

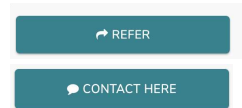
## Connect to Programs

### Overview

Make sure that the people you’re caring for are getting the care and support they need. Referrals connect people to the programs that can serve them. Through referral dashboards and email notifications, the status of the referral can be shared with the Seeker, the Helper, and the Community Based Organization (CBO) so that all parties involved know what happened with the referral, and can follow up as needed.

### Connect

Connect allows people in need to connect directly to programs, or allow staff to make referrals to Community Based Organizations (CBOs) listed in the Social Care Network. Simply click the button (“Refer” or “Contact Here”) and fill out the form.



### When sent...

The person being helped:

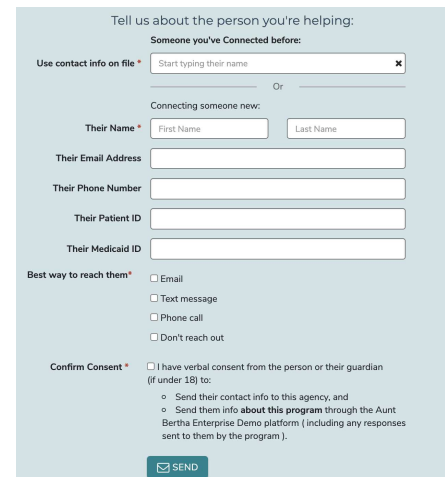
- Receives a notification with next steps to reach out to the program
- Has the referral saved so they may log in and review or update it later

The Community Based Organization (CBO):

- Receives a notification with next steps to reach out to the person in need
- Has the referral saved so they may log in and review or update it later

The Helper:

- Has the referral saved so they may log in and review or update it later



Tell us about the person you're helping:

Someone you've Connected before:

Use contact info on file \* Start typing their name x

Or

Connecting someone new:

Their Name \* First Name Last Name

Their Email Address

Their Phone Number

Their Patient ID

Their Medicaid ID

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

Confirm Consent \*  I have verbal consent from the person or their guardian (if under 18) to:

- o Send their contact info to this agency, and
- o Send them info about this program through the Aunt Bertha Enterprise Demo platform ( including any responses sent to them by the program ).

SEND

### Who from my organization can see submitted referrals?

By default, the person who made the referral has access to it. Customers may set up teams and enable “Team Navigation” so that all team members can see referrals made by other members of their team.

### Close the Loop

- ▶ Needs client action
- || Pending
- ▼ Referred elsewhere
- ✓ Got help

**All parties can update the status of a referral** either via the referral email notification or their respective dashboard where the referral is saved. Since all parties are connected to the referral, any status updates made will automatically be reflected in each party’s dashboard.

### [Learn more.](#)