CRISP DC

Getting Started With LinkU via CRISP DC

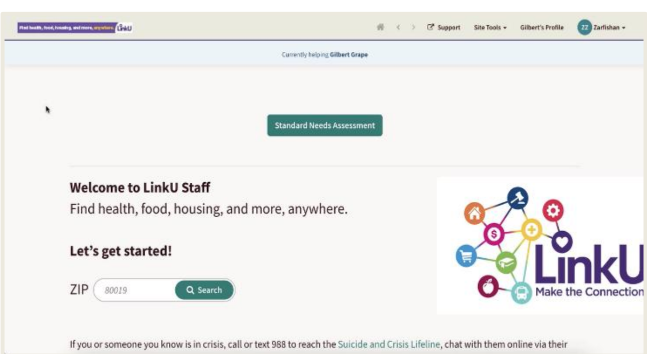
Congratulations on completing your training on the basics of the LinkU platform via CRISP DC. Here is a guide that will get you started with providing the people you help with the resources and services they need!

This Guide Includes:

Accessing LinkU Through the CRISP DC Portal

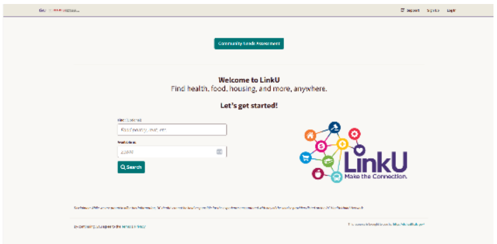
You have two sites at your disposal. One for your staff and one that is a community site that you can share with people you are helping to self-navigate to resources.

Staff Site



- Integrated with your CRISP DC Portal or InContext application
- Allows you to use additional tools
- Allows you to collaborate between teams
- Facilitates data for reporting & analytics
- Screening and referral data captured through the staff site will be shared with the CRISP DC HIE.

Community Site: linkudmv.org

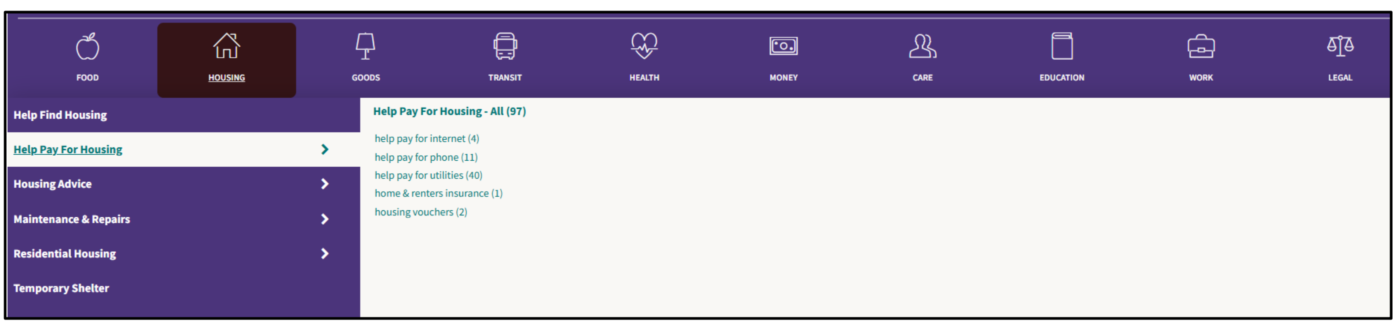


- Share this site with the community and patients
- Created for individuals to self-serve
- Screening and referral data captured through the community site will not be shared with the CRISP DC HIE.

If you happen to encounter an error when logging into the staff site, please reach out to CRISP DC Project Manager Abby Lutz at abby.lutz@crisphealth.org.

Searching For Resources

1. Once you are in the LinkU platform you will need to enter the zip code for the patient that you are helping, allowing you to start searching for programs that available in that search area.
2. You can browse categories or subcategories to find resources. The number next to the category name indicates how many programs match that specific category.

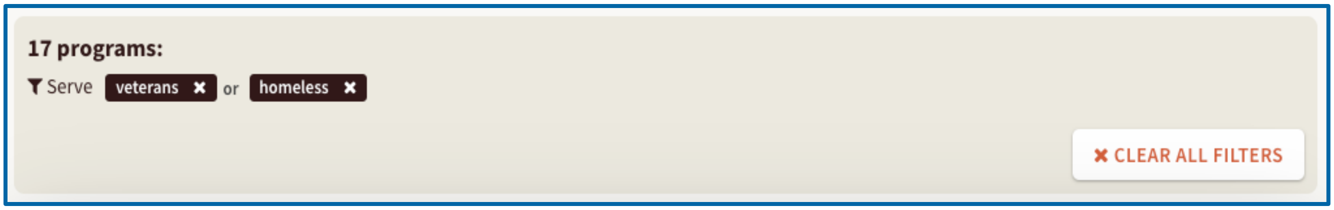


3. You can also use search filters to narrow your results to the person you are helping:

- Personal Filters: Filters specific to the attributes of the person you are helping.
- Program Filters: Filters specific to the program, including hours or language spoken.
- Income Eligibility: Filters for the income criteria required.

4. Clear your filters after you have done your search by either clicking on the x next to the filter at the top or by clicking on the clearing all filters button.

Best practices:



- ★ Make sure you clear your filters when you start a new search!
- ★ Use categories and search filters to find relevant resources!
- ★ You can search by nearby zip codes! Make sure to verify eligibility requirements before sharing

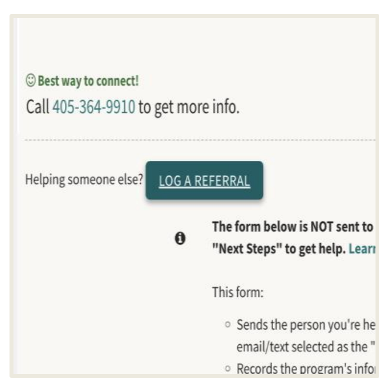
Sending Referrals

Sharing a resource enables the seeker to access and follow up on program information at their convenience via email, text, or Facebook.

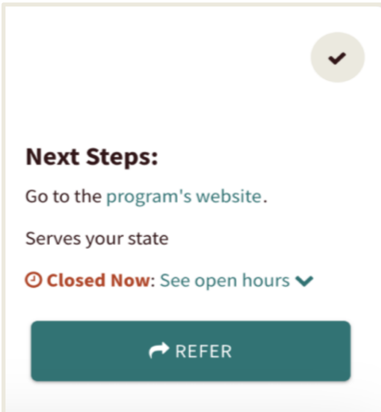
Referring a seeker to a program directly connects them to the next step in obtaining support or resources. There are two different types of referrals that can be made, live referrals or logged referrals.

A **Logged Referral** is a one-way communication pathway the navigator owns that creates a record of the referral that lives in the seeker's profile.

- Clicking the connect button provides a summary of the next steps for reaching out to the program.
- You'll also see an option to log the referral by completing a form.
- The details are saved to the seeker's profile for your records but are not shared with the program's sponsoring organization.
- You will manage and close the referral yourself.



A **Live Referral** is a two-way communication pathway between the navigator helping the seeker and the organization providing the service or resource.



- Clicking the connect button opens a form to complete, including the seeker's preferred contact method, language, and a space for notes.
- This form is sent to the program's sponsoring organization, **so you must get the seeker's consent before submitting.**
- The details are saved in the seeker's profile for you to track, while the organization closes the loop.

Closing the Referral Loop

Closing the loop is an important part of making a referral. It means the outcome of the referral is known. You can use the referral statuses, the referral notifications, the People I'm Helping dashboard, and the seeker profile to manage these.

Referral Statuses

Referral statuses help seekers, navigators, and programs track and update the progress of referrals, ensuring the seeker receives the needed support. You can review what each status means by visiting the **What does each referral status mean article** in the Support Portal.

Closing a Referral

Closing a referral means you have updated the referral status to indicate it has been resolved. Referrals can be closed in a few different ways.

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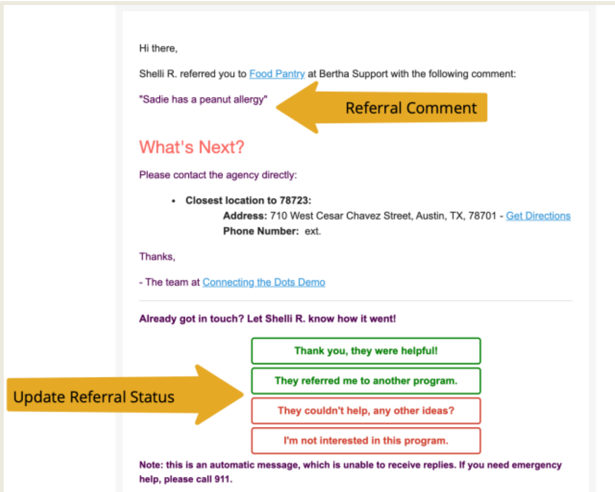

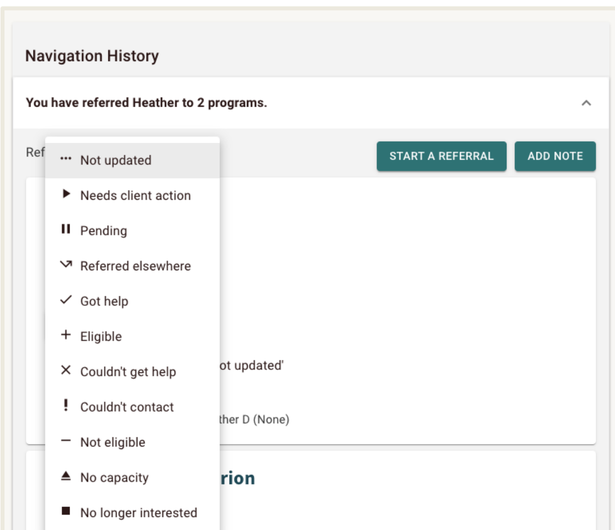

1. When a referral is made, the seeker gets an email notification. They can update the status by clicking an option in the email, which updates the status in their seeker profile and the People I'm Helping dashboard.

2. You can also close the loop inside the Navigation History section of a Seeker Profile. This is how you will manage closed-loop referrals.

3. If you are part of a group with Team Navigation enabled, you can also help close the loops of referrals your team has made.

4. Live referrals are closed by the sponsoring organization. They can update the status through the notification email or their inbound referral dashboard.

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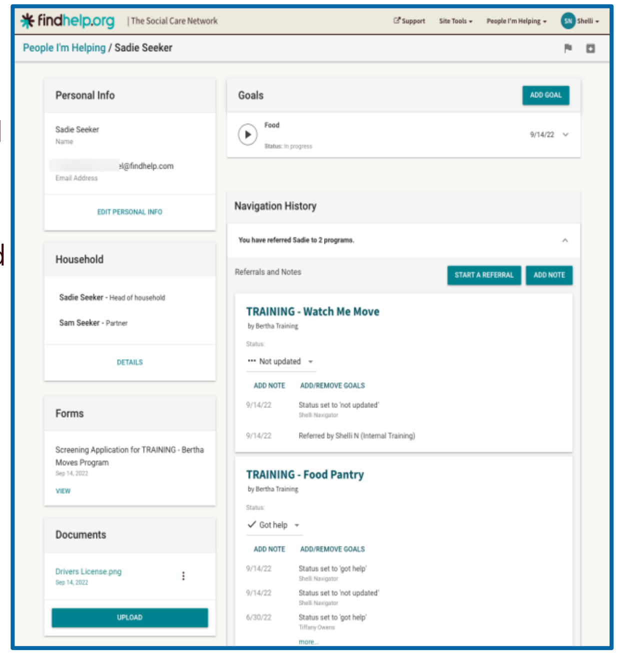
Utilizing the Seeker Profile

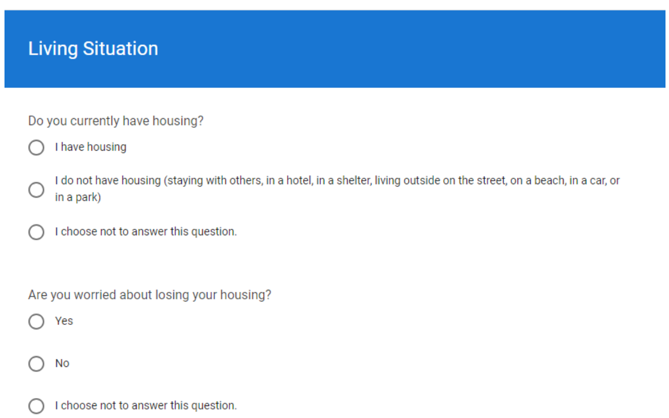


When you make a referral for the person you are helping, you have access to a profile created for them. From here you can add notes and goals, make referrals, look at past referral history and see household details added for your seeker.

A best practice when making a logged referral is to set a follow-up date! This can be done in the personal information section.

For more information on Seeker Profiles, visit our [Support Portal](#).

Screening Assessments

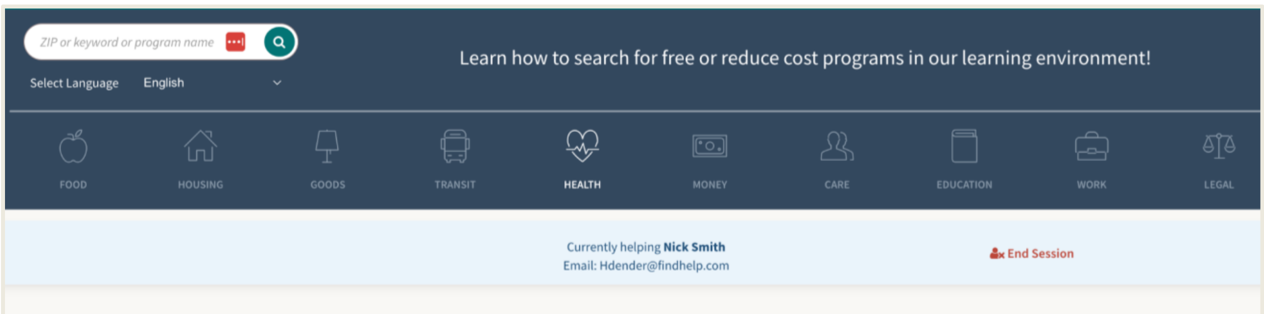


Assessments are designed to help assess a person's social needs, and to understand how to best help them. Within LinkU you will have access to the Standard Needs Assessment.

You can start an assessment from the forms section in the Seeker Profile.

Once you fill out the assessment, you will see categories highlighted to help you find the right resource for the person you are helping.

You can view past assessments filled out by you or your team who has also helped this seeker in the forms section.



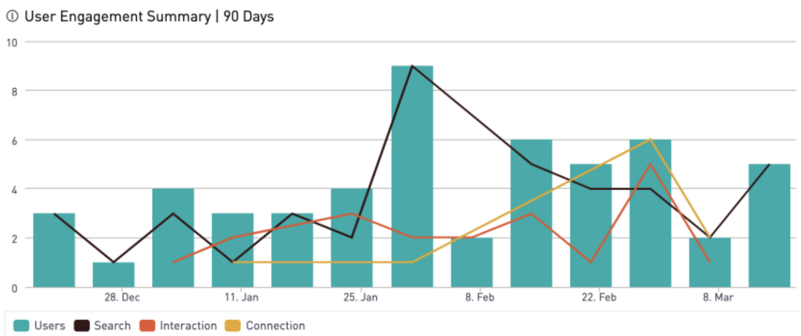
Reporting and Analytics

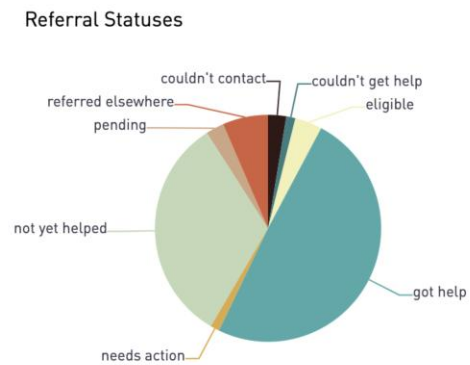
Findhelp's analytics suites provide both high-level and detailed views of your social care network, community needs, and activity data. In addition to tracking your impact, whether it be personal, programmatic, or site-wide, you can monitor key metrics such as users, searches, and connections to programs and use data and insights to make data-driven decisions.

The benefits of our Analytics Suites include:

- **Always Available, Updated Daily**: Your analytics suites are always available on your site and are updated daily, meaning you don't have to wait until the end of the month to gather key insights.
- **Filters and Data Ranges**: You can change various filters and data ranges allowing you to slice and dice data in the ways you want.
- **Downloadable**: Dashboards and reports are available to download as a CSV file if your team wants to further analyze the data.

Example Reports





32	7	3	3
Distinct Identified Users	Distinct Anonymous Users	Seekers Referred | 90 Days	Seekers that Got Help | 90 Days

For more information on analytics, visit our Support Portal.

The Support Portal

The support portal can be accessed through your staff admin and community site and is a great first step to troubleshoot any issues you have or learn more about the tools you have at your disposal on LinkU. We have included a few great links to get you started!

- ★ The Learning Hub
- ★ Searching for Specific Needs
- ★ Sharing and Referring Programs
- ★ Training Videos for Navigators
- ★ Requesting a Program be Added

Best practices:

- ★ Look for a support article that could resolve your issue as a great first step!
- ★ If you are still experiencing issues with the LinkU platform, you can reach out to your Site Administrator or email support@findhelp.com.

- Include a screenshot if you are reporting an issue.

★ If you do email support@findhelp.com or request a program, be added or edited to the LinkU platform, responses will be visible in the Support Portal

★ For any issues logging into LinkU from the CRISP DC Portal or InContext application please contact CRISP DC Project Manager, Abby Lutz at abby.lutz@crisphealth.org.