍
SHARE

☰
NOTES

✎
SUGGEST

➡ REFER

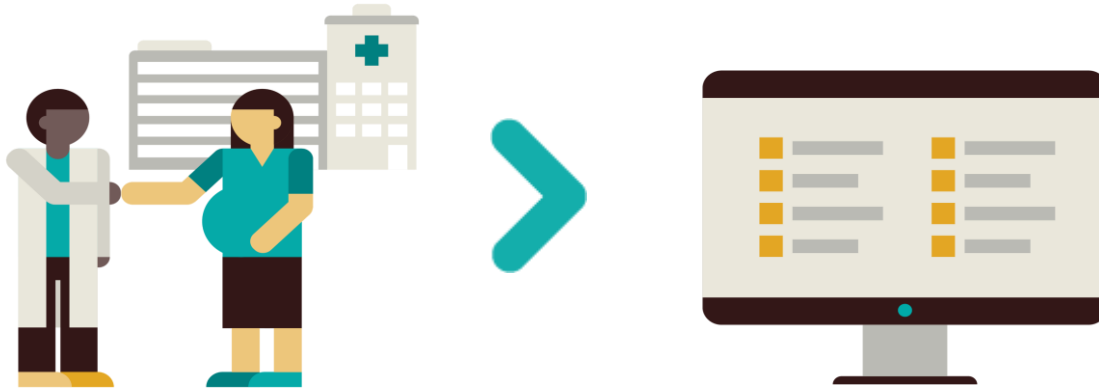
✓

Next Steps:
[Apply on their website](#) ↗
Serves nationwide
🕒 Open Now : 9:00 AM - 5:30 PM EDT ▼



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 Live 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

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

Your Name *

Tell us about the person you're helping:

Someone you've Connected before:

Use contact info on file * ✕

_____ Or _____

Connecting someone new:

Their Name *

Their Email Address

Their Phone Number

Their Language

Best way to reach them* ☐ Email
☐ Text message
☐ Phone call
☐ Don't reach out

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

The form above is NOT sent to the program.

This form:
☐ Sends the person you're helping "Next Steps" to contact

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



Next Steps:

Go to the [program's website](#).

Serves your state

 **Closed Now:** [See open hours](#) 

 REFER

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

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

Your Name *

Tell us about the person you're helping:

Someone you've Connected before:

Use contact info on file * x

Or

Connecting someone new:

Their Name *

Their Email Address

Their Phone Number

Their Language v

Best way to reach them* ☐ Email
☐ Text message
☐ Phone call
☐ Don't reach out

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

This referral **is** 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 out or is not a preferred contact



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).

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](tel: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

The screenshot displays the 'People I'm Helping / Heather Dender' profile page. The interface is organized into several sections, each with a corresponding callout letter in a yellow circle:

- A. Personal Info:** Displays the name 'Heather Dender', email 'hdender@findhelp.com', and an 'Edit Personal Info' button.
- B. Assignment:** Features an 'Assign To Me' button.
- C. Household:** Shows a message 'Household information has not been added' and a 'Create' button.
- D. Forms:** Indicates 'No forms have been submitted for this user' and includes a 'Start A Form' button.
- E. Documents:** Lists a document 'Care Plan.png' dated 'Sep 9, 2024' with an 'Upload' button.
- F. Flag and Archive:** Located in the top right corner, containing 'Flag' and 'Archive' icons.
- G. Goals:** Shows 'Heather has 1 goal.' with an 'Add Goal' button. The goal is 'Getting ID Replacing a Missing ID' with a status of 'In progress' and a due date of '9/09/24'.
- H. Navigation History:** Displays 'You have referred Heather to 1 programs.' and a 'Start a Referral' button. Below, it lists a referral to 'Mitch Food Pantry' with a status of 'Needs client action'. The history includes notes from 9/09/24, 9/09/24, 7/31/24, and 7/31/24, detailing the client's need to replace her ID and the referral status.



Personal Info

Personal Info

Heather Dender
Name

hdender@findhelp.com
Email Address

Edit Personal Info

First Name
Heather

Last Name
Dender

Email Address
hdender@findhelp.com

Phone Number
(555) 555-5555

Next Follow-up Date
05/01/2021

Patient ID

Medicaid ID

Street Address

ZIP Code

CANCEL SAVE

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.

Assignment

Assign To Me

Assignees

Assignment

Heather Dender ×

Assignees



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

Household information has not been added.

[CREATE](#)

Add Member to Household

First Name	Last Name	Date of Birth (optional) mm/dd/yyyy
------------	-----------	---

Relationship to Head of Household ▼

Email Address (optional)

Phone (optional)

Comment (optional)

[CANCEL](#) [SAVE](#)



Household Important Details

Household Details

Households are only visible to staff.

Penny Proud - [EDIT](#)

Child

Trudy Proud - [EDIT](#)

Head of household

Penny's Mom

Phone: (589) 987-4568

Oscar Proud - [EDIT](#)

Partner

Cece Proud - [EDIT](#)

Other - family member

Penny's sister

Date of Birth: 6/01/20

[ADD MEMBER](#)

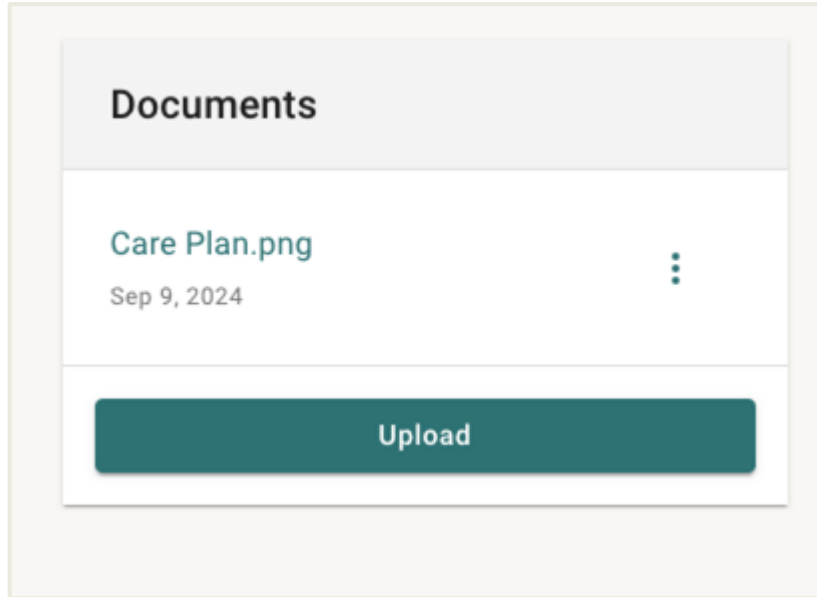
[CANCEL](#)

[SAVE](#)

- 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?



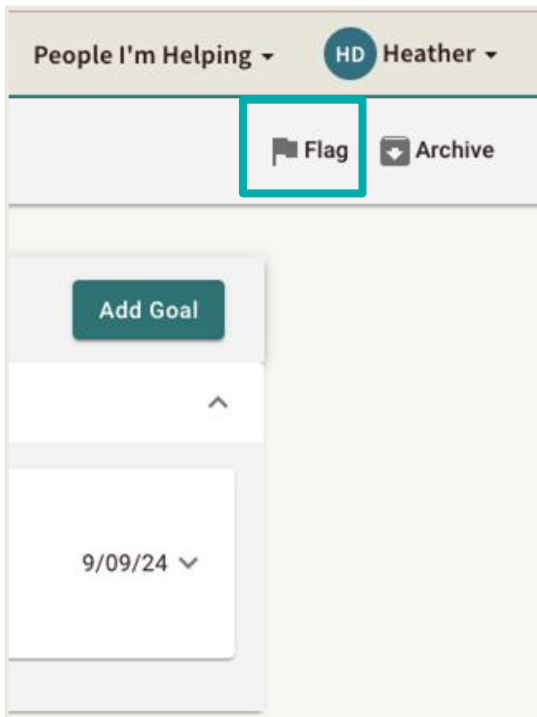
Select upload and then choose the document you wish to attach to the seeker profile.

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



Flagging a Seeker Profile

Flagging a profile will prioritize it in the People I'm Helping dashboard.



By flagging a profile, you prioritize it and bring it to the top of the People I'm Helping list. Note that flags are visible to others at your organization who have worked with the same person.

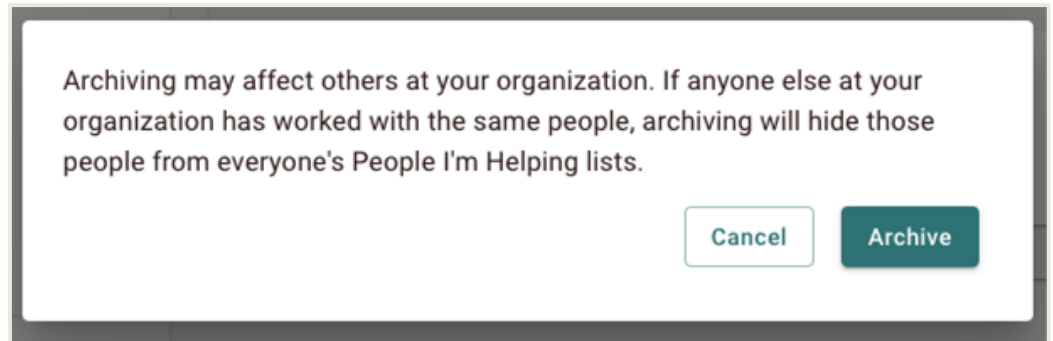
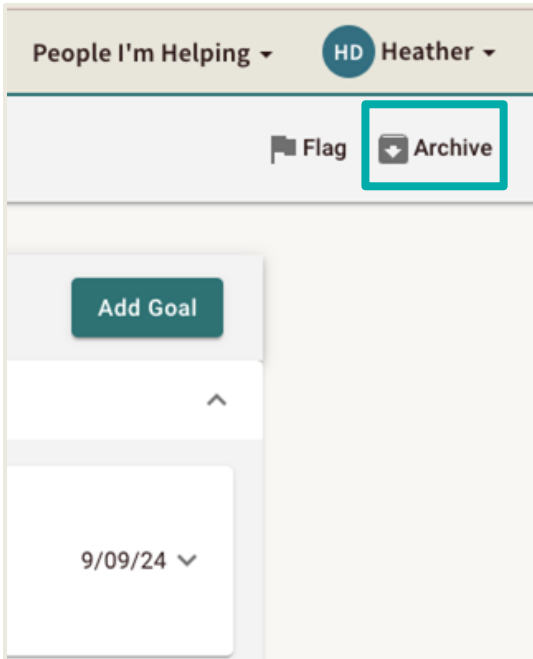
Cancel

Flag



Archiving a Seeker Profile

Archiving a profile will hide it in the People I'm Helping dashboard. While not deleting the record, it does remove it from being searchable in the dashboard unless you use the archived profile's filter.





Unarchiving a Seeker Profile

If you toggle the **Archived Profiles** to show all, you can then select the archived seeker's name and access their profile. Inside you will click on **Unarchive** to make the profile viewable again in the dashboard.

People I'm Helping

Unread Messages

☐ Unread By Me

Messages Received Within

mm/dd/yyyy

-

mm/dd/yyyy

Assignee

Show All

Archived Profiles

Show All

Flag

Unarchive

Add Goal



Adding a Goal

Goals

ADD GOAL

Heather doesn't have any goals yet!

Add Goal

What kind of goal is this?*

Please select a goal type.

Goal Description

CANCEL SAVE

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

Navigation History

You have referred Heather to 2 programs. ^

Referrals and Notes

Start a Referral

Add Note

Housing Services

by Placer County Homeless Resource Helpline

Status:

... Not updated ▾

Add Note

Add/Remove Goals

9/10/24	Status set to 'not updated' Heather Dender
9/10/24	Referred by Heather D (Findhelp Learning and Development)

Mitch Food Pantry

by Mitch Food Pantry

Status:

► Needs client action ▾

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

You have referred Heather to 2 programs. ^

Referrals and Notes Start a Referral Add Note

- ⋮ Not updated
- ▶ Needs client action
- || Pending
- ✓ Referred elsewhere
- ✓ Got help
- + Eligible
- ✗ Couldn't get help
- ! Couldn't contact
- Not eligible
- ▲ No capacity
- No longer interested

Resource Helpline

ove Goals

'not updated'

Heather D (Findhelp Learning and Development)

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

Housing Services

by Placer County Homeless Resource Helpline

Status:

*** Not updated ▼

CancelAdd/Remove Goals

Type your note here... ×

☐ Make note visible to people outside your organization who can see the referral

save

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



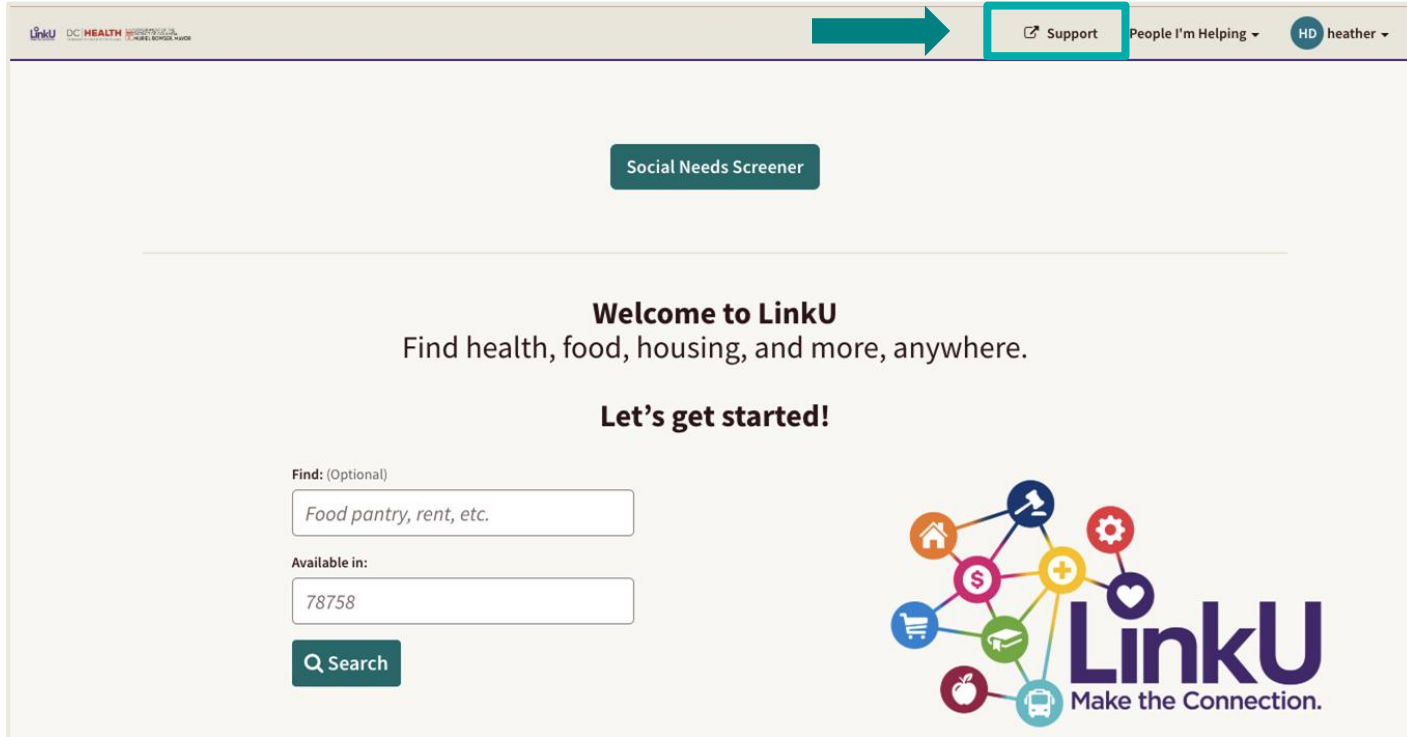


The Support Portal



Accessing the Support Portal

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



The screenshot shows the LinkU website interface. At the top, there is a navigation bar with the LinkU logo on the left, a teal arrow pointing right, a "Support" button with a magnifying glass icon (highlighted by a red box), a "People I'm Helping" dropdown, and a user profile "HD heather" with a dropdown arrow. Below the navigation bar, there is a "Social Needs Screener" button. The main content area features the text "Welcome to LinkU" and "Find health, food, housing, and more, anywhere." followed by "Let's get started!". Below this, there is a search section with a "Find: (Optional)" label, a text input field containing "Food pantry, rent, etc.", an "Available in:" label, a text input field containing "78758", and a "Search" button. On the right side of the search section, there is a circular network diagram with various icons (house, dollar sign, plus, heart, gear, shopping cart, graduation cap, apple, bus) connected by lines, and the LinkU logo with the tagline "Make the Connection."



Access to updated resources to go further

A screenshot of the findhelp website banner. The background is a grey field with a grid of overlapping circles in teal, mustard yellow, and dark brown. In the top left corner is the findhelp logo. Centered below the logo is the text "How Can We Help?". Below this text is a white search bar with a magnifying glass icon and the placeholder text "Search for information". Below the search bar, the text "Featured portals" is displayed. Underneath are six white rectangular boxes, each containing an icon, a title, and a brief description.

findhelp

How Can We Help?

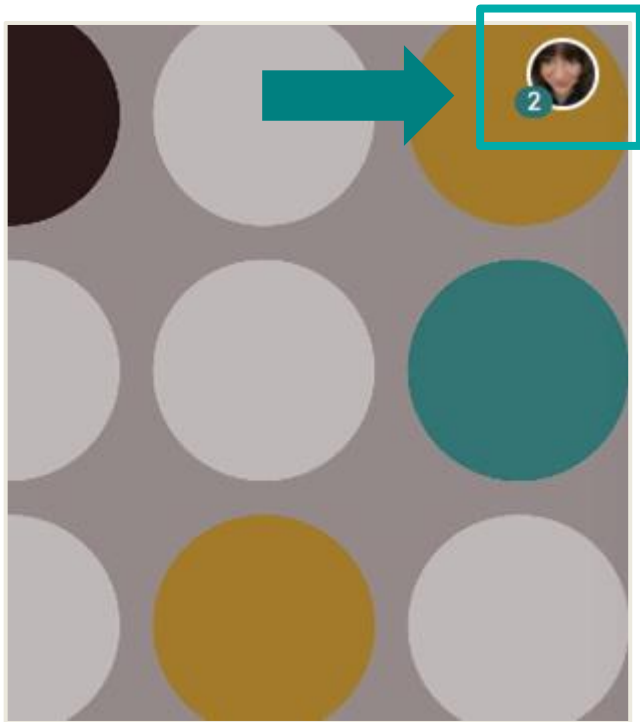
Search for information

Featured portals

- Looking for Help?**
Are you looking to find help for yourself, a family member, or a friend? Learn how to find free or...
- Our Customers**
Does your organization have its own branded platform? Access this portal to learn how to...
- Community Organizations**
Do you have a program on findhelp? Access this portal to understand the benefits of...
- Learning Hub for Navigators**
Want to learn how to use the platform? Access training articles, videos, and other resources to...
- More About findhelp**
Looking for general information about findhelp? Access this portal to learn about key findhelp...
- Product & Service Updates**
Stay up to date with new features and services available to findhelp users.



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**.

The screenshot shows the Find Help website interface. The top navigation bar is light gray and contains the Find Help logo on the left, followed by links for 'Support', 'My Program Tools', and 'People I'm Helping'. The 'People I'm Helping' link is highlighted with a yellow box, and a dropdown menu is open showing the 'People' option. On the far right of the navigation bar is a user profile for 'HD Heather'. Below the navigation bar, the main content area has a light gray background and contains the text: 'Find free or reduced-cost resources like food, housing, financial assistance, health care, and more. **Help starts here.**'

findhelp

Support My Program Tools **People I'm Helping** HD Heather

People

Find free or reduced-cost resources like food, housing, financial assistance, health care, and more.
Help starts here.



“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



People I'm Helping











Assignee **A**
Show All

Follow Up Date
mm/dd/yyyy - mm/dd/yyyy

Date of Birth
mm/dd/yyyy - mm/dd/yyyy

Gender
Show All

B Search name, email, or ID  **C**  Search

Name	Refer	Summary
Laurie Britt	D 	E 
Patricia Washington		
George Williams		
Laurie O		
John Smith		



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.

×

Rate this program ☆☆☆☆

Save a note about this program.

Have an edit or new information about this program listing? [Report a change here!](#)

☐ Save as a note for myself.

☒ Share with

Pay for Books Group ▾

SAVE NOTE



Sharing Favorites

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

Saved Favorites / Book Resource (1) /

Share Edit Print

Tell a friend about these programs! ×

Share As A Link Send An Email Share With A Group

Share with:* Pay for Books Group ▼

The members of the group(s) you share with will be able to:

- ★ See this folder in their own My Favorites page
- ⊕ Add or remove programs in the folder

Send Close



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 / Nick Smith

Edit Personal Info

Assignment

Heather Dender X

People I'm Helping / Nick Smith

Edit Personal Info

Assignment

Assign To Me



People I'm Helping

Assignee
Show All

Follow Up Date
mm/dd/yyyy - mm/dd/yyyy

Date of Birth
mm/dd/yyyy - mm/dd/yyyy

Gender
Show All

Race
Show All

Ethnicity
Show All

State
Show All

Search

Name	Refer	Summary	Assignee	Email
Laurie Britt	Refer	Summary		laurie.oneill@helplinecenter.org
Mitch Partners	Refer	Summary		mlango+jennamarbles@findhelp.com
Michael Partners	Refer	Summary		mlango+jennamarbles@findhelp.com
Mickey Mouse	Refer	Summary		mlango+jennamarbles@findhelp.com
Rachel Anderson	Refer	Summary	Rachel Sehr	xyz@hotmail.com
Lisa Dean	Refer	Summary		mkarls@findhelp.com
Wednesday Nexus	Refer	Summary		noemail@noemail.com
sd s	Refer	Summary		
Himani Care-2575	Refer	Summary	Himani Testing	hkulkarni+himani-care-2575@findhelp.com
Lauren Taylor	Refer	Summary		ltaylor@findhelp.com

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.