

CNY Cares Referral Center Standard Operating Procedures

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Network Referral Standards

The purpose of network standards is to provide guidance on how partners should operate within the network to ensure success. The success of the network is determined by the commitment of network partners to comply with the set network standards. To adhere to those standards, we've outlined timelines for both the referral sender and receiver below. The Referral Center will contact the party responsible to offer assistance in closing the referral gap, if timelines are not being met.

Sender of Referral Timeline and Responsibilities:

The individual who initiates the referral to a participating network partner is responsible to:

- Conduct the electronic Screening form with the client where applicable
- Review organization profile information to ensure it's an appropriate referral
- Document detailed notes that accurately describe the reason for the referral
- Obtain consent
- Monitor the referral
- Respond appropriately as per the timeline below

In an instance where the action(s) indicated below haven't been taken within the specified timeframe a member of the Referral Center will follow up to offer assistance in moving the referral forward.

<u>Instance</u>	<u>Action Taken</u>
<p><u>High Priority Referral</u>: <i>i.e. can jeopardize client's physical or emotional health.</i></p> <ul style="list-style-type: none"> • Sender is responsible to clearly document the referral is High Priority/Urgent • Create a batch referral if applicable <p>No response from recipient after 1 business day</p>	<p>Must recall and resend after 1 business day If the recipient has not taken action for a sent referral, the sender of the referral must recall and send the referral to a new source.</p>
<p><u>General Referrals</u>- No response from recipient after 2 business days</p>	<p>Must recall and resend after 2 business days If the recipient has not taken action for a sent referral, the sender of the referral must recall and send the referral to a new source.</p>
<p><u>Referral in "Review" status</u>- No response from recipient after 3 business days</p>	<p>Must be responded to within 3 business days or less If the recipient has not taken action for a referral in "Review" status, the sender must add a note under the "Other" tab in the notes section to check the status of the referral and or request that it be accepted or rejected.</p>
<p><u>Out of Network Referrals</u></p>	<p>Must Document any Out of Network Referrals In the event that you want to refer a client to an organization that is not a part of the Unite Us network, you can use the platform to document the profile of the organization, that the referral was made via an internal process, and the outcome. This will create a case within the system, but it will not generate an actual referral. Individuals will be responsible to track the information and manage internally.</p>

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Receiver of Referral Timeline and Responsibilities:

The individual who receives the referral through the platform is responsible to take action to resolve the referral within the specified timeline below and document accordingly.

In an instance where the action(s) indicated below haven't been taken within the specified timeframe a member of the Referral Center will follow up to offer assistance in moving the referral forward.

<u>Instance</u>	<u>Response Timeframe</u>
<p><u>High Priority:</u> i.e. can jeopardize client's physical or emotional health</p> <ul style="list-style-type: none"> • Sender indicated in notes that the referral is High Priority/Urgent 	<p>Must be responded to within 1 business day By selecting a status of Accept/Reject/Review</p>
<p><u>General Referral</u></p>	<p>Must be responded to within 1 -2 business days By selecting a status of Accept/Reject/Review</p>
<p><u>Referral in "Review" status</u></p>	<p>Must be responded to within 3 business days By selecting a status of Accept/Reject</p>
<p><u>Resolving a referral when a client is unresponsive</u></p>	<p>Must make up at least 3 attempts over 10 business days Note: All attempts MUST be documented on the referral timeline</p>
<p><u>Closing a Referral</u></p>	<p>Once a referral has been Accepted, it must be closed/resolved within 2 business days of service provision with the appropriate outcome disposition.</p> <p>Once a case is ready to be closed, determine if the case/need has been resolved or unresolved. Based on that determination, the user can choose from a list of structured outcomes specific to the type of need and the resolution status.</p> <p>ie: If the client requests assistance applying for health insurance benefits and was successfully enrolled, Case Resolution = Resolved, and Outcome = Enrolled in Health Insurance.</p>

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Onboarding

As partner organizations sign up to be a part of the Unite Us platform, they will follow the below process to gain access for their end users to be able to utilize the platform.

Partner Registration Form (PRF): The PRF is used to build the profile for the organization (service type, locations, etc.)

- Each new partner organization must complete the PRF prior to training on the platform
- Only staff named in the approved PRF will receive training and upon completion of the training, they will be given access to the platform
- PRFs can be updated to include or remove additional programs, sites and staff when necessary by completing and submitting the Organizational Update Form (OUF) found here: <https://www.cognitofirms.com/UniteUs/organizationupdateform>
- Profiles will be reviewed quarterly by the organization's Point of Contact and the Referral Center, to be updated as needed

Training and Support

New Organizations

In person training sessions combine various organizations in a shared setting to learn how to navigate the platform.

Note: In an instance where in person training is not feasible, the Referral Center will coordinate with organizations to provide a virtual learning experience.

- Required training for network organizations will be as such: an initial training and completion of the [UU Referral Pledge Survey](#)
- Only staff named in the approved PRF will receive training and upon completion of the training, they will be given access to the platform

Current Network Partners

- Can submit additional training requests to the Referral Center via email to SDOH@cnycares.org (once the OUF has been updated to add additional person(s) to be trained) and include the following information:
 - Subject: UNITE US Training Request
 - Body: Name of the organization, Name of the program, # of people who need to be trained, preferred time frame and venue (on site, virtual, in person, off site), and type of training being requested ie: refresher, new trainee, train the trainer.

Post Training

To strengthen and promote the accurate use of the platform, the Referral Center will provide continued followed up support centered on agency-specific outcomes.

The Referral Center will coordinate in-person or virtual meetings 30, 60, and 90 days post-onboarding training to address the following:

- Review of individual Partner UU Referral Pledge Packets and original letter of interests
- Data driven platform reports and gaps analysis
- Areas of excellence
- Partner Profiles
- Opportunities for improvement
- Exploration of challenges using the platform
- Specific training needs/challenges

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Service Directory

Each month, Information from each organization's PRF will be reviewed in order to maintain and update the Referral Center Unite Us Service Directory, [found here](#):

Analytics and Reports

Partner Organizations will have access to the following organization level reports:

1. Assessments
2. Cases
3. Clients
4. Notes
5. Referrals
6. Service Episodes (raw)
7. Service Episodes (snapshot)
8. Users

Consent and Privacy

To ensure that end-users always have the most current consent and policy information for the platform, please request any consent/policy documents from:

SDOH@cnycares.org or Support@uniteus.com

Revision History

Created/Edited/Updated	By	Date
Created	Ebony Pengel & Tammy Van Epps	4-9-20
Updated Consent and OUF information as per UU	Ebony Pengel & Tammy Van Epps	4-20-20
Added clarification for High Priority/Accepting/Closing referrals	Ebony Pengel	5-1-20
Removed Disposition List link & edited language for Referral in Review	Ebony Pengel & Tammy Van Epps	5-5-20