DCF Aunt Bertha Training -- Facilitator Guide

Overview & How to Use

Thank you for sharing Aunt Bertha with your team. This facilitator guide is meant to provide you with tips and talking points needed to share a basic overview with your users and give you the tools and suggestions, should you be facilitating a larger training. Regardless of the audience size, we suggest doing a live demonstration, either through your branded site. Depending on the modules you select, training can take between 30 minutes to 1 hour.

This guide is meant to be used in conjunction with the associated training slide deck and Tip Sheets.

When this lightbulb icon is on a slide, it indicates that there is a corresponding tip sheet template available.

Outline

This outline below lists the recommended order for training the functionality within the site. We encourage you to reorder the sections, if necessary to better follow your staff workflow.

Table of Contents

Preparation

Regardless of the audience size, we suggest doing a live demonstration through your branded site. Here are a few reminders and tips to prepare for the training!

Share the "Why"

A good start to training it to share the "why" with the users. Sharing the company vision or team's goals and the end users role in achieving those goals help provide staff with context and achieve buy-in on using the product!

Understand Workflow

When facilitating training, be sure to show how the platform fits within their workflow. The actual platform is relatively easy to use. Sharing how to use the platform within their existing workflows will help provide context to using the platform, so it is easier to understand when and how to use it!

Tell a Story

Stories are sticky. Rarely people will remember the specific details of the different features, but they WILL remember the story that you told and that the problem was resolved. We recommend including use cases so that in addition to learning how to use the platform, staff can better understand in which scenarios they should use it. Present the use cases, and then give staff time to find the resources they would use to help these patients.

Example use cases:
- A patient is admitted for a diabetic emergency. They took their insulin on an empty stomach because they are having a hard time paying for food.
- A member calls and shares that they are on a ventilator and they are worried that their electricity may be shut off.

Do a Dry Run

Program results vary by area. Do a dry run of your presentation with your story. That way you can be sure that relevant results will come up in that area to address the needs in the story you're telling. Helpful items to identify during your dry run include:
- What Zip Code will you use?
- What resources categories will you highlight?
- What program card will you use to demonstrate sharing?
  - **Important reminder**: **Do not send referrals during your training**! Those are real organizations on your site, and we do not want those organizations to receive test referrals!
    - **Alternatives**:
      - Find a program that has the teal "NEXT STEPS" connections button. And follow the prompts to "log a referral" . This approach will allow you to demonstrate the information to capture in a referral, without sending a referral to an

organization. It is important to note that this referral will be logged into that person's profile. Which is why it also a good idea to create a test profile

- Create a dummy training program. Please work with your Customer Success Manager (CSM) to set up a dummy training program. It is important to note that even with a dummy program, any referrals made to that program will be logged into a person's profile. Which is why a good idea to create a test profile.
- What test name will you use? (i.e. Creating a test profile)
  - It is a good idea to log a referral to a test person, to demonstrate the functionality, without logging a referral to a real person!
  - Before your training figure out what test name you use!
  - Be sure to also create a dummy email or phone number for that test profile

In-Person Training Tips

- Ideally, participants should have access to a computer during the training session
- Arrive to training room ~30 minutes before to ensure:
  - Projector is working
  - You have access to wifi
  - You have time to pull up your slides
  - You have time to login to https://staff.myfloridamyfamily.com/

Virtual Training Tips

- Log into your virtual sharing platform 15 minutes prior to the start of your meeting
- You have time to pull up your slides
- You have time to login to https://staff.myfloridamyfamily.com/
- Complete a sound check prior to start of the meeting, to ensure participants will be able to hear you
- Mute all lines, or ask participants to mute their phone lines
- If you able, you may want to consider recording your training

Provide Follow-up

Provide staff with follow-up materials so that they can reference it following your training! Reference the Follow-Up Communication section below for sample emails you can use!

Quiz

Quizzes are a great way to engage the users you are training and assess their knowledge of key points for using the platform. There are a few ways to facilitate a quiz during your training:
1. Ask quiz questions verbally throughout your in-person training
2. Use polls throughout virtual trainings
3. Distribute the quiz at the end of the training. If users are completing the quiz while in the training sessions, consider setting aside time to review and discuss the answer together

For example questions to start with, please reference the Quiz section of this guide.

Worker / Staff Training

Welcome & Agenda

Welcome everyone to class, share the agenda and let them know that slides and tip sheets will be provided following the training.

Hello! And welcome to [Customer site title] training!

During today's training I will be providing you with some background on the goals and purpose of [customer site title], how to access it, how to navigate the site and some best practices when using the site. I will provide these slides and other tip sheets, following today's training. Lets get started!

What is the DCF Social Care Platform?

DCF's Social Care Platform is a network of social programs across the United States and an online platform for finding and connecting to these resources. All programs listed are direct services that are free or reduced cost. The DCF Social Care Platform is powered by Aunt Bertha's database and functionality.

Login & Account Management

You will log in to the Aunt Bertha platform to access tools and resources to address the social needs of the families of Florida.

Site Overview

1. http://myfloridamyfamily.com/
   - Audience: Community members
   - Rationale: community support, capture community search data
2. https://staff.myfloridamyfamily.com/
   - Audience: Staff members
   - Rationale: Access to additional tools and features related to team collaboration, access to reports and analytics to help you understand your community needs and your usage.

How do I access the site?

- Internal access points https://staff.myfloridamyfamily.com/
- Single sign on

Why can't I access the site or log in?

- Check for the correct site and credentials

- FYI: If SSO isn't enabled- after 5 incorrect login attempts, your account will be locked for 1 hour for security. To avoid this, reset your password after your 4th attempt.

Tip Sheet Template: How to Log In (SSO)

Search

Aunt Bertha's search begins with a zip code. Location and accessibility are important considerations when finding programs to address seekers' needs.

How can I find programs I need?
- **Example Scenario**
  - Example: A patient in your clinic has complained of headaches, constant fatigue, and stomach cramps. You realize while talking with her that she is a single mom working two jobs. She is trying to stretch her paycheck to feed her three kids, so she's only eating one meal a day.
- **Search by zip code**
  - Programs include national, statewide, county, city and community programs
- **Category vs keyword search**
  - Category: Listings are displayed that are directly mapped to that tag
  - Keyword: Listings are displayed by the best match (exact match to program/provider name or words in description) followed by possible matches (one word in program/provider name or description)
- **Filters**
  - Filters narrow results to display more specific programs
  - *Personal*: dynamic, based on program results, reference the person you're helping, can specify things like "veteran" or "senior"
  - *Program*: static, about the program you're trying to find, can specify open hours, cost, or language
  - *Eligibility*: household and income eligibility

Why can't I find the right programs?
- Check filters and spelling (for keyword searches)
- Try broadening the search (both for keywords/categories and zip code)
- Suggest a program not listed in the database!

Program Cards

Instead of seekers having to navigate many different organizations' websites to find services they need, Aunt Bertha's database lists individual programs. This way, seekers can quickly find direct services.

How can I find information about a program?

- Services are listed in the database as **Program Cards**
- Program cards show a consolidated view of relevant program information including the program name, provider name, tags for types of services provided and to whom, hours/location and more!
- **Next Steps** - how to connect with a program
- **Description -** overview of the program
- **Hours & Location** - nearest three locations and hours of operation
- **My Notes** - leave reviews and notes for yourself or your fellow staff
  - Examples: back office phone numbers, names of internal admin staff, helpful tips for working with the organization
- **Suggest Change** - if program info is incorrect, submit a change here and the Aunt Bertha data team will review the program within two business days.

This is a great opportunity to provide a use case and have staff try searching for programs to address the needs of that hypothetical seeker.

Programs and CBOs

If a program is *claimed*, this means that the organization has taken responsibility for the program on the platform.

What is a claimed program and why does it matter?

- This means that a CBO has taken ownership of their program. They log in, update program information, access tools to manage referrals and capacity, and view reports to track metrics.
- Claimed programs have a checkmark badge next to their name
- More claimed programs = stronger community of help because of increased engagement

How can I claim a program I own?

- Claim Programs link in the footer of the website
  - If you don't own the program but you know who does, you can send this link to them!
- Click **Work here? Claim!** on the program card.

Sharing

Once you find a program that meets your/the seeker's needs, there are a couple ways to share it.

How can I share a program with a seeker?

Remember to reiterate the scenario so your staff understand how this fits into the workflow!

- **Share Programs**
  - Share the program via email or text message
  - Sends a link to the details page for a program
  - Messages come from Aunt Bertha. Your contact information is not shared.
- **Details and Print**
  - Shows program information in a printer-friendly page
- **Translate**
  - How to translate any page on the website
  - How to translate before printing

This is another great opportunity to provide a use case and have staff try searching for programs to address the needs of that hypothetical seeker.

Referrals

Important reminder: **Do not send referrals during your training**! *Those are real organizations on your site, and we do not want those organizations to receive test referrals! An good alternative is to find a program that has the teal "NEXT STEPS" connections button. And follow the prompts to "log a referral" . Alternatively, you can create a dummy training program. If you would like to create a dummy program, please work with your Customer Success Manager. These approach will allow you to demonstrate the information to capture in a referral, without sending a referral to an organization. It is important to note that this referral will be logged into that person's profile.*

When you find a program that meets your/the seeker's needs, you can connect to the program by making a referral. Not only is this a quick and easy way to connect to the program, but you can also use this tool to review and update the status of a seeker's referrals to give a full picture of how they are navigating the social system.

How can I connect someone to a program?

Remember to reiterate the scenario so your staff understand how this fits into the workflow!

- Click **Refer** on a program card and specify if you're filling out the referral for yourself or someone else.
- **Fill out the contact information**
  - Email address OR phone number is required
  - If you've worked with a seeker before, you can pull in their contact info on file instead of typing it out again
  - Confirm consent
- **When you click send,** three steps take place**:**
  1. The person that you are sharing the resource with will receive an email or text with information about the program and next steps
  2. If the agency has an email address on file, they will receive a notification with the contact

information of the person you are referring. Some agencies will also see these inquiries on their referrals dashboard if the program is claimed.

3. The referral will be tracked on your People I'm Helping dashboard

- **Note:** programs are listed on the platform with different next steps based on how the organization prefers to be contacted.
  - The button may say See Next Steps, Schedule, Apply, or others.
  - See all options and their explanation here: [Variations of the Connect button](#).
  - If an organization doesn't accept direct referrals, you can still Log a Referral to track that you shared a resource with a patient without sending a message to the community organization.

People I'm Helping

When you or your staff create referrals for seekers within the platform, you can find them by navigating to the People I'm Helping dashboard.

How can I see which programs a seeker is referred to?

Remember to reiterate the scenario so your staff understand how this fits into the workflow!

- You can search for a seeker by typing their name or scrolling to find them on the list.
- Staff with the same *role* in the Aunt Bertha can share referrals. Otherwise, referrals are only visible for the individual who made them.
  - I.e. CPI's or ESS staff
- When you open the **Seeker Profile**, you can view/edit personal info, review prior assessments, and review/update navigation history.
- The **Navigation History** section of the seeker profile will list all referrals for the seeker.

How can I update the status of a referral for a seeker?

- In the **Navigation History** section of the Seeker Profile, you can update the status of a referral.
  - You, the seeker, or the referred-to organization can update the status of the referral.
  - The organization must be actively participating (claimed their program) on the Aunt Bertha platform to make this update.
- The status update history is also shown to track progress
  - Adding notes to the referral is possible for internal communication
  - These are internal only. The patient and organization will not see the notes.
- You can add an internal note to the Seeker Profile overall (not specific to a referral) to add extra details about the seekers needs or navigation history.

My Notes

You have a lot of knowledge about the programs serving your community - who to contact, backline phone numbers, organizations that tend to run out of funding at the end of the month. You can add that information to the My Notes section and save it for later. Better yet, you and your team can share that information with each other, saving you time and sharing knowledge across the team.

How can I create notes?

- Provide an Example Scenario:
  - Example: You have a great relationship with one of your community partners, and want to add a rating and note for you and your colleagues.
- From the program card, click "My Notes"
- Type in your note
- Save that note as a personal note or share with your team

Who can see the notes if I share them?

- Only you or the people on the team you share with (your **role** in the platform) can see your notes.
- The program itself, and the general public will not be able to see your notes.

Favorites

If you frequently search for the same resources in the same area, prioritize specific resources, or want to compile/share multiple resources at once, you can save your programs to Favorites Folders to reduce the amount of time spent searching.

How can I save my favorite programs?

- Provide an Example Scenario:
  - Example: Your patients frequently need lists of options for skilled nursing facilities in the area. You'd like to compile a list of the most reliable/highest quality facilities in the county and share that list with the patient to help them make a decision about where to go
- From a program card, add a program to an existing folder or create a new one
  - Can select a single program or multiple programs
- Find all folders under My Account > **Saved Favorites**
  - Folders can be shared, edited, and printed from this view.

How can I share resources within a folder?

- Send as an email- recipient will receive an email with links to each program in the folder
- Share with a link- recipient can access all programs in the folder (without being able to edit)
- Share with a group- folder can be shared with other members of your team or department. Group members can see the list of programs and also add/remove programs as needed

This is a great opportunity to utilize another example scenario and have staff create their own favorite folders

Data

The Aunt Bertha data team works hard to continually add new programs as well as keep programs on the database up to date.

How does the data work?

- Data is updated and added in two main ways
- **Aunt Bertha's data process:**
  - *Identify Programs*: we find programs using proprietary software, Suggest a Program by users, and client resource lists
  - *Upload programs*: experts in our platform taxonomy make calls to CBOs and organize data to be easily digestible for seekers
  - *Review programs*: we review programs at least every 6 months
  - *Update programs*: platform users can suggest changes and CBOs can take responsibility of their own program updates.
- **Suggest a Program link**
  - Search for the program first, then submit if it doesn't exist on the database
  - Programs submitted through Suggest a Program will be added within two business days
  - Can send the Aunt Bertha team a spreadsheet of programs if you have >10 programs to submit

Support

There are many resources available to assist you as you navigate the platform.

How can I find more information about using the platform?

- DCF's Training Materials
- Aunt Bertha's Support Page
- Training Videos
- Aunt Bertha Technical Support

Follow-Up Communication

Providing follow-up after a training is an easy way to remind the staff of the key points you addressed during the training! You will find a few follow-up resources below:

Email

Here is an email that you can use to send to staff following a training. Just replace the highlighted text with your site title & link and be sure to use the appropriate language that resonates with staff!

Template:

> Hello!
>
> Thank you for joining today's [DCF Social Care Platform](#) training! It's your one-stop-shop for searching and providing services to the Florida community.
>
> Attached you can find several resources to help you to use and navigate the site:
> - End User Training Slides
> - Several Tip sheets
>
> Don't forget to navigate to https://staff.myfloridamyfamily.com/ and bookmark the page for quick access!
>
> Please feel free to reach out if you have any questions!

Quiz

You may want to consider facilitating a quiz, to help reiterate the key points of the training! Below are a few questions that you can start with!

1. **How do I narrow down programs? (select all that apply)**
   a. Use categories/subcategories options
   b. Utilize filters
   c. Use more general search terms

   Answer: A & B; Browsing for resources using the categories listed along the top or utilizing personal, program or eligibility filters can help narrow down search results.

2. How can I share resources with a seeker? (select all that apply)
   a. Email
   b. Text
   c. Print
   d. Live Referral

Answer: All of the above; You can share resources with seekers in the way that best meets their needs! Please note that Live Referrals are the only way that allow the Helper, Seeker, and CBO to be in the loop about referrals and their outcome

3. Who can update the status of a referral? (select all that apply)
   a. Member/Patient/Seeker
   b. Staff Member/Helper
   c. CBO/service organization

Answer: All of the above; Seekers, helpers and CBOs are able to update the status of a referral and close the loop!

4. Where do I go to see past referrals sent on behalf of a seeker?
   a. My Favorites
   b. People I'm Helping
   c. Printed Resources

Answer: B. People I'm Helping; Access the People I'm Helping dashboard from the top menu to search for people you or your team members have helped. You will be able to review all referrals you or your team members made on behalf of that person in the Navigation History section of their profile.

5. What tool can you use to save a list of programs?
   a. My Notes
   b. Filters
   c. Favorites
   d. Search Box

Answer: C. Favorites; Favorite folders are a great way to quickly access programs you regularly use. You can even share favorite folders with your team, to create a collaborative, well-curated list of the programs.

6. True or False: I can suggest changes, updates or new programs get added to the platform.
   a. True
   b. False

Answer: True; You can suggest specific program changes or updates using the suggest button located on the program card. You can request programs get added to the platform by using the Suggest Program button located at the footer of every page.