

CBO ONE DEGREE CLOSED-LOOP REFERRAL TRAINING

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AGENDA

Introduction

- What is One Degree?
- Why Are We Using One Degree?
- Your Clinic Partners
- Admin vs. Staff Permissions

Core Training Elements

- How to Set Up a One Degree Account and Affiliate with Your Organization
- Organizational One Degree Features
- How to Process Incoming Referrals
- How to Update Referral Status
- How to Use Messaging Features
- HIPAA Compliance
- How to Get Help with One Degree

Conclusion

- Q&A

WHAT IS ONE DEGREE?



One Degree is a website designed to link users with services provided by the community.



Services commonly sought out by users include:

- Food Pantries
- Housing Assistance
- After-School Programs
- Financial Assistance



Clinics will use One Degree to refer patients directly into such Community-Based Organizations (CBOs).



Clinic users can check the status of each referral from submission to utilization, thus **CLOSING THE LOOP.**

WHY ARE WE USING ONE DEGREE?

PROBLEM	Clinics and CBOs are not aware of each other	Multiple and inefficient referral pathways (calls, emails, faxes, etc.)	Clinics are not able to receive feedback on whether or not a referral was received or utilized
SOLUTION	ACEs-LA Network of Care community navigators (CN team) work with DHS clinics to identify community-based organizations (CBOs) that offer services to refer patients to; CN team vetted CBOs that are now in each clinic's One Degree collection.	Using One Degree streamlines the referral process between clinics and vetted CBOs.	The closed-loop referral (CLR) feature in One Degree allows clinics and CBOs to communicate with each other regarding the status of referrals.

YOUR CLINIC PARTNERS

DHS Clinic Profile – Harbor UCLA, Pediatrics



- Clinic Name: [Harbor UCLA-Pediatrics](#)
- Location: SPA8 (South Bay)
- Clinic staff: 11 MDs, 30 Resident MD/DOs, 5 NPs, 1 RN, 5 LVN/CMAAs, 2 Clerks, 1 Social Worker and 1 Child Psychologist
- **# Referrals to different CBOs: 50-100 per week**
- Most common service referrals:
 - Mental Health
 - Housing
 - Legal Needs
 - Employment resources
 - Food Insecurity
 - Parenting Support
 - Financial Assistance
 - Education Support
 - Childcare

DHS Clinic Profile – Harbor Lomita Clinic, Family Medicine



- Clinic Name: Harbor Lomita Clinic-Family Medicine
- Location: SPA8 (South Bay)
- Clinic staff:
- **# Referrals to CBOs: ~20 per week**
- Most common services referrals:
 - Food Insecurity
 - Housing
 - Homelessness Services
 - Trauma
 - Mental Health
 - Legal
 - Substance use/abuse
 - Teen services
 - Childcare
 - Educational support
 - Financial Assistance

DHS Clinic Profile – High Desert Regional Health Center, Pediatrics



- Clinic Name: High Desert Regional Health Center - Pediatrics
- Location: SPA1 (Antelope Valley)
- Clinic staff: 8 MD/DOs, 3 NPs, 3 RNs, 1 LVN(s), 3 CMAs, 1 Clerk, 1 Supervising Clinic Nurse
- # **Referrals to CBOs: 5 – 7 per week**
- Most common services referrals:
 - Mental Health
 - Parenting Support
 - Domestic Violence Intervention
 - Food Insecurity
 - WIC and lactation support
 - Education Support
 - Legal Needs
 - Applied Behavioral Analysis
 - Dental
 - Housing
 - Employment Services

DHS Clinic Profile – Olive View Medical Center, Pediatrics



- Clinic Name: Olive View Medical Center-Pediatrics
- Location: SPA2 (San Fernando)
- Clinic staff: 16 MD/DOs, 2 NPs, 1 RN, 2 LVN(s), 2 CMAs, 1 Supervising Clinic Nurse
- **# Referrals to different CBOs: 20 per week**
- Most common services referrals:
 - Mental Health
 - Legal Needs
 - Childcare
 - Transportation
 - Parenting Support
 - Financial Assistance
 - Community Activities
 - Food Insecurity
 - Employment resources
 - Nutrition
 - Social services

DHS Clinic Profile – H. H. Humphrey CHC, Pediatrics



- Clinic Name: H.H. Humphrey CHC-Pediatrics
- Location: SPA4 (Metro)
- Clinic staff: 5 MDs, 2 LVNs, 4 CMAs, 1 Social Worker Supervisor, 2 Medical Case Workers
- **# Referrals to CBOs: x per week**
- Most common services referrals:
 - Mental Health
 - Housing
 - Legal Needs
 - Transportation
 - Food Insecurity
 - Employment resources
 - Nutrition
 - Social services
 - Immigration Services
 - Educational Support
 - Domestic Violence
 - Dental

DHS Clinic Profile – H. C. Hudson, Pediatrics



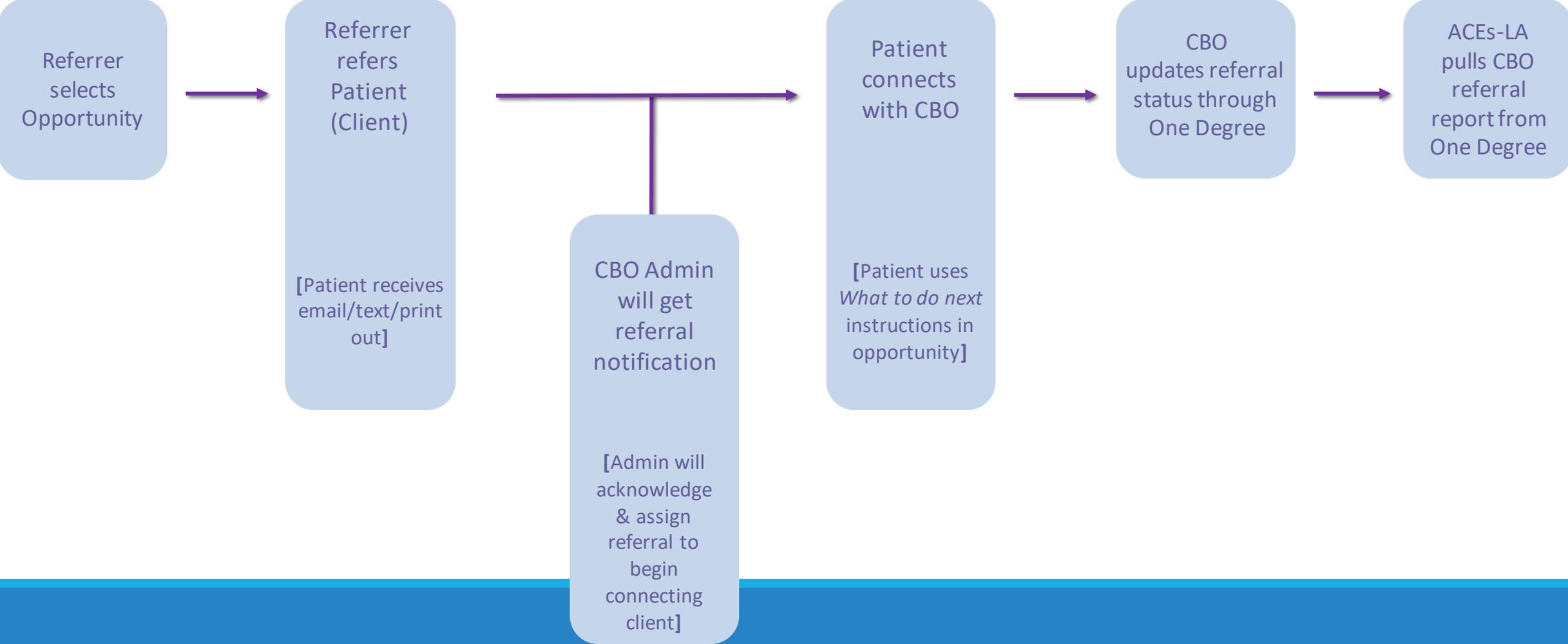
- Clinic Name: [C. Hudson-Pediatrics](#)
- Location: SPA4 (Metro)
- Clinic staff: 10 MDs, 2 RNs, 2 LVNs, 2 CMAs
- **# Referrals from Peds to CBOs: ~23 per week**
- **# Referrals from Family Med. to CBOs: ~20 per week**
- Most common services referrals:
 - Mental Health
 - Developmental delays
 - Housing
 - Employment
 - Education
 - Legal
 - Food Assistance
 - Immigrant Services
 - Parenting Support
 - DV/IPV
 - Trauma

DHS Clinic Profile – East San Gabriel Valley, HUB



- Clinic Name: East San Gabriel Valley-HUB
- Location: SPA3 (San Gabriel)
- Clinic staff: 3 MDs, 2 NPs, 1 Part-time NP, 1 Out stationed PHN, 2 RNs, 1 LVN, 2 Clerks, 2 MCWs, and 1 CSW
- **# Referrals to different CBOs: 20-25 per week**
- Most common services referrals:
 - Mental Health
 - Legal Need
 - Education Support

ONE DEGREE REFERRAL WORKFLOW



KEEPING YOUR ONE DEGREE PAGE UPDATED

One Degree organization and opportunity pages updated every 3 months and/or as needed

- Eligibility
- Capacity
- Opportunities etc.

Contact

[View website](#)



ACES-LA
Los Angeles, CA 90012

[Get directions](#)
2.1 miles away

ACES-LA
Los Angeles, CA Verified Information

[Refer](#) [Bookmark](#)

[ACES-LA Network](#)

ACES-LA is a collaboration of organizations, including the Los Angeles County Department of Health Services, who are committed to building community partnerships to address Adverse Childhood Experiences (ACEs).

Opportunities [+ Add opportunity](#)

Find activities to build connections with your family	Refer Bookmark
Get primary care services for children	Refer Bookmark
Get behavioral health services for children and parents (SHARK)	Refer Bookmark

HOW TO SET UP A ONE DEGREE ACCOUNT AND AFFILIATE WITH YOUR ORGANIZATION

ADMIN VS. STAFF PERMISSIONS

ADMIN

- Acknowledge referrals.
- Delegate referrals to staff.
- Edit organization page.
- Manage staff list.
- View and pull reports.

STAFF

- Update referral status.
- Edit organization page.
- Edit collections.

CBO ONE DEGREE PAGE FEATURES

DASHBOARD

RECENTLY UPDATED
REFERRALS PANEL

LEFT MENU ITEMS

PUBLIC-FACING
PAGE WITH CBO
INFORMATION AND
OPPORTUNITIES

COMPONENTS OF
INDIVIDUAL
OPPORTUNITIES
PAGE

STAFF LIST

ONE DEGREE DASHBOARD

one degree Menu Browse Resources Find Search for resources Near Los Angeles, CA, USA Search Español My account

Hello Nicolette

You are an Admin member affiliated with Heart of Los Angeles (HOLA).

ACES-LA Network member

Dashboard Browse Resources

+ Create referral

Search by Client or Referral ID Search

Heart of Los Angeles (HOLA)

My clients & referrals

Edit organization

Staff

All clients Entire organization

All referrals Entire organization

Reports

Recently Updated Referrals Incoming Outgoing

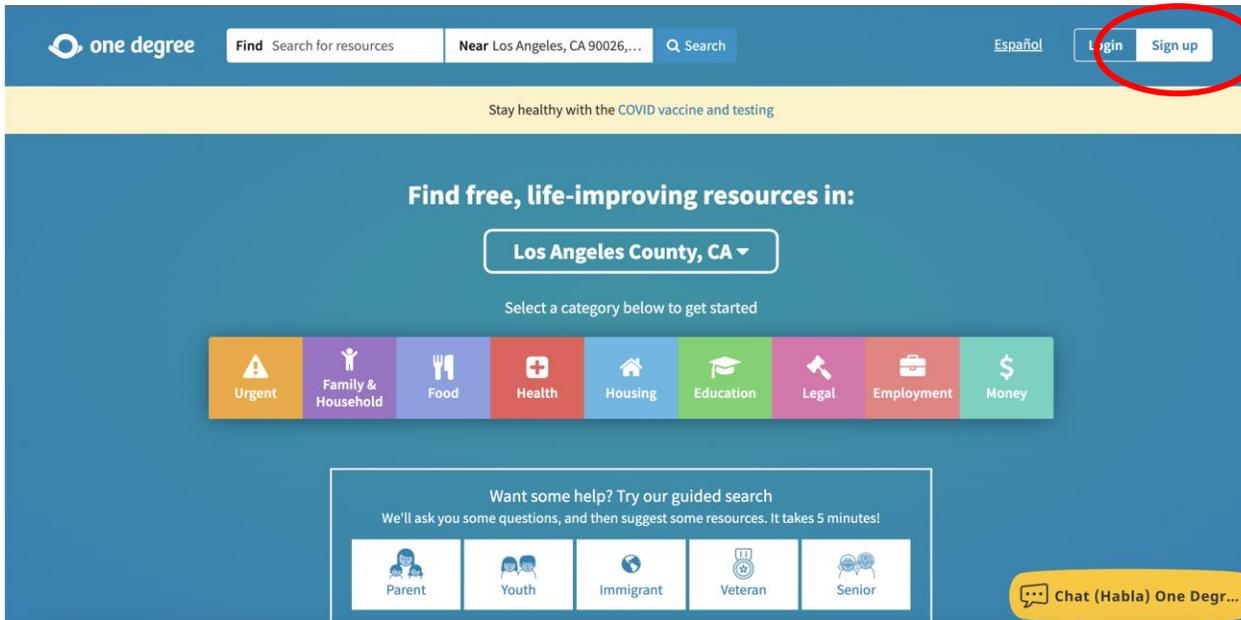
Referral ID	Client	Opportunity	Referring Organization	Last updated	Status
708	Marin, Tanya	Attend English as a Second Language (ESL) classes		Feb 28, 2022	Assigned

See all my referrals

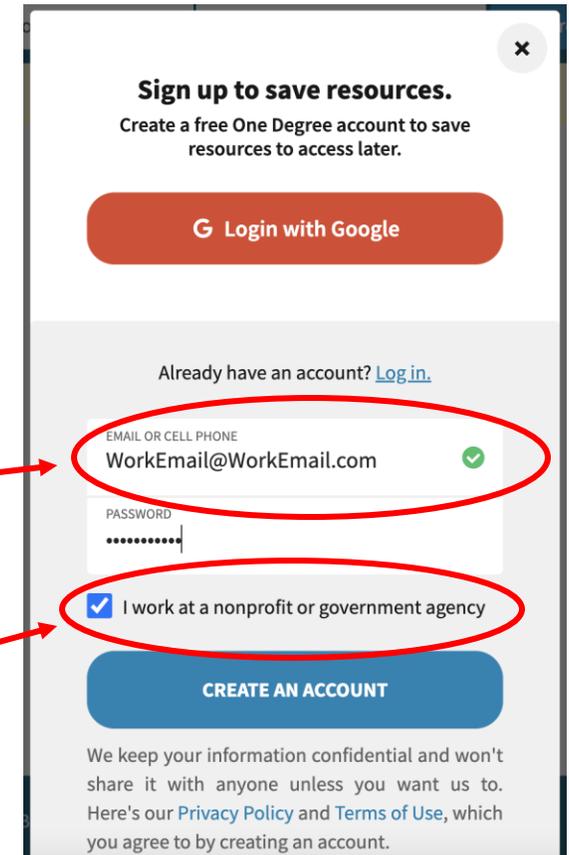
Left Menu Items contain:

- Organization page
- Staff list

Signing up for One Degree



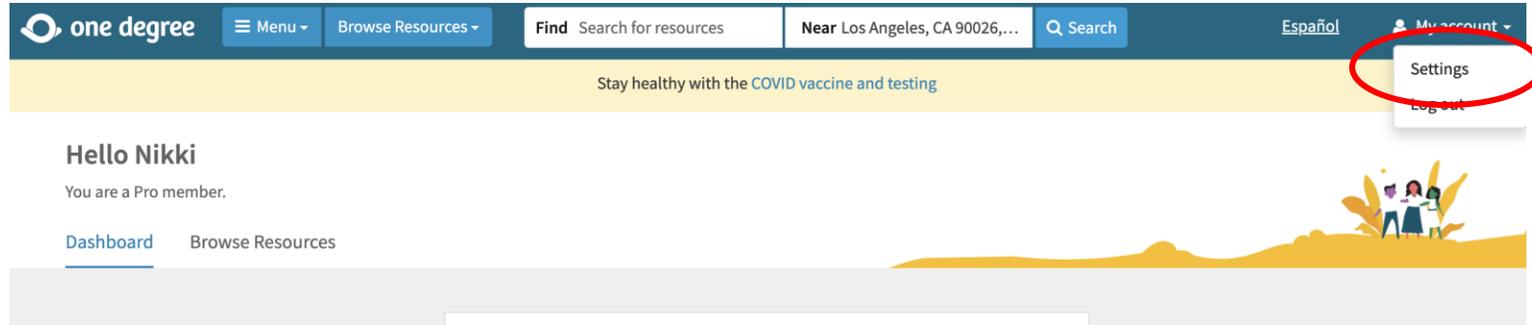
Go to 1Degree.org and click on 'Sign Up'



When signing up make sure to use you're work email

Make sure to click the 'I work at a nonprofit or government agency' box.

AFFILIATING WITH YOUR ORGANIZATION



Once you've logged in, you go to my account and click on 'Settings'

A screenshot of the "Settings" page in the One Degree application. The "Basics" tab is selected. The form contains fields for "FIRST NAME" (Juana), "LAST NAME" (Doe), "EMAIL" (jdoe@WorkEmail.com), "Cell phone", and "ADDRESS, CITY, OR ZIP" (Los Angeles, CA 90026, USA). On the right side, there are sections for "LANGUAGE" (English selected), "BIRTHDAY" (Day, Month, Year dropdowns), and "GENDER" (Male, Female, Let me specify). At the bottom, the "PRO MEMBERSHIP" section has a checkbox labeled "I work at a nonprofit or government agency" which is checked and circled in red.

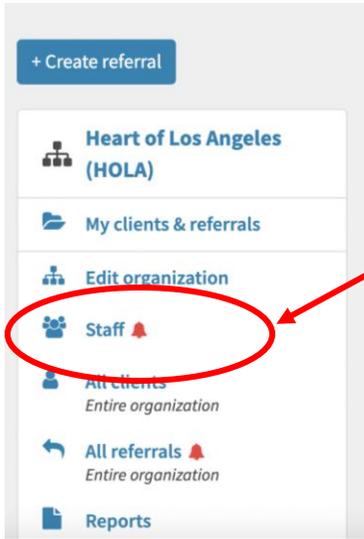
Make sure that your basic info is filled out & that the PRO MEMBERSHIP box is checked.

A screenshot of the "Connect Organization" page. The "Connect Organization" tab is selected and circled in red. The page title is "Connect your organization to get started:". Below the title, there is a text box for "ORGANIZATION" containing "Heart of Los Angeles (HOLA)" and a text box for "POSITION" containing "intake staff". At the bottom, there is a blue "CONNECT" button.

Click on 'Connect Organization'. Type in the name of your organization and your position there.

Once you're done filling in the information, click 'Connect'

ADMIN ACCEPTING STAFF AFFILIATIONS



Find the 'Staff' icon on the left side of the dashboard

The screenshot shows the 'Staff' page with a table of staff members. The 'Pending Requests (2)' tab is circled in red. The table has columns for Name, Title, Email, and Permissions.

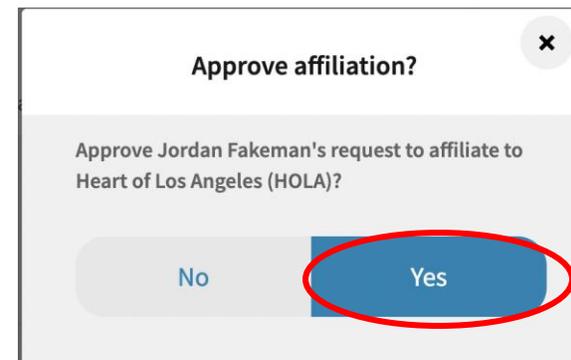
Name	Title	Email	Permissions
Alan Watts	Social Worker	j+ryanparsons@gmail.com	Member
Anna Gorman (CBO Admin)	Exec director	AGorman+cbo-admin@dhs.lacounty.gov	Admin
Anna Gorman (CBO Staff)	Director	AGorman+cbo-staff@dhs.lacounty.gov	Member

Click on 'Pending Requests'

Click on 'Requesting Affiliation'

The screenshot shows a table of pending requests. The 'Requesting affiliation' status is circled in red. The table has columns for Email and Status.

Email	Status
dsalter@alluma.org	Requesting affiliation
fakeemail@fakedomain.gov	Requesting affiliation



Click 'Yes' and they will then become affiliated and have access to referrals



HOW TO PROCESS & UPDATE INCOMING REFERRALS

PROCESSING AN INCOMING REFERRALS

On the left side of your dashboard, make sure to click 'My clients & referrals'

Heart of Los Angeles (HOLA)

My clients & referrals

Edit organization

My Collections + New

Create sets of resources with Collections

Use the + button on the top-right corner to create a new collection and use the Save button on an opportunity page to add a resource to your collection.

See all My Collections >

Recently Updated Referrals

Incoming Outgoing

Referral ID	Client	Opportunity	Referring Organization	Last updated	Status
722	Gold, Joe	Join a counseling program for children and teens		Feb 28, 2022	Assigned
721	Smith, Jane	Join a parent resource center		Feb 28, 2022	Assigned
710	doe, john	Attend visual and performing art classes for children and teens		Feb 28, 2022	Assigned
705	Hernandez, Nani	Join a counseling program for children and teens		Feb 28, 2022	In Progress

See all my referrals >

From here you can see a quick breakdown of all the referrals assigned to you.

You want to click on your clients 'Referral ID'

Incoming (4)				Outgoing		
Referral ID	Client	Opportunity	Referring organization	Last updated	Status	Notes
710	doe, john	Attend visual and performing art classes for children and teens	Littlerock Community Clinic	Feb 28, 2022	Assigned	
721	Smith, Jane	Join a parent resource center	Littlerock Community Clinic	Feb 28, 2022	Assigned	Hi, pls reach out to parent.
722	Gold, Joe	Join a counseling program for children and teens	Littlerock Community Clinic	Feb 28, 2022	Assigned	Pt will be contacting you in 2-3 days.
705	Hernandez, Nani	Join a counseling program for children and teens	Heart of Los Angeles (HOLA)	Feb 28, 2022	In Progress	Will be contacting Nani in the coming days

ONE DEGREE TIP SHEET

Status Options in One Degree Closed-Loop referrals.

Status option	Dropdown or Automatic	When to use
Acknowledged	Automatic <i>Status changes to acknowledged once acknowledged button is clicked</i>	Referral has been acknowledged. ACEs-LA recommends responding within one business day or receipt.
Assigned	Automatic <i>Status changes to Assigned once the CBO admin assigns the referral to a staff member</i>	Referral has been assigned to a provider.
In Progress	Dropdown	CBO in process of establishing contact with client, reviewing eligibility and capacity. ACE's-LA encourages continued communication with DHS referrer if possible.
Not Eligible	Dropdown	CBO determines client does not fit eligibility criteria
Not Utilized	Dropdown	CBO is unable to reach client after multiple attempts.
Utilized	Dropdown	Client <u>is able to</u> receive services from CBO.

*REMINDER: Please do not use One Degree to transmit Protected Health Information (PHI)

PROCESSING AN INCOMING REFERRALS

Contact info

Name
john doe

Email
johndoe@gmail.com

Phone
323-000-0000

Date of birth
Jun 5, 2003

Preferred language
English

One Degree member
No

Referrer

Referrer name
Nikki Rivera

Organization
Littlerock Community Clinic

Opportunity [Print referral](#)

Heart of Los Angeles (HOLA)
Attend visual and performing art classes for children and teens

Referral History

ID: 710	Status: Assigned	Assigned to: Stephanie Ramos
Feb 28, 2022	Nicolette Morales assigned referral to Stephanie Ramos. Status is Assigned.	
Feb 28, 2022	Nicolette Morales acknowledged referral. Status is Acknowledged.	
Feb 10, 2022	Nikki Rivera sent referral to Heart of Los Angeles (HOLA). Status is Sent.	

[Update referral](#)

That then gives you a deeper breakdown of the referral.

To respond to the referral, click on 'Update Referral'

Update Referral
john doe

Heart of Los Angeles (HOLA)
Attend visual and performing art classes for children and teens

Status: Assigned

Update status

- In progress
- Not eligible
- Not utilized
- Utilized

You then pick the appropriate status from the pick list provided.

Update Referral
john doe

Heart of Los Angeles (HOLA)
Attend visual and performing art classes for children and teens

Status: Assigned

Update status

In progress

Add note (optional)

Please do not use One Degree to transmit Protected Health Information (PHI).

Will be reaching out to client in the next 48 hrs.

90 characters

[Cancel](#) [Update](#)

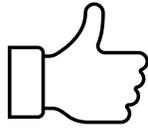
Then make sure to type up a quick note to provider. Then click 'Update'

*Please remember to not disclose any PHI!

COMPLIANCE VS. NON-COMPLIANCE



GOOD



Patient feedback on the referral experience:

- *"Patient is upset that they have not been contacted. Please reach out to them ASAP."*

Your contact information.

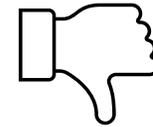
- *"I have an important update on this patient, please contact me at 555-555-5555 to discuss."*

Basic requests regarding referral status:

- *"Please provide an update on this referral."*



BAD



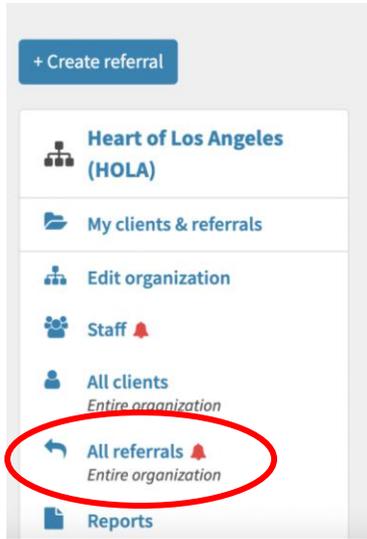
Details on specific patient health conditions.

- *"Josh is a dual-diagnosis case: ASD and ADHD. Please treat."*

Contact information for patient beyond what is noted in the referral.

Any additional information not directly related to the referral.

ADMIN PROCESSING AND ASSIGNING AN INCOMING REFERRALS



On the left side of your dashboard, make sure to click 'All referrals'

You'll be able to see all the referrals made to you as well as the status of them.

To see the referral details, click on the 'Referral ID'

A screenshot of the 'Referrals' page in the dashboard. The page has a navigation bar with 'Organization page', 'Staff', 'Referrals', 'Clients', 'Reports', and 'Settings'. Below the navigation bar is a search bar with the text 'Search by Client or Referral ID' and a 'Status' dropdown menu set to 'Open'. The main content area shows a table of referrals. The table has columns for 'Referral ID', 'Client', 'Opportunity', 'Referring organization', 'Referred by', 'Received', and 'Status'. The first row is highlighted with a red circle and a red arrow pointing to it from the text below. The table data is as follows:

Referral ID	Client	Opportunity	Referring organization	Referred by	Received	Status
722	Gold, Joe	Join a counseling program for children and teens	Littlerock Community Clinic	Nikki Rivera	Feb 22, 2022	sent
723	Fast, Jane	Join a free sports and fitness program for children and teens	Littlerock Community Clinic	Nikki Rivera	Feb 22, 2022	sent

ADMIN PROCESSING AND ASSIGNING AN INCOMING REFERRALS

Referral ID - 722

Contact info	Opportunity Print referral
Name Joe Gold	Heart of Los Angeles (HOLA) Join a counseling program for children and teens
Email jgold@gmail.com	
Phone -	
Date of birth Feb 1, 1932	
Preferred language English	
One Degree member No	
Referrer	
Referrer name Nikki Rivera	
Organization Littlerock Community Clinic	
Email ns+m@ucla.edu	
Phone -	

Referral History [Acknowledge](#)

ID: 722	Status: Sent	Assigned to: None
Feb 22, 2022	Nikki Rivera sent referral to Heart of Los Angeles (HOLA). Status is Sent.	
	Nikki Rivera: Pt will be contacting you in 2-3 days.	

We want to assign that referral to staff by clicking on 'Acknowledge'.

Acknowledge Referral ×
Joe Gold

Heart of Los Angeles (HOLA)
[Join a counseling program for children and teens](#)

Select an option

[Acknowledge referral](#)

[Acknowledge and assign referral](#)

[Cancel](#)

To assign the referral, you then click on 'Acknowledge and assign referral'

ADMIN PROCESSING AND ASSIGNING AN INCOMING REFERRALS

Assign Referral
Joe Gold

Heart of Los Angeles (HOLA)
Join a counseling program for children and teens

Search staff
Name, email, or phone number

n+stephm8@gmail.com Search

Staff results 1 result

Stephanie Ramos
n+stephm8@gmail.com
101-112-1314

Cancel Assign

You then search for your staff member in the search bar. You can use their name, email or phone number

Once you've clicked on the appropriate staff member, you click 'Assign'

It'll then shoot you back to the referral history where it'll reflect that it's been assigned to a staff member

Referral History		Update referral
ID: 722	Status: Assigned	Assigned to: Stephanie Ramos
Feb 28, 2022	Nicolette Morales assigned referral to Stephanie Ramos. Status is Assigned .	
Feb 28, 2022	Nicolette Morales acknowledged referral. Status is Acknowledged .	
Feb 22, 2022	Nikki Rivera sent referral to Heart of Los Angeles (HOLA). Status is Sent .	
Nikki Rivera: Pt will be contacting you in 2-3 days.		

HIPAA COMPLIANCE

One Degree is HIPAA compliant--a federal law that sets rules about who can look at and receive a patient's health information. Just like at their doctor's office, no one but their doctor is allowed to see their account information unless the patient shows it to them. On One Degree, a patient's account information is completely private and confidential, and can only be viewed by One Degree staff.

! *Please do not use One Degree to transmit Protected Health Information (PHI).*



COMMUNICATION PATHWAYS

STAY UP TO DATE

Website

- <https://aces-la.org/noc-cbos/>

Monthly Newsletters

- <https://aces-la.org/noc-cbos/#:~:text=ACEs%2DLA%20NoC%20CBO%20Newsletter%20Archive>

Review FAQs

- https://aces-la.org/wp-content/uploads/2022/06/NoC-CBO_FAQs_1Degree.pdf

GET HELP WITH ONE DEGREE

CONTACT YOUR ONE DEGREE NAVIGATOR

- Nikki Morales - nmorales2@dhs.lacounty.gov
- SUBMIT A TICKET THROUGH THIS LINK: <https://aces-la.org/noc-helpdesk>



Q&A
