

## How do I log in to the DC Health Matters?

Go to the DC Health Matters and login with your email and email password

1. Go to <https://dhealthmattersconnect-user.auntbertha.com>
2. Enter your username and password  
Note: If you don't have a username or password yet, please see this support article <https://support.auntbertha.com/hc/en-us/articles/216523477-Your-Account>
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.

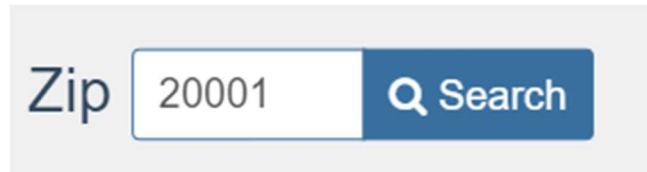
Zip



## How can you search for programs using the DC Health Matters?

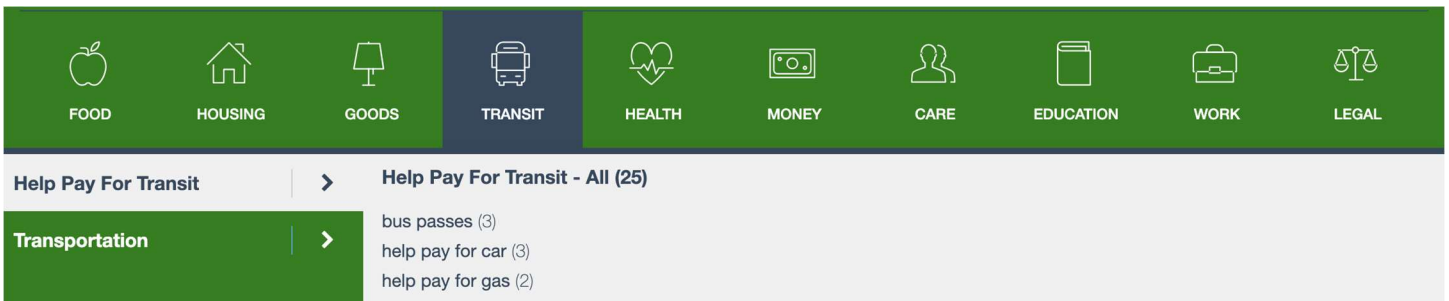
By entering a zip code and then using a keyword search or filters, you can find free and reduced cost programs to meet your patient needs.

1. From the homepage, enter the patient zip code.



A screenshot of a search interface showing a 'Zip' label, a text input field containing '20001', and a blue 'Search' button with a magnifying glass icon.

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.



A screenshot of the navigation bar and category list. The navigation bar is green with icons and labels for FOOD, HOUSING, GOODS, TRANSIT, HEALTH, MONEY, CARE, EDUCATION, WORK, and LEGAL. Below it, a list of categories is shown with counts: 'Help Pay For Transit' (25), 'Transportation' (3), 'bus passes' (3), 'help pay for car' (3), and 'help pay for gas' (2).

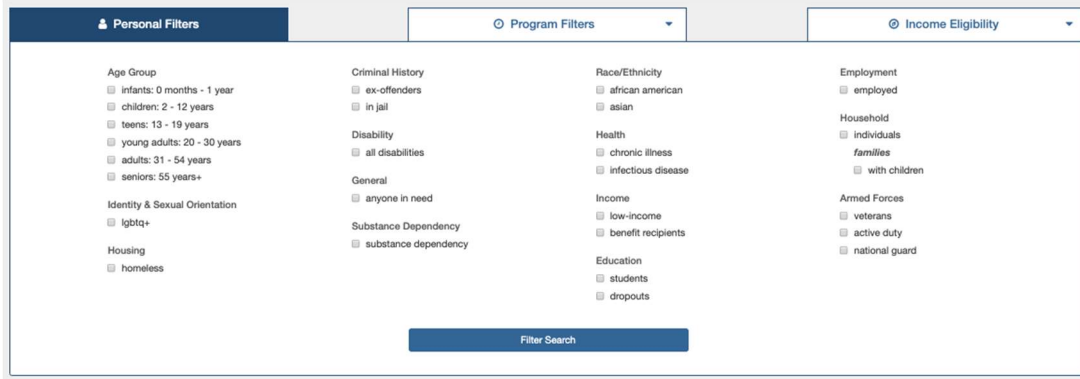
3. You can also **enter a keyword in the search box** to find programs within the patient service area and **click the magnifying glass or press enter** to search.



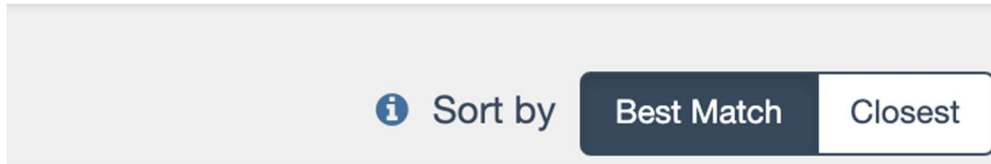
A screenshot of a search interface showing a text input field containing 'food bank', a blue 'Search' button with a magnifying glass icon, and a 'Select Language' dropdown menu.

# How can I filter searches for programs using the DC Health Matters?

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 armed forces status.
  - b. *Program Filters* show items that are specific to the program including hours or language.





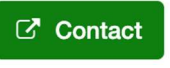

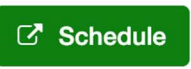


2. By default, your search results will be sorted by the best match. **Click Closest** on the upper right side of the results to sort results by distance from the middle of the zip code.



## How can I refer a patient to a service?

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

**Note:** Use this workflow when you have the contact information for a specific person. If this person prefers to remain anonymous, follow the **Sharing Program Information** workflow instead.

| Button  | Next Step  |
|---|--|
|  <b>Apply</b><br>Apply Through 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. |
|  <b>Apply</b><br>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.  |
|  <b>Contact</b><br>External Contact      | Contact through a form on the organization's website. The CBO will not receive an emailed referral.  |
|  <b>Refer</b><br>Refer Through Platform  | Create a referral for the patient. The CBO will receive an emailed referral.   |
|  <b>Schedule</b><br>Schedule             | A new tab in your browser will open, taking you to the scheduling tool.  |
|  <b>See Next Steps</b><br>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.  |
|  <b>Log Referral</b><br>Log a Referral   | Create a referral for the patient for tracking purposes. The CBO will not receive an emailed referral.   |

1. Select **I'm referring someone else** and your name will default in.

Who is this for?  For myself or my family  
 I'm referring someone else

Your Name\*

2. If this is your first time creating a referral for this patient **enter their first name, last name.**
3. Note: 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

Use contact info on file \*

4. Enter their email address and/or phone number and communication preference.

Connecting someone new:

Their Name\*

Their Email Address

Their Phone Number

Their Patient ID

Best way to reach them\*  Email  
 Text message  
 Phone call  
 Don't reach out

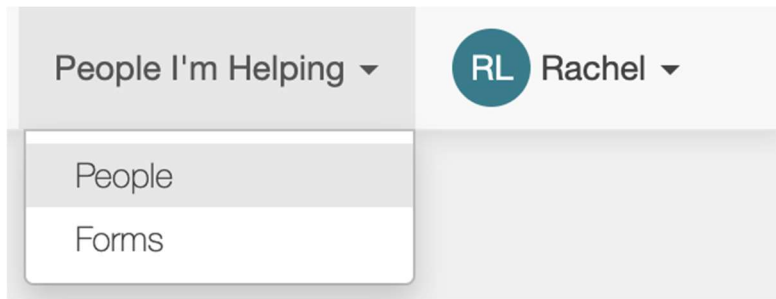
Tell them: We are sending a text message with program contact info. Msg & data rates may apply. They can unsubscribe any time by replying STOP.

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.

## How can I find a person that I've already helped and connect them to more programs?

The **People I'm Helping** activity allows you to find patients, review existing and create new referrals and goals.

1. Click the **People I'm Helping > People activity** on the main toolbar.
  - a. Note, you need to be logged in to see this activity.



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. From the account, you can take a number of actions including adding a goal, adding notes, or starting a referral.
7. To start a new referral, **click Start a Referral**.

### Navigation History

You have referred Chris to 2 programs. ^

Referrals and Notes

START A REFERRAL

ADD NOTE

8. You're taken to the initial search screen where the patient's zip code already defaults in and where 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.

Currently helping **Meg Murray**  
Patient ID: AB98765

 End Session

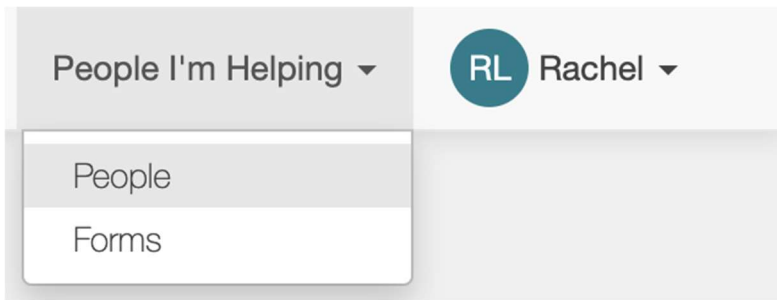
9. At any point, to return to the patient profile, **click End Session**.

10. After ending a session, you'll return to the People I'm Helping activity where you can search for another patient.

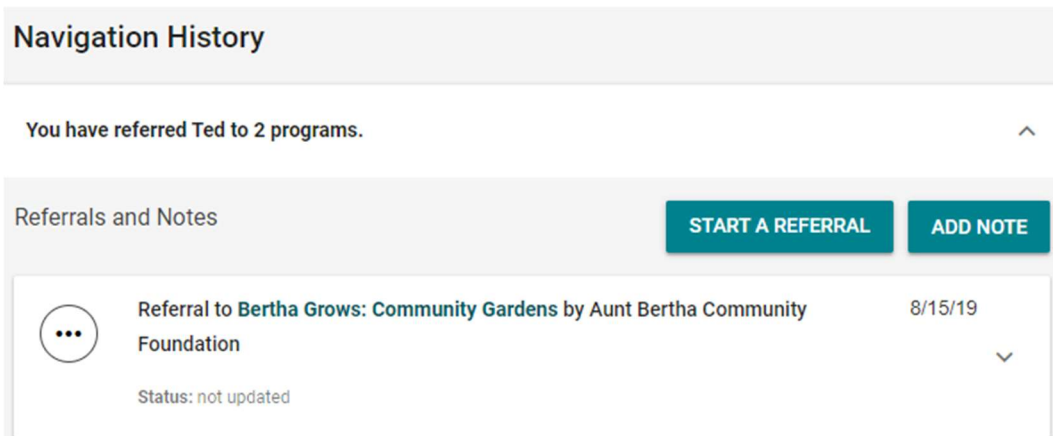
# How can I close the loop on a referral I have sent through the platform?

You can update the status of a referral in your **People I'm Helping** dashboard

1. Click the **People I'm Helping > People activity** on the main toolbar.
  - a. Note, you need to be logged in to see this activity.

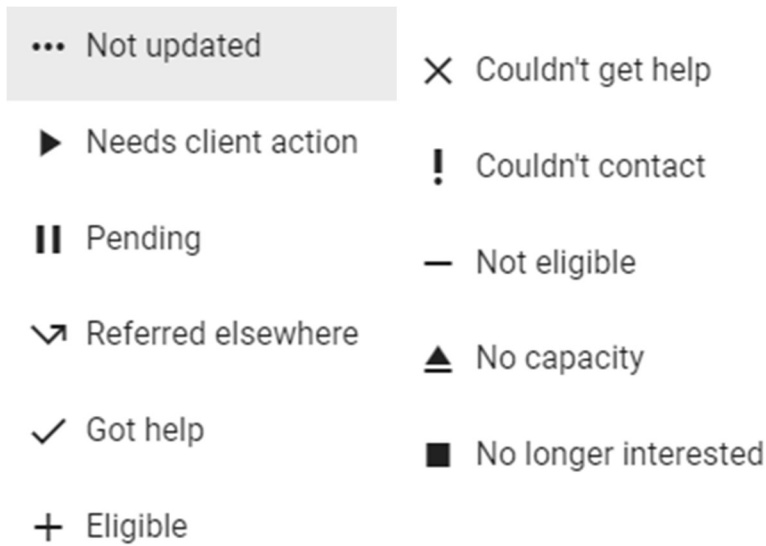


2. Use the toolbar on the left to **search for patient**. You can search by any combination of patient name, navigation (or referral) status, team assignment, follow-up date range, or navigation start date.
3. **Click Search** to filter patient.
  - a. Click Clear Filters to reset the filters and start 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.



Note: Did you know that CBOs receiving referrals and patients can also update the status of a referral? Ask your Project Manager about “CBO Engagement” or check out this resource guide for more information: <https://support.auntbertha.com/hc/en-us/articles/360004867271-Start-Here-Engaging-Community-Based-Organizations-CBOs->


8. To add a “note” to your referral, click the  icon on the right side, then click the “add note”

**ADD NOTE**

button, and then enter your note before clicking the “save” button

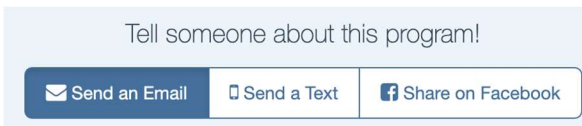
**SAVE**

## How can I share program details with a patient without storing their information and sending an actual referral?

Use the  button on the program card to share the program listing via email, text, or Facebook.

**Note:** Use this workflow when you the patient doesn't want to share their personal contact information with the organization. If this person wants to directly connect with the organization, follow the **Sending a Referral** workflow instead.

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:**
  - 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.**
  - a. The patient contact information will not be stored.
4. **Click Send.**
5. You will receive confirmation once the message was sent.

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