



**HEALTH FEDERATION  
OF PHILADELPHIA**

The keystone of community health since 1983



# Enabling & Supporting SDoH Screening & Referral Processes Using Aunt Bertha

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# Background

Funded By:



Our white label version of Aunt Bertha:  
**Connect4Health**



LOOKING FOR FREE OR LOW COST SERVICES OR PROGRAMS IN  
AND AROUND PHILADELPHIA?

The advertisement features a photograph of a smiling family—a man, a woman, and a young boy—looking out a window. The text is overlaid on the top half of the image.



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# Platform Overview

A patient profile is created

Couch referrals within associated goals

Run reports to quantify SDoH work



Assessment

Goal Creation

Resource Search

Referral

Closing the Loop

Assess patient needs to determine SDoH areas of focus

Based on assessment results, goals can be added or generated around identified domains of need.

Use the Aunt Bertha resource database to find local, suitable programs

Using the program's preferred referral method, submit a referral and/or "log" the referral action

Update the status of the referral or see updates from the patient/recipient org.

**Customization:**

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**Customization:**

Use the standard PRAPARE or HRSN tools

Create custom goal categories to align with your SDoH focus areas

Create favorites folders to highlight trusted resources within each domain of need

N/A

N/A

**OR**  
Create a custom screener

# Current Partners

1. New Kensington Community Development Corporation (NKCDC)
  2. Delaware Valley Community Health (DVCH)
  3. Philadelphia Department of Public Health (PDPH) - various departments
  4. Family Practice and Counseling Network (FPCN)
  5. Mental Health Partnerships
  6. Education Plus Health
  7. Esperanza Health Center
  8. St. Christopher's Hospital for Children
  9. Spectrum Health Services
-

# Our Setup Process



Demo

- Discuss what is possible through the platform
- Involves key players within the team



Workflow

- Understanding the existing workflow
- How will C4H complement/replace existing process
- Test before committing (optional)



Training

- Assess training needs
- Provide training to users
- Schedule periodic refreshers



Adjust

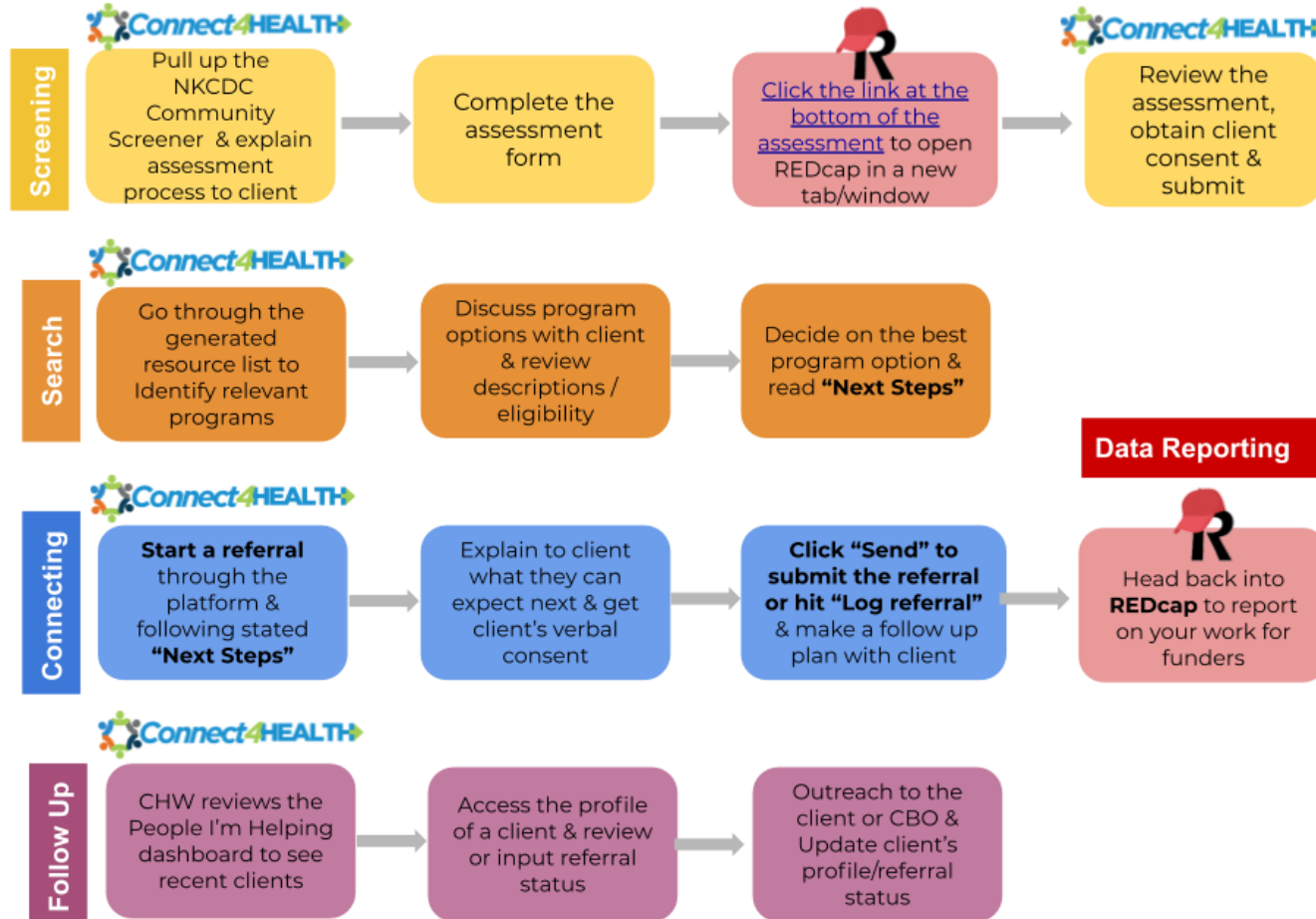
- Refining processes
- Addressing unmet needs
- Integrating new platform capabilities



Ongoing Support

- Check-ins
- User Groups
- Product Updates & Feedback Opportunities

# Example Final Workflow



# Utilization

In the past year...

**10x**

Increase in claimed  
programs

**11,000+**

Searches

**4,986**

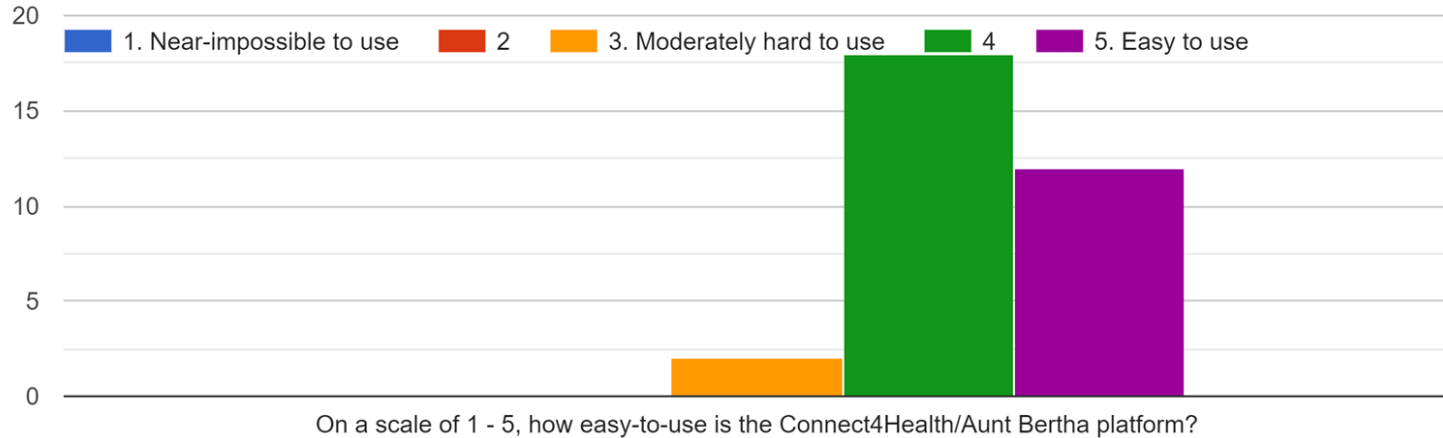
distinct users

|  
**3,800** anonymous users

# Utilization

## End-User Survey Results

On a scale of 1 - 5, how easy-to-use is the Connect4Health platform?



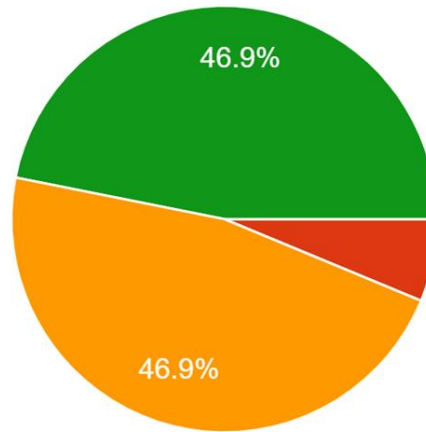


# Utilization

## End-User Survey Results

How efficient do you find the Connect4Health Platform?

32 responses



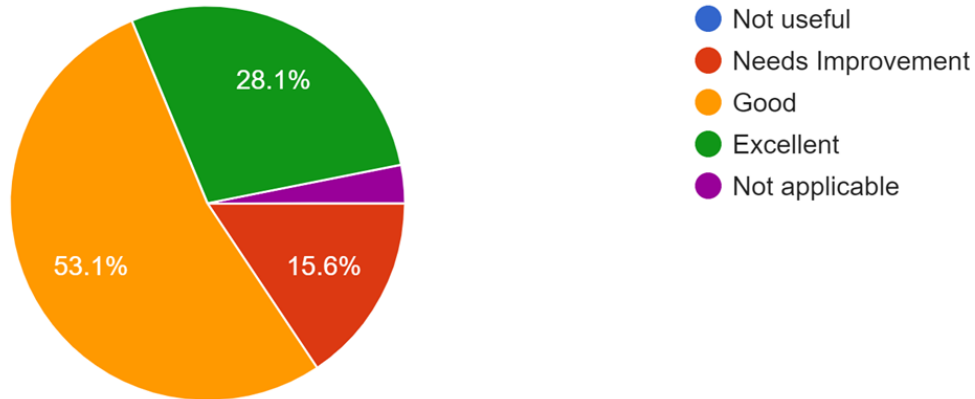
- Inefficient
- Somewhat inefficient
- Somewhat efficient
- Efficient

# Utilization

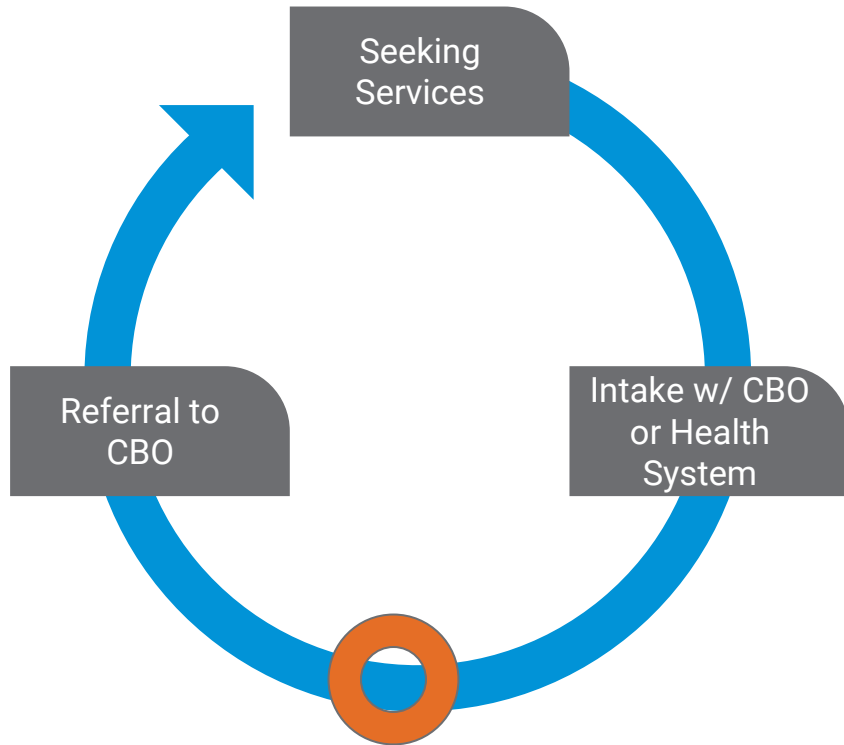
## End-User Survey Results

Overall, how successful is the Connect4Health platform in helping you connect your seekers to social services?

32 responses



# CBO Engagement



- ❖ Increasing CBO engagement on platform ensures robust and accurate resources and the completion of “closed loop” referrals

Since CBO outreach began...

- ❖ ID and outreach to 124 CBOs
- ❖ 37% response rate
- ❖ Approx. 30 “workflow ID” conversations

# CBO Engagement

## Prioritize Outreach

- ❖ 3-Tiered structure
  - Tier 1 - partner organizations
  - Tier 2 - partner organization networks
  - Tier 3 - support other's outreach

## Organization Workflow ID

- ❖ Introductory conversations with CBOs helped to identify specific needs and how the platform fits within their existing model

## Technical Assistance

- ❖ Support the ongoing needs, workflow development, addition of new programs, and staffing changes across time

# Lessons Learned

- ▶ Aunt Bertha-based SDoH **workflows can be customized** for each program/health center & benefit from some lead time & planning
- ▶ Workflows that **require** platform use & build it into supervision & reporting structures have greatest potential for success
- ▶ Staff/users may benefit from practical step-by-step training opportunities, which **explicitly** place Aunt Bertha within the larger workflow
- ▶ **CBO engagement is critical** to the success of the platform and requires targeted, multi-pronged outreach & often individualized CBO support

# Lessons Learned - 2

- ▶ **Targeted conversations with CBOs** can improve platform-based closed loop referral processes, but communication external to the platform is still necessary
- ▶ **Search optimization** efforts are crucial for achieving sustained staff use
- ▶ The existing **analytics suite may not be flexible enough** to address the full range of reporting/data needs
- ▶ Our model is still somewhat uncommon - Advocating for our needs takes time
- ▶ Platform is in “**early adopter**” phase of usage - positive feedback is promising as idealized outcomes requires engagement and time