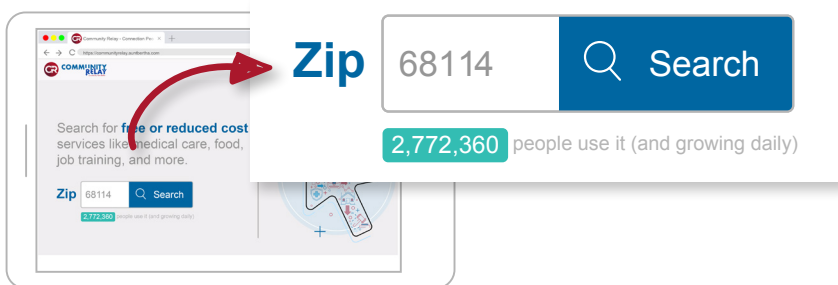


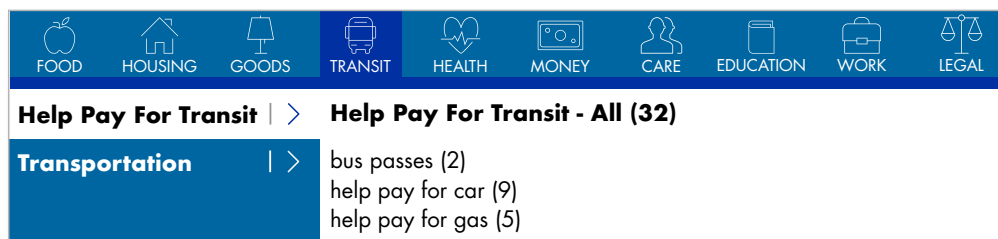
How to Search for Programs

1 Start by going to **COMMUNITYRELAY.COM**



2 Search functionality is available via the main navigation – **Begin a Search**; through the **Find Local Support** Banner or directly on the search page at **CommunityRelay.AuntBertha.com**.

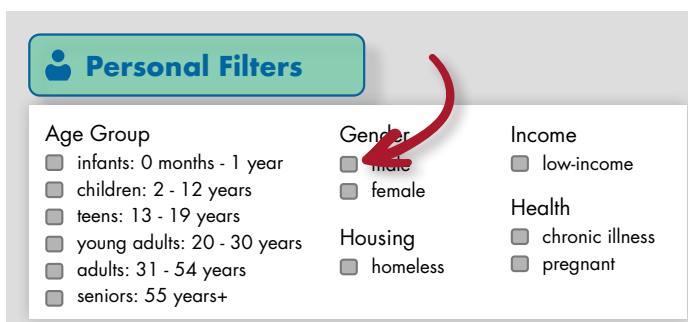
3 Begin by entering your zip code and browse for programs by **moving over the navigation bar and drilling down into more specific categories**. The number next to the titles shows the number of programs under that category.



OR you can **enter a keyword in the search box** to find programs within the service area and click the **magnifying glass or press enter** to search.



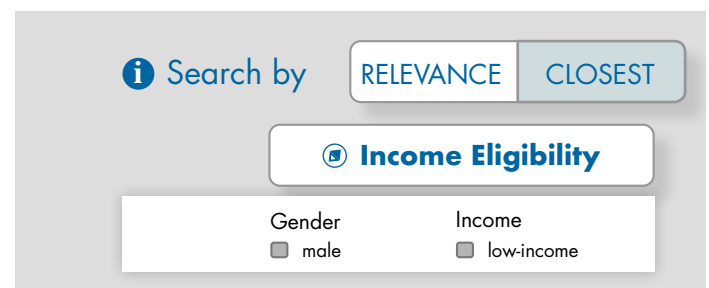
4 Refine search results by clicking **Personal Filters, Program Filters or Income Eligibility**. Click the relevant **checkboxes**, and then **click Filter Search**.



Personal Filters show items that are specific to the person you are helping, such as age group or armed forces status.

Program Filters show items that are specific to the program including hours or language.

5 By default, 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 to Read a Program Card

There are three primary sections on the program card.

- 1 Program Details
- 2 Next Steps
- 3 Additional Actions

☐

Bertha Legal Assistance

by Bertha Success

Recommended

Bertha's Legal Assistance provides direct legal representation to individuals to enforce their rights in the workplace. Through our legal assistance, we show workers how they can access the justice system...

Main Service: advocacy & legal aid, workplace rights, representation

Serving: adults, young adults, teens, seniors

Next steps:
Schedule on their [website](#).

15 miles (Serves nationwide)
1234 Congress Avenue, Omaha, NE 68114

Open now: 8:00am - 4:30pm

MORE INFO **SAVE** **SHARE** **NOTES** **SUGGEST** **SCHEDULE**

1

☐

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Program Details

- A Program Name
- B Provider Name
- C *Optional:* Claimed program icon
- D *Optional:* Ranked program
- E Program description
- F Service tags
- G Personal tags

Next Steps

- A Summary of next steps
- B Distance from zip code search
- C Location address & link to Google Maps
- D Location Hours
- E Next Step button: Will dynamically change based on preferred contact methods

A waitlist icon may also appear here, if applied by the organization.

☐

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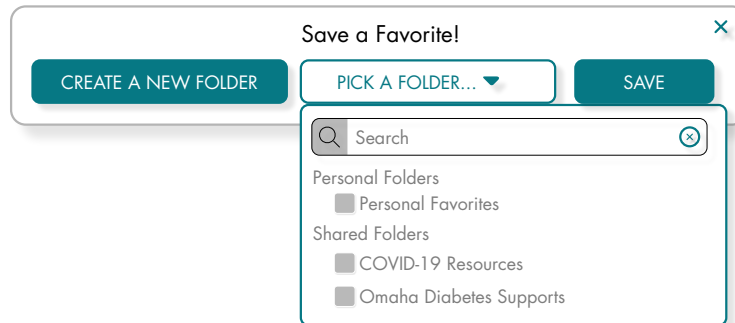
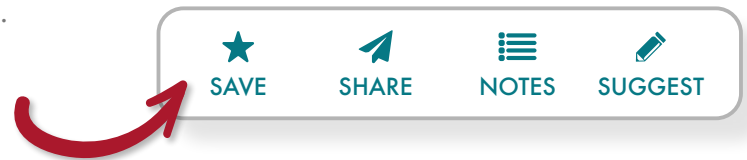
- A More info drop down button
- B Save program button
- C Share program button
- D Notes
- E Suggest an edit button

How to Save Your Favorite Programs

Use the **Save** button to save your favorite programs to personal or shared folders

- 1 On a program card, **click the save button.**

You must be logged in to use this functionality.
You will be prompted to log in if you are not.



- 2 To create a new folder, **click Create New Folder, enter a folder name and click Save.**

- 3 If a folder already exists, pick a folder from the drop down list.

- 4 To save multiple programs to a folder, click the checkboxes next to the program name.

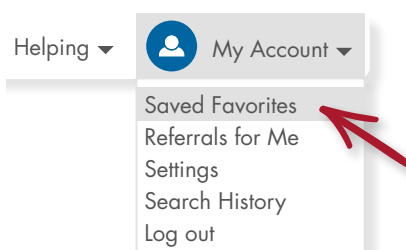
- 5 At the bottom of your web browser, a banner will appear. **Click the Save** button to save all selected programs.



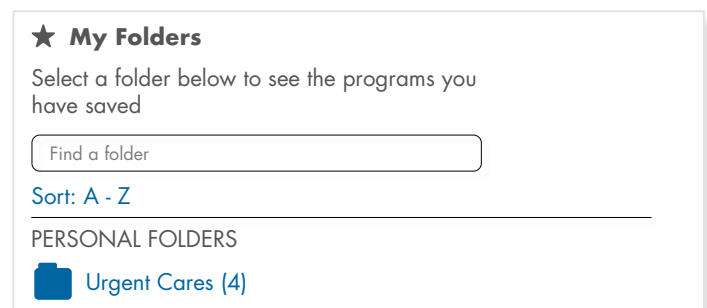
Access Saved Programs

Use the **Saved Favorites** activity to find and search within your favorite folders.

- 1 Under your profile on the top toolbar, **click Saved Favorites.**



- 2 **Click on the favorites folder** you want to access on the toolbar on the left. You can also search for favorite folders using the Find a Folder search bar.

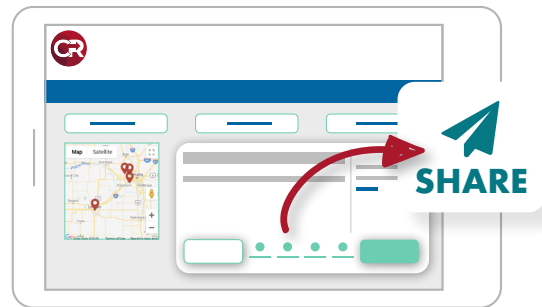


How to Share a Program

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



Use this workflow when the individual does not 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.



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

1 Once you've identified a program that would be helpful for an individual, **click the Share button.** You can then select one of three methods:

Send an Email.

This option sends the individual an email from you via the platform.

Send a Text.

This option sends the individual an SMS text from you via the platform.

Share on Facebook.

After you log into a Facebook account, you can share to a newsfeed, story, group, event, page or via Messenger.

Tell someone about this program!

SEND AN EMAIL

SEND A TEXT

SHARE ON FACEBOOK

Your Name *

Your Email *

To *

Message

2 Enter your name. This will increase the chance that they will open the message.

3 Enter the individual's email or phone number. The contact information will not be stored.

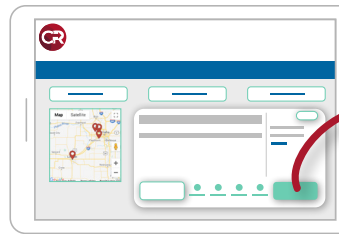
4 Click Send. You will receive a confirmation once the message was sent.

How to Refer Individuals to Programs

How can I refer an individual to a program in Community Relay?



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



Next steps:

Go to the [program's website](#).

⌚ Open now: 8:00am - 4:30pm ▾

→ SEE NEXT STEPS

Once you have identified a program that can help, use the **Blue** button on the program card to refer the individual to that program.

Button	Next Step
APPLY Apply Through Platform	Create a referral for an individual and then complete a screener within the platform to collect eligibility information.
APPLY External Apply	A new tab in your browser will open, taking you to the organizations screener on their website.
CONTACT External Contact	Contact the organization.
REFER Refer Through Platform	Create a referral for the individual.
SCHEDULE Schedule	A new tab in your browser will open, taking you to the scheduling tool.
→ NEXT STEPS See Next Steps	The best way to reach a program is to call, email, or go in person. See more instructions on how to best contact the organization.
LOG REFERRAL Log a Referral	Create a referral for the individual for tracking purposes.

- 1** Select **I'm referring someone else** and your name will default in.
- 2** If this is your first time creating a referral for this individual **enter their first name, last name**.
- 3** Enter their email address and/or phone number and communication preference.
- 4** 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.

Eligibility All enrolled Veterans are eligible IF they meet clinical need for the services

Who is this for?

☐ For myself or my family
☒ I'm referring someone else

Your Name* Rachel Lauderdale

Tell us about the person you're helping

Someone you've Connected before:

Use contact info on file* ✕

Or

Connecting someone new:

Their Name* Anna Seeker

Their Email Address

Their Phone Number

Their Patient ID

Best way to reach them*

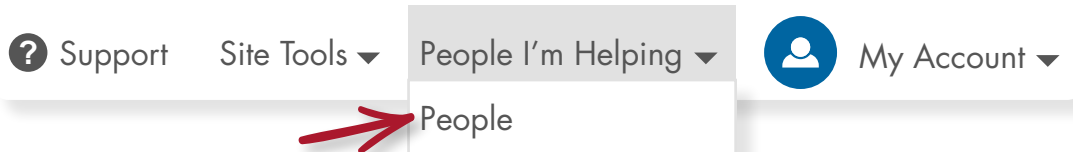
☐ Email ☐ Phone Call
☐ Text Message ☐ Don't reach out

Confirm Consent* ☐ You have verbal consent from this person or their guardian (if under 18) to share the information provided with this...

How to See People I am Helping

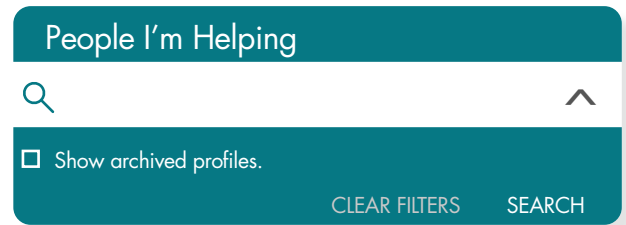
The People I'm Helping activity allows you to find members, review existing and create new referrals and goals.

- 1 Once you are logged in, click the **People I'm Helping > People** activity on the main toolbar.



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

COMMUNITY RELAY Powered by Aunt Bertha



- 4 Potential matches appear below the search box. Click on the member in the search results to open the profile.
- 5 From the account, you can take a number of actions including adding a goal, adding notes or starting a referral.
- 6 To start a new referral, click **Start a Referral**. This will take you to an 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 member.

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

 **End Session**

- 7 To return to the member profile at any time, click **End Session**. After ending a session, you'll return to the **People I'm Helping** activity where you can search for another member.



How to Suggest a Change or Program

Community Relay is constantly adding programs to the platform and verifying the data that is already listed, **but you can help.**

Everyone is encouraged to submit new programs to be added, and to suggest changes and updates to programs that already exist.

Suggest a Program

✓ Suggest an Individual Program

You're encouraged to enhance the Community Relay network by suggesting programs you think are missing! Just remember that they must be both a direct social service and either free or reduced cost.

- 1 Click "**Suggest a Program**" on the bottom right hand side of the page in the footer
- 2 Enter the information of the program into the form
- 3 Check if Aunt Bertha already lists the program you've searched for
- 4 Add any additional information about the program
- 5 Click the "**Add Program**" button at the bottom

 [Suggest Program](#) | [Claim Programs](#) | [Accessibility](#) | [Terms](#) | [Privacy](#)

✓ Suggest Multiple Programs

If you have a list of 10 or more programs you'd like added, please use this [template](#).

✓ Program Verification

Aunt Bertha's data team will verify each program.

- If the program meets the requirements of being a direct social service that is offered at a free or reduced cost, we will add it to the database
- Aunt Bertha will respond to you within two business days so you will know if/when the program is listed

Suggest a Change

Aunt Bertha updates every program at least once every six months. Additionally, community partners with programs listed on the platform can claim their programs and update the information in real time!

✓ How to Suggest a Change

If you notice information about a program has changed, such as a phone number or address, notify Aunt Bertha by following these steps:

- 1 Click "**Suggest**" on the program listing
- 2 Summarize what needs to be change
- 3 Click "**Send**"



✓ Change Verification

Aunt Bertha's team will verify each change.

- Staff at Aunt Bertha will reach out to the program contacts to verify the change, and then they will update the program listing
- Aunt Bertha will respond to you within two business days so you will know if/when the change has been made

How to Share Results in Different Languages

Use the “Print” options for Favorites folders to update the language to automatically translate all of the text.

- 1 Start by **creating Favorite folders for your most-used programs**. You can then print those program in multiple languages.

 SHARE |  EDIT |  PRINT

2

Once you have selected a folder, you will see the **Print option** in the top right of the page.

- 3 Once you are on the **Print Preview** page, use the “**Select Language**” menu in the bottom left of the page and select one of 100+ languages to translate the listed resources.

Esperanto
Estonian
Filipino
Finnish
French
Frisian
Galician
Georgian
German
Greek
Gujarati
Haitian Creole
Hausa
Hawaiian
Hebrew
Hindi

Select Language

- 3 After you have selected a language, click the **blue print button** at the top of the page to print the resources. Note that this button will also be appear translated, it should still launch your standard print menu.

 PRINT

Frequently Asked Questions

Q How can individuals self-navigate in another language?

A The “Select Language” menu is available right below the free text search box on search results pages. It is available in the bottom left of the page on all other pages of the site. The menu also shows up on the mobile site.

Q Do emails and texts that are sent to patients get sent in the selected language?

A All communication from the platform is sent in English. However, once the individual clicks on any links in those communications, they will be brought back to the CommunityRelay.com site. Once they are on the site, they can use “Select Language” menu to translate the page’s contents.