DC Health Matters *Connect*

Quick Start Tip Sheet
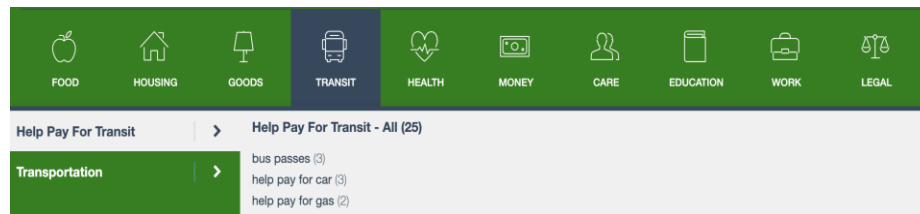
➤ Log In to DC Health Matters Connect

1. **Go to: *https://dchealthmattersconnect.org***
2. Enter your username and password.
3. When you've successfully logged in, you should see the home screen.

> Search for free or reduced cost resources or services to help support your health and well-being.
>
> Zip [90210] 🔍 Search
>
> DC Health Matters *Connect*
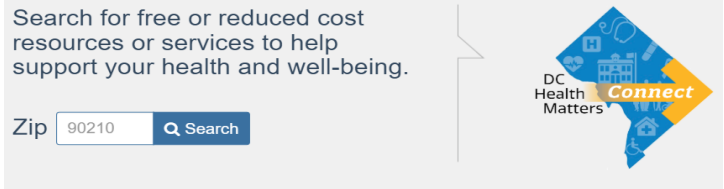
➤ Search for Programs Using DC Health Matters Connect

1. From the homepage, enter the patient zip code to begin searching for free or reduced cost programs to meet your patient's needs.
2. Browse for programs by moving over the navigation bar and drilling down into more specific categories. The number next to the titles shows the number of programs under that category.

FOOD	HOUSING	GOODS	TRANSIT	HEALTH	MONEY	CARE	EDUCATION	WORK	LEGAL

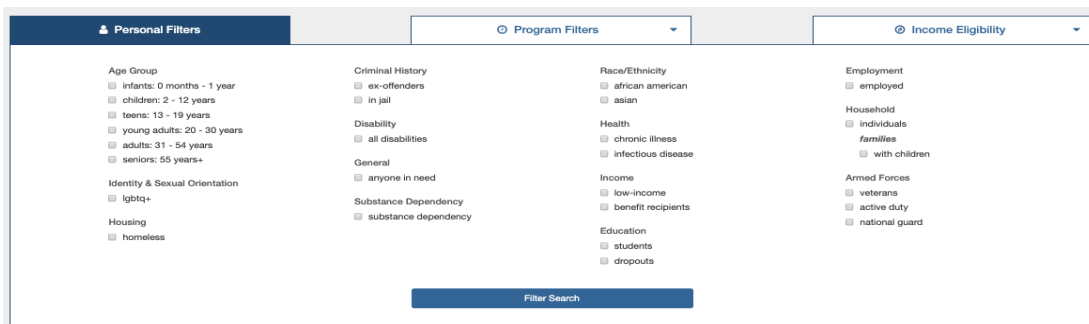| Help Pay For Transit	>	Help Pay For Transit - All (25)
Transportation	>	bus passes (3)
		help pay for car (3)
		help pay for gas (2)

3. You can also enter a keyword in the search box to find programs within the patient service area and click the magnifying glass or press enter to search.

> food bank [🔍]
>
> Select Language ▼

➤ Filter Programs on DC Health Matters Connect

1. You can further refine search results by clicking "Personal Filters", "Program Filters", or "Income Eligibility". Click the relevant checkboxes, and then click "Filter Search".
   a. **Personal Filters** show items that are specific to the person you are helping, such as age group or income.
   b. **Program Filters** show items that are specific to the program including hours or language.
2. By default, your search results will be sorted by the best match. Click "Closest" on the upper right side of the results to sort results by distance from the middle of the zip code.

👤 Personal Filters	⊘ Program Filters ▼	⊘ Income Eligibility ▼

Age Group	Criminal History	Race/Ethnicity	Employment
☐ infants: 0 months - 1 year	☐ ex-offenders	☐ african american	☐ employed
☐ children: 2 - 12 years	☐ in jail	☐ asian	
☐ teens: 13 - 19 years			Household
☐ young adults: 20 - 30 years	Disability	Health	☐ individuals
☐ adults: 31 - 54 years	☐ all disabilities	☐ chronic illness	*families*
☐ seniors: 55 years+		☐ infectious disease	☐ with children
	General		
Identity & Sexual Orientation	☐ anyone in need	Income	Armed Forces
☐ lgbtq+		☐ low-income	☐ veterans
	Substance Dependency	☐ benefit recipients	☐ active duty
Housing	☐ substance dependency		☐ national guard
☐ homeless		Education	
		☐ students	
		☐ dropouts	

Filter Search

➢ Save Your Favorite Programs to a Folder to Reduce Search Time

1. Favorites folders are best when:
   a. Searching for same resources in one area repeatedly
   b. You have specific resources that you prioritize
   c. You want to compile and send multiple resources at once
2. To access your Favorites Folder:
   a. Click on your account on the top right of the header menu
   b. Click "Saved Favorites"
3. You can share favorites:
   a. In an email
   b. As a link
   c. With a group
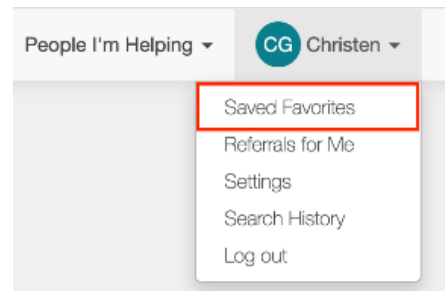
➢ Refer Your Patient to Services on DC Health Matters Connect

1. When you identify a program that can help, use the green button on the program card to refer the patient to that program.

Button	Meaning	Next Step
☒ Apply	Apply through the platform	Create a referral for the patient and then complete a screener within the platform to collect eligibility information. After applying the CBO will receive a message about a new application and a referral.
☒ Apply	External Apply	A new tab in your browser will open, taking you to the organizations screener on their website. The CBO will not receive an emailed referral.
☒ Contact	External Contact	Contact through a form on the organization's website. The CBO will not receive an emailed referral.
➤ Refer	Refer through Platform	Create a referral for the patient. The CBO will receive an emailed referral.
☒ Schedule	Schedule	A new tab in your browser will open, taking you to the scheduling tool.
➔ See Next Steps	See Next Steps	The best way to reach a program is to call, email, or go in person. The CBO will not receive an emailed referral.
▤ Log Referral	Log a Referral	Create a referral for the patient for tracking purposes. The CBO will not receive an emailed referral.

2. Select I'm referring someone else and your name will default in. Note: This workflow should be used when you have the contact information for a specific person.
   Follow the *Share Program Details* workflow if the person prefers to remain anonymous.

3. If this is your first time creating a referral for this patient enter their first name, last name. If you have helped a patient before, use the "Use contact info on file" to look up your patient and pre-load their name / contact information.
4. Enter their email address and/or phone number and communication preference.
5. Click "Send" and you will receive confirmation that the referral was created, a summary of the next steps, and instructions for how you can review the referral. The text will vary based on the specific next step.

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➢ Find People You Have Helped and Connect Them to More Programs

1. Click the "People I'm Helping > People" activity on the main toolbar.
   Note: You need to be logged in to see this activity.
   This allows you to find patients, review existing and create
   new referrals and goals.

2. Use the toolbar on the left to search for patient. You can search by
   any combination of patient name, navigation (or referral) status,
   team assignment, follow-up date range, or navigation start date.
3. Click "Search" to filter patient.
4. Click "Clear Filters" to reset the filters and start a new search.
5. Potential matches appear below the search box.
6. Click on the patient in the search results to open the profile.
7. From the account, you can take a number of actions including adding a goal, adding notes, or starting a referral.
8. To start a new referral, click "Start a Referral".
9. You're taken to the initial search screen where the patient's zip code defaults in and you can navigate to a new
   program. There will be a banner on the screen to show that you are navigating for a specific patient.
10. At any point, to return to the patient profile, click "End Session".
11. After ending a session, you'll return to the People I'm Helping
   activity where you can search for another patient.
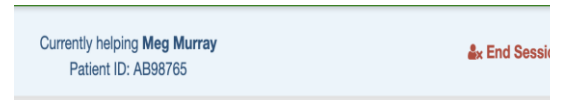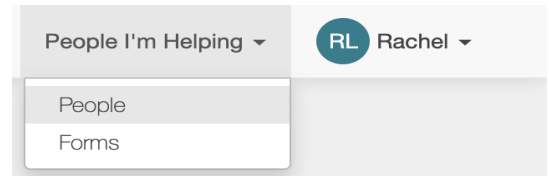
➢ Close the Loop on a Referral Sent Through the Platform

1. Click the "People I'm Helping > People" activity on the main toolbar. Note: You need to be logged in to see this
   activity and you can update the status of a referral in your "People I'm Helping" dashboard.
2. Use the toolbar on the left to search for patient. You can search by any combination of patient name, navigation
   (or referral) status, team assignment, follow-up date range, or navigation start date.
3. Click "Search" to filter patient.
   a. Click "Clear Filters" to reset the filters and start a new search
4. Potential matches appear below the search box.
5. Click on the patient in the search results to open the profile.
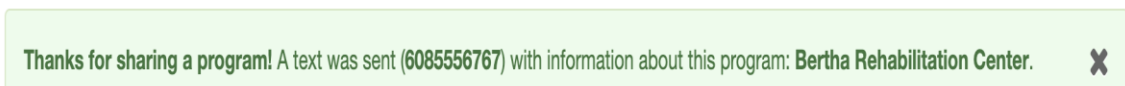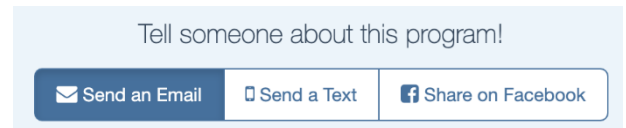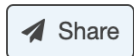6. Scroll down to "Navigation History" and the referral status you wish to update.
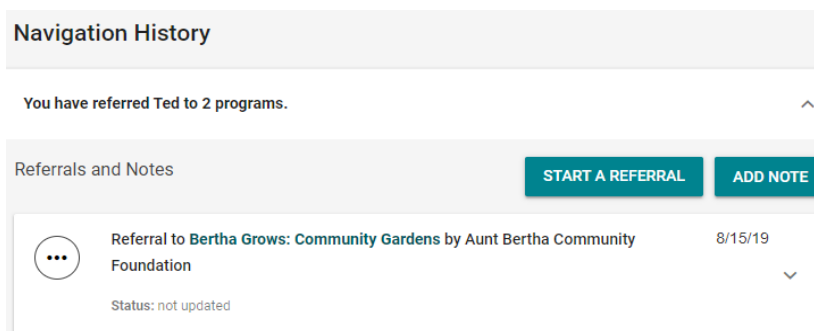
7. Click the referral status icon and select a new status from the dropdown. Referral statuses are automatically
   saved.

8. To add a "note" to your referral, click the ⌄ icon on the right side, then click the "add note"
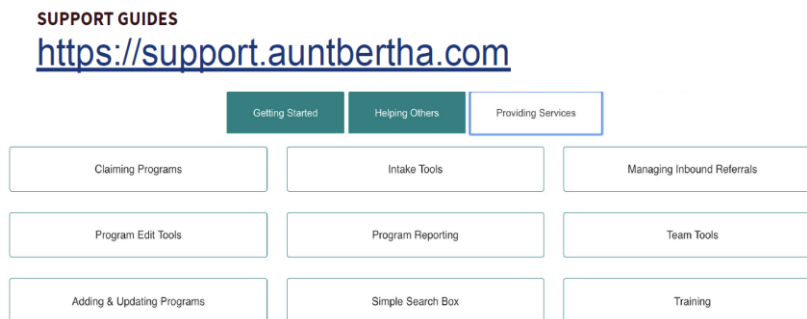   button, and then enter your note before clicking the "save" button.
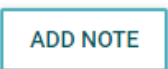
➢ Share Program Details without Storing Information or Sending a Referral

1. Once you've identified a program that would be helpful for a patient, you can click the "share" button under the program name. You can then select one of three methods:

     Share

    a. Send an Email: Will send the patient an email from you via the platform.
    b. Send a Text: Will send the patient an SMS text from you via the platform.
    c. Share on Facebook: After you log in to a Facebook account, you can share to a newsfeed, story, group, event, page or via Messenger.
2. Enter your name. This will increase the chance that they will open the message.
3. Enter the patient email or phone number.
4. The patient contact information will not be stored.
5. Click "Send"
6. You will receive confirmation once the message was sent.

Tell someone about this program!

✉ Send an Email | ☐ Send a Text | f Share on Facebook

Thanks for sharing a program! A text was sent (6085556767) with information about this program: **Bertha Rehabilitation Center**. ✖

➢ Need More Information

- Email: Connect@dchealthmatters.org
- Find additional support at:

SUPPORT GUIDES
https://support.auntbertha.com

| Getting Started | Helping Others | Providing Services |

Claiming Programs	Intake Tools	Managing Inbound Referrals
Program Edit Tools	Program Reporting	Team Tools
Adding & Updating Programs	Simple Search Box	Training

DC Health Matters Connect is powered by Aunt Bertha, the largest closed-loop referral network for social services in the US, servicing 1.8 million people (and growing). If an organization is already on Auntbertha.com, all information is mirrored on dchealthmattersconnect.com, and organizations only need to log in 1 time to see their portal, accept referrals, or update their listings.