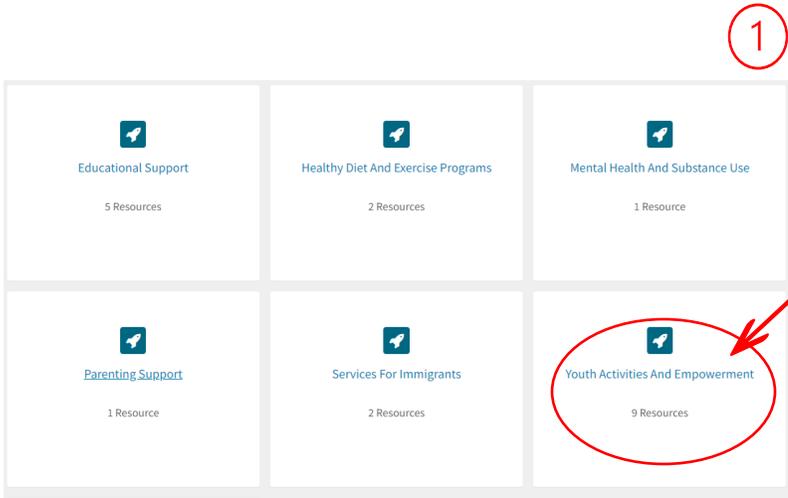# HOW TO CREATE AND MONITOR A REFERRAL

ACEs LA

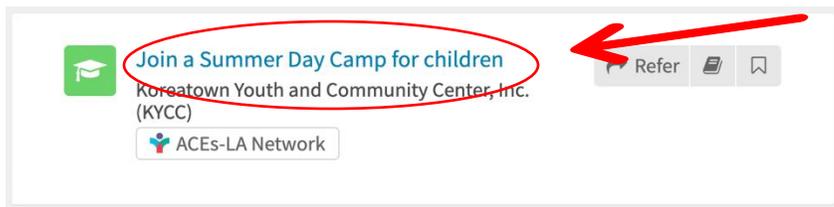# CREATING AND MONITORING REFERRALS

PLEASE BE ADVISED

It is important to remember that you can refer a patient to multiple CBOs at a time,

however, you CANNOT mix CLR and non-CLR CBOs in the same referral.

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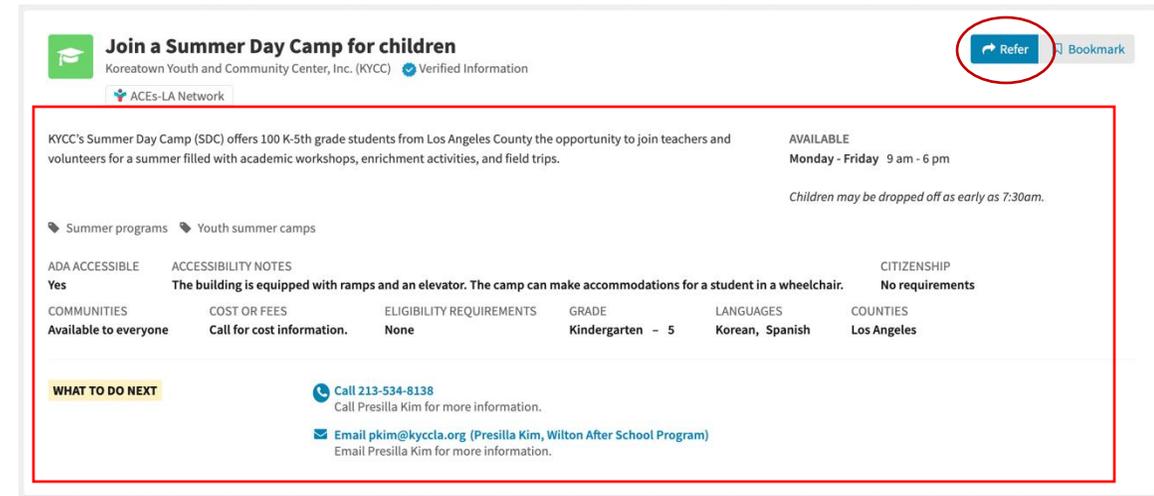# CREATING REFERRALS CONT'D

**1** Select the appropriate service category.

2 When you locate a service, you would like to refer to, click on the title of the service to find more information about the service.
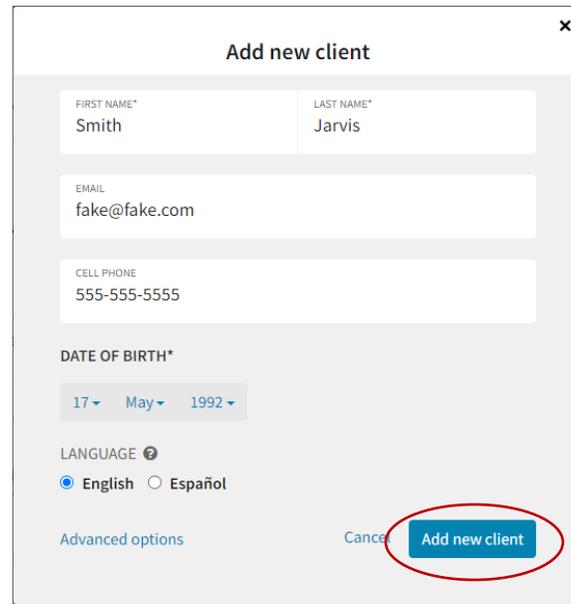
3 Once you have read through the details of the service (I.e. eligibility , language, cost, etc.) and the What To Do Next steps, you may click on the refer button to initiate referral.
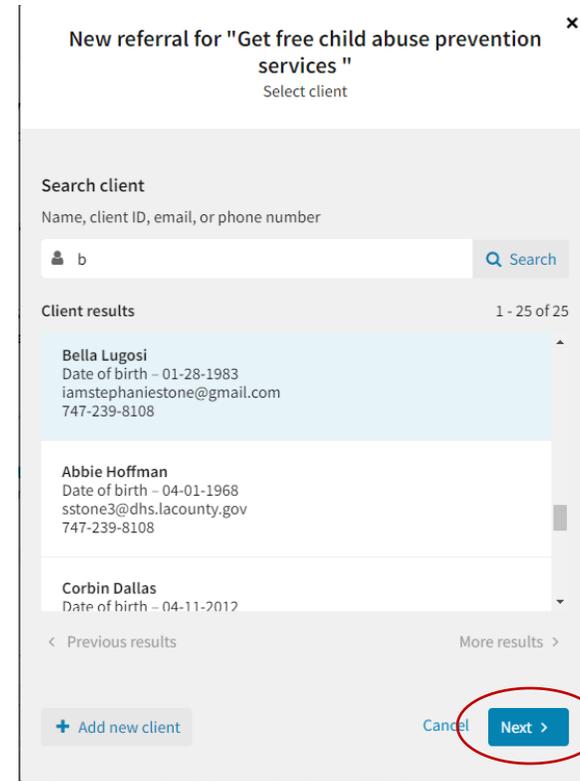

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CREATING REFERRALS CONT'D
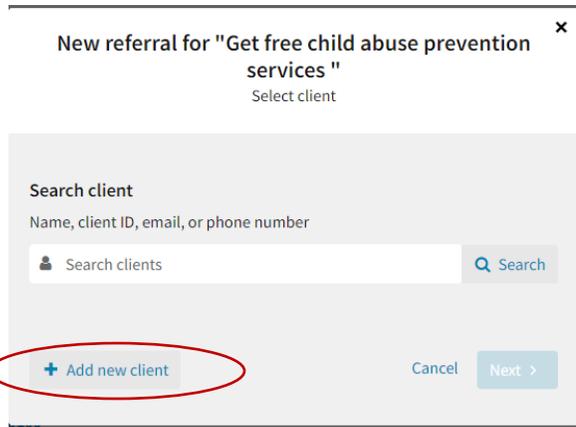
After you click refer, click "Add new patient" or you can search for them if you've already created a profile for them

After filling out the required fields (i.e. Name, email/phone, DOB and Language) click "Add new client" to finish creating their profile

You then search for the profile of the patient you want to refer to said service, click on it and click "next"
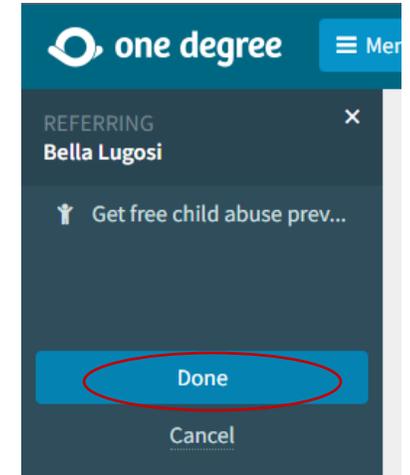
Once the name of your patient and the service you're referring them to pops up on the left side of your screen, click "done"

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CREATING REFERRALS CONT'D

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

Resources - ACEs-LA Network (1)

Find activities to build connections with your family
ACEs-LA   Remove

ACEs-LA Network

Note for Juana

Please ask if you need to bring any other paperwork.

Write a note for the referred agency

Referral is for mother and 6 yr old son. Prefers phone call or email M, W, & Fr from 10am - 2pm.

Recipients
ⓘ Adding a recipient gives the referred organization the ability to let you know if your client used their service.

+ Add recipient

Referral Summary

Client
Juana LaCubana

Send to:

☑ **Email:** fake@mail.com Edit

Add mobile phone

Your client will receive automated reminders that will ask if they have used these services.

☑ Send me a reminder email and notification to follow up on this referral

✈ Send referral

Before finalizing your referral, you can send a message to your patient and a message to the CBO you are referring them to.

Do not worry about adding a recipient

When sending a message to the CBO please refrain from sending any PHI.

You can choose to send the referral to your patient via
- Email
- Text
- Print out

Once done, click submit and the referral is sent to both patient and CBO.

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HOW TO CHECK REFERRAL STATUS

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One Degree Tip Sheet

Below are the options CBOs select to notify you on the status of referrals they have received from clinics.

Status option	Dropdown or Automatic	When to use
Acknowledged	**Automatic** *Status changes to acknowledged once acknowledged button is clicked*	Referral has been acknowledged. ACEs-LA recommends responding within one business day or receipt.
Assigned	**Automatic** *Status changes to Assigned once the CBO admin assigns the referral to a staff member*	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 or Client refuses services.
Utilized	**Dropdown**	Client can receive services from CBO.

*REMINDERS:
- Please check the status of your One Degree referrals.
- Please do not use One Degree to transmit Protected Health Information (PHI).

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Benefits of using the CLR vs traditional referral methods

It's all about streamlining and efficiency!

- Shorter wait times for patient referrals to be acknowledged by CBOs
- All communication between referring staff and CBO are documented
- Both clinics and CBO staff can track the progress of referrals

CHECKING REFERRAL STATUS

From your dashboard, click the Referral ID to view the referral detail.

To message the CBO, click update referral.

When finished composing your message, click Update (there's no need to select a status update from the dropdown to send a message).

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).*

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HOW TO GET HELP WITH ONE DEGREE

CN Primary Contact depending on your clinic

Nikki Morales
nmorales2@dhs.lacounty.gov

Julie Ruedaflores
jruedaflores@dhs.lacounty.gov

Ask your One Degree clinic champion for help.

Use this link to submit a problem ticket:

https://aces-la.org/noc-helpdesk

CN team will handle your request.

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