



aunt
bertha

Claiming Your Program

Get access to your programs!

- › Go to www.auntbertha.com/claims.
- › Enter the name of your program or organization, then click “Search.”
- › Select the program(s) you’d like to claim and click the “Claim” button.
- › Create an account by entering your name, work email, and password.

My Program Tools

Once you’re logged into your Aunt Bertha account, navigate to the top right corner and locate “My Program Tools.”

This menu is your central navigation. You have access to all your tools, reporting, and editing capabilities from here!



Program Analytics

- › **Screener Dashboard:** Review reporting on screening form. (This must be enabled before use.)
- › **My Activity Dashboard:** See an overview of your search activity.
- › **Claimed Program Dashboard:** Find search trends and inbound referral statistics on your claimed programs.

Free Tools for Community Organizations

Suggest a Program

Not seeing your program?

- › Go to www.auntbertha.com/find_a_program.
- › Search and verify your program isn’t listed.
- › Fill out the section titled “Review the program you searched for.”
- › Click the “Suggest a Program” button at the bottom of your screen.

You should hear from us within two business days!



Inbound Referrals

- › Go to “My Program Tools” > “Inbound Referrals.”
- › Click the folder of the program with a new referral.
- › View the details of the person reaching out.
- › Update the status of each referral. (This translates to your program analytics.)
- › **Have you claimed your programs on Aunt Bertha?** www.auntbertha.com/claims



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Edit Your Program Listings

In “Edit Contact Settings,” you can make changes and updates to programs; hours and locations; and contact information.

Make sure there is an email address in the second box labeled “What address should we send their info to?” This email address only gets notifications from Aunt Bertha letting your program know someone has reached out. It is NOT visible in public search.

Screening Form

Go to “Edit Program Listings.”

- › Click “Edit Contact Settings”
- › Select “Customized Screening Form” button.

You’ll be able to create and customize your screening form, with over 80 standard questions available to help you get started!

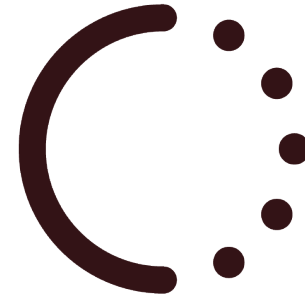


My Teams

Give members of your organization access to edit programs, see analytics, and benefit from all other claimed provider resources without having to go through the process of claiming the program(s).

To add a team member, click the “Invite Team Member” button in the top right.

- › **Admins** can gain full access to view and edit details associated with your programs.
- › **Workers** will have the same access as above, but cannot add additional team members.



Scheduler

Go to “Edit Program Listings.”

- › Click “Edit Contact Settings” for the program you wish to update.
- › Select “Intake Scheduler”

An Aunt Bertha team member will help you configure this tool.

- › Set custom availability for individual team members.
- › People in need can book appointments directly from Aunt Bertha.
- › The Scheduler includes Google Calendar and Outlook integrations.

Need Help?

If you can’t find what you’re looking for, or need additional step-by-step instructions, you have access directly from your Aunt Bertha account!

In the top right corner, select “Support” and navigate to “Support for Community Based Organizations” to find additional articles and videos.

- › **Have you claimed your programs on Aunt Bertha?** www.auntbertha.com/claims