

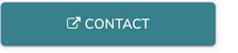
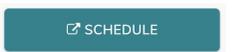
Refer to Programs

How can I refer a Seeker to a service?



When you identify a program that can help, use the teal button on the program card to connect the Seeker to that program.

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

Button	Button	Next Step
	Apply Through Platform	Create a referral for the Seeker and then complete a screener within the platform to collect eligibility information.
	External Apply	A new tab in your browser will open, taking you to the organizations screener on their website.
	External Contact	Contact the organization through an external means.
 	Refer Through Platform	Create a referral for the Seeker. Note, this button will say “refer” for logged in Helpers, and “Contact Here” for Seekers or non-logged in users
	Schedule	A new tab in your browser will open, taking you to the scheduling tool
	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 a Referral	Create a referral for the Seeker for tracking purposes

Making a Referral

1. **Select, “I’m referring someone else”** and your name will default in.

Eligibility Must meet annual household income eligibility.

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

Your Name *

2. If this is your first time creating a referral for this Seeker **enter their first name, last name.**
3. **Enter their email address and/or phone number and communication preference.**

Tell us about the person you're helping:

Someone you've Connected before:

Use contact info on file * x

Or

Connecting someone new:

Their 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

Comment

Confirm Consent * I have verbal consent from the person or their guardian (if under 18) to:
◦ Send their contact info and additional info to this agency, and
◦ Send them info about this program through the Aunt Bertha Enterprise Demo platform (including any responses sent to them by the program).

4. **Add a comment (optional)** You can add a comment to the referral to help streamline communication between you and the program.

Comment This comment is visible to you, your team, the agency, and person you're helping.

5. **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.

Thanks! We sent your referral. x

We emailed your referral to **Bertha Success**. We also sent Sarah their contact information.

What's Next?

1. Sarah should contact the agency directly:
Phone: 512-859-3684
[Print Program Details](#)
2. To track and update the status of this referral go to [Outbound Referrals](#) and choose the folder for Sarah Seeker.

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?

The Seeker

- 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):

- If the connection method is Refer or Apply Thorough Platform, they'll receive 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 (you):

- Has the referral saved so you may log in and review or update it later in your "People I'm Helping" Dashboard