Information Guide

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INTRODUCTION

Through a partnership with Aunt Bertha, Capital Area Food Bank is proud to present the Food Bank Network, a directory where you will be able to quickly and easily connect people with the resources they need in their area.

This document will provide you with an overview of the directory and some of it's key features as well as additional information about site security and information on the Accountable Health Communities grant. For support materials and videos for all of our features, visit our staff support site:

https://auntbertha.zendesk.com/hc/en-us/categories/202547488-Staff-Support-Site.

If you have any questions or need further assistance using the site, please contact **support@auntbertha.com**.

KEY TERMS

- A **seeker** is someone who is in need of services.
- A **navigator** is someone who is working on behalf of the seeker to connect the seeker to services.
- An **agency** is the organization providing the services.
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Q&A FROM THE TRAINING

The training from 4/20 can be found here: https://auntbertha-2.wistia.com/medias/fisq0gowxw

Q: Are we able to track the patient through the lifecycle of referrals?
A: Yes. You can see whether or not your patient was able to receive help. In the future, we will also have reporting for both the navigator and the agency so that they will have data to make better decisions.

Q: Can I be I the navigator and the agency?
A: In some cases, you could be both. If you are an organization that offer services, and also refers clients to other services, you could be both a navigator and the agency.

Agencies can "claim their program" listing and also set up an intake screener. When an agency claims their listing and sets up a screener, they have access to a dashboard they are able to update their program page information and manage the applications that they have received.

If you are a navigator at one of these agencies, you can have the ability to see the applications in addition to your referrals.

Q: Are you working to become more in line with the Accountable Health Communities Grant?
A: Yes, we have a lot of the functionality in place as far as the software platform goes. There are a few additional things that we are adding on to that to satisfy some additional needs. They are fairly minor. Keep reading for the summary.

Q: How can we share referrals with a smaller team, such as our case management team?
A: In the future, CAFB will be able to manage groups. In the meantime, you can reach out to support@auntbertha.com and we can set up your groups for you.

Q: When using this in a healthcare setting, is the site HIIPA compliant?
A: Yes, we have a BAA through Google who is HIIPA compliant. We work with several healthcare organizations. Keep reading for our security summary.

Q: One of the requirements for the CMS grant is to offer screeners. Do you have capacity for 75,000 screeners?
A: Yes, our screening process is built to scale. We are confident we can accommodate all of yours (and others) screening needs without burdening our system.

Q: Where across the country are you also working? And how does ours compare?
A: We're in Austin, TX so we work with many organizations in Texas. We work with Camden Coalition in NJ and Robin Hood Foundation in NYC. CAFB is a great model for how to organize community. You did a lot to promote the search among your employees and the community as well. Usage from your site is extremely high and is a testament to your work and influence in the area. Starting with your search is the best area to get started on. Now, the natural next step is for organizations to claim their account, set up screeners and making and responding to referrals.

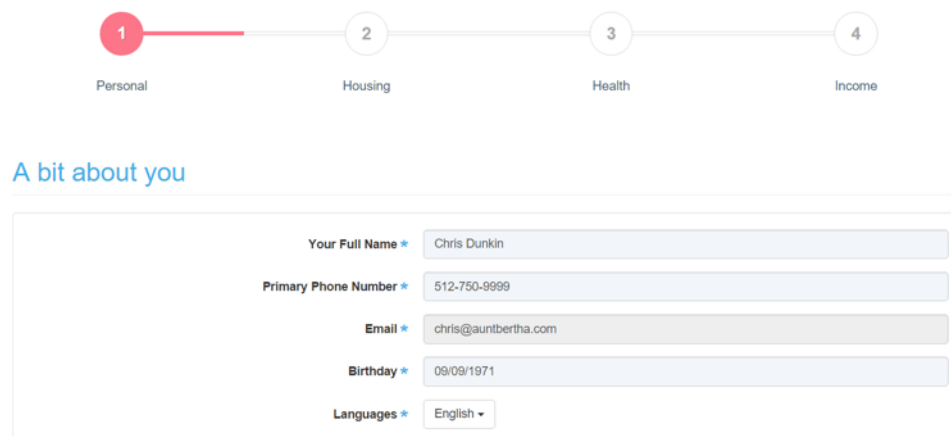# Aunt Bertha Accountable Health Communities Platform

Aunt Bertha has been focused on connecting people in need with social programs that can help them for more than 5 years, and we are excited to be partnering with several AHC Bridge applicants across the country. Our software platform addresses CMS's requirements for a referral platform with a robust database of social programs (Inventory), screening forms, referral tools, and a robust suite of reports.

Inventory

Having accurate, up to date program information is critical to our clients as they engage with people in need, and Aunt Bertha has the most comprehensive social program database in the country. We have proprietary technology that locates information about these programs and a data team of 30 that researches missing information, verifies for quality, and updates changes on a 6 months cycle.

Screening

Aunt Bertha has electronic forms that are configurable and can quickly incorporate any screening questions and associated categories. Bridge Organizations can configure any form to ask follow-up questions based on a Medicare & Medicaid beneficiary's responses. So questions, for example one that includes the number of emergency room visits, can be asked to a beneficiary where this information needs to be gathered (example below).

Figure 1: Example Configurable Forms

Referral

Based on information collected from a beneficiary a community referral summary with recommended agencies is created. Agencies are displayed based on information gathered on the individual (i.e. age, veteran status) identified needs (i.e. housing, food,

transportation), and geographic location. Information is printed and emailed with links to additional resources.

For high-risk beneficiaries that require more intensive community service navigation, Aunt Bertha's Electronic Referrals can be utilized to accurately track referral activity. This allows a navigator to record referrals made on behalf of a beneficiary and outcomes of that referral can be updated by the navigator, the beneficiary, and the agency the beneficiary is being referred to.
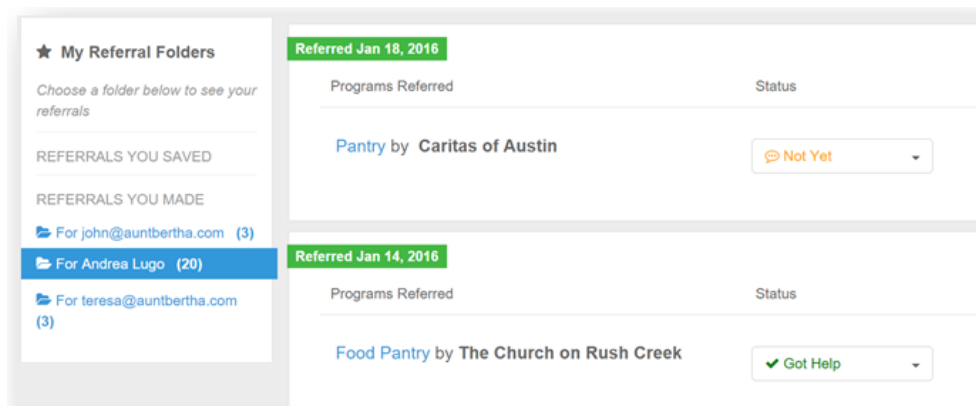

Figure 2: Aunt Bertha's Electronic Referrals Technology

Reporting

Aunt Bertha records all beneficiary, referral, and aggregate social needs information so organizations can report on the success of human service interventions as well as gaps in their community. The Aunt Bertha platform is scalable for any size community and is HIPAA compliant.

Additional Support

Aunt Bertha also provides onsite, web based, and recorded training for your organization and for partners.   Each customer is assigned a Community Outreach specialist that will reach out to local human service agencies so they can claim their accounts and respond to electronic referral submissions.

For More Information Please Visit http://about.auntbertha.com/accountablehealth or email us at sales@auntbertha.com .

Aunt Bertha's data management staff have over a decade of experience working with large data sets and keeping them secure. The team keeps pace with best-practice industry standards to protect data and ensures HIPAA compliance.

Data Storage

Aunt Bertha stores data and software applications using the Google Cloud platform with integrated, independently audited security standards (see **Figure 1**). The Google Cloud platform offers support for Business Associates Agreements (BAAs) to securely handle HIPAA-protected information. Aunt Bertha has signed a BAA and is fully compliant. The platform keeps data distributed across multiple geographic locations in the United States to ensure that no information is lost. Data is also "sandboxed", meaning that software applications and services are isolated from one another.
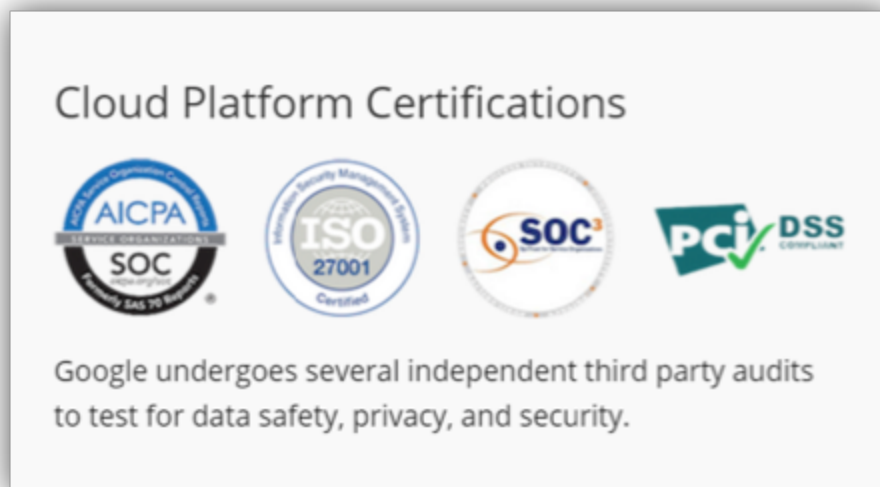
Figure 1: Google Cloud Platform Certifications

Data Transmission

Aunt Bertha uses SSL for transmitting private data (SHA-256 with RSA Encryption), the same high security standard used by online banks and healthcare organizations.

User Roles & Password Policies

Aunt Bertha's software application enforces user roles, and best-practice password policies (including expiration periods and non-standard characters).

Data Access

Aunt Bertha software only allows those authorized within organizations that subscribe to our services to access aggregated data information. Users must sign in and be validated in order to gain access. Aunt Bertha staff who need access to information to carry out data management and reporting must go through HIPAA training materials to understand how to keep personal information secure.

LOGGING IN

Logging in provides you with access to additional features and functionality beyond just search. You will be able to leave notes and reviews about programs in the database as well as save and share listings that you found useful and want to remember.

You will also be able to collaborate with other navigators in the community by viewing their favorited programs and reviewing the notes and reviews they have contributed.

To access the directory and log in, visit cafb.auntbertha.com/

Click "Sign Up," enter your work email address and create a password. Remember to log in each time you use the site. If you need assistance, please contact support@auntbertha.com.
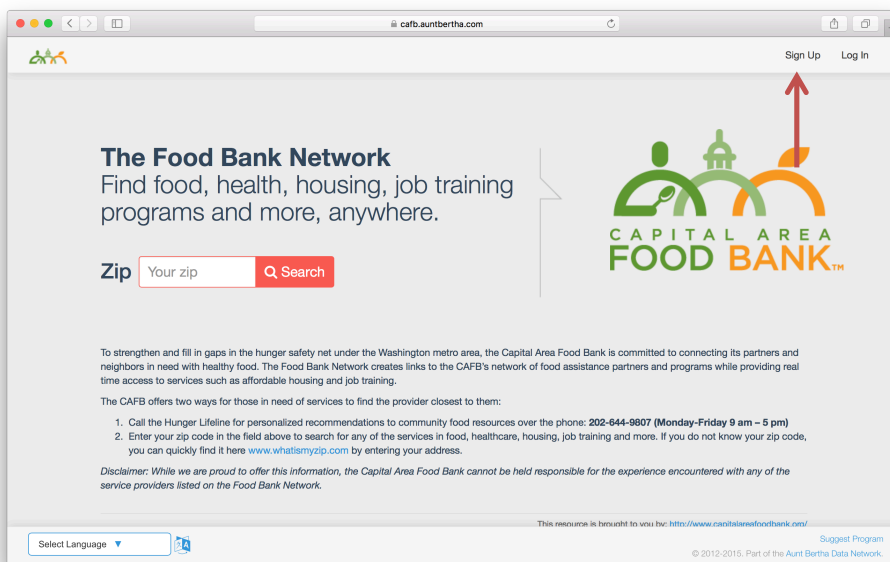
FAVORITE A PROGRAM

Log in and search by Category or Keyword, then follow the steps below. Once you find a program you like, locate the "Add to Favorites" button on the Program Listing

Create a new folder*, or add the program to an existing folder
Example: DC Housing Programs or DC Counseling Programs

To view your Favorite folders, click "My Favorites" at the top of the screen, above the category bar. Select your Favorite folder on the left

Save programs to the Favorites section for easy reference later. Click "Add to Favorites" and create a new folder or pick an existing folder.

SHARING A FAVORITE FOLDER

You can share your Favorite folder with someone outside of your organization by email, or share with a group that you are a part of.

You can create a collaborative folder where anyone can view or add programs for a well curated list of programs from across your network. To do this, select "Share" and "Share with a Group"
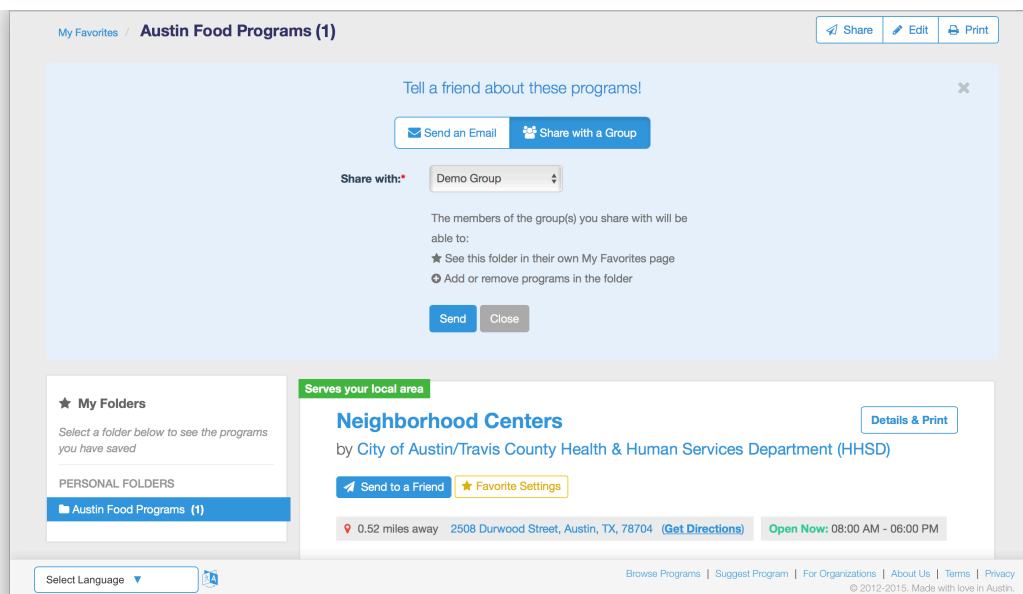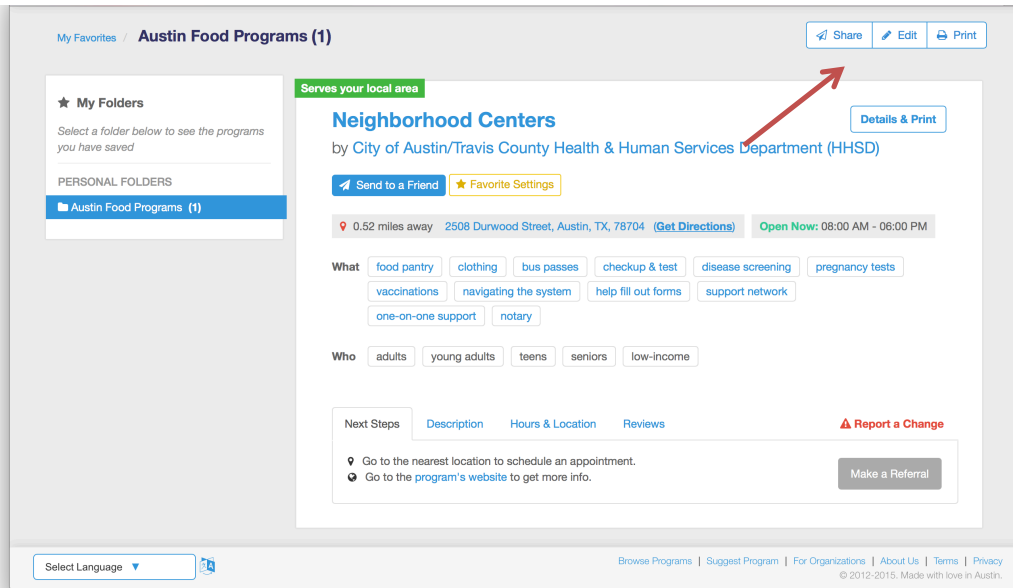
WRITE A REVIEW

To keep notes about programs, use the "Write a Review" 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!

MAKE A REFERRAL

To make a referral, click the "Make a Referral" button. This will put the program in a folder for your customer. You can continue adding more programs or you can go to the referral dashboard.

You can view the referrals you have made under My Referrals on the top, right hand navigation.

Aunt BERTHA.com

Once you select a folder, you will be given the option to make the referral:

An email will be sent to your seeker from Aunt Bertha with information about the program. They can also create an account and log in and see all of the programs to which they have been referred.

An email will also be sent to the agency asking them to contact the seeker with their intake information. If the agency already has a screener set up, the seeker can enter their information and begin the intake process with the agency.
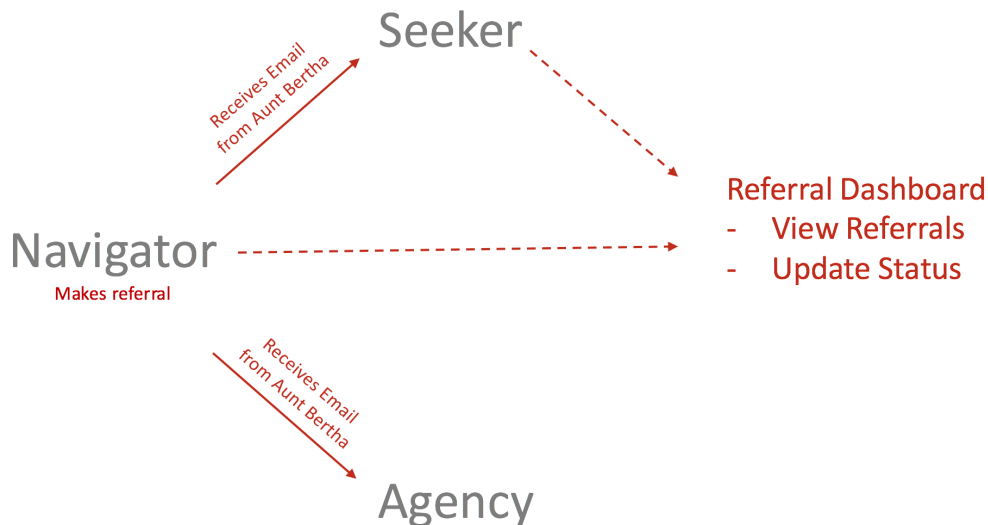
UPDATE REFERRAL STATUS

Once you select a folder, you also can update the status of your referrals.

If the seeker creates an account, they can log in and see all of the programs to which they have been referred. From their seeker dashboard, they can update the status of their referrals

REFERRALS – WHERE WE'RE GOING

Navigator

We are developing more robust reporting for navigators so that they can see how many referrals were made, to what types of programs and how many of those referrals were able to be converted into help for the seeker.

Agency

We are developing a dashboard for the agency. In the future, when a seeker is referred to an agency, in addition receiving information through the screener form, the agency will also be able to update the status of the referral. We will also provide the agency with basic reporting on their referral conversion rate
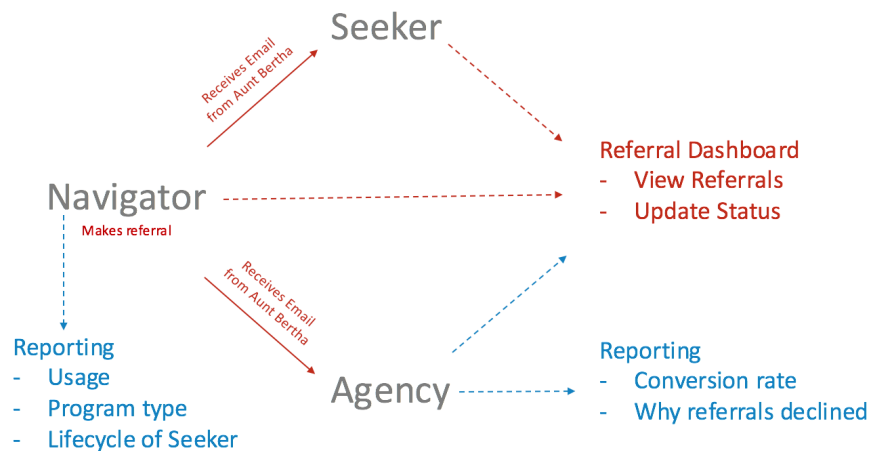
SHARE A PROGRAM VIA TEXT MESSAGE

To share a program with someone via text message, use the "Send to a Friend" button and select "Send a Text". The recipient will receive a text with a link to the program. However, you will not be able to track this action.
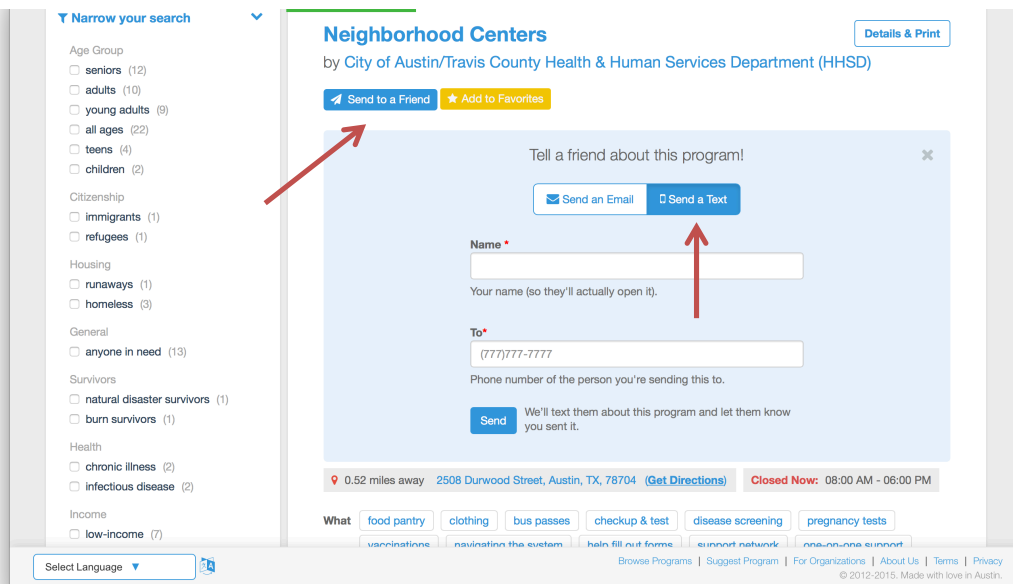

CLAIMING YOUR PROGRAM

Claim your free program listing and put Aunt Bertha to work for your community.

Aunt Bertha's program listings help people and families in need find the right services in the right places in seconds.

- Add and update your program listing details
- Provide real-time updates for program availability
- Improve search relevance by refining search tags
- Create a screener to streamline your intake process

To claim your listing, visit **auntbertha.com/claim**.
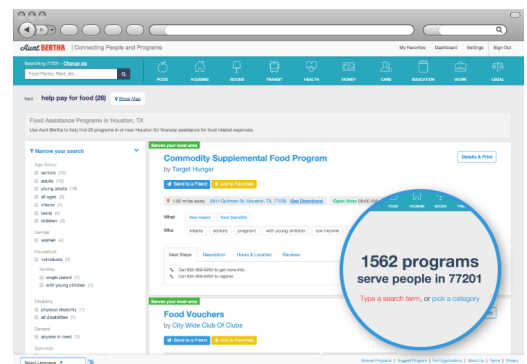
SET UP A FREE SCREENING FORM

Get the right information to the right person, to help someone sooner.

Set up a free screener on Aunt Bertha with the questions you need answered to jump start your intake process.

With Aunt Bertha it's easy to:

- **Customize your form**

  Choose the questions you need answered to start your intake process

- **Assign the right person on your team**

  They'll get notified when someone submits a new inquiry

- **Easily respond and update status**

  We'll track the history of your interaction with each seeker

To set up your screener or get more information, contact us here:
http://about.auntbertha.com/screeners
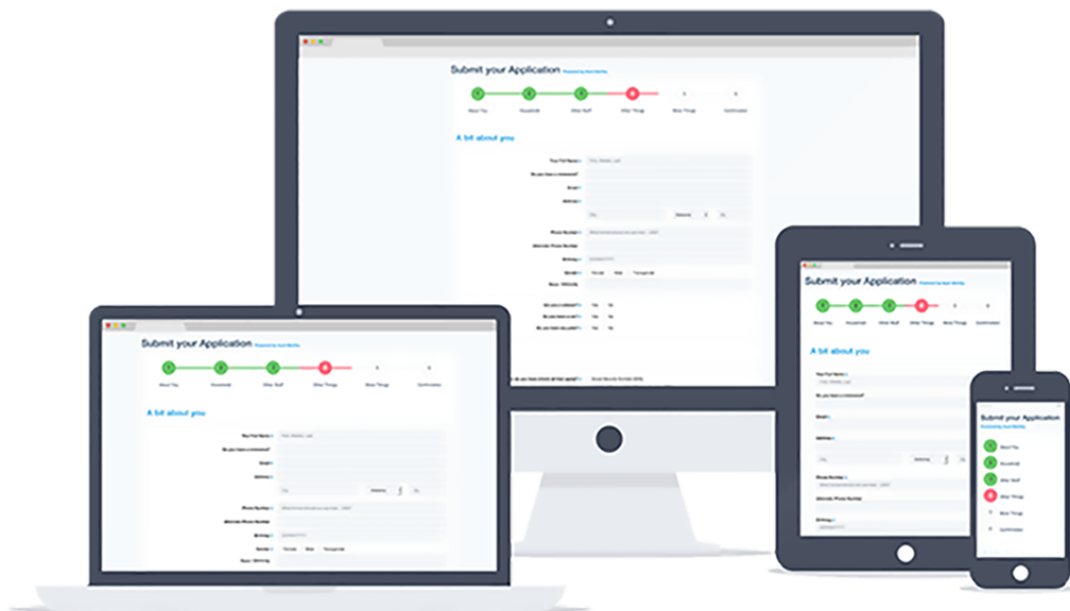
OUR DATA

What kinds of programs do you list?
Aunt Bertha is a social services search engine. The programs that we list are all direct services that are offered at a free or reduced
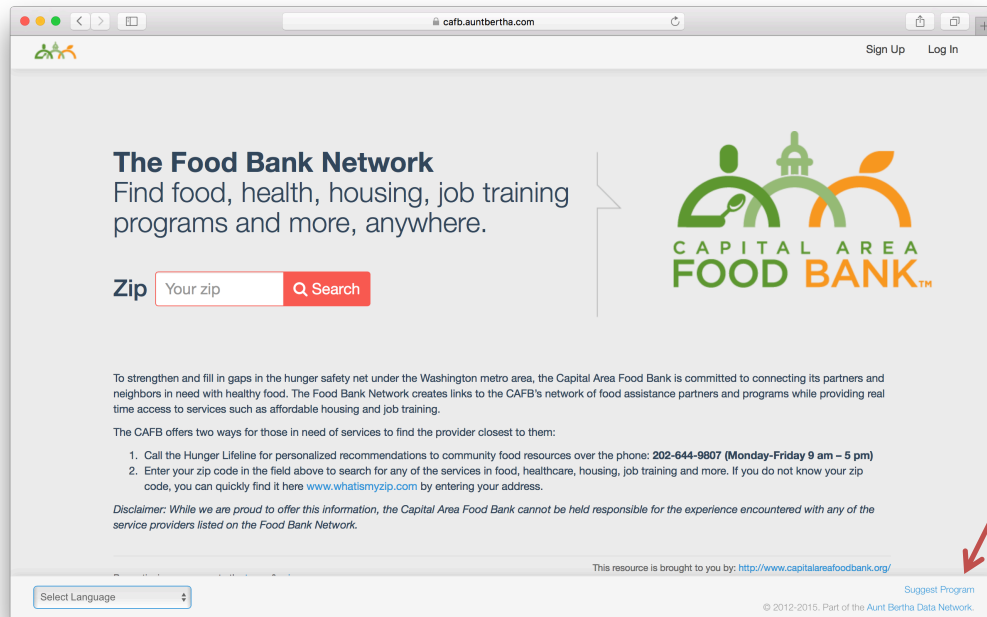cost.

Where do you find your programs?

• We are a technology company. We use proprietary technology to gather the programs. Then our data team goes through each listing, validates that the program meets our requirements, verifies the information is correct and uploads it to the site.
• People can suggest programs to be added to the database. We have a 48-hour response time

How often are programs updated?

• Every program is validated every 6 months
• Organizations can claim their programs and update the information in real time
• If something is incorrect, you can report a change and we will verify and update the information. We have a 48-hour response time.

SUGGEST A PROGRAM

If you know of a program that you don't see in the search, you can notify us by visiting the "Add a Program" link at the bottom of every page. Once our data team verifies the information, they will add the program within 2 business days.