LinkU User Guide

Review this comprehensive guide to learn everything you need to know about leveraging LinkU through the DC HIE.

Questions or need support?
To learn more about the LinkU platform, please visit crispdc.org/hrsn.

If you are interested in access to LinkU, please reach out to CRISP DC Project Manager, Abby Lutz at abby.lutz@crisphealth.org.

For general questions about the CRISP DC Portal, please reach out to dcoutreach@crisphealth.org.

Table of Contents

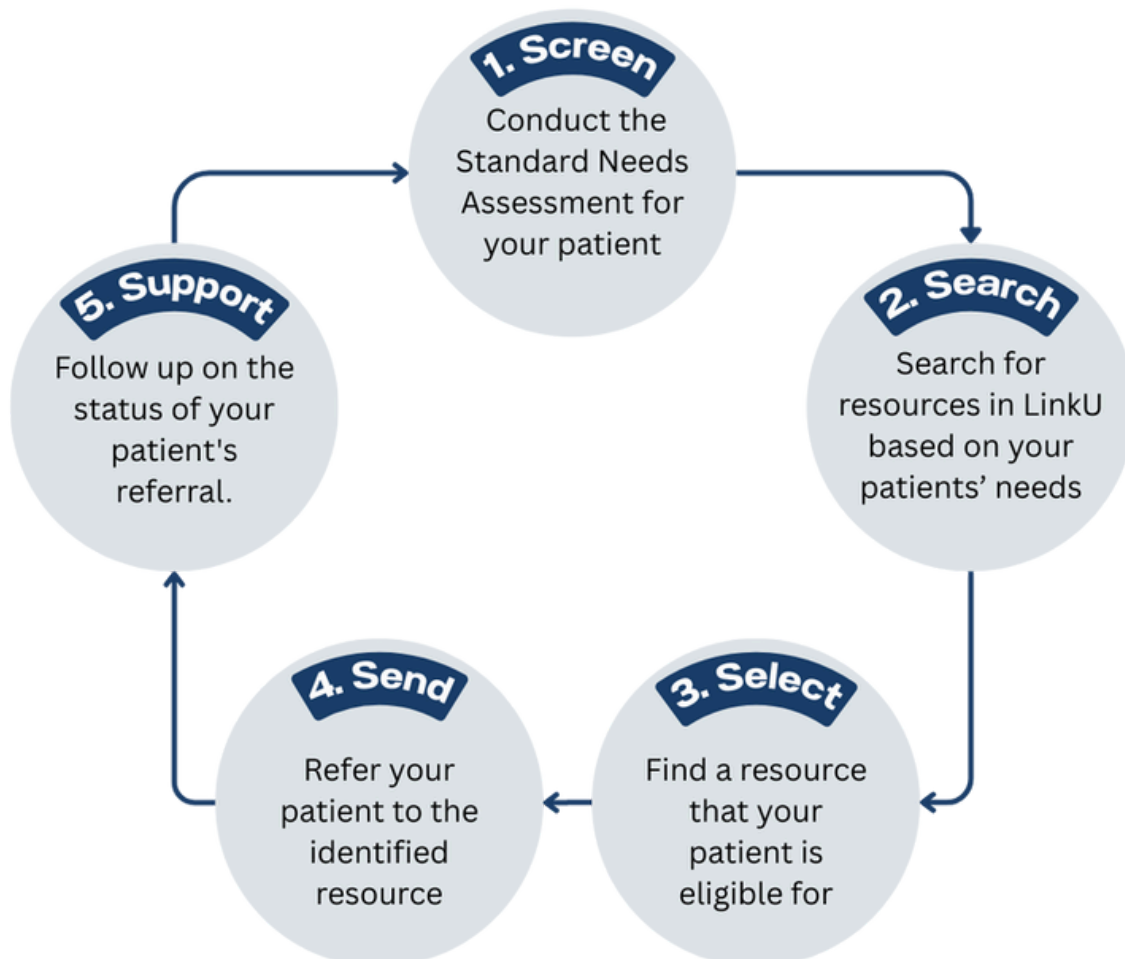**Contents**

Introduction

What makes LinkU different?

LinkU, DC Health's instance of *Findhelp*, is an all-in-one screening, referral, and resource directory platform that can easily be launched from CRISP DC.

Organizations that have been onboarded to the platform have access to these key benefits:

- **Seamless Access:** No extra login needed- launch directly from CRISP DC.
- **Personalized Support:** Screening assessments suggest tailored search areas based on your patient's needs
- **Direct Patient Connection:** Send resources straight to patients so they can quickly access care.
- **Referral Tracking:** Monitor the status of referrals you've sent and receive timely updates.
- **Team Collaboration:** Work together with colleagues to support patients in your care.
- **Enhanced Care Coordination:** Data collected in LinkU flows back to the HIE for a complete patient record.

Workflow

Please see below the desired flow for using the LinkU platform.

1. Screen
Conduct the Standard Needs Assessment for your patient

2. Search
Search for resources in LinkU based on your patients' needs

3. Select
Find a resource that your patient is eligible for

4. Send
Refer your patient to the identified resource

5. Support
Follow up on the status of your patient's referral.

3

Getting Started with LinkU

Account Activation

Access to LinkU begins with a dedicated instance set up for your organization by CRISP DC and Findhelp.

Setup: The CRISP DC team will work to configure access through either the HIE Portal or the InContext application.

Confirmation: Once set up is complete, you'll receive an email with login confirmation and training details

New Users: If your organization has not yet been onboarded, you can begin by completing the interest form [here](#).

Orientation Checklist

☐ **Complete the LinkU Interest Form**

☐ **Account Setup:** CRISP DC and Findhelp will create your account

☐ **Confirmation:** Receive an email from CRISP DC confirming your access

☐ **Training:** Attend a LinkU training session or receive 1:1 training with the CRISP DC Project Lead

☐ **Start Using LinkU:** Screen patients, search for resources, and make referrals

4

Accessing LinkU

Launching LinkU from the HIE Portal

Step 1: Search for a Patient
- Log into the **CRISP DC Portal,** using **Google Chrome** (preferred browser)
- Use the **Patient Search** tool to locate the individual

Step 2: Select the LinkU Tile
- Click on the patient's name, and select LinkU from the drop-down of applications

Step 3: Conduct Screenings and Referrals
- You will automatically be logged into **LinkU** with the selected patient's information preloaded.
- Within LinkU:
  - Conduct a **Social Needs Screening**
  - **Search for Community Resources** relevant to the patient
  - **Make Closed-Loop Referrals** directly through the platform. A closed-loop referral is a coordinated process where a provider sends a referral for a service to a specific organization, the receiving organization delivers the service, and then the organization providing the service confirms that the service was delivered.

Launching LinkU from the CRISP DC InContext Application

Step 1: Launch the InContext Application
- Open the **InContext** app from within the patient's chart in your EHR
- You will be placed within the CRISP Interface for the selected patient
- Expand the **left side menu**

Step 2: Launch the LinkU Application
- Click on **"APPS"** on the left-hand menu
- Select **"LinkU"** from the app list
- A new browser tab or window will open
- You will automatically be logged into **LinkU** with the selected patient's information preloaded

Step 3: Conduct Screening and Referrals
- Within **LinkU**:
  - Conduct a **Social Needs Screening**
  - **Search for Community Resources** relevant to the patient
  - **Make Closed-Loop Referrals** directly through the platform

If you would like to see more detailed How to Launch Guides with screenshots included, please visit the CRISP DC website at crispdc.org/hrsn.

5

# Leveraging the LinkU Standard Needs Assessment

LinkU, now available through Single Sign On (SSO) from CRISP DC, has a built-in screening assessment for you to leverage. If you decide to use the screening assessment through LinkU, it will select areas in which you should look for resources for your patient based on the answers that were provided.

Why should you use the Standard Needs Assessment?

- Help identify your patients' Social Needs
- Screening Data Collected in LinkU will be shared back to the DC HIE for all care team members to view
- Reduce duplicative data entry
- Reduce asking harmful questions to a patient multiple times

What Needs does the screening assessment help identify?

- Living situation
- Food
- Financial Situation
- Medical Needs
- Mental Health
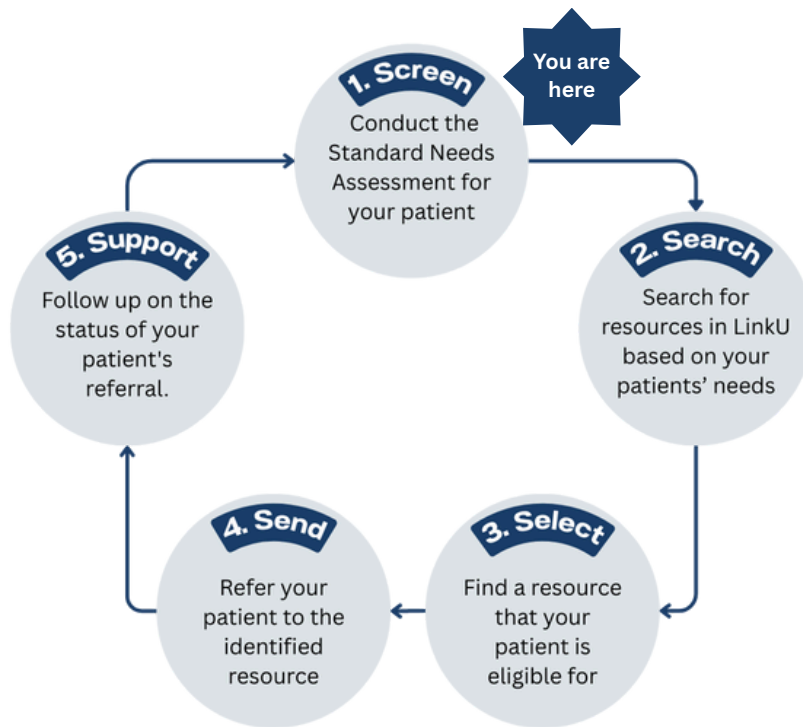
- Transportation
- Legal
- Safety
- Substance Use
- Additional Needs

CRISP DC

Searching for Resources in LinkU

LinkU is now integrated with CRISP DC through SSO via the HIE Portal, and the InContext application after completing the standard needs assessment in LinkU, you can begin searching for resources that match your patients' needs. You can start a search in two ways:
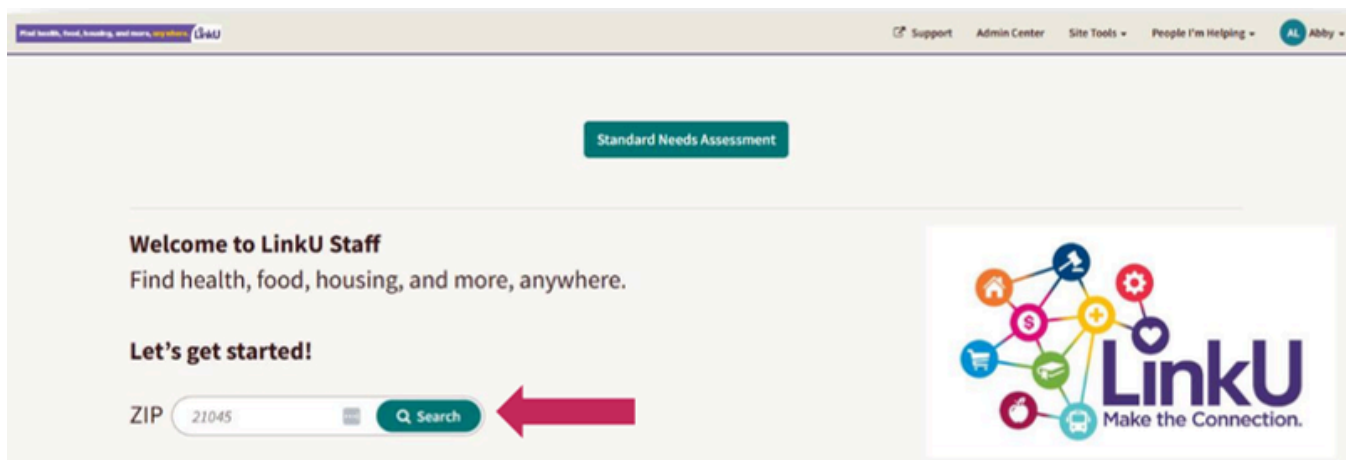
Use Screening Results: Let LinkU suggest areas of need based on the patients' responses

Start a New Search: Search directly by keyword, program name, or category.
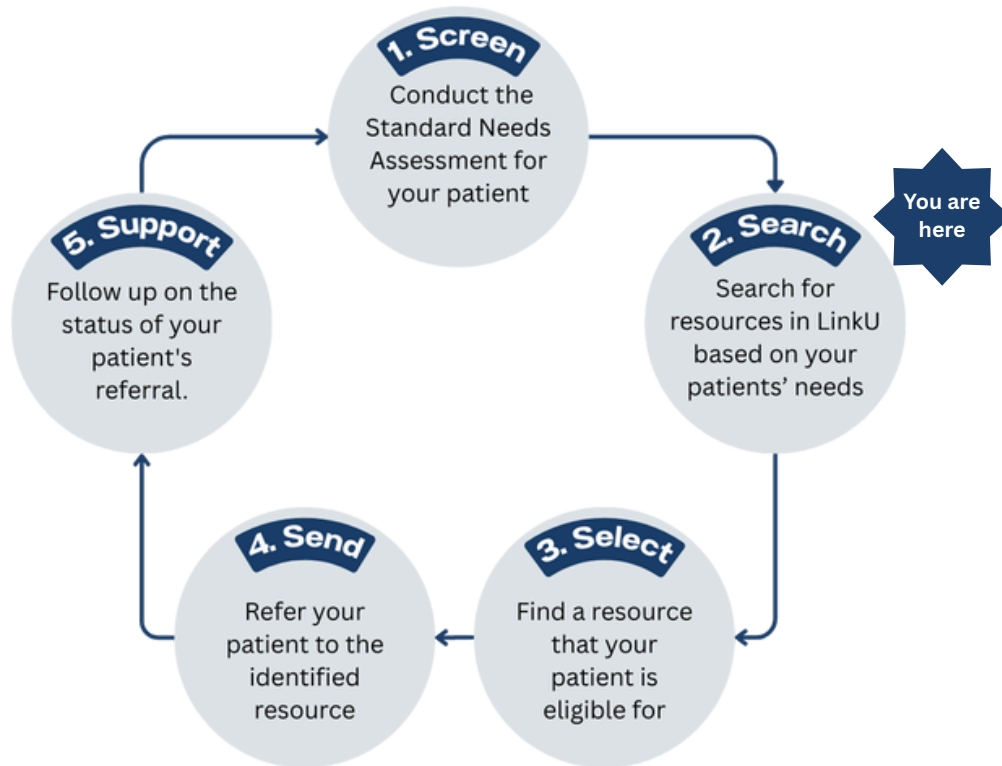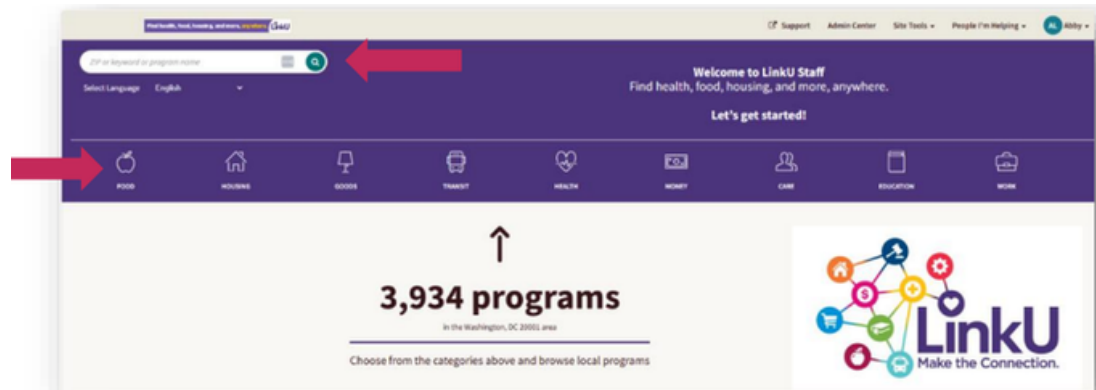

Steps to Find Resources

When you first launch into LinkU from CRISP DC, the first thing you will need to do is search for the patient's zip code.

From there you will be brought to the main search page where you can find resources in two main ways.

1. Searching for keywords or the name of the program.
2. Narrow down your search using the categories and subcategories.

Things to consider when searching for programs:

- Eligibility criteria of the program
- Accessibility of the service
- Insurance accepted by service providers
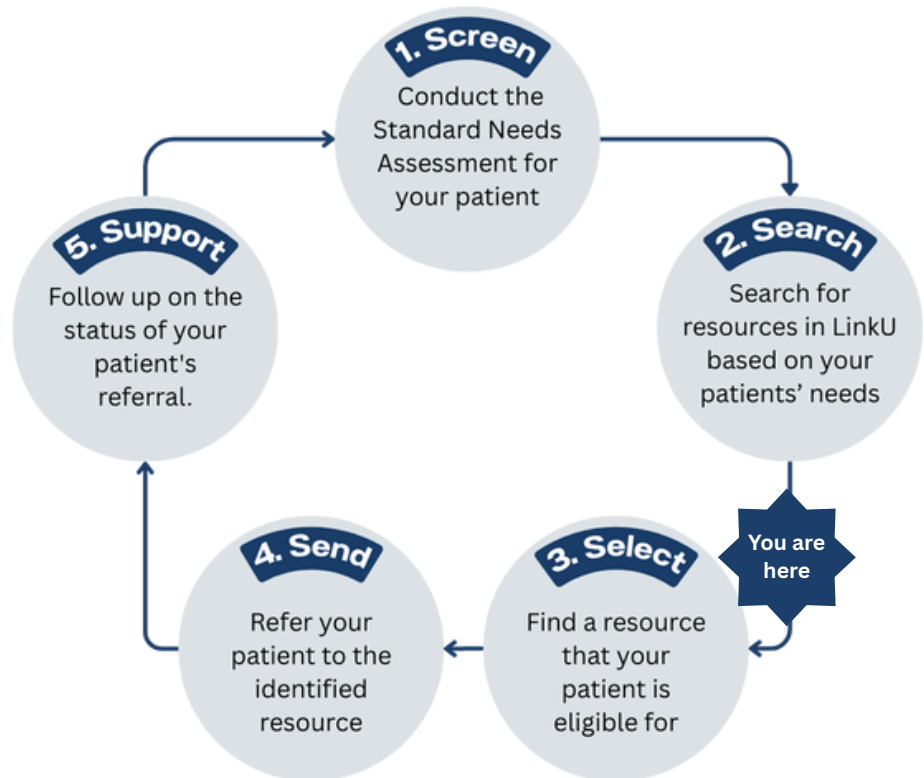
Filters

To help ensure that you are finding a program that is right for your patient, you can also use the program filters at the top of the page to help narrow down your search and find a program that best suits the needs of your patient.

Personal Filters can be used to filter information related to the patient, such as age or armed forces status. **Program filters** are specific to the program, such as hours of operation or language spoken, and the **Income eligibility filter** allows you to filter based on the number of members in your household and your total household income.

8
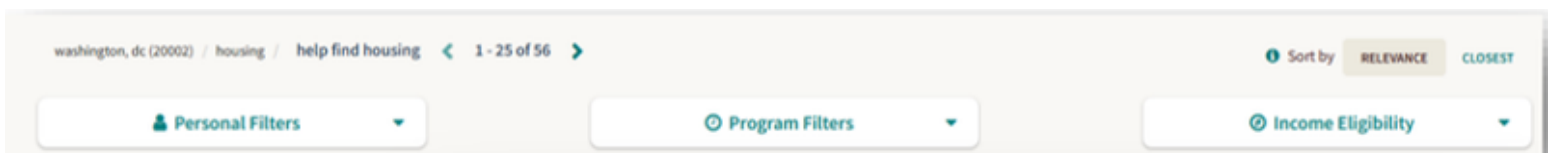
Sending Referrals for Patients Through LinkU

LinkU, now integrated with the DC HIE, allows providers to send referrals to resources that fit their patients' needs.
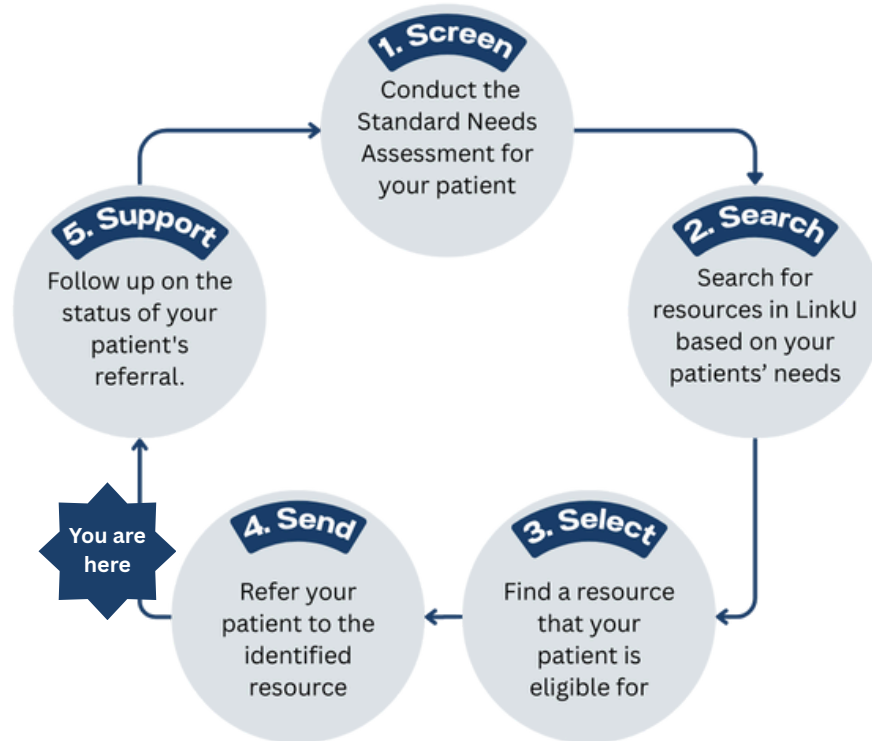
Once you have identified the resource that you would like to refer your patient to, there are a couple of different steps that you can take to refer your patient to the resource based on the organization's preference for receiving referrals.

A check mark next to the organization's name means that the organization is claimed and someone from that organization is ensuring that the information on the site is up to date.

Live Referrals

- **Live referrals** are sent **directly to the organization** that is providing the services
- Providers can send these referrals directly through the **LinkU platform**, or sometimes it will ask you to apply directly on the program's website.
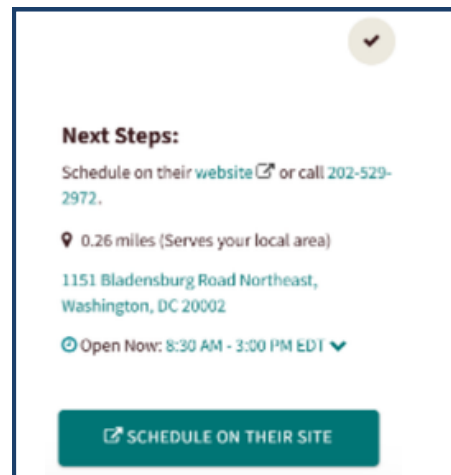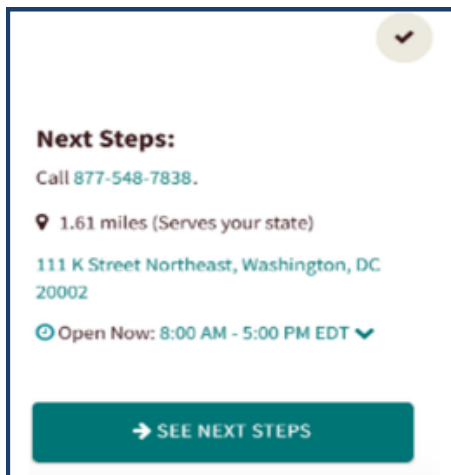
9

Next Steps:

Call 202-722-1815.

Serves your local area

⊙ Open Now: 8:00 AM - 5:00 PM EDT ⌄

↪ REFER

Next Steps:

Email thejubileeorg@peoplepc.com to get more info.

📍 0.71 miles (Serves your local area)

, Washington, DC 20002

⊙ Open Now: 7:00 AM - 8:00 PM EDT ⌄

▤ APPLY HERE
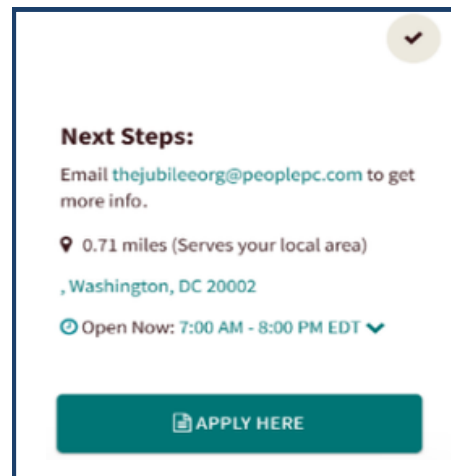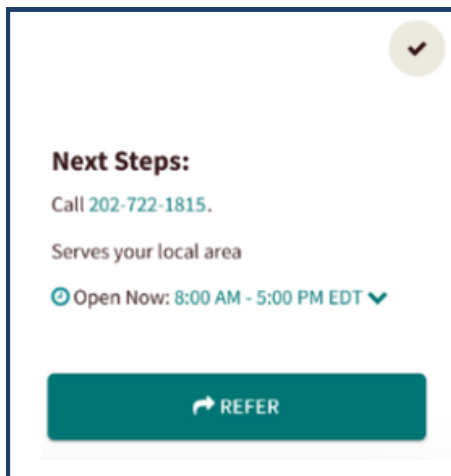
Logged Referrals

- A logged referral is not directly sent to the organization providing services, and it serves as an internal reference for where the patient was referred.
- Some organizations in LinkU do not take live referrals due to staffing capacity, or they have a more preferred method of receiving referrals.

Next Steps:

Call 877-548-7838.

📍 1.61 miles (Serves your state)

111 K Street Northeast, Washington, DC 20002

⊙ Open Now: 8:00 AM - 5:00 PM EDT ⌄

➜ SEE NEXT STEPS

Next Steps:

Schedule on their website ⬀ or call 202-529-2972.

📍 0.26 miles (Serves your local area)

1151 Bladensburg Road Northeast, Washington, DC 20002

⊙ Open Now: 8:30 AM - 3:00 PM EDT ⌄

⬀ SCHEDULE ON THEIR SITE

What are the benefits of sending referrals through LinkU?

- **Shared Data**: Referral details are sent back to the DC HIE, allowing all care team members to view them in the **Care Coordination tab**.
- **Status Tracking & Communication**: See real-time updates on referral progress and send messages directly to the receiving organizations.
- **Closed-Loop Referrals**: Ensure patients receive the care they need through a simple process that confirms when services are delivered.

Additional Functionalities in LinkU

Patient Profile

The Patient Profile in LinkU gives providers a centralized view of important patient information, including:

- **Personal Details** (demographic and contact information)
- **Patient Goals** set during care planning
- **Navigation History** (Live and logged referrals made)
- **Household information**
- **Forms** (Completed Standard Needs Assessment)
- **Uploaded Documents** relevant to care coordination

This profile helps care teams quickly understand a patient's needs and history, reducing duplication and improving care coordination across providers.

Referrals and Notes

- When a **live referral** is submitted, the organization that receives the referral is responsible for updating the status within LinkU.
  - You can also make a note and choose for the organization receiving the referral to see the note that you made.
- If you have submitted a **logged referral** for your patient, this will not be seen by the organization, and you are responsible for updating the status of that referral through the platform.

11

Troubleshooting & Support

Frequently Asked Questions

1. What is LinkU and how does it differ from other tools?
LinkU is a comprehensive screening and referral tool that allows you to search for resources and make closed-loop referrals all in one place. It is different from other tools because its integrated within CRISP DC so that you can Single Sign on from CRISP DC into the LinkU platform.

2. How do I log in?
- Log into CRISP DC via the HIE Web Portal or the InContext app in your EHR.
- Open the LinkU tile (or select it from additional applications).
- If you have login issues, email Abby Lutz (CRISP DC Project Manager) at abby.lutz@crisphealth.org.

3. What data is shared with the DC HIE?
Screening Assessment data and referral data that are captured in LinkU will be shared back to the DC HIE.

4. What if I can't find a resource?
If you are not able to find a resource, you can always broaden the zip code in which you are searching. Use the categories and subcategories to narrow down the search. Lastly, you can use the filters at the top to narrow down your search results.

5. What if an organization is not accepting closed-loop referrals?
If an organization is not accepting closed-loop referrals, another contact method will be indicated on the program card for you or the patient to directly contact the organization. If you would like to keep track of the referral through the LinkU platform, you can log a referral for the patient, and you will be able to update the status of the referral through the patient's profile. Logged referrals will not be sent to the receiving organization.

6. Who do I contact if I experience an error message when logging into LinkU?
If you receive an error message when launching the LinkU platform, please contact CRISP DC Project Manager, Abby Lutz, at abby.lutz@crisphealth.org.

7. Who do I contact if I don't see the LinkU application or tile in CRISP DC?
If you don't see the LinkU application on your CRISP DC account, please contact CRISP DC Project Manager, Abby Lutz, at abby.lutz@crisphealth.org.

8. What if I want additional training on the LinkU platform?
If you would like additional training on the LinkU platform, or if you were unable to attend a training. Please reach out to CRISP DC Project Manager, Abby Lutz, at abby.lutz@crisphealth.org.