



NorCal Resources

Community and Social Services

101 Guide
For
Community-Based
Organizations

Helping others just got easier.

Table of Contents

Welcome	2
Your Checklist	2
Adding Your Program	3
Claiming Your Program Listing	4
Inviting Other Team Members to Claim	7
Who can claim my programs?	8
What's this Badge Next to My Listing?	8
Who Can Edit My Program?	8
Editing Your Program Information	9
What are Next Steps?	13
Editing Search Tags	14
Add Search Tags	14
Remove Search Tags	15
Setting up Team Sharing	17
Logging In	18
Making Referrals	18
Viewing Referrals	20
Inbound Referrals	20
Outbound Referrals	21
Updating Referrals	21
Inbound Referrals	21
Outbound Referrals	22
Saving Favorite Programs	23
Leaving a Note	24
Utilizing Team Sharing	24
Sharing Your Favorite Folders with other Groups	24
Sharing My Notes with Other Groups	25
Send to a Friend	26
Utilizing Analytics	26
Adding a Simple Search Box to Your Website	29
Community-Based Organization FAQs	30

Welcome

Hello and welcome to our community of helping professional and change-makers. We're so excited you're here! Our goal with our online directory and platform is to connect all people in need and the programs that serve them (with dignity and ease). **And we can't do that without community-based organizations (CBOs).** CBOs are so important to us that we created this guide especially for you!

You may be asking yourself, "*Am I a community-based organization?*" If you founded, run, work for, or are otherwise engaged with providing a free or reduced cost social service to the community, then YES! Keep reading to learn about all of the features you have access to (for free!) on our online directory.

Together we can address social issues and support the lives of your community, empowering community members to take advantage of programs that can improve their overall health, wellness and happiness. Thank you for what you do, and from all of us--welcome!

Questions about anything you see in this Guide? Feel free to email community@auntbertha.com for support.

Your Checklist

How do you know you're on the right track to implementing the platform with your team? Just follow these (#) easy steps:

- ☐ #1: Add your program(s) to the platform
- ☐ #2: Claim your program listing(s)
- ☐ #3: Update your program's information (as necessary)
- ☐ #4: Setup Team Sharing
- ☐ #5: Train your team to use the platform (see training videos here)
 - ☐ Logging in
 - ☐ Practice receiving and/or making referrals
 - ☐ Review your dashboards
 - ☐ Learn how to create and share favorites folders
- ☐ #6: Add your Simple Search Box (if applicable)
- ☐ #7: Email your partners to let them know you're ready to accept referrals

❑ #1: Add your program(s) to the platform

Adding Your Program

If there is a program that you would like to see listed, let us know!

1. Click "Suggest Program" on the bottom right hand side of any webpage on the platform.

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

2. Enter the information of the program into the "Suggest a Program" form and click "Search." This initial search will make sure that we don't already list the program on the platform.

Suggest a Program

First, let's do a quick check!

Fill out the form below with any information you have, and we'll check if the program you're looking for is already listed. If not, you'll be able to suggest that we add this program.

Program or Provider Name

State program serves

Phone Number

Website

3. The Aunt Bertha Data Team will then verify if the program meets our requirements of being a **direct social service** that is offered at a **free or reduced cost**, and then add it to the platform. Within 48 business hours you will receive a confirmation email letting you know if the program was listed or if any additional follow up questions are needed.

❑ #2: Claim your program listing

“So I’ve added my program. Now what?”

Great question! We’ll show you here. This guide is your go-to to get started using all of the features we’ve created to help your organization get a greater impact from the work you’re already doing in the communities you serve.

Claiming Your Program Listing

Your first step is taking ownership of your listing by “claiming” it. Claiming your programs on the platform has never been easier! If you founded, run, work for, or are otherwise affiliated with a CBO that has a program listed on the platform, you can claim that program in just a few easy steps.

1. Go to the website as directed by the platform’s contact.
2. Enter the name of your organization or program, then click “Search.”


Step 1: Search for your Program

Search for your program or agency name *

✓

Program zip code (optional)






✓

 Search

3. Select one of the programs you’d like to claim by clicking the “Claim” button.

Step 2: Select a Program ?

You searched for **Aunt Bertha Community Foundation**, here are some possible matches. **Pick one** of them to see if we list any other program from your organization.

Program Name	Agency/Provider Name	
Case Management 	Aunt Bertha Community Foundation	<div>Claim</div>
Healthy Food Program 	Aunt Bertha Community Foundation	<div>Claim</div>
Food Pantry 	Aunt Bertha Community Foundation	<div>Claim</div>
Soup Kitchen 	Aunt Bertha Community Foundation	<div>Claim</div>
Residential Housing Program 	Aunt Bertha Community Foundation	<div>Claim</div>

4. Select any additional programs you'd like to claim by checking the box to the left, then click "Claim Programs."

Select additional programs

We found these other programs in our database that belong to **Aunt Bertha Community Foundation**. Please select any other programs you would like to claim.

<input checked="" type="checkbox"/>	Program Name	Agency/Provider Name
<input checked="" type="checkbox"/>	Case Management ↗	Aunt Bertha Community Foundation
<input checked="" type="checkbox"/>	Residential Housing Program ↗	Aunt Bertha Community Foundation
<input checked="" type="checkbox"/>	Soup Kitchen ↗	Aunt Bertha Community Foundation
<input checked="" type="checkbox"/>	Healthy Food Program ↗	Aunt Bertha Community Foundation
<input checked="" type="checkbox"/>	Food Pantry ↗	Aunt Bertha Community Foundation



Claim Programs

5. Create an account by entering your name, work email, and password. (If you already have an account, use that password here.)

Step 3: Verify Your Claim [?](#)

You're almost done claiming your programs! You just need to create an account to verify that you work for **Aunt Bertha Community Foundation**.

Your first Name

Leslie ☒

Your last name

Knope ☒

Work email address

lknope@auntbertha.com ☒

We use this to verify that you work for Aunt Bertha Community Foundation.

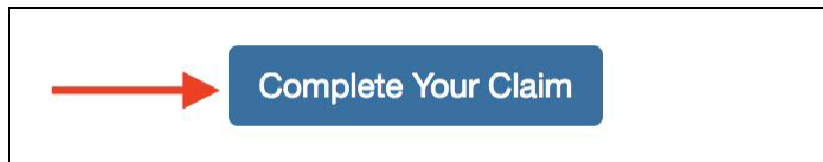
Your password

..... ☒

Use your account password if you already have one, or create a new one if you don't. [Forgot your password?](#) Min. 8 characters with 1 capital, 1 lowercase, and 1 special character.

☒ I agree to the [Terms](#) and [Privacy Policy](#) for the Aunt Bertha system and I consent to creating an account and storing this data to create an account.

6. Click "Complete Your Claim."



* If you have any questions, enter your email address and click "Get Help" at the bottom of the page

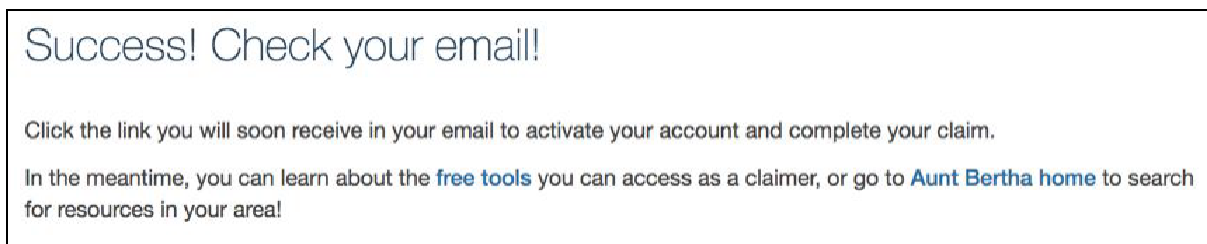
Having Trouble?

If you can't find your program or would like help, let us know how to contact you and we'll reach out as quickly as possible! Clicking "Get Help" won't navigate you away from this page.

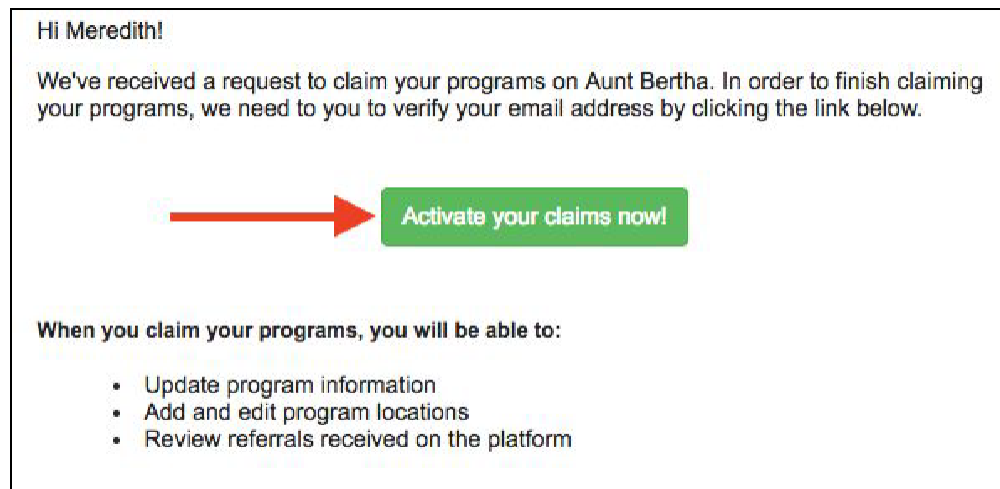
Your email address

Get help

7. You'll see a confirmation that your programs were claimed. Check your email for the confirmation to activate your claim.



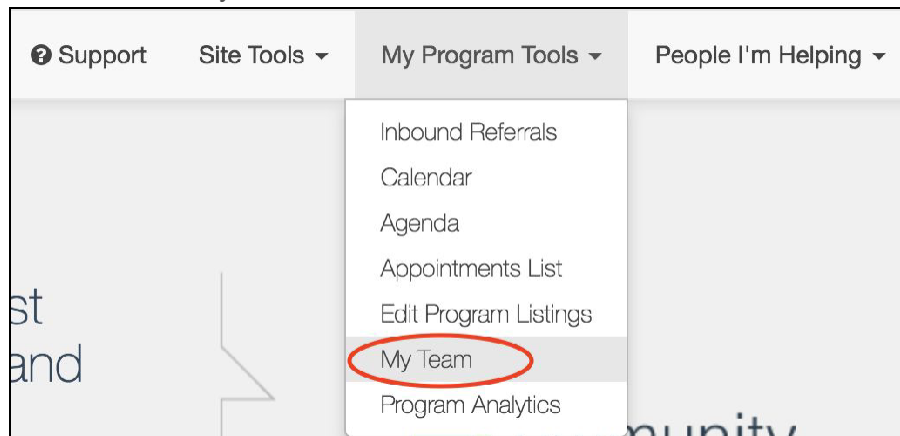
8. Check your email to validate your claim and click on "Activate your claims now!"



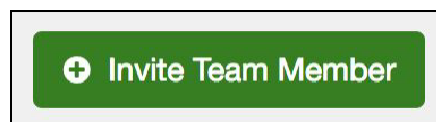
Inviting Other Team Members to Claim

Sometimes you will want more than one person to claim a program. For example, you may want additional people to have access to inbound referral information or make updates to your program. To invite other staff to your program follow these steps:

1. Click on “My Program Tools” then “My Team”



2. In the top right corner, click “Invite Team Member”



3. Fill out the form and select the programs that you want this Team Member to have access to. Select whether they should be a Worker or an Admins. Admins can invite additional staff to join the program as well.

4. Click “Send Invite”

5. An email will be sent to your Team Member with a button to join the team and claim the program. They will be prompted to setup a password if they do not already have an account.

Who can claim my programs?

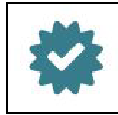
If you founded, run, work for, or are otherwise affiliated with a program listed on the platform, you can claim that program. You do not have to be the Program Director or Executive Director to claim the program, **but we do verify that the user attempting to claim is affiliated with the program.**

A single program can be claimed by more than one person, so multiple staff within your organization can have access to edit your program and use the free tools in our CBO Package. See instructions above to invite others to claim your program.

By claiming a program, you unlock the ability to update your programs' information to ensure the right people are able to find your services easily as well as many [free tools](#) to help you put our platform to work for you.



What's this Badge Next to My Listing?



The claimed badge is a marker used on program cards to indicate the program has been claimed. It helps you stand out amongst the other programs that are listed with similar services. To people who are viewing your programs, it means:

1. Information associated with the program has been reviewed for accuracy by someone who works for the organization that administers the program.
2. CBOs have access to continually update their program information.

Who Can Edit My Program?

1. Our Data Team updates the programs.

They strive to do this every six months, but as we rapidly grow, we encourage claimed CBOs to update their programs when something changes.

2. And CBOs can update their programs too.

At the time a program is claimed, we look to see if your information matches what we know about the organization you work for. If it matches, we complete the claim instantaneously. If the information is slightly different than what we would expect, our team takes a look and may contact you for more information. We take this combined approach to make claiming as easy as possible while also maintaining the security of your data. **Users/Team Members who have successfully claimed a program can edit a program's information.**

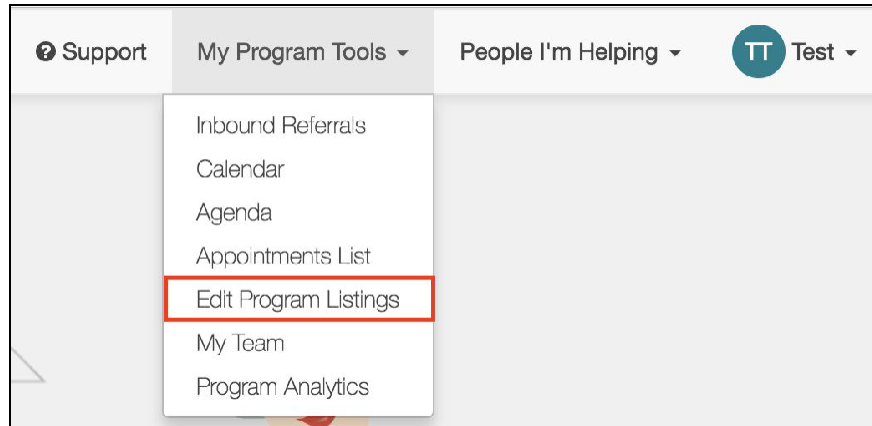
A note on data entry and security... For more information on how we update programs internally and how we manage our data, click [here](#).

❑ #3: Update your program's information (as necessary)

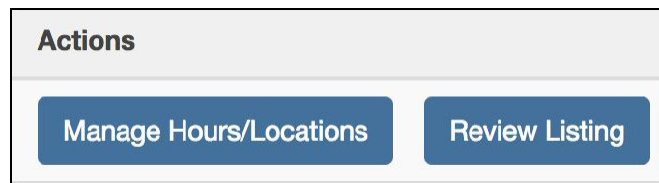
Editing Your Program Information

To update your program listing:

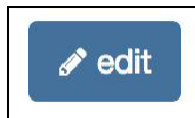
1. Click the "My Program Tools" tab and select "Edit Program Listings"



2. Choose which program you'd like to update and click either the "Manage Hours/Locations" or "Review Listing" button on the far right.



3. For "Manage Hours/Locations": Update your listing's information by clicking the "edit" button on the right.



Then update any of the following fields:

Add or Edit Location/Hours ⓘ

Bertha Grows: Community Gardens

Location Name *

Main Office

People can receive service at this location.

Address

Address line 1 *

Main Street

Address line 2

ex: Suite C

City *

Austin

State *

TX

Postal *

78703

☐ Confidential location: don't display this street address publicly

Service Hours *

☐ This location is open 24 hours a day, 7 days a week

Sunday:

☐ Open
☐ Closed

Monday:

☒ Open

8:00 AM

to

5:00 PM

Tuesday:

☒ Open

8:00 AM

to

5:00 PM

Wednesday:

☒ Open

8:00 AM

to

5:00 PM

Thursday:

☒ Open

8:00 AM

to

5:00 PM

Friday:

☒ Open

8:00 AM

to

5:00 PM

Saturday:

☐ Open
☐ Closed

Office Details

Languages supported here *

English

Location phone number (optional)

Ext.

Location email address (optional)

Website for this location (optional)

http://...

Notes for this location (optional)

Location end date (optional)

for temporary locations, we can deactivate them from your listing on this date

Deactivate after

For temporary locations only, enter the date the location will close.

4. When you're finished editing, click "Save and go back" to save your changes, or "Discard changes" if you do not want to save any of your changes.

Save and go back

✕ Discard Changes

5. To add a new location, click "Add New Location," then follow the same instructions in Step #3.

Manage Locations/Hours ?

Program: Bertha Grows: Community Gardens


+ Add New Location


6. To activate any inactive location, click "activate location" on the right hand side of your Inactive Locations listings.

Inactive Locations

These locations will not be visible to people looking at your program.

Inactive: test

 edit

 activate location

1805 7th Street
Wyandotte, MI 48192

People can receive service at this location.


Languages Supported: English
Phone: ext.

You can also deactivate any active location at any time by clicking "deactivate location" on the right hand side of your Active Locations listings.

7. To edit additional information within your program listing, click "Review Listings" on the "My Program Listings" page (see Step #2).

Actions

Manage Hours/Locations

 Review Listing

8. For "Review Listings": Update any of the following fields:

- * To select multiple items from the drop down menu (i.e., services you provide and languages you support), hold down the "shift" key and select all the items with your mouse.

Edit Program Information - Bertha Grows: Community Gardens

Program Name: Bertha Grows: Community Gardens

About Your Program

Program Description:

Bertha Grows: Community Gardens program provides resources and education to enable participating families to grow their own food for their own health and well-being and the benefit of their families, their community, and the environment. Participation includes access to free garden plots and gardening resources, seeds, transplants, compost, tools and books; classes and leadership training which enable families and community members to plan, start, and sustain their community gardens.

What services do you provide?

help pay for food, community gardens, help pay for food, nutrition education, nutrition education, help pay for food

Who do you serve?

All Ages, Families, Low-income

Which languages do you support?

Danish
Dutch
English
Esperanto
Finnish

Is your program available to new clients?

Available

Does your program have a cost?

☐ Free
☒ Reduced Cost
☐ Not Free or Reduced Cost

Contacting Your Program ?

1) People should to

2) People should to

Main phone number*

Main email address

Website URL*

Contacting through our site ?

We try to help you meet your clients where they are by providing free tools for digital intake. Giving people a way to contact when they're online can help if they:

- are searching for help outside of office hours
- don't have a phone or don't have minutes
- are using a computer in a public space (like a library or their workplace)

When someone lets us know they are interested in your program, what should we do?

Address to email their info (we won't publish this address anywhere!)

Tip: If you prefer that this email gets sent to to their nearest office instead of one main email address, then you can add office email addresses through the manage offices tool. This address will be used only if we don't have local office address.

Eligibility

This program helps people with income at or below %200 of federal poverty guidelines.

Add an eligibility rule

**This section is for your Referrals. Make sure to include the best email contact for the person receiving your referrals in the "Address to email their info" field. If you have multiple offices that will be receiving referrals, enter the referral recipient's email in the Office Details' "location email address" (in the Manage Hours/Locations button).*

9. When you're finished editing, click "Save and go back" to save your changes, or "Discard changes" if you do not want to save any of your changes.

Save and go back

Discard changes

What are Next Steps?

We want to connect people in need and the programs that serve them (with dignity and ease). The "Next Steps" tab on each program card is a big part of how we do that, and is something that differentiates us from other resource directories.

To us, finding a program to meet a need is just the beginning. The "Next Steps" are the immediate action items a person in need should take in order to receive services from a program.

Examples include:

- A food pantry who's best next step is for the person in need to present at the location in person.
- An agency who requires a person in need to call and verbally walk through an intake form with a case manager.

Why does the platform use this model?

We recognize that every program has a different set of best practices to follow when someone in need is reaching out for help. That's why we allow CBOs to update their Next Steps and include an email address, phone number, or other option and indicate the best way to get in touch.

The screenshot shows a program listing for "Bertha Grows: Community Gardens" by the "Aunt Bertha Community Foundation". At the top, it says "Serves nationwide". There are buttons for "Send to a Friend" and "Save to Favorites". A location bar shows "2.64 miles away" and the address "7514 North Mopac Expressway, Austin, TX, 78731", with links for "(Get Directions)" and a "Waitlist". Below this, it lists "What:" (help pay for food, community gardens, nutrition education) and "Who:" (all ages, all disabilities, families, low-income). A red arrow points to the "Next Steps" tab, which is active. The "Next Steps" section contains two items: "Go to the program's website to apply." and "Call 512-512-1212 to get more info." Other tabs include "Description", "Hours & Location", "My Notes", and "Suggest Change". A "Connect" button is in the bottom right.

Editing Search Tags

Every program listed on the platform has specific "search tags" which makes it easier for people to find a program that meets their specific needs. Updating your search tags to ensure that your program listing accurately reflects the services you provide so people in need can find you.

Add Search Tags

To add search tags:

1. Click the "My Program Tools" tab and select "Edit Program Listings"

The screenshot shows the top navigation bar with tabs: "Support", "My Program Tools", "People I'm Helping", and a user profile "TT Test". The "My Program Tools" tab is selected, and its dropdown menu is open. The menu items are: "Inbound Referrals", "Calendar", "Agenda", "Appointments List", "Edit Program Listings" (highlighted with a red box), "My Team", and "Program Analytics".

2. Choose which program you'd like to add search tags for and click the "Review Listing" button on the far right.

My Program Listings			
Program	Agency	Last Edited	Actions
Health Coverage Enrollment Assistance	Bertha Schedules	10/24/2018 @ 8:15pm	Manage Hours/Locations Review Listing

3. On the Program Review page, scroll to the section "What services do you provide?"

What services do you provide?*

These are the main services that someone might enroll in your program to receive. (For example, imagine a job-skills program that provides a free lunch. People on our site might enroll in this service if they're seeking only job skills, not if they're seeking only meals.)

help pay for healthcare, help pay for healthcare, help pay for healthcare

What secondary services do you provide?

These might be member-only services, perks of enrollment, or additional help you might be able to provide. People on our site might use these tags to decide between similar programs.

Please select...

Who do you serve?*

Anyone in Need, All Ages

Note: There are three types of tags. Learn more about the different types [here](#).

4. Click the box you would like to add tags and select a category or type a search tag in the box to see options.

What services do you provide?*

help pay for healthcare

food

- Emergency
 - Emergency Payments
 - Help Pay for Food
 - Emergency Food
- Food
 - Emergency Food
 - Food Delivery
 - Food Pantry
 - Help Pay for Food
 - Government Food Benefits
- Money
 - Financial Assistance

5. To select a tag, click the checkbox.
6. Scroll to the bottom of the screen and click the "Update Listing" button.

Update Listing

Remove Search Tags

To remove search tags:

1. Follow Steps 1-3 for how to add search tags.
2. Click the box you would like to remove tags.

3. Hover over the tag you'd like to remove and click the blue highlighted "x".

What services do you provide?* ?

3 help pay for healthcare x emergency food x

These are the core services that someone might enroll in your program to receive. (For example, imagine a job-skills program that provides training only job skills, not if they're seeking only meals.)

Additional help you might be able to provide. People on our

food

Emergency

Emergency Payments

Help Pay for Food

Emergency Food

4. Scroll to the bottom of the screen and click the "Update Listing" button.

Update Listing

❏ #4: Set up Team Sharing

Setting up Team Sharing

Important Note: To setup Team Sharing, you must email community@auntbertha.com to add folder sharing to your account and get started.

The Team Sharing feature allows you and your team to seamlessly share valuable information, like frequently referred programs, favorite folders and resources in your area, and notes.

To add Team Sharing:

1. Email community@auntbertha.com and let them know you'd like to add Team Sharing for your group(s).
2. Include the names and emails of the team members you'd like included, as well as the team name(s) you'd like to use.
3. Aunt Bertha's Community Engagement Managers will create your groups for you and respond back as soon as they're set up and running.
4. Once your groups have been added, you can share information by clicking the "Share" button on the screen. ***Please make sure you are logged into your account to use this feature.***

❑ #5: Train your team to use the platform (see training videos [here](#))

- ❑ Logging in
- ❑ Practice receiving and/or making referrals
- ❑ Review your dashboards
- ❑ Learn how to create and share favorites folders

Logging In

Logging in provides you with access to additional features and functionality beyond just searching. You will only be able to save your favorite programs, make referrals, etc. if you are logged in. Click "Sign Up," enter your work email address and create a password. **Remember to login each time you use the site to get access to all the great features in this guide and more!** If you need assistance, please contact community@auntbertha.com.

Making Referrals

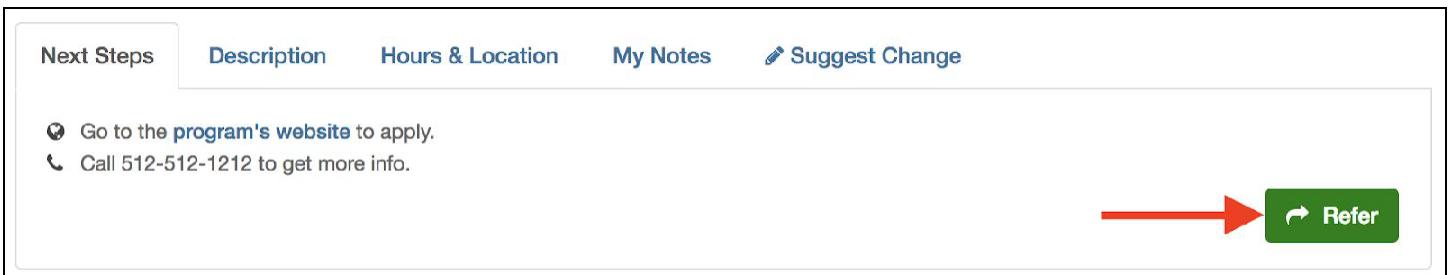
**Your version of the platform may or may not include this.*

Our platform makes it easy to connect directly to services. Anyone can use the Connect/Refer button, whether for themselves, as a seeker, or on behalf of someone else, as a helper. When people fill out this form on your program, you will receive a new request in your Inbound Referrals Dashboard to contact this client and close the loop.

1. Log in and [search by Category](#) or [Keyword](#)

2. Once you find a program you like for a seeker, locate the "Refer" button on the Program Listing

Note: This button may say "Refer," "Connect," "Apply," "Schedule," or "See Next Steps" depending on if you are logged in to your account, and what the next steps are to connect with your program. (If the program is set up to accept referrals: It will show "Refer" if you are logged in and "Connect" if you are not logged in.)



The screenshot shows a program listing interface with tabs: "Next Steps", "Description", "Hours & Location", "My Notes", and "Suggest Change". Under the "Next Steps" tab, there are two items: "Go to the program's website to apply." and "Call 512-512-1212 to get more info." A red arrow points to a green button labeled "Refer" with a circular arrow icon.

3. Select if this is for "myself or my family" or "I'm referring someone else."

4. Enter the name of the person you're referring and email address or phone number.

5. Select the best way to reach them.

6. Verify that you have consent to share this information by clicking the "confirm consent" button. Then click "Send".

7. If the agency has a screener form set up, answer the additional questions and hit "submit."

Tell the program you're interested, or make a referral ✕

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

Your Name* Meredith Englehart

Tell us about the person you're helping:

Someone you've Connected before:

Use contact info on file * Start typing their name ✕

Or

Connecting someone new:

Their Name* First Name Last Name

Their Email Address

Their Phone Number

Best way to reach them* ☐ Email
☐ Text message
☐ Phone call

Confirm Consent* ☐ You have verbal consent from this person or their guardian (if under 18) to share the information provided with this agency. If you selected "Email" or "Text message" above, you also have their consent for this platform to send them messages with info about this program.

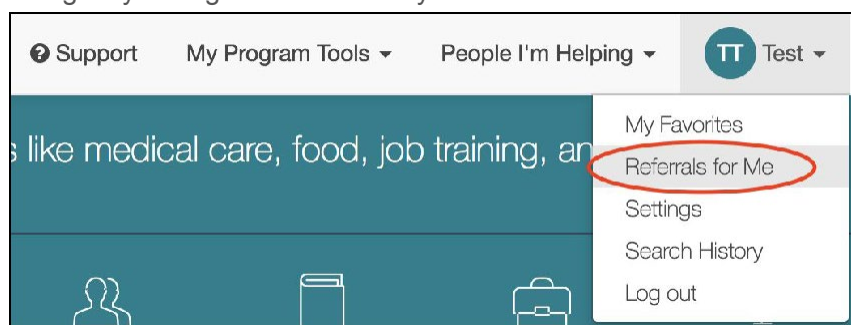
☒ Send Close

Important! We'll do our best to send them your information, but it's possible that we may not be able to reach the agency or get a quick response. *If you are in an emergency situation, call 911.*

What happens next...

Searching for Yourself or a Family Member

You can view and update the status of your connections by clicking "Referrals for Me" on the top right navigation bar. An email will be sent to the agency asking them to contact you with their intake information.

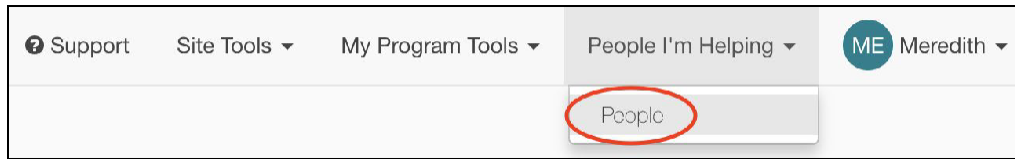


If you were able to submit a screener form, the agency will receive a notification on their account where they can respond directly to you through the platform.

Referring Someone Else

You can view and update the status of your referrals by clicking "People" under the "People I'm Helping" tab at the top right navigation bar.

An email will be sent to your seeker from our platform letting them know a referral has been made. Your seeker will be able to login and see all of the programs to which they have been referred. From their seeker dashboard, they can update the status of their referrals.



An email will also be sent to the agency asking them to contact the seeker with their intake information. If your seeker was able to submit a screener form, the agency will receive a notification on their account where they can update the status of the referral and respond directly to the seeker through our platform.

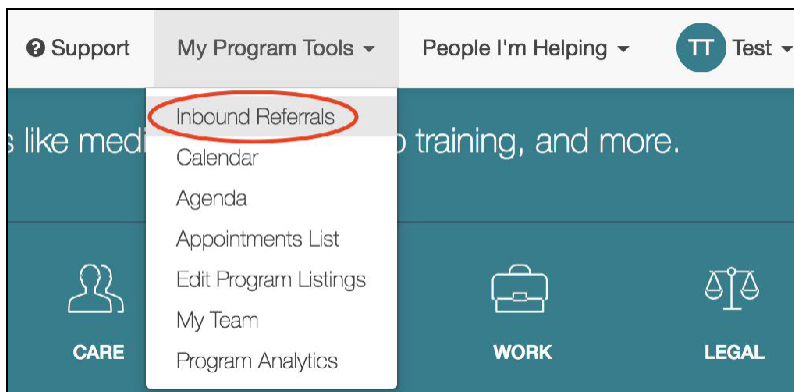
Viewing Referrals

You will not have access to this if your agency is not accepting referrals.

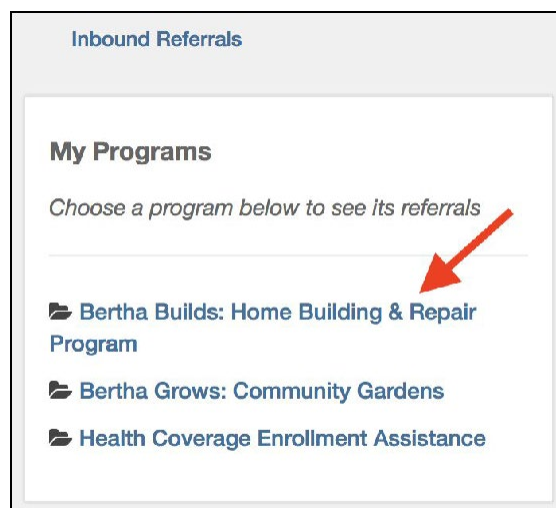
Inbound Referrals

Referrals made to your agency or organization from a person in need of service or someone navigating on their behalf.

1. Click the "My Program Tools" tab and select "Inbound Referrals."



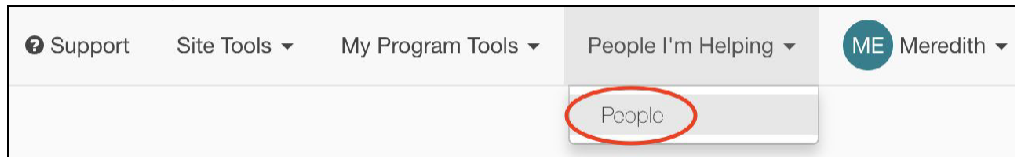
2. Choose the program which you'd like to view referrals in the "My Programs" menu on the left side of the screen.



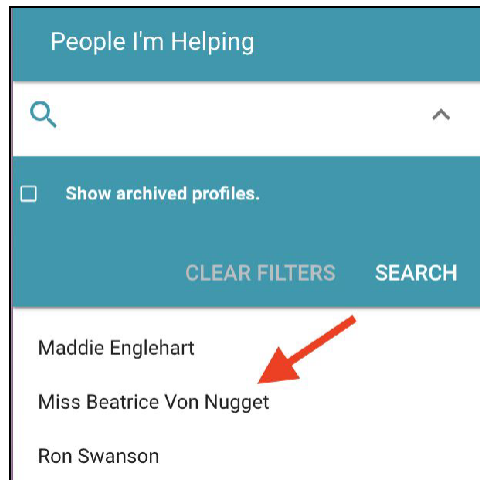
Outbound Referrals

Referrals made from your agency or organization to another organization on behalf of someone in need of service.

1. Click the “People I’m Helping” tab and select “People.”



2. Choose the name of the person you’d like to view referrals.



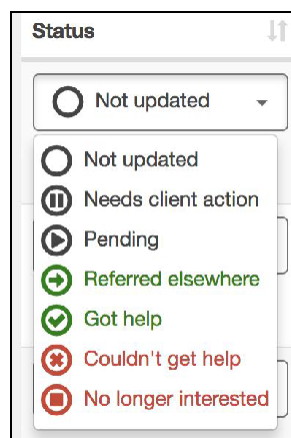
Updating Referrals

You will not have access to this if your agency is not accepting referrals.

Inbound Referrals

Referrals made to your organization from a person in need of service or someone navigating on their behalf.

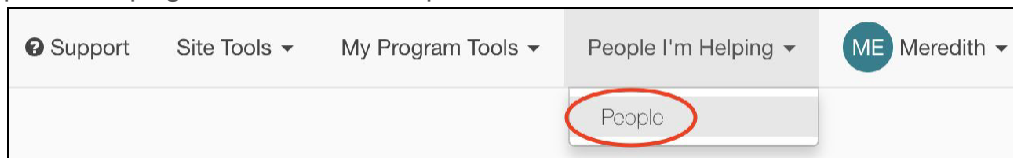
1. Click the “My Program Tools” tab and select “Inbound Referrals.”
2. Choose the program which you’d like to update the referral status in the “My Programs” menu.
3. Click the “Status” drop down menu to update this person’s referral status.



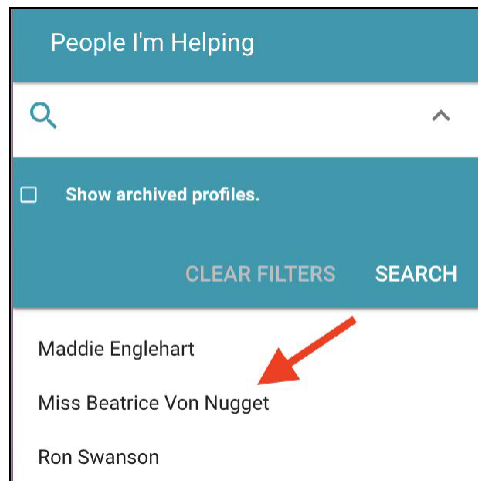
Outbound Referrals

Referrals made from your organization to another organization on behalf of someone in need of service.

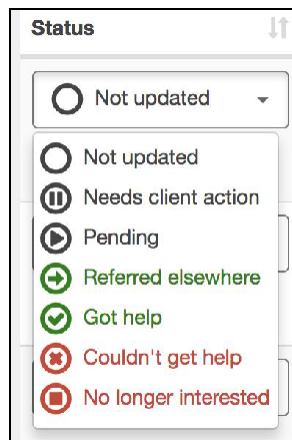
1. Click the “People I’m Helping” tab and select “People.”



2. Choose the person for which you'd like to update the referral.



3. Click the “Status” drop down menu to indicate this person’s referral status.

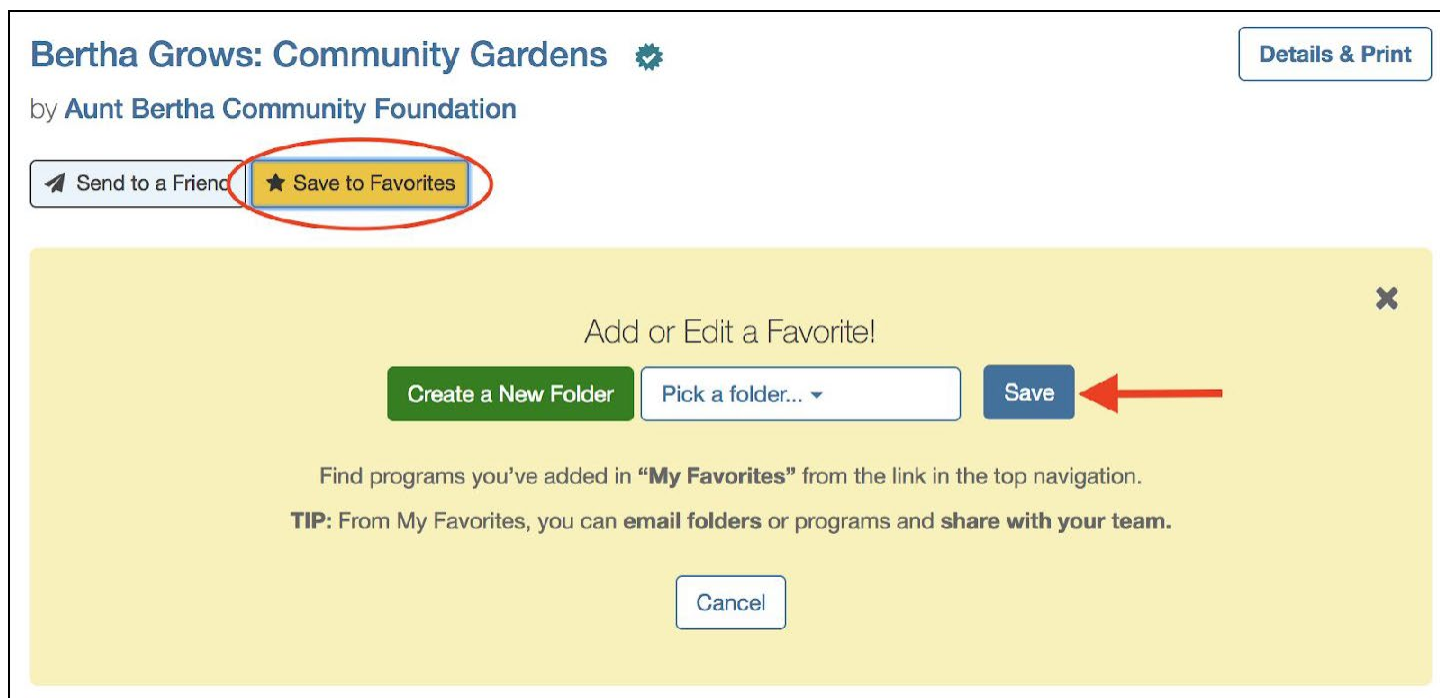


Saving Favorite Programs

Save programs you often view or refer clients to in the Favorites section for easy reference later.

Favorite a Program

1. Click “Save to Favorites” and create a new folder or pick an existing folder, then click “Save.”



Bertha Grows: Community Gardens ⚙️

by Aunt Bertha Community Foundation

Send to a Friend ★ **Save to Favorites**

Add or Edit a Favorite! ✕

Create a New Folder Pick a folder... Save

Find programs you've added in **"My Favorites"** from the link in the top navigation.

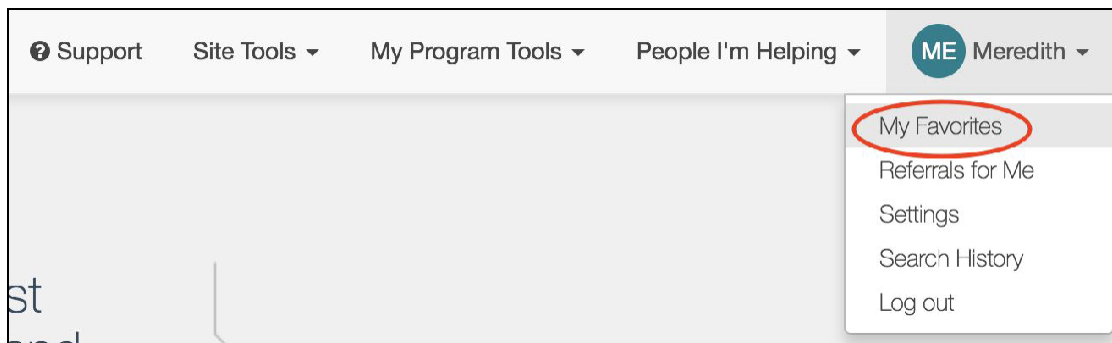
TIP: From My Favorites, you can **email folders** or programs and **share with your team**.

Cancel

View Favorites

You can view the programs you have saved by clicking on “My Favorites” under your login tab.

Note: You must be logged in to view your Favorites.



Leaving a Note

To keep notes about programs, use the “My Notes” feature. For example, you can note that an organization generally has great availability and keep track of helpful employees.

You can keep your notes private or share with your group, giving everyone more information!

The screenshot shows a web interface with tabs: 'Next Steps', 'Description', 'Hours & Location', 'My Notes', and 'Suggest Change'. A red arrow points to the 'My Notes' tab. Below the tabs, there is a section for 'Rate this program' with five stars. A text box prompts the user to 'Save a note about this program.' Below this, a message asks if the user has an edit or new information to 'Report a change here!'. There are two radio buttons: 'Save as a note for myself.' (selected) and 'Share with' (with a dropdown menu showing 'AB Basic Demo Group'). A red arrow points to the 'Save Note' button.

Utilizing Team Sharing

Important Note: You must email community@antbertha.com to add team sharing to your account and get started. (See how [here](#).)

Sharing Your Favorite Folders with other Groups

1. Click on the folder you'd like to add, then select “Share.”

The screenshot shows a program listing for 'Next Step' by 'Integral Care'. At the top right, there are buttons for 'Share', 'Edit', and 'Print'. A red arrow points to the 'Share' button. Below the program name, there are buttons for 'Send to a Friend', 'Favorite Settings', and 'Remove from this folder'. The listing includes location information (1.11 miles away, 6222 North Lamar Boulevard, Austin, TX, 78752) and a 'Get Directions' link. It also mentions 'Open Now: Open 24 Hours'. Under 'Eligibility', it states: 'Must be adults recovering from a psychiatric crisis who may be experiencing housing instability.' Under 'Next Steps', it lists 'Call 512-472-4357 to get more info.' and 'Email to get more info.' A 'Connect' button is located at the bottom right.

2. Select “Share with a Group,” then choose the group you’d like to share with from the dropdown menu, then click “Send.”

This screenshot shows a 'Share with a Group' dialog box. At the top right, there are buttons for 'Share' (circled in red), 'Edit', and 'Print'. The main heading is 'Tell a friend about these programs!'. Below this are two buttons: 'Send an Email' and 'Share with a Group' (pointed to by a red arrow). Under 'Share with:', there is a dropdown menu currently showing 'Advanced_Data_Entry'. Below the dropdown, it states: 'The members of the group(s) you share with will be able to:' followed by two bullet points: '★ See this folder in their own My Favorites page' and '⊕ Add or remove programs in the folder'. At the bottom, there are 'Send' and 'Close' buttons, with a red arrow pointing to the 'Send' button.

Sharing My Notes with Other Groups

1. In the program card you’d like to leave/share notes, click on “My Notes.”
2. Type in your note and rate the program, if you’d like, on a 1 to 5 star scale.
3. Select the “Share with” button and select the group you’d like to share this with using the dropdown menu.
4. Select “Save Note.”

This screenshot shows the 'My Notes' section of a program card. At the top, there are tabs for 'Next Steps', 'Description', 'Hours & Location', and 'My Notes' (which is active). To the right of the tabs is a 'Suggest Change' button. Below the tabs, there is a section for 'Rate this program' with five stars. Below the stars is a text input area with the placeholder 'Save a note about this program.' and a red instruction: 'Add your notes here. (They will remain private to you, unless you share them with a group)'. Below the input area, there is a link: 'Have an edit or new information about this program listing? Report a change here!'. At the bottom, there are two radio buttons: 'Save as a note for myself.' and 'Share with' (which is selected and circled in red). The 'Share with' button is followed by a dropdown menu showing 'AB Basic Demo Group'. To the right of the dropdown is a red arrow pointing to a 'Save Note' button.

Send to a Friend

You can share programs with someone outside of your organization by email, text, or printing the program's information.

1. On the program you'd like to send, click "Send to a Friend."
2. Select whether you'd like to send the program's information via email or via text.
3. Click "Send."

Note: Recipients will receive the information from "Aunt Bertha," not from you directly.

Send to a Friend Save to Favorites

Tell a friend about this program!

Send an Email Send a Text

Your Name*

Your name (so they'll actually open it).

Your Email*

menglehart+demo@auntbertha.com

To*

Email of the person you're sending this to.

Message

Let them know your thoughts on this program.

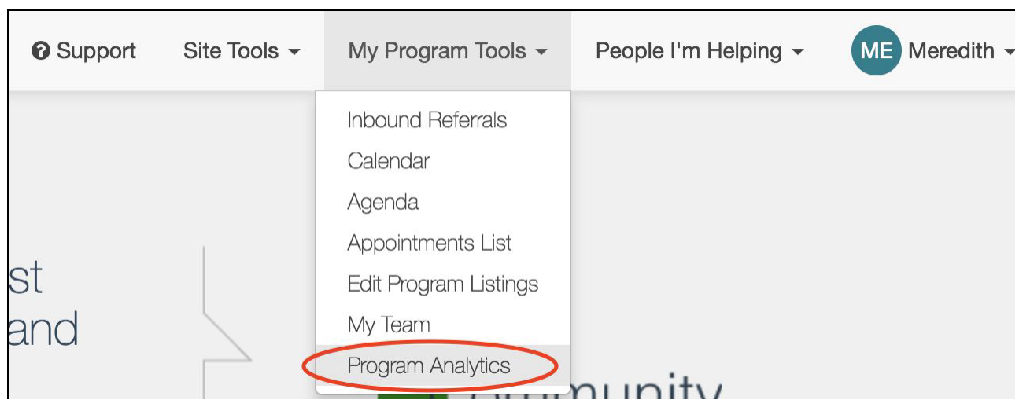
Send We'll email them your message with a link to this program listing.

Utilizing Analytics

Your Claimed CBO Dashboard is a snapshot of your program's analytics on the platform. Here, you'll be able to see and download information such as the number of times your program showed up in searches on the platform, the number of people who viewed your program, and more.

How to access and use your Program Activity Report

1. Click the "My Program Tools" tab then select "Program Analytics."



2. Select “Claimed Program Dashboard” by clicking the “View Report” button.

My Analytics

Report Name	Description	
My Activity Dashboard	Basic report showing your recent activity and area information for the past 90 days based on the last postal code you searched.	View Report
Claimed Program Dashboard	This report will show you information on your claimed programs such as how often they come up in searches.	View Report
Simple Search Box Report	This report provides you with searches made through your simple search box.	View Report

3. Choose which program’s report you would like to view, as well as the date range and aggregation of the report by clicking “Filter” in the top left corner. Once you have made your selection, click “Apply”.

FILTERS (3)

Claimed_Program_Filter Bertha Builds: Home Building & Repair Program ×

Aggregation Monthly ×

DateRange 90 Days ×

Claimed_Program_Filter

☒ Bertha Builds: Home Building & Repair Program

Date Range

☐ All Dates

☐ 365 Days

☐ 180 Days

☒ 90 Days

☐ 60 Days

☐ 30 Days

☐ 14 Days

Aggregation

☐ Hourly

☐ Daily

☐ Weekly

☒ Monthly

☐ Quarterly

☐ Yearly

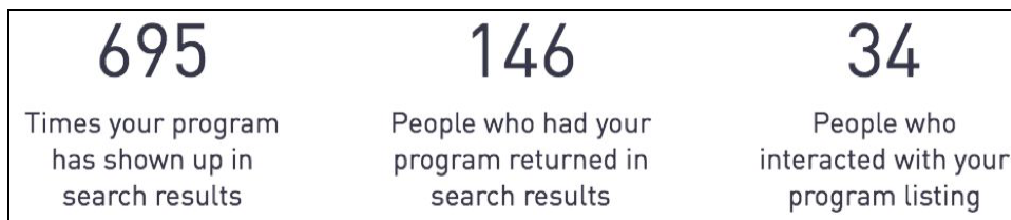
RESET FILTERS

CANCEL

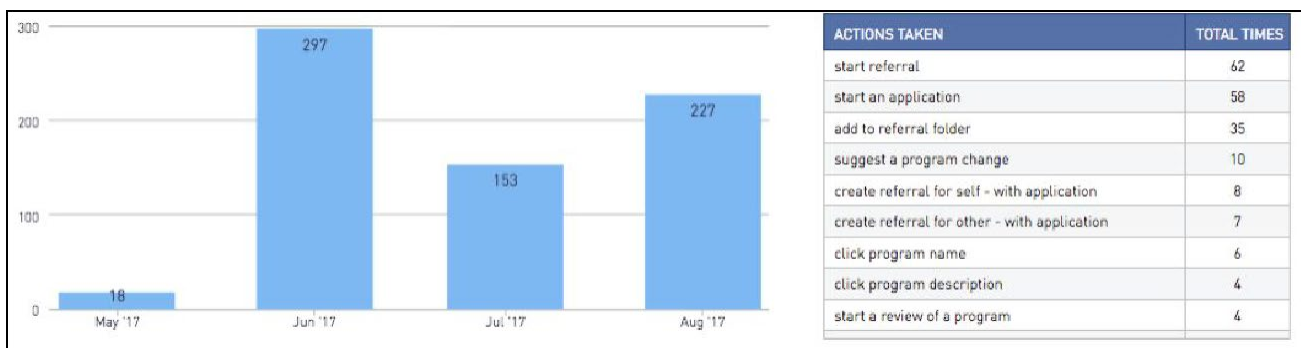
APPLY

4. Check out all the impactful analytics related to your claimed programs, like...

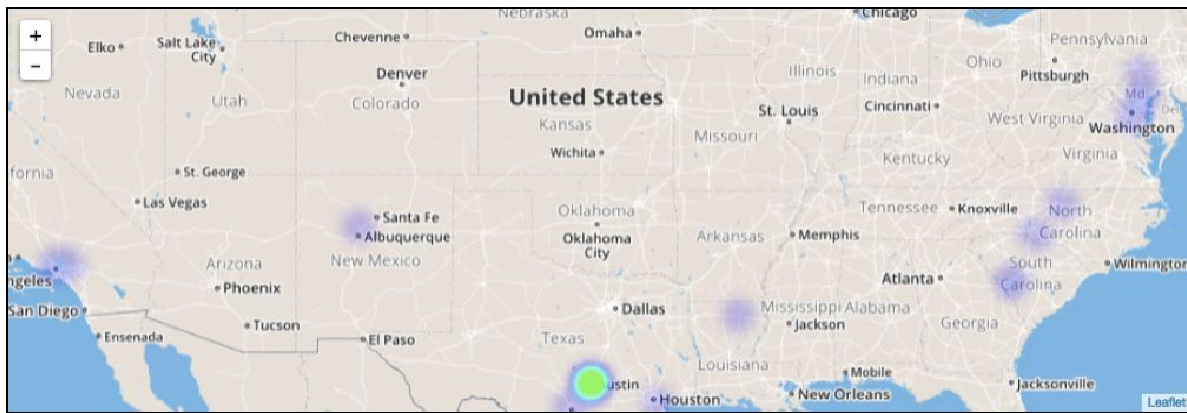
How many people are searching for and interacting with your program on the platform:



See what months people are searching for your programs and what actions they’re taking on your listing:



See what zip codes people searched to find your programs:



.....and a whole lot more!

5. Edit, search, or export parts of the report by clicking the “More Options” menu in the top-right corner of any analytics graphic.

program listing

More Options

Actions Taken on Your Program Listing

ACTIONS TAKEN	TOTAL TIMES
start referral	62
start an application	58
add to referral folder	35
suggest a program change	10

❑ #6: Add your Simple Search Box (if applicable)

Adding a Simple Search Box to Your Website

The Simple Search Box, sometimes also called a search widget, is an embedded line of code that can be easily added to any website. Once inserted, this code displays a search box inside of an i-frame that allows users to type in their zip code and start searching for services straight from your webpage.

There are several steps that will enable you to embed the Simple Search Box and access its free reporting.

1. Fill out [this form](#) letting Aunt Bertha's Community Engagement team know about your specific Simple Search Box request. (You'll need to scroll to the bottom of the page.)
2. A member from Aunt Bertha's Community Engagement team will contact you with the information necessary to embed a code on your website.
3. If you have any questions about Aunt Bertha's Simple Search Box or the process of adding it to your website, email community@auntbertha.com.

Need help? Search free and reduced cost services like medical care, food, housing, and more in your area.

SEARCH

Powered by *Aunt* **BERTHA**

❏ #7: Email your partners to let them know you're ready to accept referrals

Congratulations on getting to this point! Now you can send an email to your partner agencies to let them know that your programs have been claimed and you are accepting referrals.

Community-Based Organization FAQs

1. Why would I list my program on this platform?

Listing your program allows more of the right people to find and connect with your services. Through a quick zip code search, people in need (we call them seekers) can easily find the services they need in their area. We know you're already doing amazing work in your community--increase the impact of that work by listing on our platform today.

2. What is "claiming" my program?

Simply, claiming your program makes you the "keyholder" to the listing on our platform. It unlocks free features like: the ability to update your program's information (location, hours of operation, availability, eligibility requirements, etc), managing referrals in real time, and access to customized reporting and analytics tool.

3. How do I claim my program?

It's simple! Head over to the website indicated by the platform, or go to auntbertha.com/claims to get started. Follow the how-to guide [here](#) if you need more help.

4. What happens after I claim my program?

Well first, great job and thank you! You'll be hearing from a member of the Aunt Bertha team soon who can act as a resource for any questions you may have about the new free features you've unlocked. You can also head [here](#) (about.auntbertha.com/provider) for more information and how-to's. Still not finding what you need? Email community@auntbertha.com!

5. What are the benefits of claiming my program?

Claiming your program has tons of great (and free!) benefits and we're constantly working on more. When you claim today, you...

- 1) Will have the ability to get the right information about your programs to people in need by easily updating key information, like: your location, hours of operation, availability, eligibility requirements, supported languages, etc.
- 2) Will gain access to free tools to help you help others, including:
 - a) Referrals and outcome tracking
 - b) The ability to link to an eligibility screener or your own online application
 - c) Analytics of what programs and services people are searching for in your area, which can be exported for use in impactful presentations and funding applications
 - d) NEW! Team sharing of favorite resources
- 3) You will be identified as a Claimed CBO on the platform with a badge on your program listing, helping you stand out as an engaged and valid resource.

Are there other features you wish were existed? Want to help make an awesome product even better? Suggest changes or enhancements by sending an email to community@auntbertha.com.

6. How much time does it take to manage my listing?

Updating your listing is easy and only takes a couple of minutes. Follow the how-to-guide [here](#). You only need to update your program's listing when something has changed. Have you moved to a new office? Changed your eligibility requirements? Is your availability full? Just a couple minutes lets people know your program's most up to date information.

7. How much does it cost to list/claim my program?

Listing and claiming your program is FREE! It's our goal to connect all people in need and the programs that serve them (with dignity and ease). That means the more programs we can list, the more that people in need can find the services that they deserve.

8. My organization is really small. How can the platform help me?

We help organizations of all sizes. We know it's not about driving the most people to your program, but driving the *right* people to your program. Claiming your listing allows you to fine tune your program's search details, so people can find out if they're eligible for your services even before talking with you. At the same time, updating your listing takes just a few minutes and is only necessary when something has changed within your program.

9. My organization is really large. How can you help me?

We work with organizations of all sizes. As a large CBO, we know that impact is important to you. Claiming your listing allows you to use the reporting tool to access customized data like how often your program has shown up in searches and how many seekers received help from your program. Additionally, you can manage the referrals for all of the programs offered by your organization in one, centralized location.