



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.

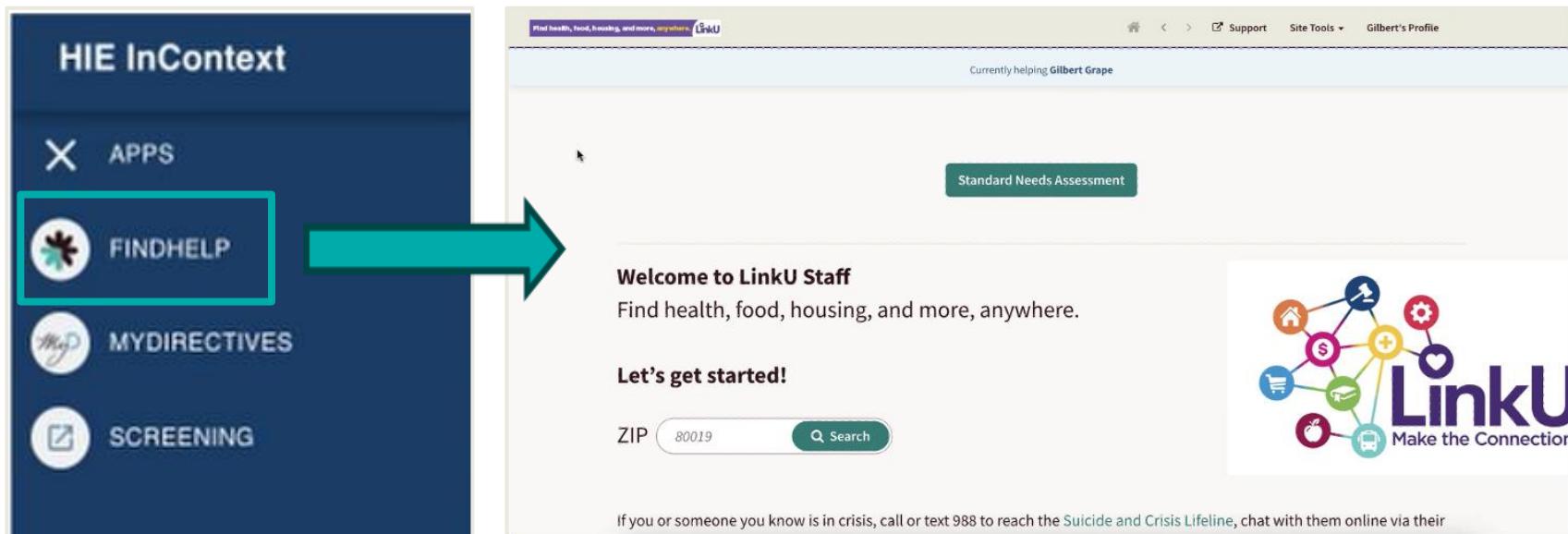
### **Connect Button**

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.



**HIE InContext**

**APPs**

- FINDHELP** (selected)
- MYDIRECTIVES**
- SCREENING**

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

Currently helping **Gilbert Grape**

**Standard Needs Assessment**

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

**Let's get started!**

ZIP

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





# 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](http://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.

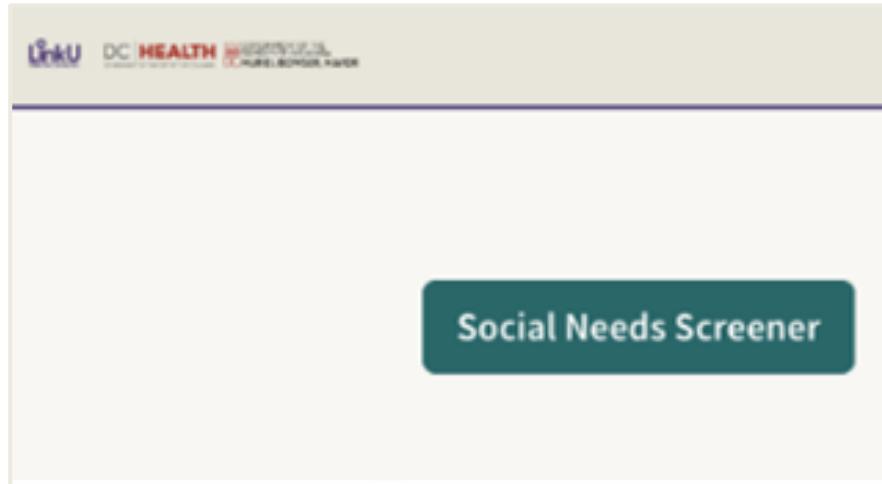
They not only help assess individual needs, but also recommend programs that match those needs—making it easier and faster to get seekers the help they need.

They also provide useful data for your organization.



# Starting an Assessment

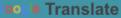
You might have a custom assessment built for your organization. You will use this inside of your system of record with your seekers. We also have a social needs assessment you can access inside of LinkU!





# Filling Out the Assessment

Standard Needs Assessment

Select Language ▾ 

## 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

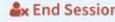
ZIP or keyword or program name  

Support Site Tools My Program Tools Nick's Profile  Heather

Learn how to search for free or reduce cost programs in our learning environment!

Select Language English

 FOOD  HOUSING  GOODS  TRANSIT  HEALTH  MONEY  CARE  EDUCATION  WORK  LEGAL

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



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

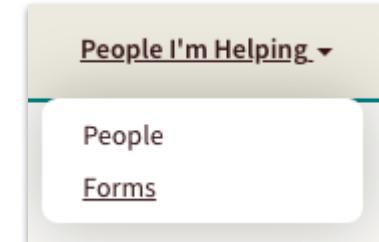
Choose from the categories above and browse local programs



# 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**

Show  entries

Search:

Form Name	Form About	Summary	Date	Completed By	Actions
HRSN Assessment	Lavender Seeker <a href="mailto:jkelly+lavenderseeker@findhelp.com">jkelly+lavenderseeker@findhelp.com</a> 6082222222		3/19/2024 10:12 AM	Jane Kelly	<a href="#">View Form</a> <a href="#">Lavender's Profile</a>

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**

Currently helping Gilbert Grape

Standard Needs Assessment

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

**Let's get started!**

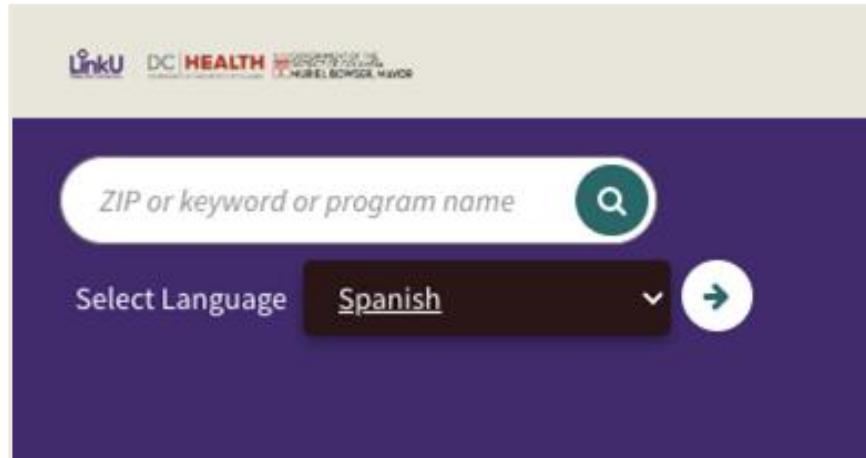
ZIP

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



# 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

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

Let's get started!

ZIP or keyword or program name

Select Language English

FOOD      HOUSING      GOODS      TRANSIT      HEALTH      MONEY      CARE      EDUCATION      WORK      LEGAL

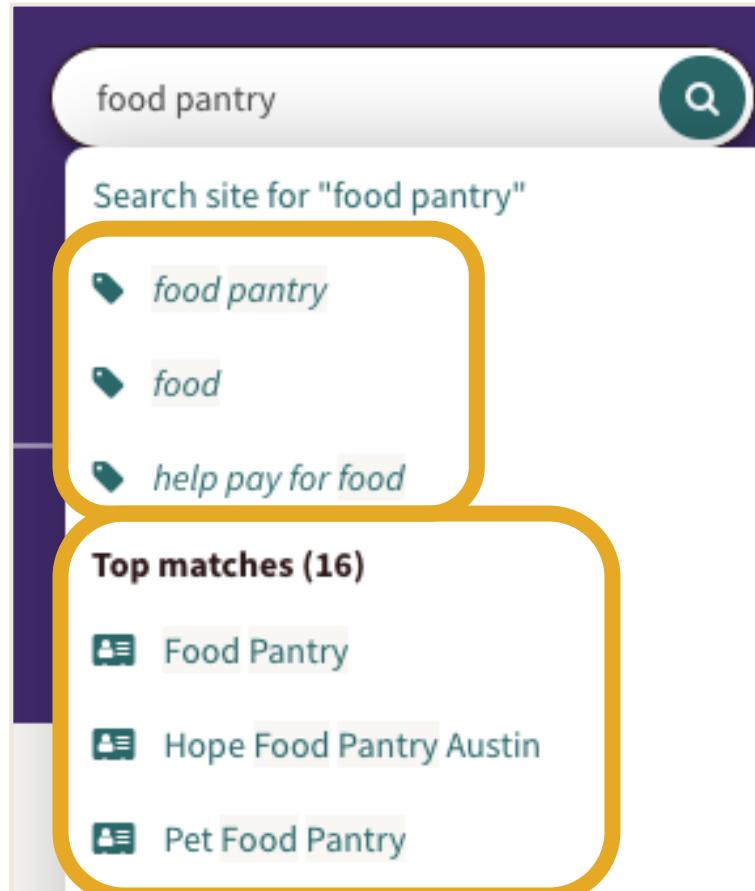
Browse



# 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 Language English 

 FOOD

 HOUSING

 GOODS

 TRANSIT

 HEALTH

 MONEY

<b>Financial Assistance</b> >	<b>Financial Assistance - All (832)</b> 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)
<b>Financial Education</b> >		
<b>Government Benefits</b> >		
<b>Insurance</b> >		
<b>Loans</b> >		
<b>Tax Preparation</b>		



# Search Terms vs. Browsing

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

housing

Search site for "housing"

- housing
- safe housing
- help find housing

**Top matches (20+)**

- Safe Housing
- Sober Housing
- Rapid Re-Housing

**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.

The screenshot shows the LinkU DC Health website interface. At the top, there is a search bar with the placeholder "ZIP or keyword or program name" and a magnifying glass icon. Below the search bar, the "Select Language" dropdown is set to "English". To the right of the search bar are two icons: a white apple icon with the word "FOOD" and a white house icon with the word "HOUSING".

The main content area features a list of categories under "Help Find Housing":

- Help Pay For Housing >
- Housing Advice >
- Maintenance & Repairs >
- Residential Housing** > (This category is highlighted with a teal background)
- Temporary Shelter >

On the right side, a sidebar titled "Residential Housing - All (191)" lists sub-categories with their counts:

- long-term housing (80)
- assisted living (7)** (This category is highlighted with an orange border)
- independent living (8)
- nursing home (4)
- public housing (1)
- safe housing (14)
- short-term housing (92)
- nursing home (4)
- sober living (7)



# 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.

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

Sort by RELEVANCE CLOSEST

## 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**

<b>Age Group</b> <input type="checkbox"/> infants: 0 months - 1 year <input type="checkbox"/> children: 2 - 12 years <input type="checkbox"/> teens: 13 - 19 years <input type="checkbox"/> young adults: 20 - 30 years <input type="checkbox"/> adults: 31 - 54 years <input type="checkbox"/> seniors: 55 years+	<b>Language</b> <input type="checkbox"/> limited english	<b>Role</b> <input type="checkbox"/> spouses	<b>Household</b> <input type="checkbox"/> individuals <b>families</b> <input type="checkbox"/> with children
<b>Education</b> <input type="checkbox"/> students	<b>Gender</b> <input type="checkbox"/> female	<b>Income</b> <input type="checkbox"/> low-income	<b>Urgency</b> <input type="checkbox"/> in crisis <input type="checkbox"/> emergency
<b>Disaster Victims</b> <input type="checkbox"/> covid19	<b>Housing</b> <input type="checkbox"/> runaways <input type="checkbox"/> homeless	<b>Health</b> <input type="checkbox"/> chronic illness <input type="checkbox"/> pregnant	<b>Armed Forces</b> <input type="checkbox"/> veterans <input type="checkbox"/> active duty <input type="checkbox"/> national guard
	<b>Disability</b> <input type="checkbox"/> mentally incapacitated <input type="checkbox"/> all disabilities	<b>Guardianship</b> <input type="checkbox"/> foster youth	
	<b>General</b> <input type="checkbox"/> anyone in need	<b>Employment</b> <input type="checkbox"/> unemployed	

**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 ▾

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<b>I want to</b> <input type="checkbox"/> Visit <input type="checkbox"/> Call <input type="checkbox"/> Email	<b>Open Hours</b> <input type="checkbox"/> Open Now <input type="checkbox"/> Open Late <input type="checkbox"/> Open Early <input type="checkbox"/> Open Weekends	<b>Cost</b> <i>All programs are either free or reduced cost</i> <input type="checkbox"/> Free	<b>Program communicates in</b> <a href="#">SELECT LANGUAGE ▾</a>
			<b>Documents Required</b>

**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?

0	family members
---	----------------

How much does your household make per month?

\$	0	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'

**17 programs:**

▼ Serve veterans  or homeless 

 **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 provides 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

## 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



SUGGES

[↗ APPLY](#)

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

- 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](#)

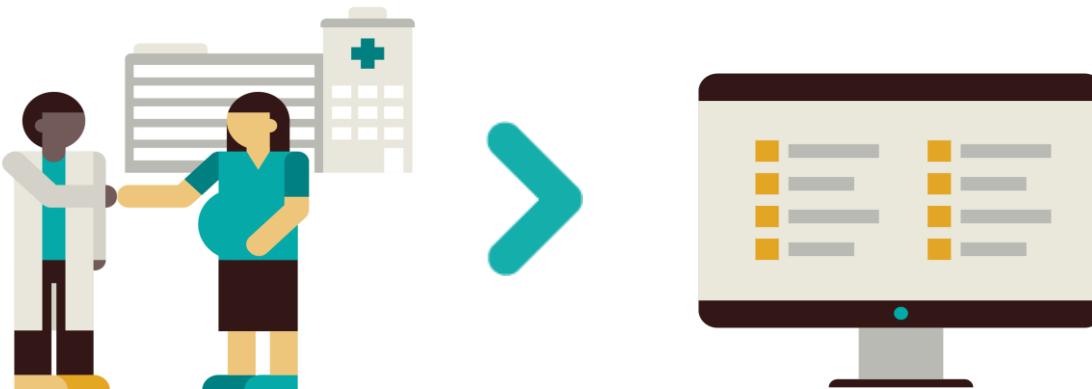
[SUGGES](#)

[REFER](#)



# What is a Logged Referral?

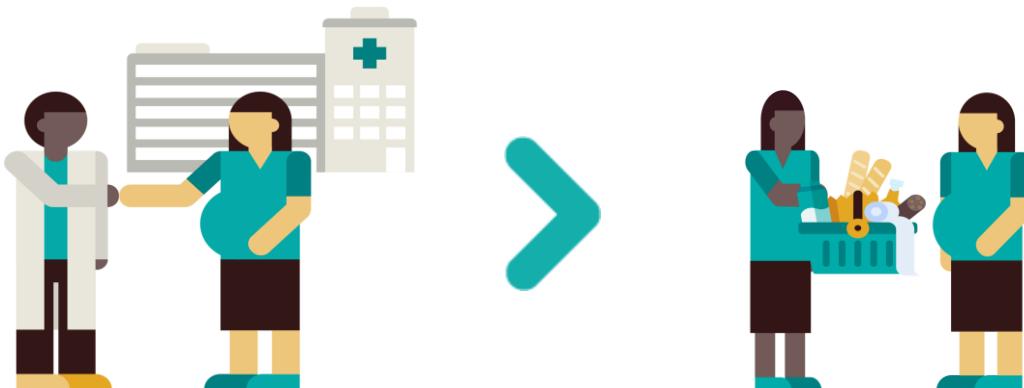
A logged referral is one that is documented to the seeker's profile but is not sent to the organization providing the service. Updating the referral status is owned by the navigator.





# 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
 <b>APPLY HERE</b> <b>Apply through platform</b>	Create a referral for the seeker and then complete a screener within the platform to collect eligibility
 <b>REFER</b> <b>One-step referral</b>	Create a referral for the seeker
 <b>SCHEDULE</b>	Schedule an appointment for the seeker within the platform to create the referral

## Logged Referrals

Button	Next Step
 <b>APPLY ON THEIR SITE</b> <b>External Apply</b>	A new tab in your browser will open, taking you to the organizations screener on their website
 <b>CONTACT ON THEIR SITE</b> <b>External Contact</b>	Contact the organization through an external website
 <b>SCHEDULE ON THEIR SITE</b> <b>External Schedule</b>	A new tab in your browser will open, taking you to the organizations scheduling tool
 <b>SEE NEXT STEPS</b> <b>See Next Steps</b>	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 \* Heather Dender

**Tell us about the person you're helping:**

Someone you've Connected before:  
Use contact info on file \* Start typing their name

Or

Connecting someone new:  
Their Name \* First Name  Last Name

Their Email Address

Their Phone Number

Their Language English

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 \*  Dender

**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 \*  First Name  Last 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 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 in a safe situation.



# 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](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](mailto: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

People I'm Helping / Heather Dender

**F** Flag Archive

**A** Personal Info

Heather Dender  
Name  
hdender@findhelp.com  
Email Address

**B** Assignment

**C** Household

Household information has not been added.

**D** Forms

No forms have been submitted for this user.

**E** Documents

Care Plan.png  
Sep 8, 2024

**G** Goals

Heather has 1 goal.

Getting ID  
Replacing a Missing ID  
9/09/24  
Status: In progress

**H** Navigation History

You have referred Heather to 1 programs.

Referrals and Notes

**Mitch Food Pantry**  
by Mitch Food Pantry

9/09/24  
"Heather needs to replace her ID to qualify for this program"  
Heather Dender

9/09/24  
Status set to 'needs client action'  
Heather Dender

7/31/24  
Status set to 'hot updated'  
Heather Dender

7/31/24  
Referred by Heather D (Findhelp Learning and Development)



# Personal Info

Personal Info

Heather Dender  
Name

hdender@findhelp.com  
Email Address

[Edit Personal Info](#)

Edit Personal Info

First Name  [...](#)

Last Name

Email Address

Phone Number

Next Follow-up Date

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) \_\_\_\_\_



# 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**

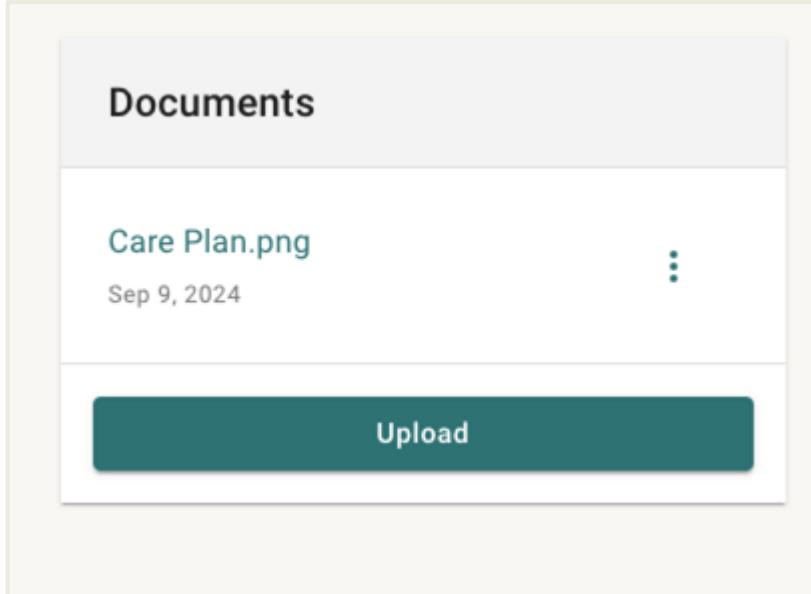
**CANCEL**

**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?



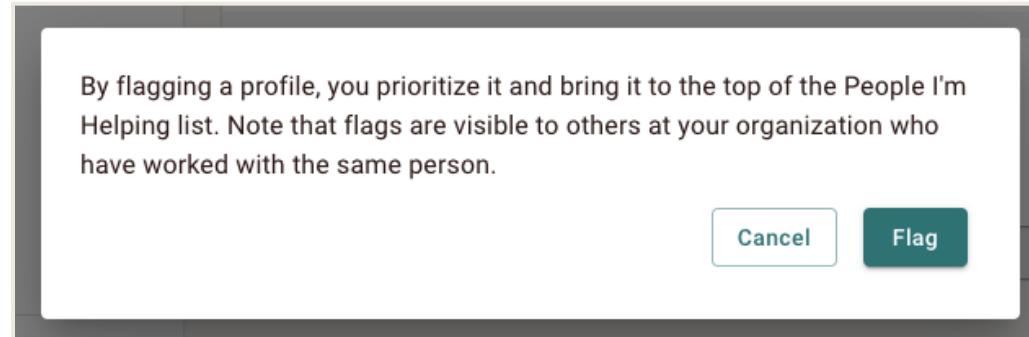
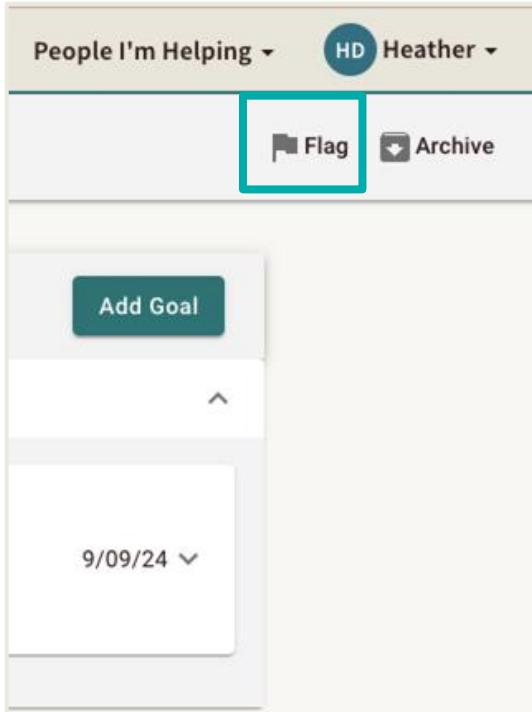
Select upload and then choose the document you wish to attach to the seeker profile.

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



# Flagging a Seeker Profile

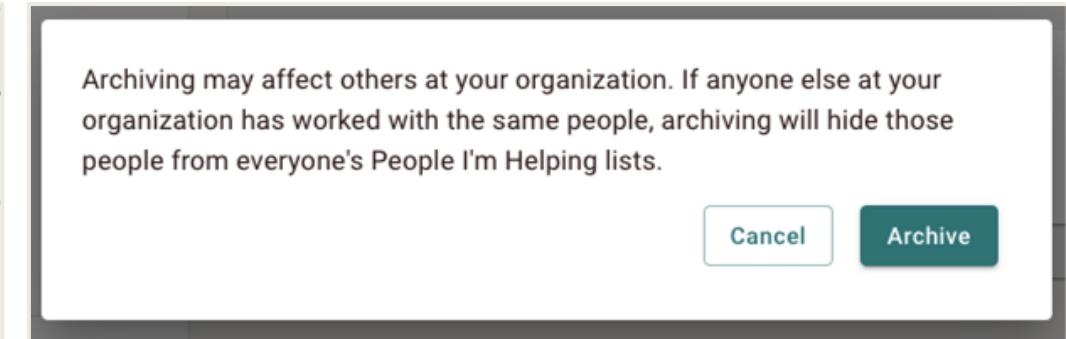
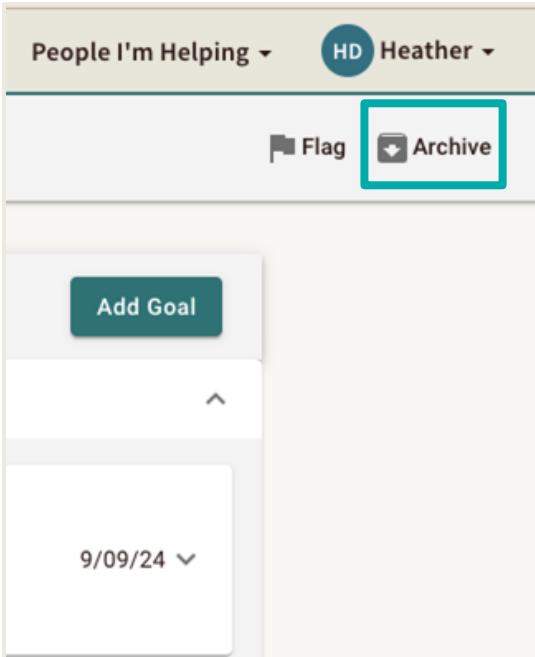
Flagging a profile will prioritize it in the People I'm Helping dashboard.





# 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

Heather doesn't have any goals yet!

**ADD GOAL**

**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.

Start a Referral Add Note

Referrals and Notes

- ... 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

Move 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 ▾

Cancel

Add/Remove Goals

Type your note here...

X

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.

LinkU DC HEALTH HealthyDC

Support

People I'm Helping

heather

Social Needs Screener

Welcome to LinkU

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

Let's get started!

Find: (Optional)

Food pantry, rent, etc.

Available in:

78758

Search

**LinkU** Make the Connection.



# Access to updated resources to go further

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...

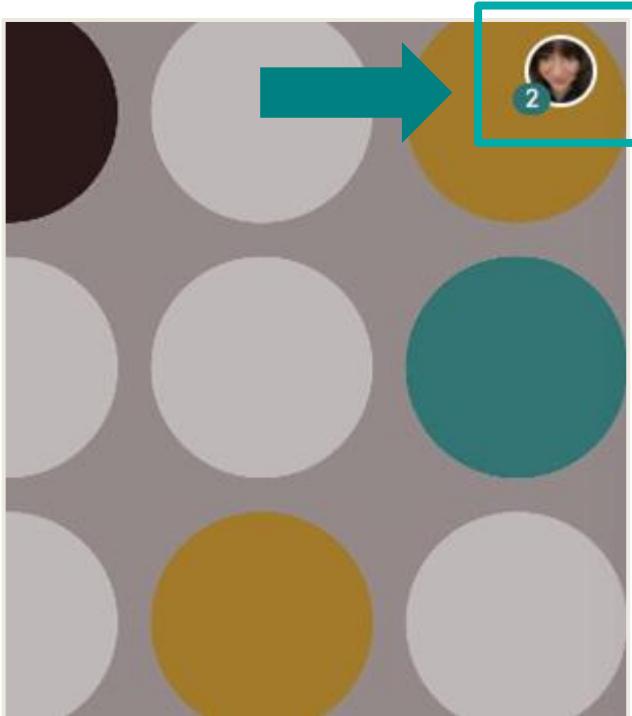
**Learning Hub for Navigators**  
Want to learn how to use the platform? Access training articles, videos, and other resources to...

**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!

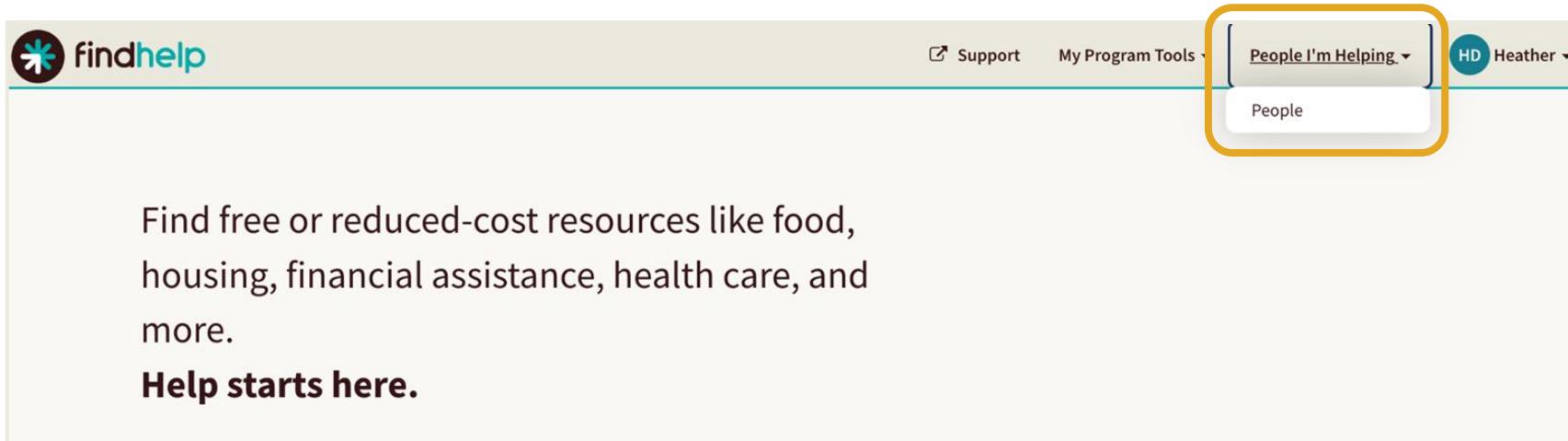
### **Groups Connected with Team Collaboration**

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**.



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

B  ... Search

Show All

**Follow Up Date**

mm/dd/yyyy ... - mm/dd/yyyy ... C

**Date of Birth**

mm/dd/yyyy ... - mm/dd/yyyy ...

**Gender**

Show All

Name	Refer	Summary
Laurie Britt	D <span>Refer</span>	E <span>Summary</span>
Patricia Washington	<span>Refer</span>	<span>Summary</span>
George Williams	<span>Refer</span>	<span>Summary</span>
Laurie O	<span>Refer</span>	<span>Summary</span>
John Smith	<span>Refer</span>	<span>Summary</span>



# 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:**

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 

People I'm Helping / Nick Smith

Edit Personal Info

Assignment

Assign To Me



# People I'm Helping

The screenshot shows a dashboard titled 'People I'm Helping'. On the left, there are several filtering dropdowns: 'Assignee' (set to 'Show All'), 'Follow Up Date' (two date pickers), 'Date of Birth' (two date pickers), 'Gender' (set to 'Show All'), 'Race' (set to 'Show All'), 'Ethnicity' (set to 'Show All'), and 'State' (set to 'Show All'). A search bar at the top right contains the placeholder 'Search name, email, or ID' and a 'Search' button. The main area is a table with columns: Name, Refer, Summary, Assignee, and Email. The table lists 12 entries:

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.