



findhelp DC | **HEALTH**



→ LinkU Hospital 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**

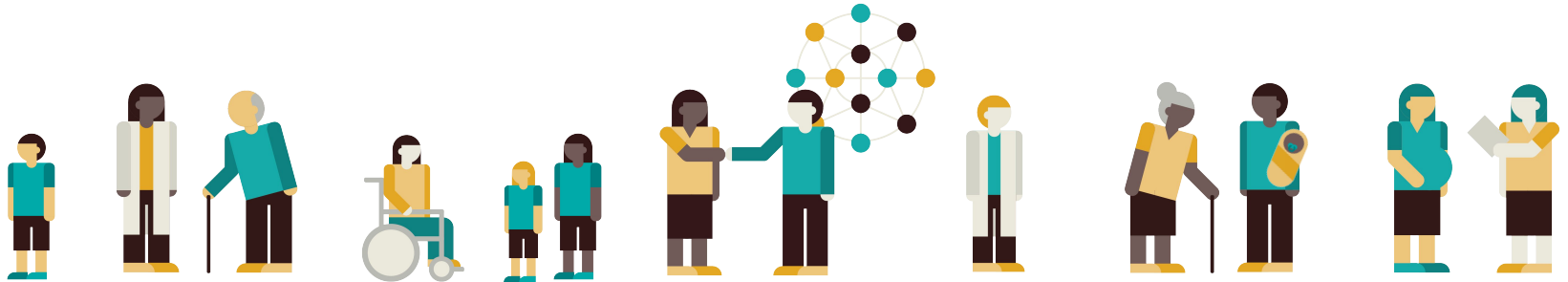


CRISP DC



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.

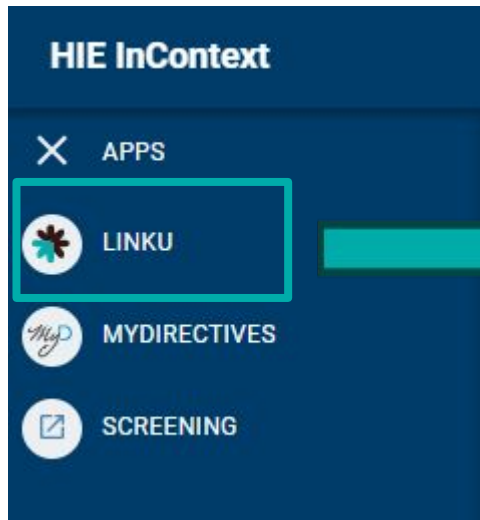
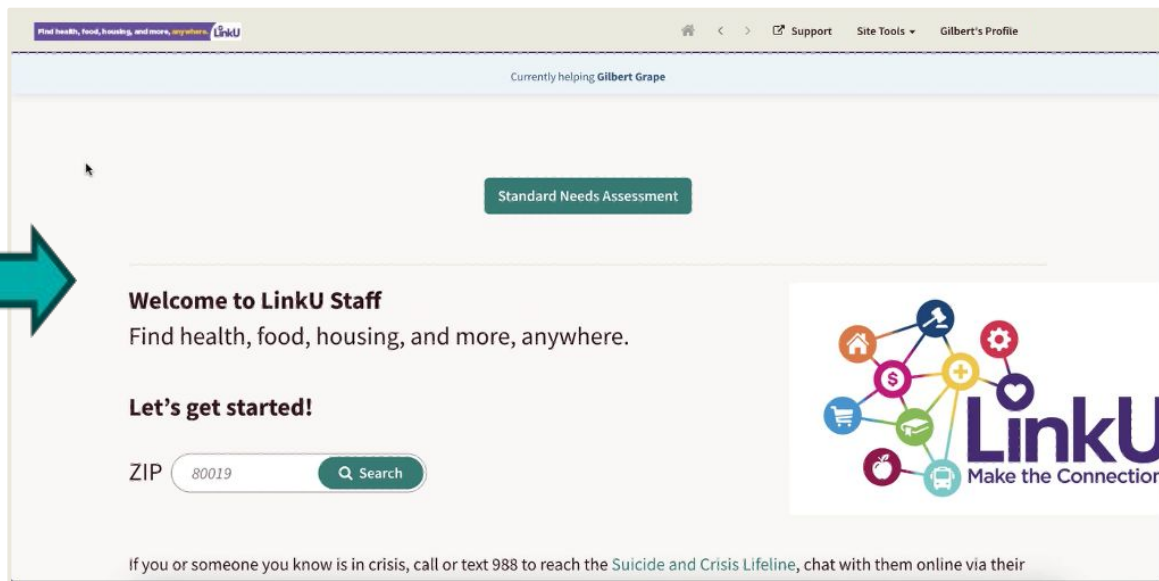
Connect Button

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 from the CRISP DC InContext App, under Additional Applications. Once you launch LinkU, the site administrator will be able to assign you to a group with your other team members.





Your Sites



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



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



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

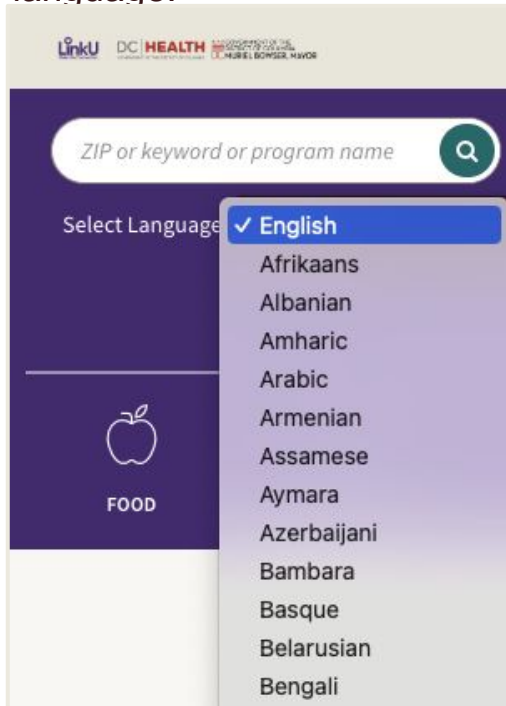
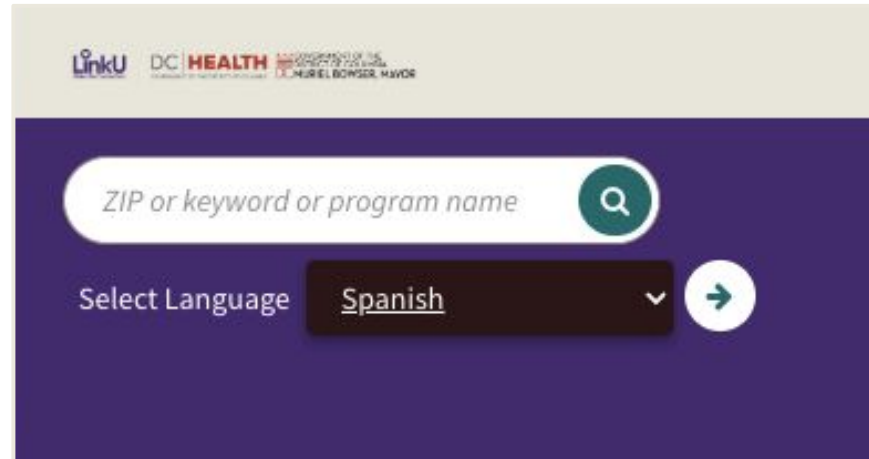
If you or someone you know is in crisis, call or text 988 to reach the [Suicide and Crisis Lifeline](#), chat with them online via their

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

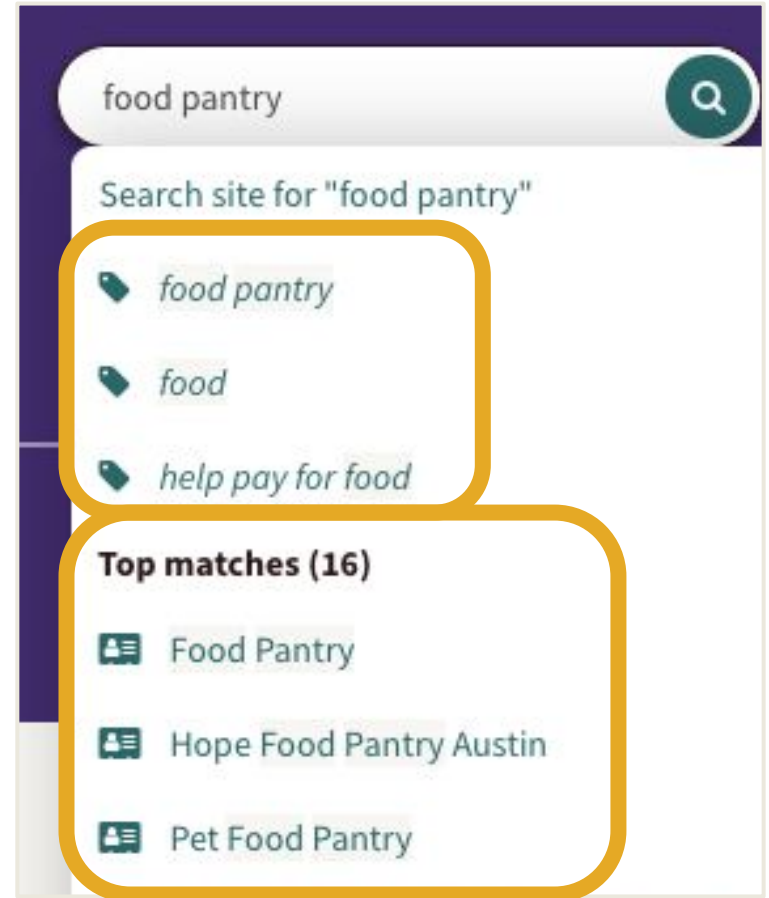
FOOD HOUSING GOODS TRANSIT HEALTH MONEY CARE EDUCATION WORK LEGAL



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 Language English 

 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)

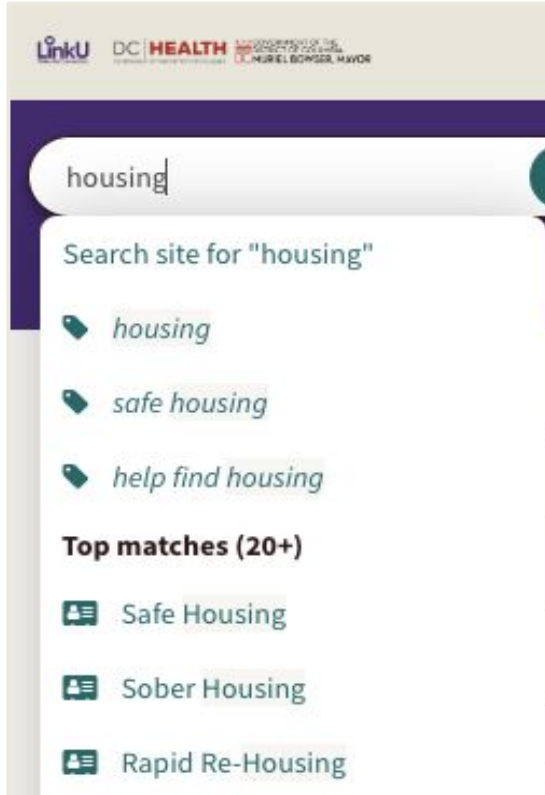
financial aid & loans (45)

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:

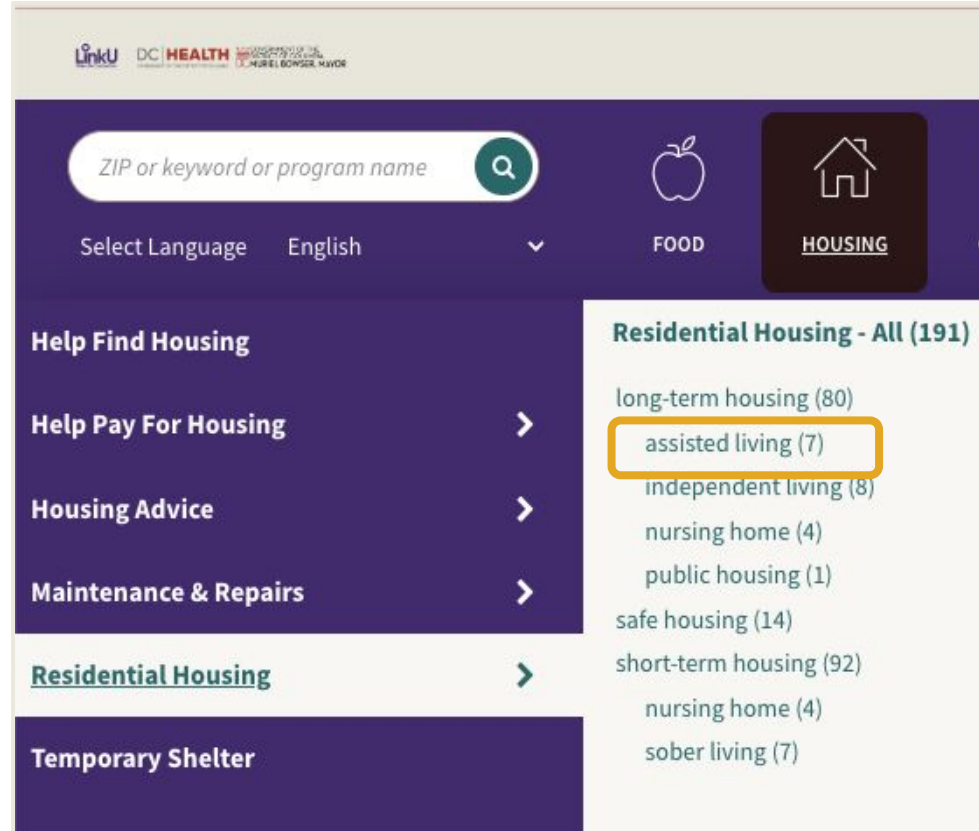


Search Terms vs. Browsing

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.





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

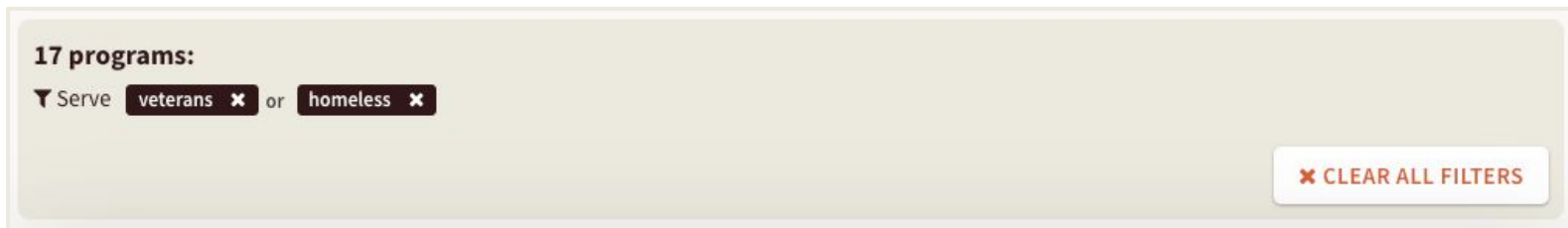
You may be eligible! Look for programs with the

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!



**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](#)

Next Steps:
Apply on their [website](#) .

Serves nationwide

🕒 Open Now : 9:00 AM - 5:30 PM EDT ✓

MORE INFO ▼

★
SAVE

📍
SHARE

☰
NOTES

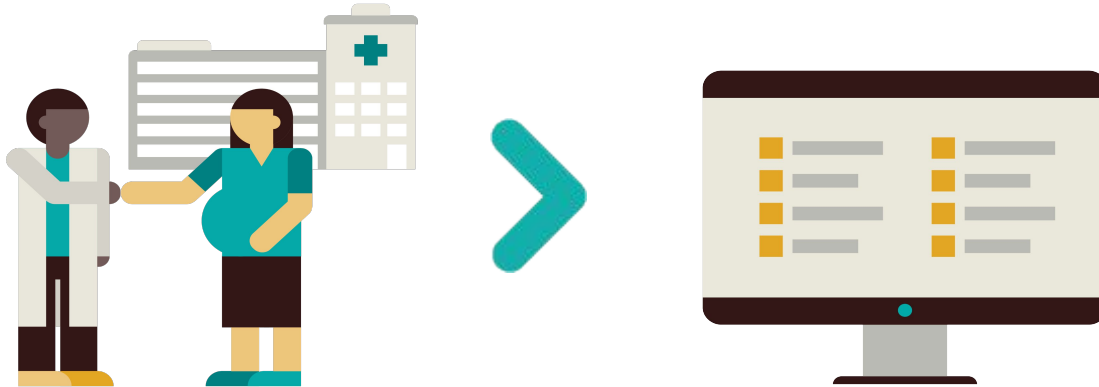
✎
SUGGEST

➡ REFER



What is a Logged Referral?

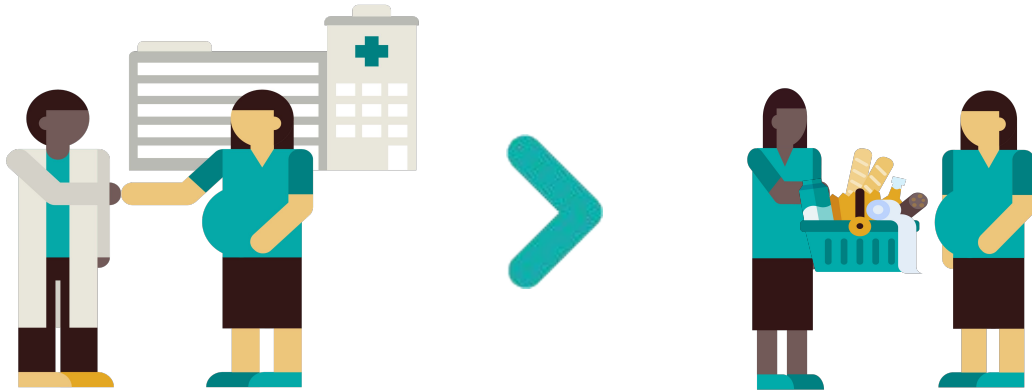
A logged referral is one that is documented to the seeker's profile but is not sent to the organization providing the service. Updating the referral status is owned by the navigator.





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

Logged Referrals

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



Starting a Logged Referral

😊 **Best way to connect!**

Call 877-548-7838 to get more info.

Helping someone else?

[LOG A REFERRAL](#)



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

This form:

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

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

Then click on the [Log A Referral](#) button and fill out the form so it saves to their seeker profile.



Filling Out A Logged Referral Form

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

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 in an unsafe 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).

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:

- 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:** Shows a document titled '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:** Displays '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:** Shows 'You have referred Heather to 1 programs.' with 'Start a Referral' and 'Add Note' buttons. It lists a referral to 'Mitch Food Pantry' with a status of 'Needs client action' and a date of '9/09/24'. Below this, it shows a log of status updates: 'Status set to: needs client action' (9/09/24), 'Status set to: not updated' (7/31/24), and 'Referred by Heather D (Findhelp Learning and Development)' (7/31/24).



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





LinkU Resources



CRISP DC Resources on the LinkU Platform

Resources & Videos

User Guides & One Pagers

Training Videos & Webinars

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

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



DC Health's Trusted Network

- DC Health is working to develop a Trusted Network of programs that have claimed their program on the LinkU site and are accepting live referrals through the platform.
- This will ensure that when referrals are submitted through the platform, those programs will be responding to the referrals they receive.

More information coming soon!



→ LinkU 1:1 Training Sessions

If you would like a tailored 1:1 training with your entire team, please reach out to Abby Stretz at abby.stretz@crispdc.org.



Questions?