

A Community Portal for Social Services



An electronic referral system developed in 2013 to connect community-based clinics and health centers, hospitals, surgery centers and nonprofit CBOs.

- Funded by...
 - United Healthcare
 - Kaiser Permanente
 - St Joseph Health System
 - Orange County Community Foundation
 - Lestonnac Free Clinic
 - AXEIUM EHR

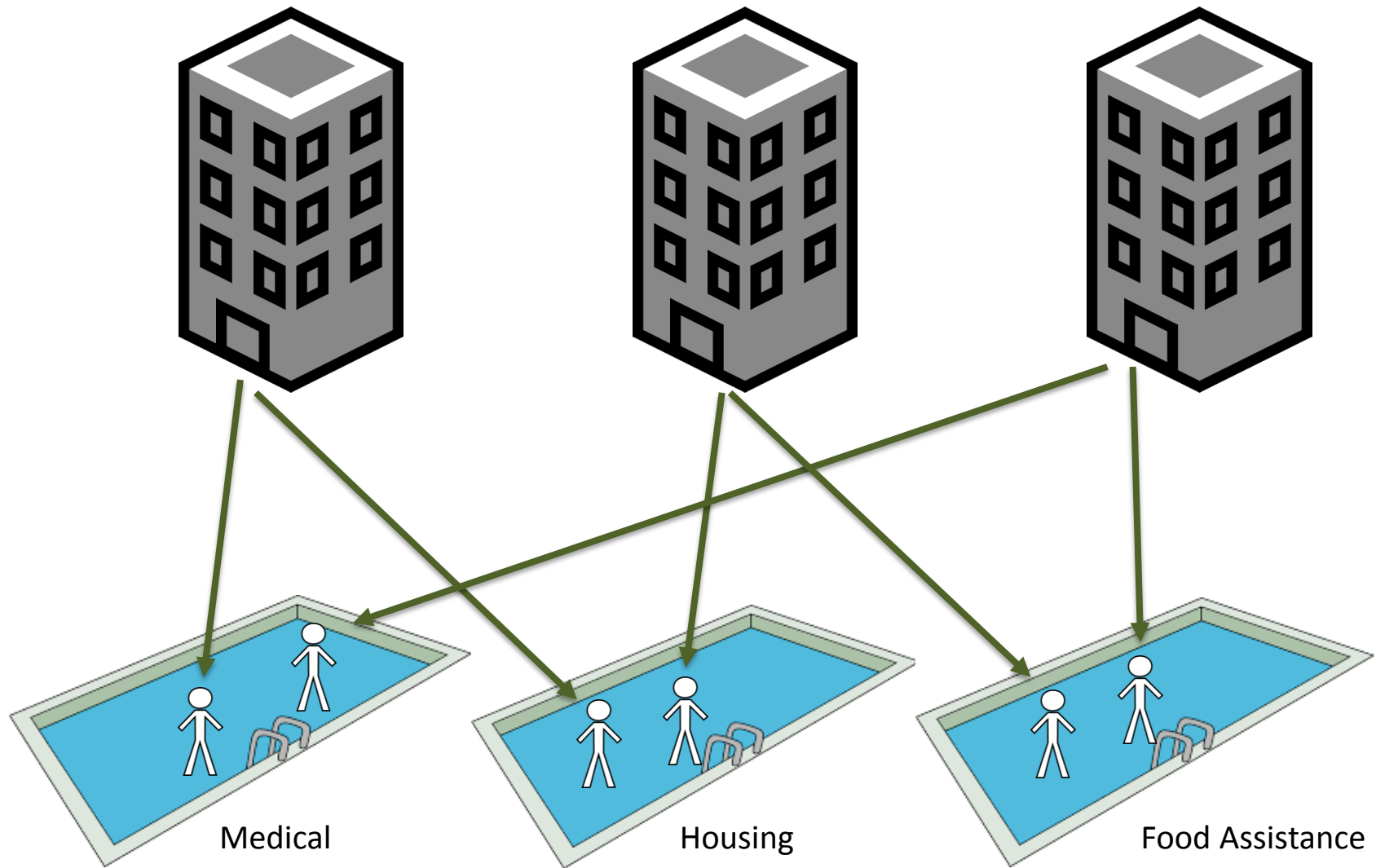


The concept...

- Enable health care centers to refer patients beyond the scope of medical care, i.e., to manage **Upstream Health**
- Connect health care providers with social service non-profit organizations
- Expand upon the consumption of underutilized services through collaborative efficiency
- Member organizations are able to access a “queue” of referred eligible individuals in need of the assistance they provide
- Services currently in the system:
 - Legal Aid
 - Food
 - Shelter
 - Domestic Violence
 - Health insurance enrollment



Organizations Creating Referrals



referrals put clients into the queue



Step 1 – ENTER CLIENT INFO

- only about 60 seconds ...
- just name, gender, dob, phone, and some demographics

The screenshot shows a web application window titled "Create Referral". At the top, there are "Save" and "Cancel" buttons. Below them, the "Facility" is set to "North OC Regional Health Foundation" and the "Provider" is "Ana Orellana Solis MD". The "Referral Type" section has four radio buttons: "Referral", "Consult", "Surgery Waitlist", and "Social Svcs", with "Social Svcs" selected. The "Demographic" tab is active, showing "Client Identification" fields: "First Name" (Jose), "Middle" (empty), "Last Name" (Martinez), "Gender" (Male), and "Date of Birth" (01/01/1981) with an "Age: 34" indicator. Below this is the "Client Information" section with fields for "Home Phone", "Alternate Phone", "County" (Orange), "City", "Language", "Ethnicity", "Race", "Veteran" (checkbox), "Homeless" (checkbox), "eMail", "Reference #", "Authorization #", and "Your Tracking #". Some fields like "City", "Language", and "Race" are highlighted in red, indicating they are required. The "Reference #" and "Your Tracking #" fields have example text: "(e.g., your MRN, Chart, Account...)" and "(e.g., your system's referral number)".



Step 2 – ADD SERVICES NEEDED

- up to 5 services can be added at the same time

The screenshot displays the 'Create Referral' application window. At the top, there are 'Save' and 'Cancel' buttons. Below them, the 'Facility' is set to 'North OC Regional Health Foundation' and the 'Provider' is 'Ana Orellana Solis MD'. The 'Referral Type' section includes radio buttons for 'Referral', 'Consult', 'Surgery Waitlist', and 'Social Svcs', with 'Social Svcs' selected. The 'Services' tab is active, showing a list of service requests. The first entry has 'Service Requested' as 'Health Insurance, Enrollment & Renewal' and 'Reason for Referral' as 'Needs emergency medi-cal, asap ...'. To the right of this entry, a text box lists 'Covered California, Obamacare, Medi-Cal, CalOptima'. An orange arrow points from the 'Reason for Referral' field of the first entry to the 'Submit Confirmation' dialog box. The dialog box shows a 'Success' message: 'Your referral for Jose Martinez has been submitted to Social Services', accompanied by a green checkmark. It includes an 'OK' button and a 'Message ID: 302' at the bottom. A small logo is visible in the bottom right corner of the application window.

Create Referral

Save Cancel

Facility North OC Regional Health Foundation Provider Ana Orellana Solis MD

Referral Type

☐ Referral ☐ Consult ☐ Surgery Waitlist ☒ Social Svcs

Demographic Services

Service Requested Health Insurance, Enrollment & Renewal

Reason for Referral Needs emergency medi-cal, asap ...

Service Requested

Reason for Referral

Service Requested

Reason for Referral

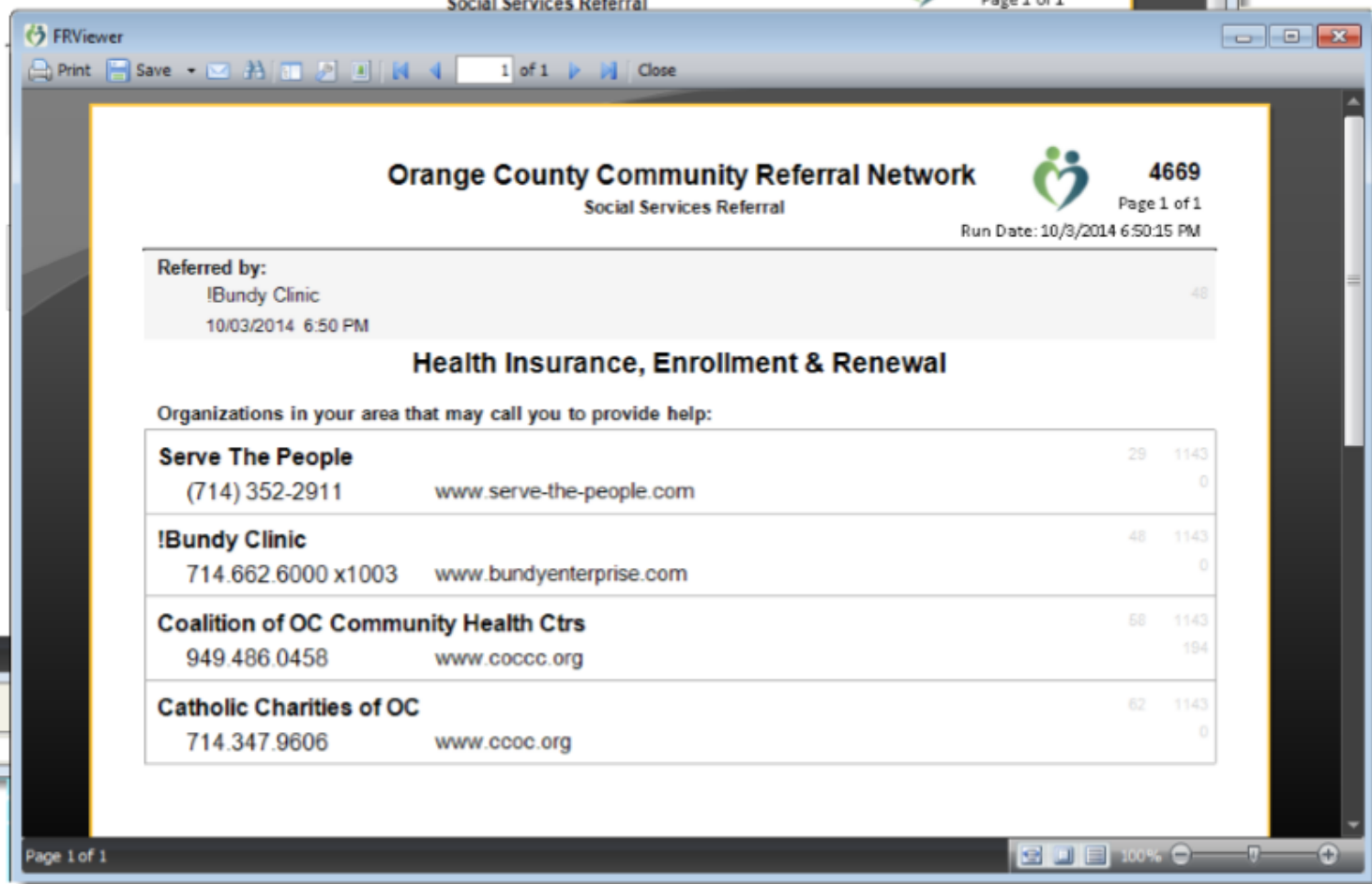
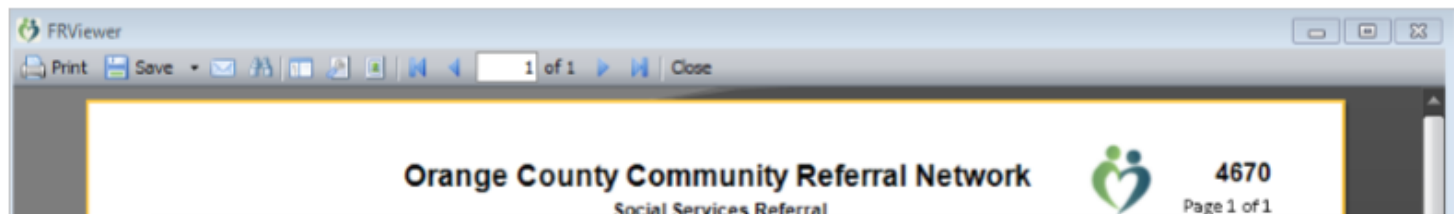
Submit Confirmation

Success

✓ Your referral for Jose Martinez has been submitted to Social Services

OK

Message ID: 302



each CBO that matches the need receives notification of the new referral by email

OCCRN Referral Activity Notification

AXEIUM Referral System <NoReply@OCCRN.com>

Sent: Tue 10/13/2015 2:18 PM

To: Milton Allione

*** Please do not reply to this message as it was sent by a very inattentive robot ***

You have received a new referral for specialty: **Health Insurance, Enrollment & Renewal**, dated: **10/13/2015 2:17:42 PM** from: **Social Services**

Notification activity:

Activity: **Submitted**

Comment: **Needs emergency medi-cal, asap ...**

This message was sent to: milton.allione@brillogy.com from an unattended virtual SMTP server at 50.97.230.243 (mail.occrn.com)

You are receiving this correspondence because an update was made to an activity for which you are subscribed with notification services.

To change your notification options, please contact your facility administrator, or send an email to





Referral Queue

Lifeguard
(case manager)



Medical

Food

Housing

Take
Ownership

Return
Ownership

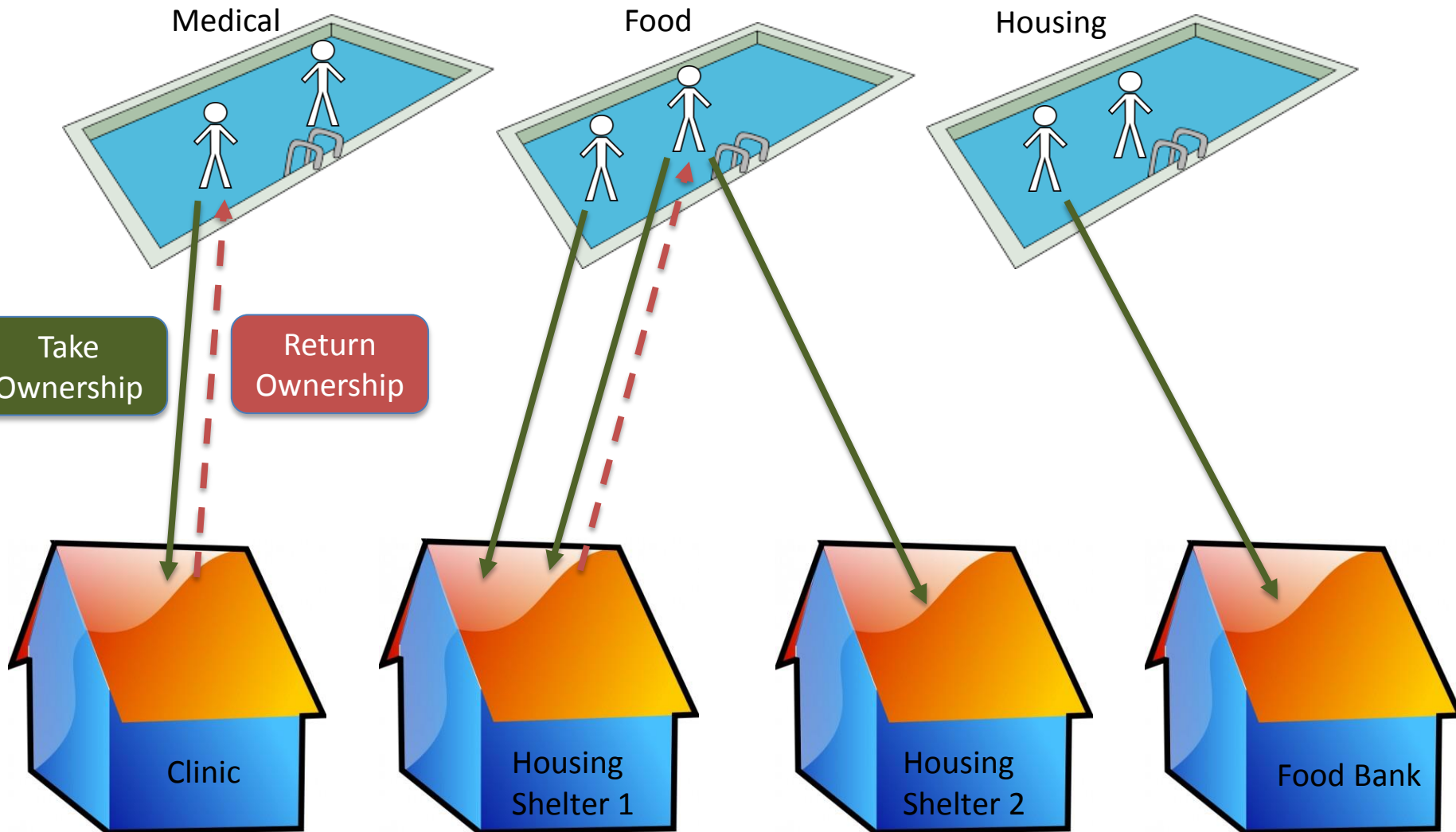
Clinic

Housing
Shelter 1

Housing
Shelter 2

Food Bank

Accepting Referrals



Step 3 – REVIEW QUEUE & TAKE OWNERSHIP

AXEIUM Referral System - Build 1.0.5389.31810 User - COCCC - Remote ARSTEST

Main Menu **Social Service Queue** **10/13/2015**

Referrals

Create Referral

Outbound Referrals

Inbound Referrals

Social Service Queue

Referring Agency: ALL

Status: ☒ Open ☐ Closed ☐ All

Scope: Referral Type: Social Svcs

Category: Health Insurance, Enrollment & Re

City:

Date Range (Create Date): ☒ All Dates ☐ Specify Range

From: Thu 10/1/2015 Thru: Sat 10/31/2015

	Status	Service Requested	Client Name	Reason For Referral	Referral Date	D
1		Health Insurance, Enrollment & R...	tony, ed f	need ins	09/29/2014	
2		Health Insurance, Enrollment & R...	Test, Joe	this is the reason	10/05/2015	
3		Health Insurance, Enrollment & R...	Martinez, Jose	Needs emergency medi-cal, asap ...	10/13/2015	

Referral Information **8/27/2014**

Take Ownership Return Ownership

Karlos Maya 04/26/1970 Age: 44, **Social Svcs** for **FOOD**, from: Bundy Clinic to: Social Service

Demographic

Client Identification

Client Information

Home Phone

Work Phone

County

City

Language

Ethnic Not Hispanic or Latino

Your Tracking #

Information Message

Information

Are you sure you want to take ownership of this referral

Yes No

Message ID: 2



Assign a case manager, record your notes and activities

Jose Martinez 01/01/1981 Age: 34, Social Svcs for Health I

Referral Information Activity

Referral Type
Social Svcs

8 Demographic **Case Manager**

Case Manager Maggie Moreno

Notes 10.13.15 called, left message on voice mail.

+ New ✕ Cancel Referral ✕ Delete Activity ↺ Reopen Referral

Karlos Maya 04/26/1970 Age: 44, Social Svcs for FOOD, from: Bundy Clinic to: Social Ser

Referral Information Workfl...

ActivityDisplayDate	Activity Date	Referral Step	Comment
08/22/2014 7:37 AM	08/22/2014	Referral was Submitted	Referral was created by ARS on: 08/22/2014 07:37
08/27/2014 8:05 AM	08/27/2014	Clinic Took Ownership	Took Ownership on: 08/27/2014 08:05, UserName:



User configurable grids provide data about the referrals

Built in filtering

Export to Excel

From: Fri 08/1/2014		Thru: Sun 08/31/2014			
StatusI	Status	ReferralCreate	DaysOld	S	Priority
	A	=	=	A	
●	Active	08/26/2014	1	;	ensions, food, sh... Normal
●	Active	08/20/2014	7	a	High
●	Active	08/13/2014	14	a	Normal
●	Active	08/13/2014	14	a	Normal
●	Active	08/13/2014	14	a	Normal
●	Active	08/20/2014	7	a	Normal
▶	Active	08/23/2014	4	C	Normal
●	Active	08/26/2014	1	F	eks Normal
●	Active	08/26/2014	1	F	of work High
●	Active	08/26/2014	1	F	Normal
●	Active	08/26/2014	1	F	Normal

Deselect AllField ChooserClose

☐ Address

☒ City

☒ Client

☒ ClientAge

☒ ContactComment

☒ County

☒ CreateDate

☐ CreateLogin


☒ CreateName

☐ CreateUserID



Visionary Participants...

a partial list
of some of the
organizations
that are
currently using
the system

OCCRN Queued Referrals Social Svcs		OC Community Referral Network Social Services Services Available		 Rpt # 203 Page 1 of 2 Run Date: 10/6/2015 2:34:37 PM	
Behavioral Health		The Gary Center	2		
Dental Assistance (with PAIN)		Lestonnac - Orange	1		
Drug & Alcohol Treatment		The Gary Center	2		
Food, Assistance		Second Harvest	68		
		Serve The People	29		
		Families Forward	60		
		The Gary Center	2		
		Mary's Kitchen Orange	69		
Food, CalFresh (Food Stamps)		Catholic Charities of OC	62		
		Dignity Health	75		
		Second Harvest	68		
Health Insurance, Enrollment & Renewal		Catholic Charities of OC	62		
		AltaMed	50		
		Families Forward	60		
		Coalition of OC Community Health Ctrs	58		
		Serve The People	29		
		North OC Regional Health Foundation	15		
		Dignity Health	75		
Housing, Emergency Shelter, Homeless, Pregnant, 18+		Families Forward	60		
		Precious Life Shelter	64		
Housing, Young Adult, Homeless (18-24)		Families Forward	60		
		StandUp For Kids - Orange County	66		
Legal, Assistance		Public Law Center	61		
		Serve The People			

Community Development



Initial response from the community has been overwhelmingly positive, and while originally funded to improve the Orange County referral process, the system has already expanded into Riverside, San Bernardino and Los Angeles counties.



Funders want Collaboration

OCCRN is the tool we all need to track supply and demand and generate outcome reports.

think about it...

You could actually enter your own referrals, take ownership, and generate reports for your funders that benefit both you and the entire community.



Contact Information

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