Train the Trainer

Overview

Login & Account Management

Search

Program Card

Sharing

Favorites

Programs & CBO Engagement

Data

Support

Login & Account Management

CONNECT IE

How Do You Access the Site?

- **Login:**
  - Go to your site URL.
  - Create an account using your work email address if you have not already.
  - Login using your credentials.

- **Check:**
  - Are your username and password spelled correctly?
  - Does the top right option show your name?
  - Are there additional options on the top menu bar?

CONNECT IE

Why Can’t I Access the Site or Log In?

Checklist:

- ❑ Are you on the correct site?
- ❑ Are you using the right credentials?
  - ❑ Use your account credentials to login

Note: After five (5) incorrect login attempts, your account will be locked for 1 hour for security reasons.

Search

CONNECT IE

How Do I Find the Programs I Need?

Basic Search:

1) Search for the ZIP Code in which you need resources

Results Page:

1) Click on a Category

OR

1) Search using the Search Box

CONNECT IE

How Do I Return to Previous Page?

Return to Search:

- Open programs in a new tab; then you can always return to the results tab.
- Press ‘Back’ in your browser to return to the Search Results.

Return to Home Page:

- Click on logo in the top left.

CONNECT IE

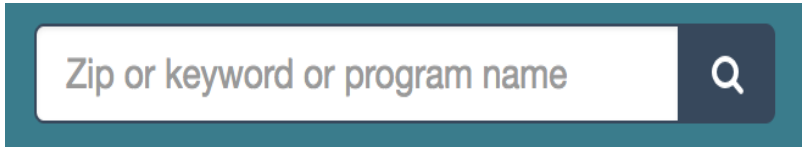
How Does the Search Functionality Work?

Category Navigation & Keyword Search

- Programs surfaced are those that have been directly mapped to that tag.
- Program results are listed by distance, since the tag is already deemed most relevant.

Category Navigation

Keyword Search



CONNECT IE

How Does the Search Functionality Work?

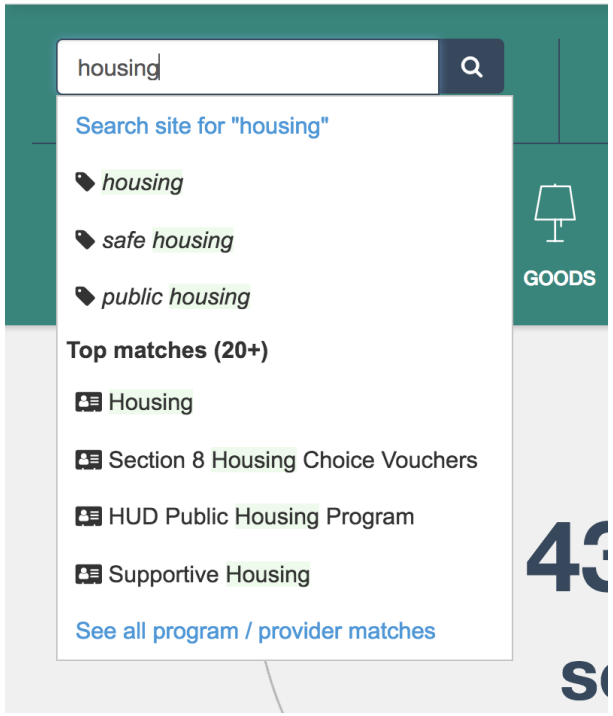
Keyword Search matches by:

1. Best Match (header): Display programs with exact match to Program or Provider Name
2. Best Match (header): Display programs with exact match to words in Program Description
3. Possible Match (header): Display programs with the one of the searched word or words in the Program Name, Provider Name, or Description

By default, program results are listed in order of relevancy, instead of distance - However you can sort by Distance, Best Match, or Featured.

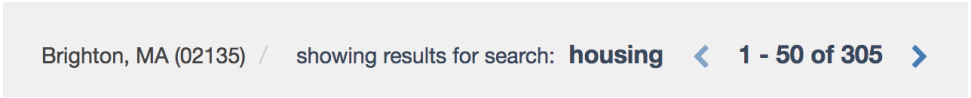
Search Example

How Do I Find the Right Programs?



If a patient has a housing need, the first instinct may be to search 'housing' in the search field.

This search, however, has 305 results in this search area:



CONNECT IE

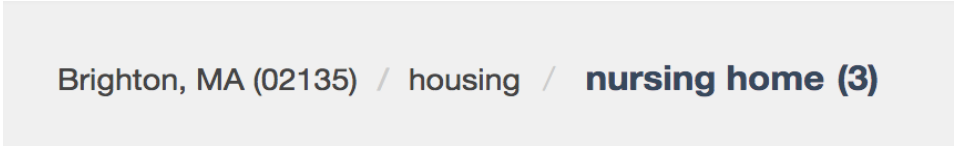
How Do I Find the Right Programs?

Instead, use the ‘Housing’ category drop down to find additional categories under ‘Housing’ and pinpoint the exact need.

CONNECT IE

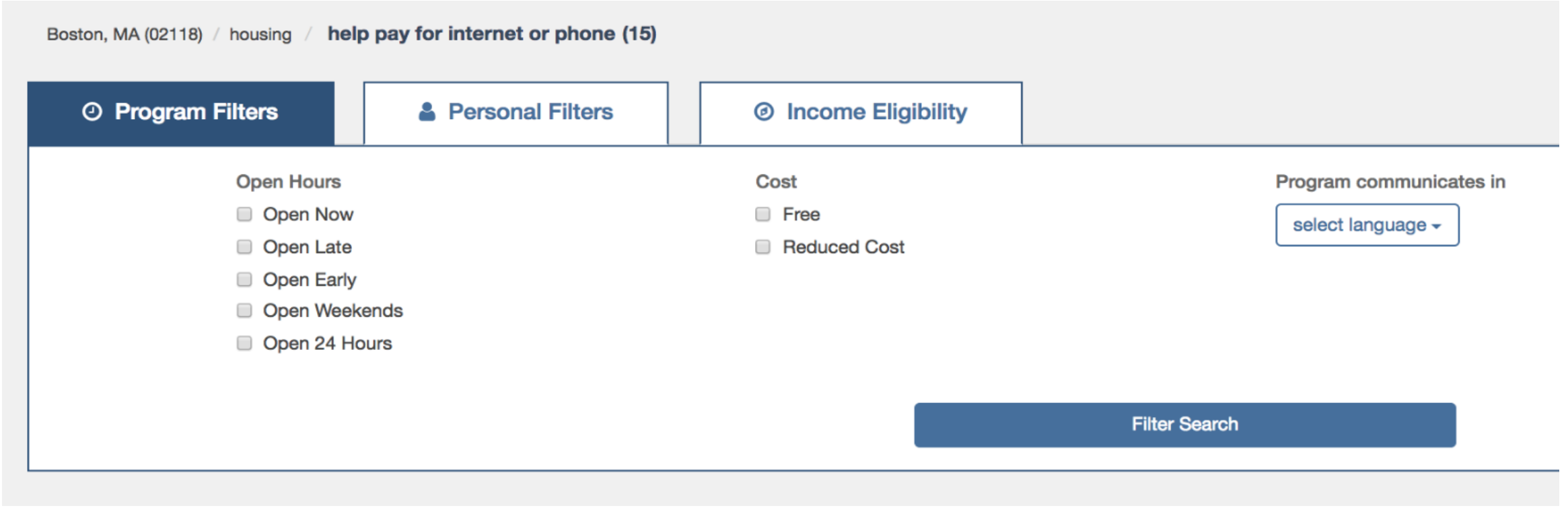
How Do I Find the Right Programs?

Now you have 3 programs to choose from for the 'Nursing Home' category:



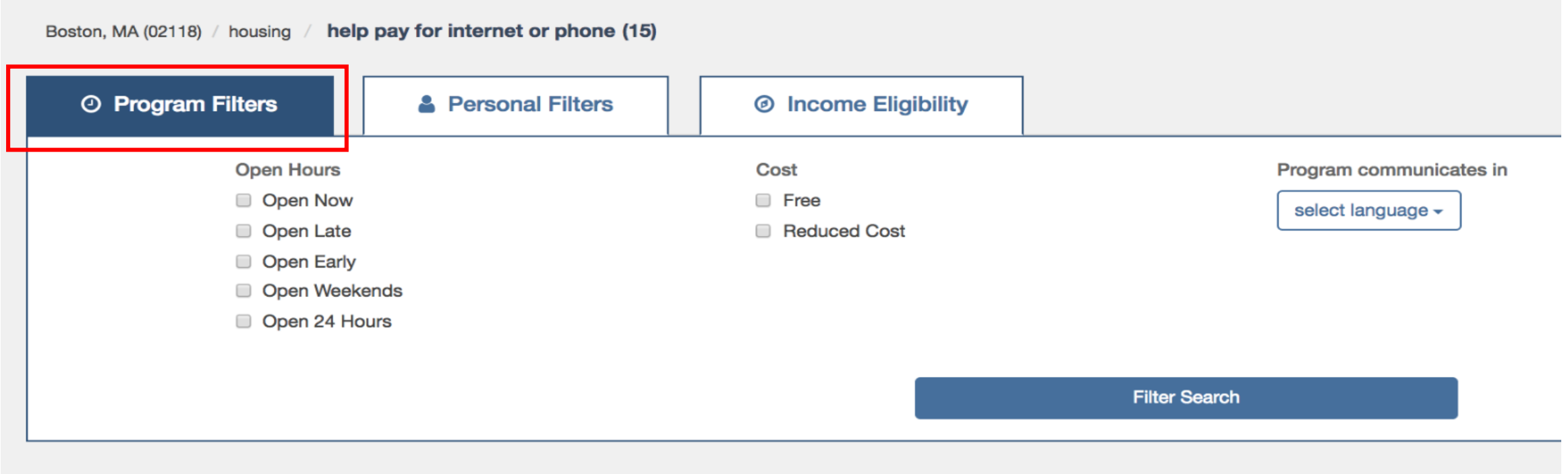
Filters

CONNECT IE



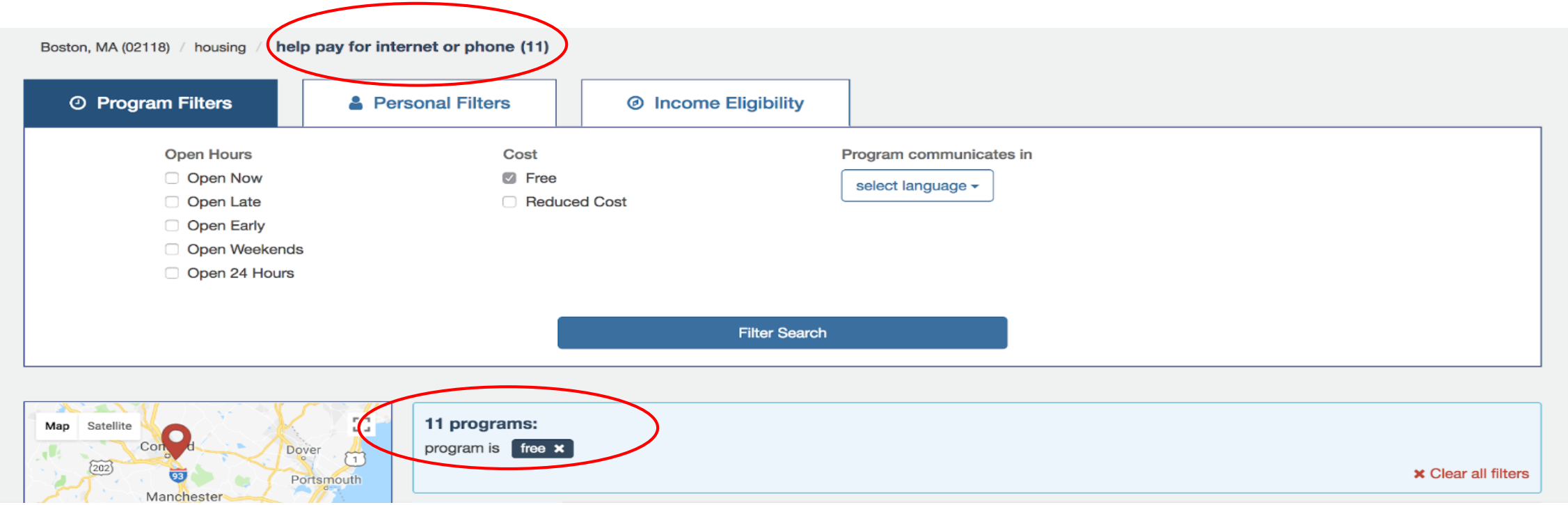
Use Eligibility Filters to further refine your search results by specific parameters. Filters will only refine by what tags programs have associated with their listings.

CONNECT IE



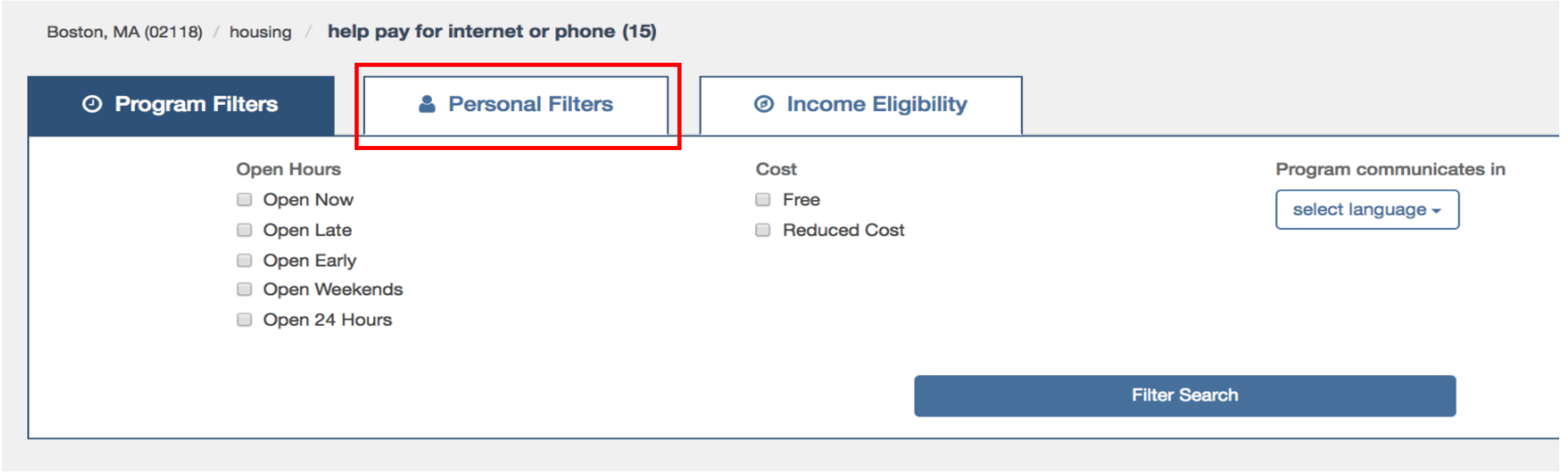
Program Filters filter by what services the programs offer. They are static and do not change based on search results.

CONNECT IE



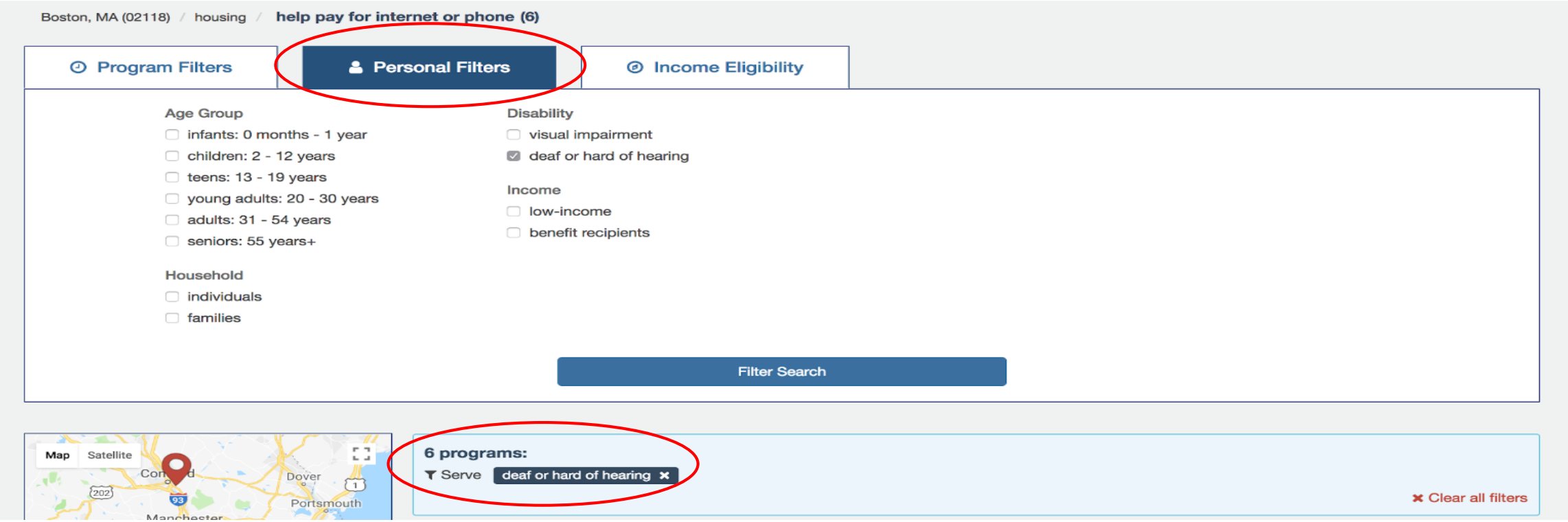
Example: After we apply the "Free" filter here, the list of search results is refined from 15 to 11 programs. These programs specifically offer free services.

CONNECT IE



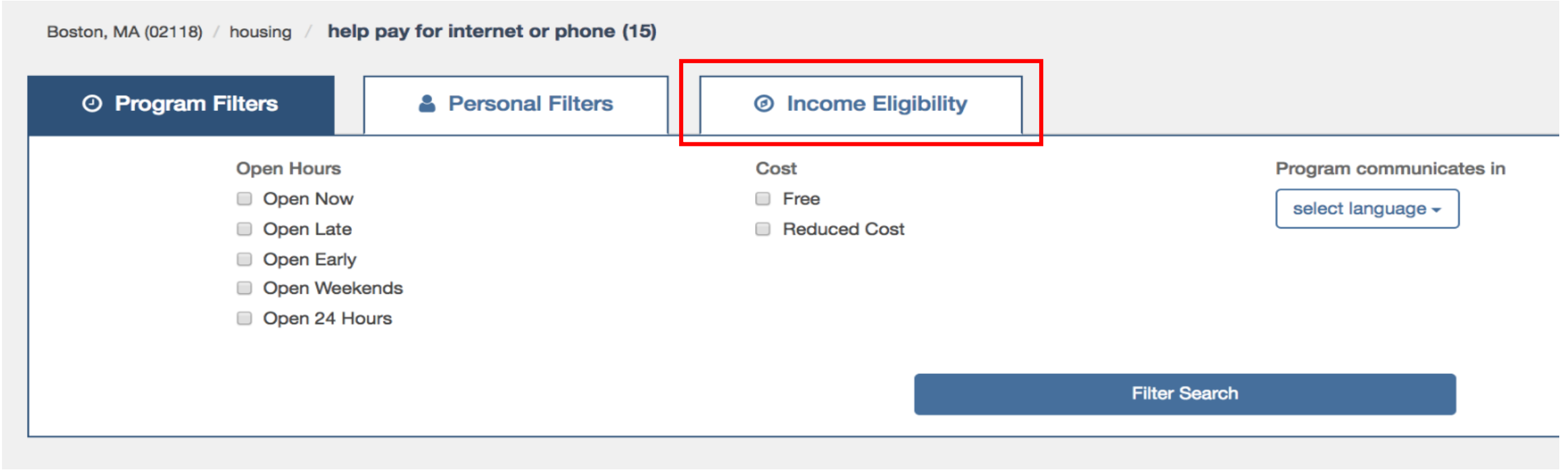
Personal Filters filter by what populations a program serves; the filters are dynamically listed and change by what programs are in the search results.

CONNECT IE



Example: After we apply the "deaf or hard of hearing" filter here, the list of search results is refined from 15 to 6 programs. These programs specifically offer deaf or hard of hearing related services.

CONNECT IE



Eligibility Filters:
Income Eligibility filters by household and income eligibility.

CONNECT IE

Boston, MA (02118) / housing / **help pay for internet or phone (15)**

Program Filters | Personal Filters | Income Eligibility

Eligibility Filters:
Eligible programs will be indicated by the icon below. You can clear the eligibility check using the red "Clear" button below the filters.

You may be eligible! Look for programs with the ⊙

Including you, how many people live in your household?

2 family members

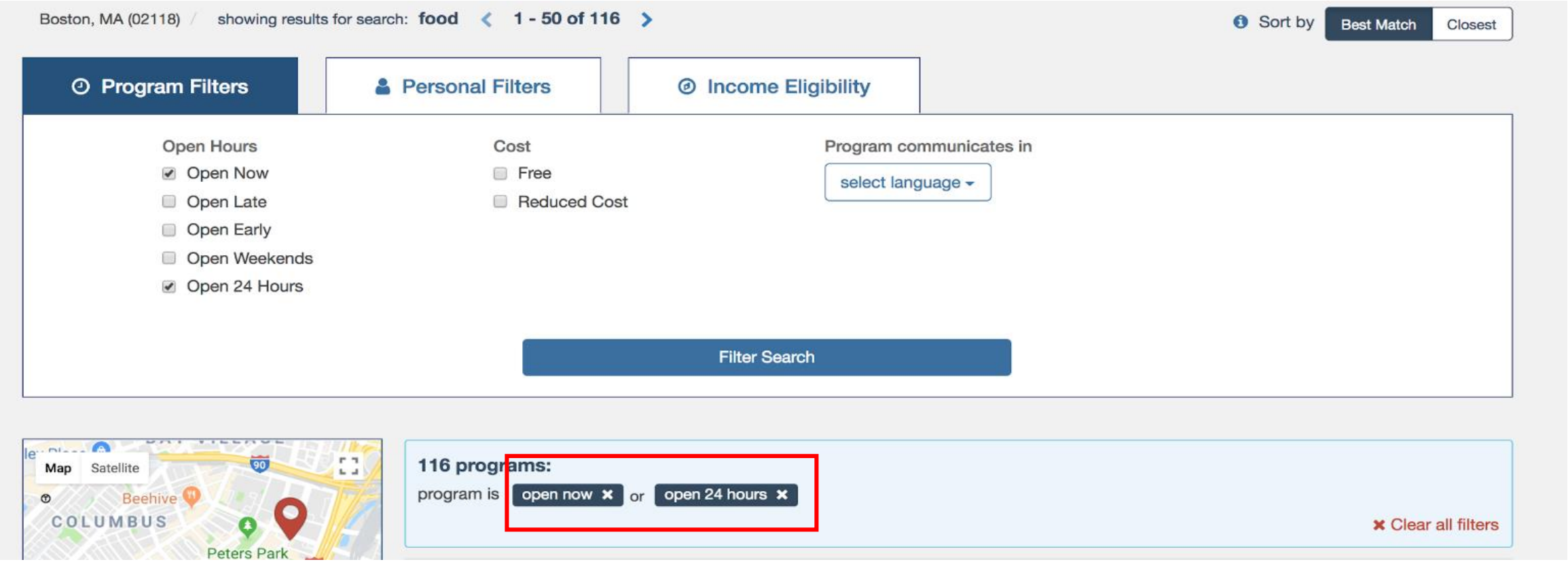
How much does your household make per month?

$ 20000.0 per month

Filter Search

✖ Clear eligibility check

CONNECT IE



Remove Eligibility Filters by clicking the 'x' on the tags or by clicking 'Clear all filters.' (Note: Filters will persist into new searches, so be sure to clear them if they are no longer relevant!)

CONNECT IE

Why Can't I Find the Right Programs?

Are you receiving zero results?

- Check to see if you applied any filters. If there are any filters applied, clear them.
- Check your text entry if that's how you searched; make sure all of your search terms are accurate.
- If your search is too specific, try broadening the search (e.g. 'medical devices' instead of 'respirators').

CONNECT IE

Why Can’t I Find the Right Programs?

Are you not finding relevant results?

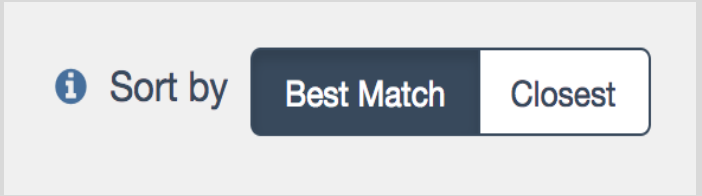
- Try finding a category tag that better matches the need.
- If results are too broad or numerous, try filtering the results to better target the right program.
- Try searching for synonyms or related terms.
- Try searching in a nearby ZIP code.

CONNECT IE

Why Can't I Find the Right Programs?

The results are hard to navigate

- If you're using the tags, the results are sorted by distance from the ZIP code.
- If you performed a keyword search, you can sort by Best Match or Closest.



CONNECT IE

Why Can't I Find the Right Programs?

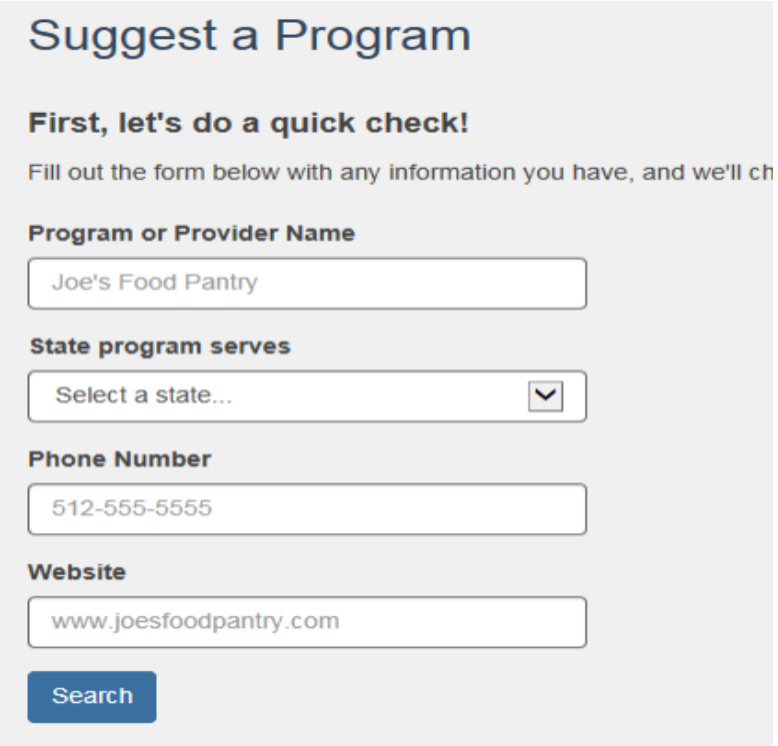
Can you not find a program you know exists?

Click 'Suggest a Program' and search for the program in question.

If the program isn't listed, suggest the program! If it matches our criteria, it will be added in 2 business days.

CONNECT IE

Suggest a Community Resource that is not Listed in the Directory



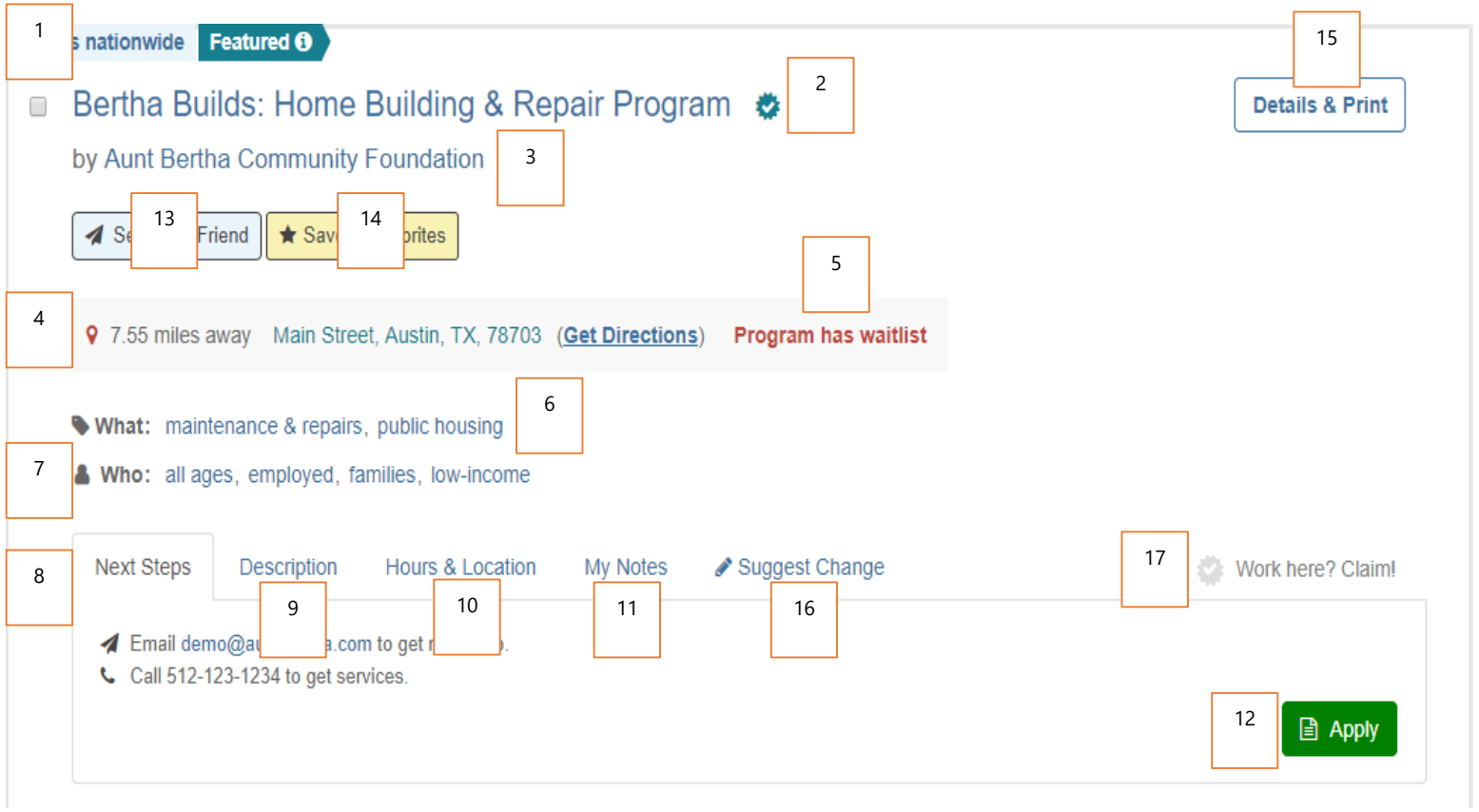
For adding between 1 to 10 programs – use the following fields to suggest that program.

- Program or Provider name
- State program serves
- Phone number (of provider / program)
- Website (of provider / program)

Program Card

CONNECT IE

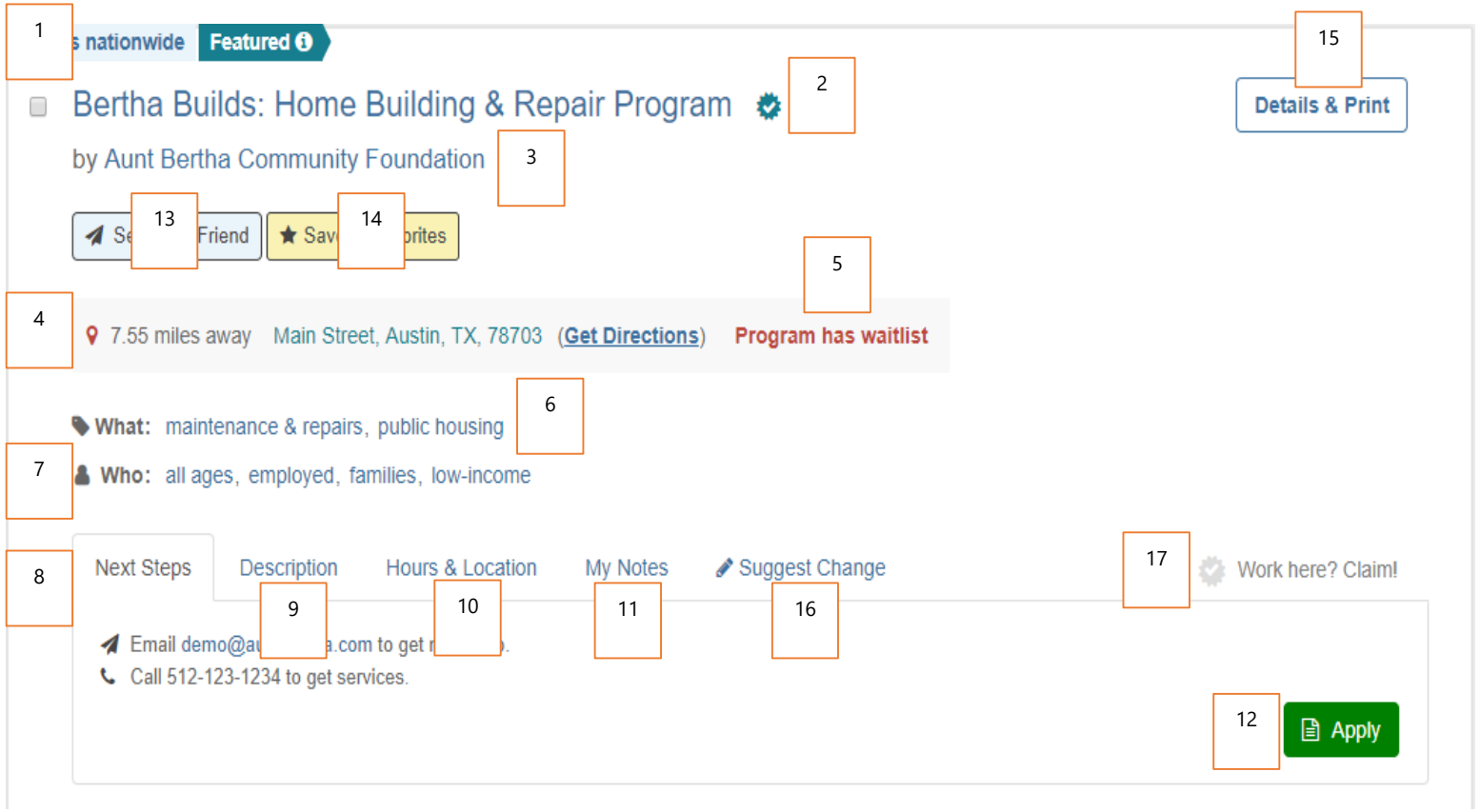
How Do I Read a Program Card?



1. The coverage area where this program provides service
2. The name of the program
3. The community benefit organization providing the program
4. The distance from the center of the zip code
5. Today's hours of operation

CONNECT IE

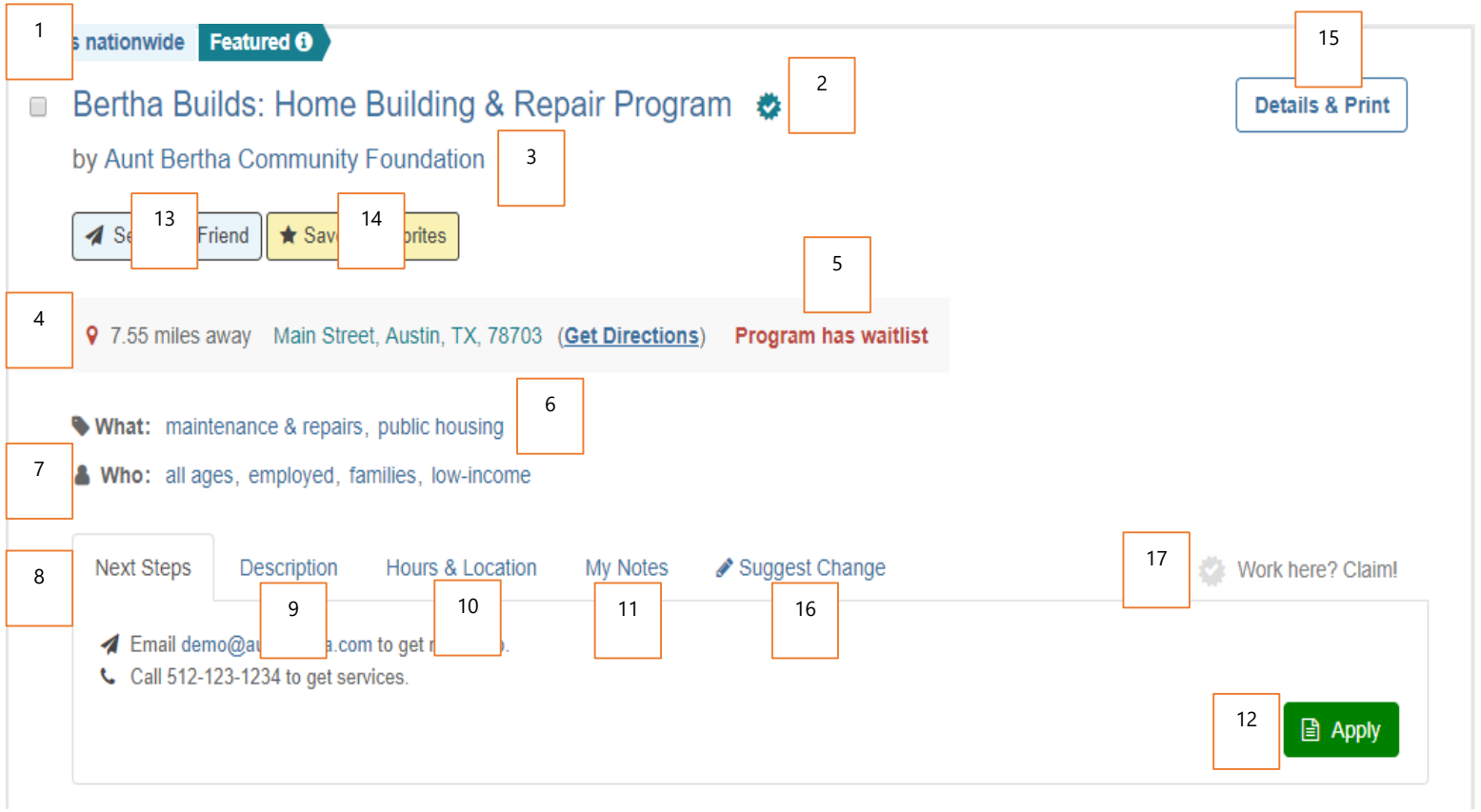
How Do I Read a Program Card?



6. What services the program offers
7. To whom the services are available
8. The Next Steps tab tells you how to connect with the program
9. The Description tab gives an overview of the program
10. The Hours and Locations tab will list the nearest three locations and their hours of operation
11. Reviews allow you to leave notes for your fellow staff about the program that can help them decide if it would be a good fit for the person they are helping

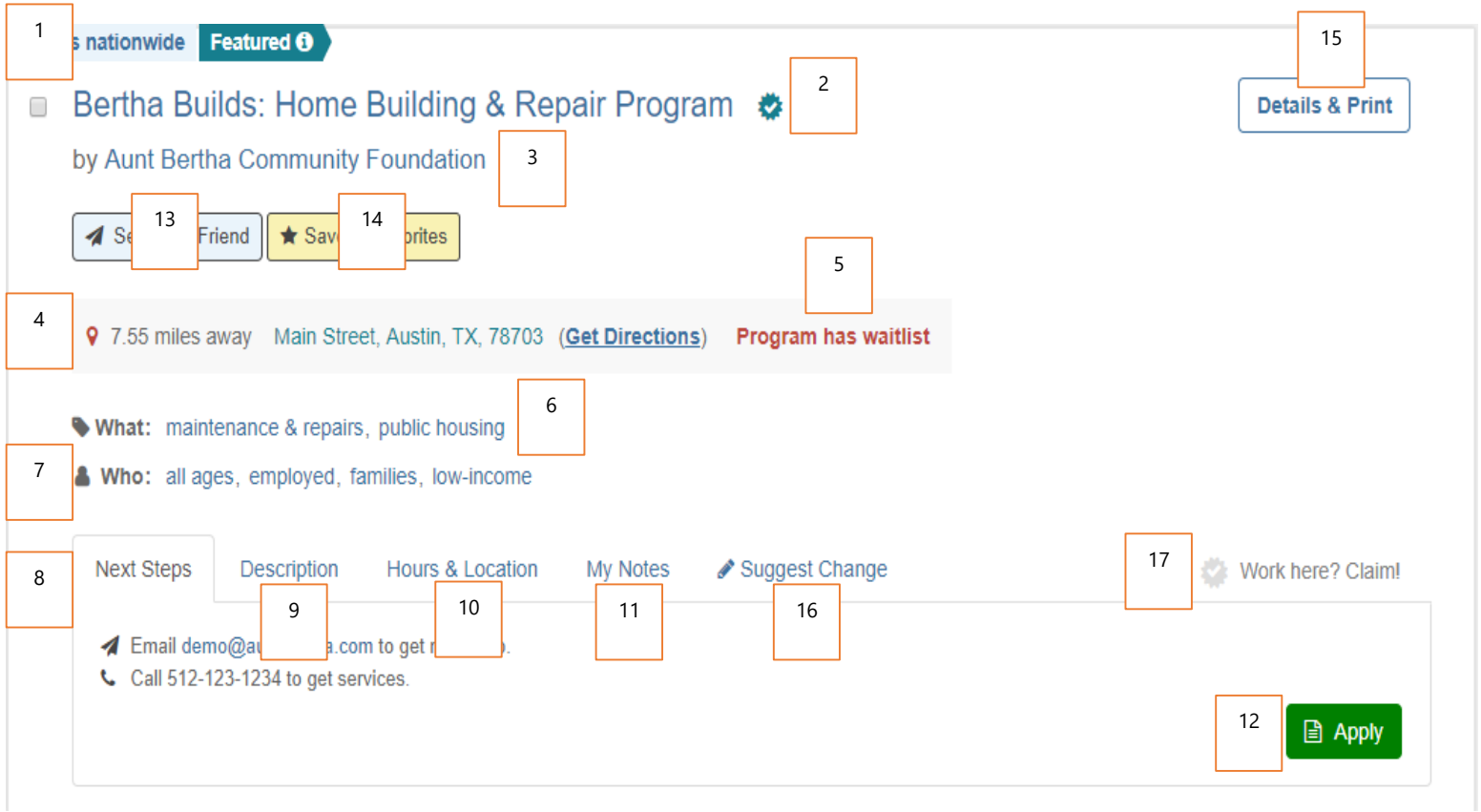
CONNECT IE

How Do I Read a Program Card?



12. The Connect Button allows you to contact the community benefit organization if they have an email on file as well as keep a record of where you've referred to in the past.
13. Send to a Friend allows you to email or text the program information to someone else.
14. Save to Favorites allows you to save a program to a favorites folder for quick access

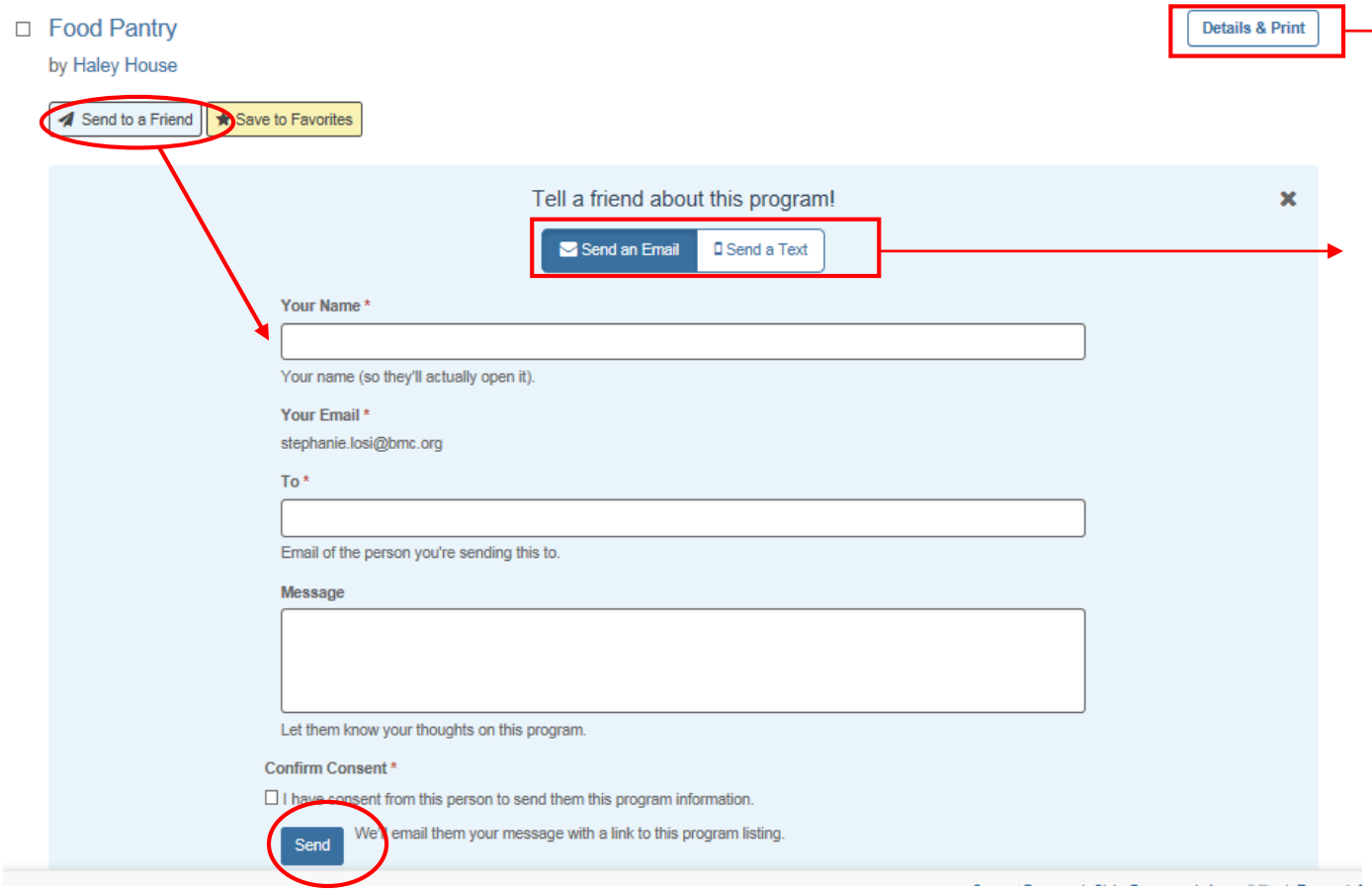
How Do I Read a Program Card?



15. Details and Print allows you see all of the program details in one place and print in a printer-friendly format
16. If you notice information on the program listing is incorrect, click "Suggest Change" and let us know what the issue is. We will confirm with the program and have a response to you within 48 hours
17. If you want to claim a program, select “Work Here? Claim!” to start the claims process

Sharing

Share Programs with a Seeker



You can use "Details & Print" to print program information.

Information can be shared via email or text message.

CONNECT IE

How to Share a Program via Email

1. Once you find a program you like, locate the "Send to a Friend" button on the Program Listing.
2. Select "Send an Email".
3. Enter your email address in the "From" text box.
4. Enter the recipient's email address in the "To" text box.
5. Enter a message.
6. Click "Send".
7. The recipient will receive a link to the details page of the program*.

**Your email address will not be shared with the recipient.*

CONNECT IE

How to Share a Program via Text Message

1. Once you find a program you like, locate the "Send to a Friend" button on the Program Listing.
2. Select "Send a Text".
3. Enter your name in the "Name" text box.
4. Enter the recipient's phone number in the "To" text box.
5. Click "Send".
6. The recipient will receive a link to the details page of the program.

Note: The text will be sent from the platform itself. The platform also sends an additional text letting recipients know that the text is coming from a non-monitored line (in case they require additional assistance).

Favorites

CONNECT IE

Why Should I Make Favorites Folders?

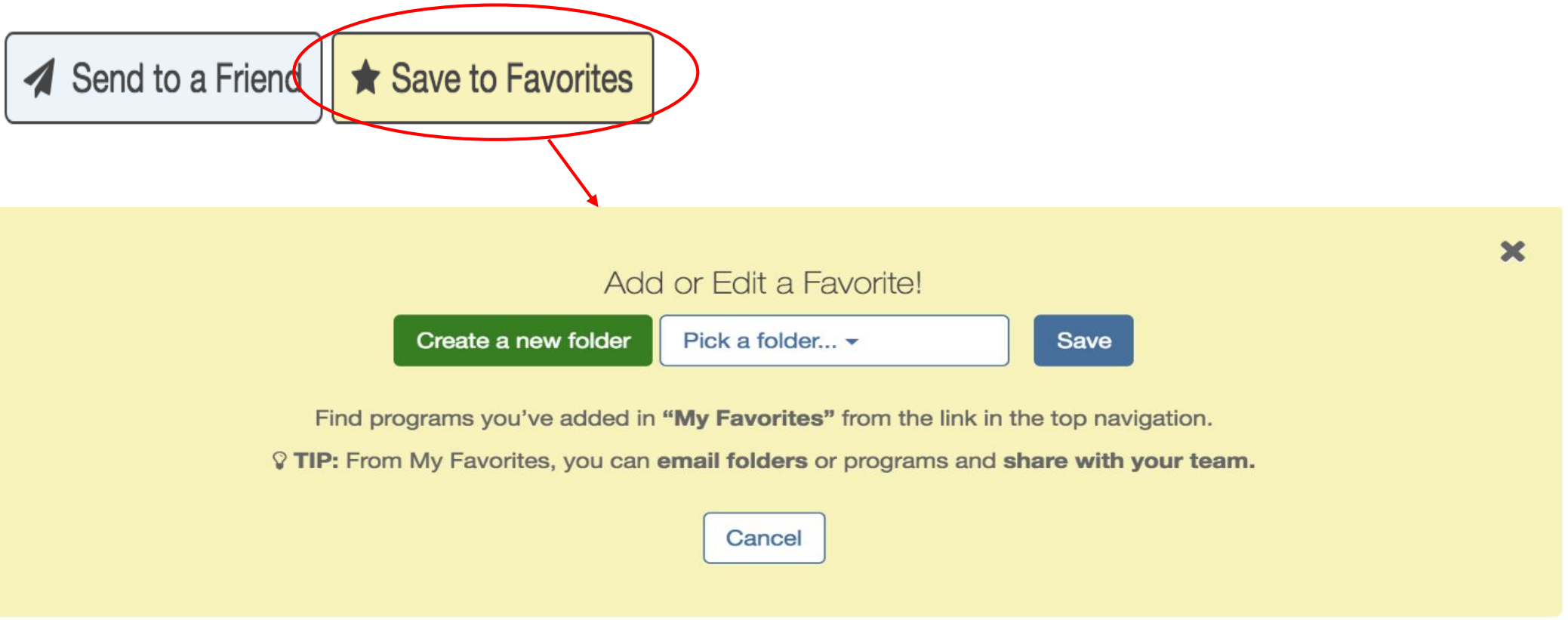
Save your programs to Favorites Folders to **reduce the amount of time spent searching.**

Favorites folders are best when:

- Searching for same resources in one area repeatedly.
- You have specific resources that you prioritize.
- You want to compile and send multiple resources at once.

CONNECT IE

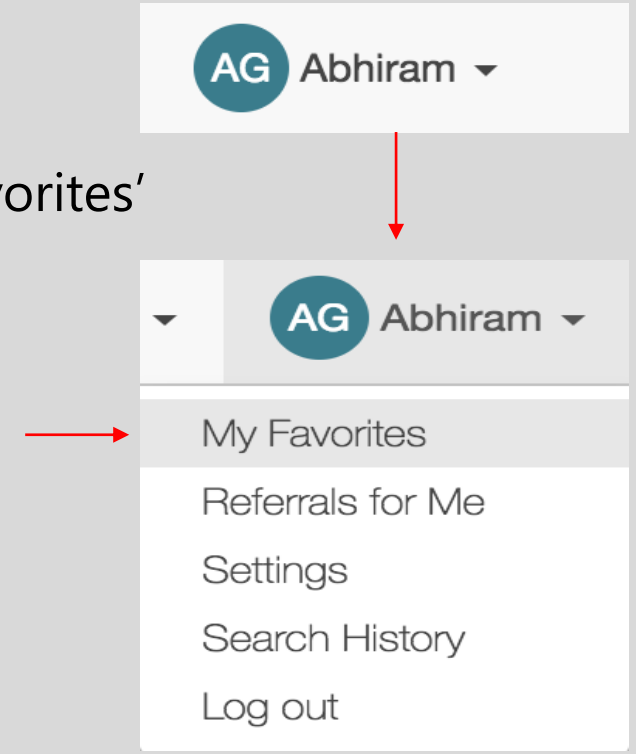
How Do I Make Favorites Folders?



How Do I Use Favorites Folders?

To Access your Favorites Folders:

- Click on your account on the top right of the header menu



- Click on ‘My Favorites’

CONNECT IE

How Do I Find the Right Programs?

Can you not find a program you know exists?

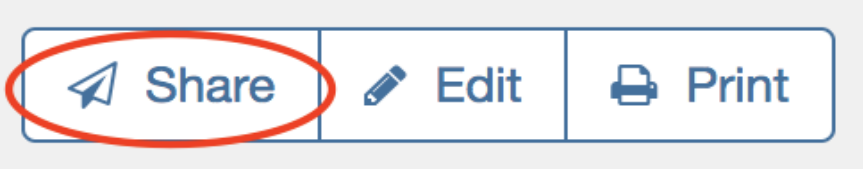
Click ‘Suggest a Program’ and search for the program in question.

If the program isn’t listed, suggest the program! If it matches our criteria, it will be added in 2 business days.

Send a Favorites Folder as an Email

This is an easy way to share programs. Recipients will receive an email with links to each of the programs in your Folder.

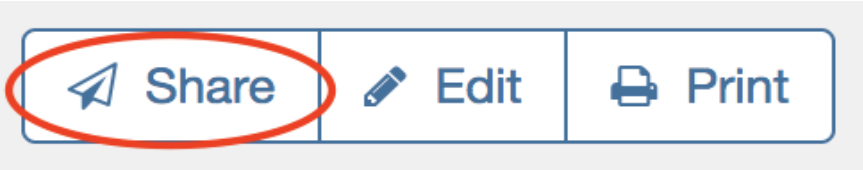
1. View your Favorite folders by clicking "My Favorites" at the top of the screen.
2. Select your Favorite folder on the left that you want to share.
3. Click the "Share" button on the right hand side of your screen.
4. Select "Send an Email".
5. Enter your name, the email of the person you want to share the folder with, and a message.
6. Click "Send".
7. The email recipient will receive links to each of the programs in your Favorite Folder.



Share a Favorites Folder With a Link

This is an easy way to share programs. Recipients who click on the link will be able to access all the programs in your Favorite Folder (without being able to edit it).

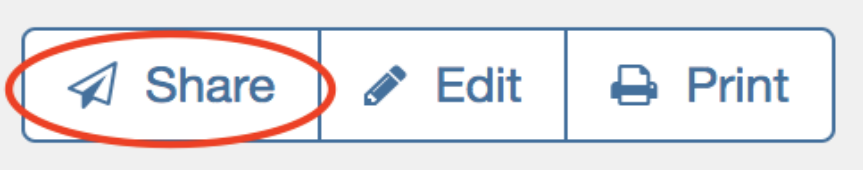
1. View your Favorite folders by clicking "My Favorites" at the top of the screen.
2. Select your Favorite folder on the left that you want to share.
3. Click the "Share" button on the right hand side of your screen.
4. Select "Share as a Link".
5. Click the box for "Generate my link," then copy the unique link displayed.
6. Share the link!

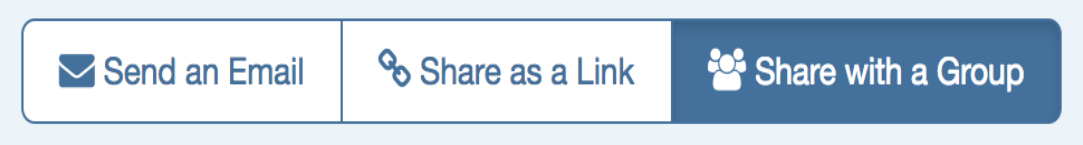


Share a Favorites Folder with a Group

Once a folder is shared, anyone in your group can add their favorite programs as well. This creates a curated list of your favorite programs across your staff.

1. View your Favorite folders by clicking "My Favorites".
2. Select your Favorite folder on the left that you want to share.
3. Click the "Share" button and select "Share with a Group".
4. Select the group with which you want to share from the dropdown menu and click "Send".
5. This folder will now appear under "Shared Folders" on the left navigation.
6. Once you share this folder, other members of your group can add their favorite programs to that folder or remove existing programs from that folder.





Programs and CBOs

Engaging Local Community Benefit Organizations

Means Organizations Drive More Value and Impact.

SERVE MORE PEOPLE IN NEED

Open up the channels of communication with direct service providers in your area and build a lasting network of support.

IMPROVE REFERRAL RESPONSIVENESS

Move from “Sent” to “Closed Loop,” faster.

CONNECT IE

What is a Claimed Program and Why Does it Matter?

Claimed Programs

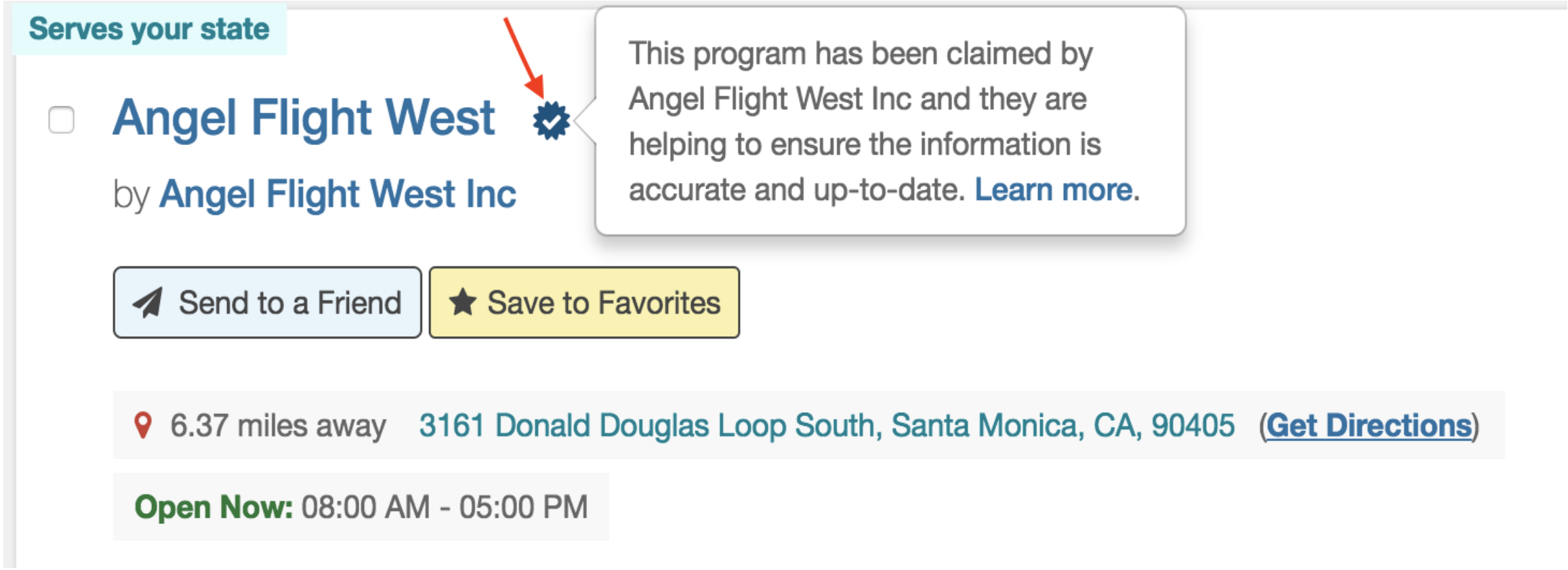
- The CBO has taken ownership of their listing and have taken the first step to accept referrals.
- They keep the program information up to date and are **generally engaged with the listing on your platform.**
- Claimed programs have a checkmark badge next to the program name; keep an eye out for them!

More Claimed Programs = Stronger Community of Help

- When more programs are engaged with their listing and your platform, they can work closer with you to help.

CONNECT IE

What Does a Claimed Program Look Like?



CONNECT IE

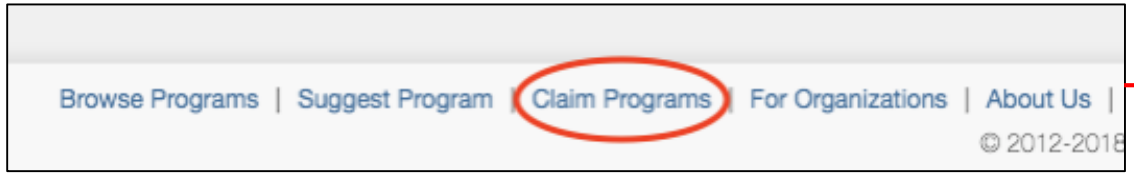
Help CBO's Claim Their Listings!

More Claimed Programs = Stronger Community of Help

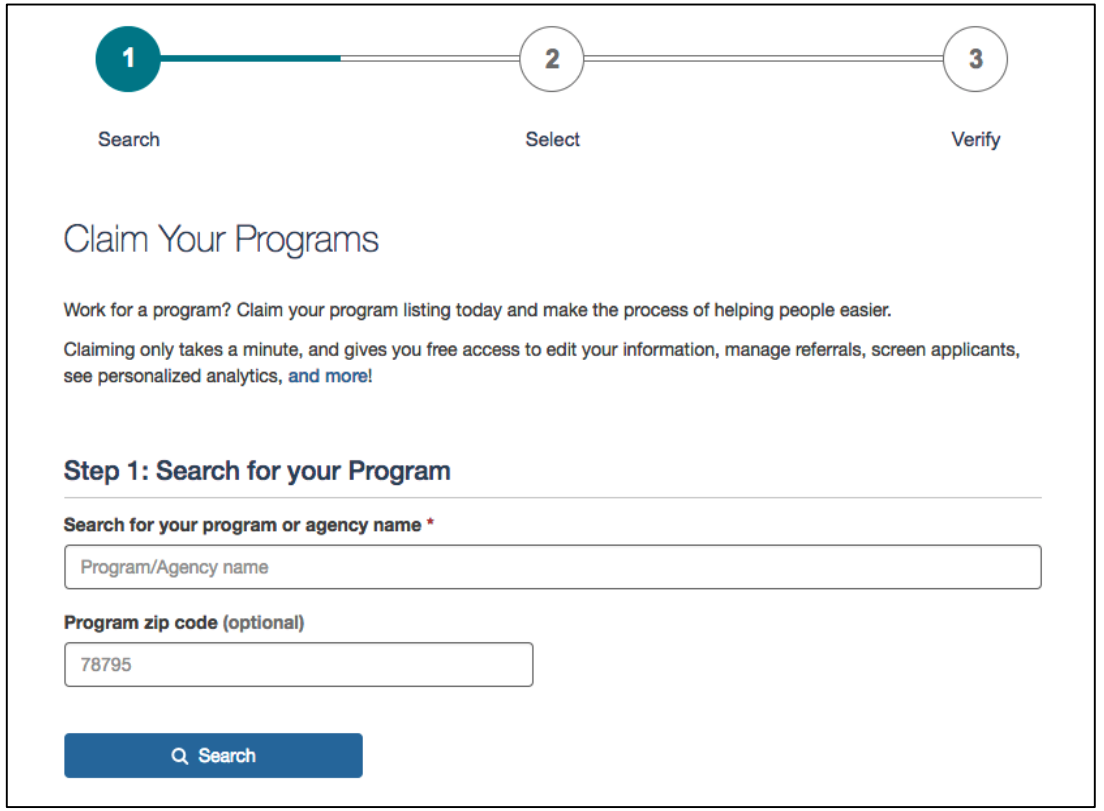
- When more programs are engaged with their listing and your platform, they can work closer with you to help.
- You can reach out to CBOs in your area and work with them to help them claim their listings! The benefits to having claimed programs in your platform are endless.

CONNECT IE

Claiming Programs



-or-



Data

CONNECT IE

How Does the Data Work?

Data Additions

- Suggest a Program (<10) link on your platform.
- Your organization will work with Aunt Bertha on any additional data requirements.

Data Upkeep

- Data is reviewed every 6 months using AB's proprietary technology.
- Our users submit edits whenever any information is out of date.
- Claimed programs keep their information up to date.

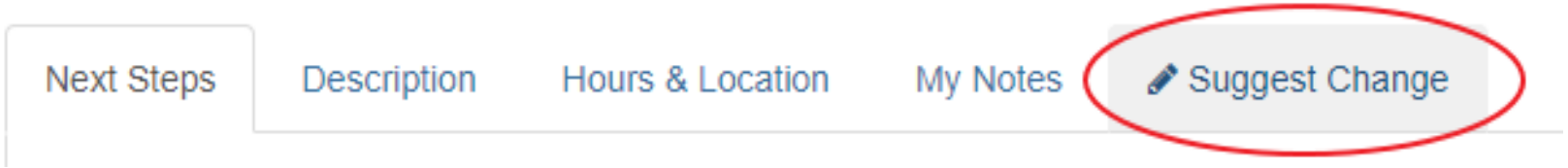
CONNECT IE

User Submitted Edits or Suggestions

How to Request a Change

1. Click "Edit or Claim" on the program listing.
2. Let us know what needs to be changed.
3. Click "Send".

Our data team will verify the change with the program. When they confirm that information, we will update the program listing. We have a response time of two business days so you will know when the change has been made.



CONNECT IE

Program Data: 4-Part Process Your Users Can Trust

Identify Programs:

We find programs in a few main ways:

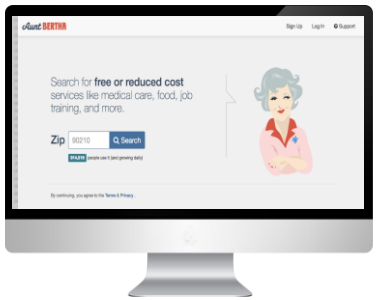
1. Proprietary software to identify programs.
2. "Suggest a Program" by our 1m+ users.
3. Client resource lists.

Data Entry Specialists:

Experts in our platform and taxonomy. Making calls to programs, verifying information, making info easy for user to digest quickly.

Quality Control Specialists:

Check work to ensure it is following taxonomy and is written how users best digest information.



Program Published:

Using and refining our processes over 7 years we have built the most robust, accurate database out there. And we are still going - we add hundreds of programs each day!

Every published listing is reviewed by real life people.

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Program Data: Keeping it Updated

Data accuracy is a top priority.

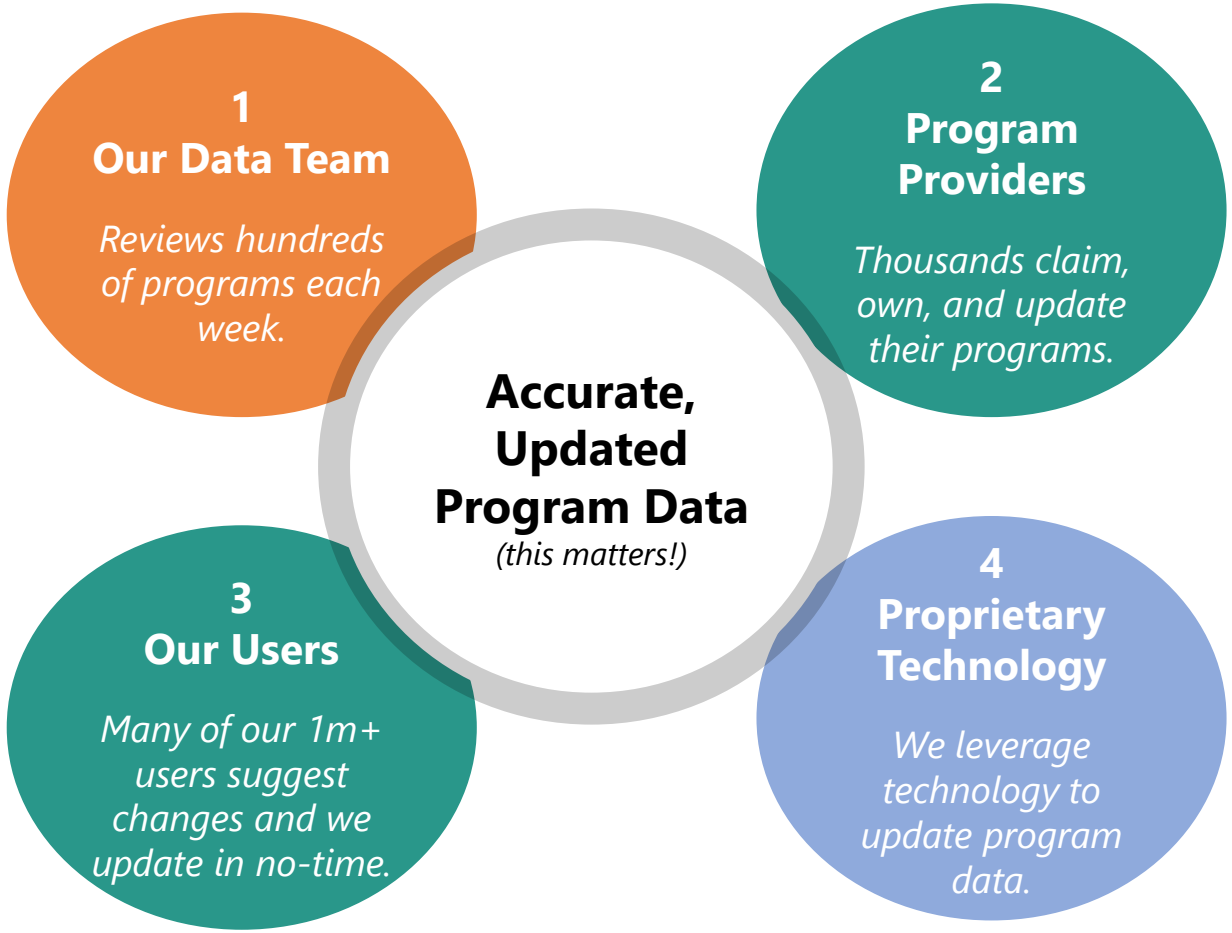
We review:

1) Data on 8,000 programs daily.

2) Every program every 6 months.

(It's often much quicker due to #2-4 on the right)

Here's how.



Support

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How Can You Support Your Users?

Support Page

- "Support" in top right of the page
- Support.AuntBertha.com

Training Videos

- Video playlist has separate videos for each feature

Weekly Office Hours

- https://about.auntbertha.com/office-hours

Support Contact

- support@auntbertha.com

Questions?

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More Information

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