

ADK Wellness Connections: Network Standards

The purpose of this document is to outline the agreed-upon standards regarding how partners will operate within the ADK Wellness Connections Referral Network to ensure the network’s success. ADK Wellness Connections is a coordinated referral network, sponsored by Adirondack Health Institute, which operates on the Unite Us technology platform to provide an integrated online referral solution. Network partners will be able to match services to need across a database of community partners and track their clients for improved outcomes.

ADK Wellness Connections Participants

The following core participants constitute the ADK Wellness Connections administrative and operational functions:

Partner Organization	Core Functions
Adirondack Health Institute	Data analysis and reporting Workflow development
Regional Coordination Centers	Accept calls/online assistance requests from clients seeking services Route referrals through the network
Unite Us	Provide partner training & onboarding Provide live chat support for the platform
Network Partners	Make outgoing and take action on incoming referrals Update client outcomes for accepted referrals Maintain organizational, program, and staff information
Out of network partners	Accept referrals

The Importance of Network Standards

The success of the network is determined by two factors: the effectiveness of the regional Coordination Centers and the commitment of network partners to comply with the network standards. If in-network partners are not engaged, even with a strong Coordination Center the efforts of the network will be unsuccessful. All network standards identified here-in have been developed for the prioritization of coordination and maintenance of the ADK Wellness Connections Referral Network. These standards are to be applied to *only* those referrals made through the ADK Wellness Connections Referral Network powered by Unite Us.

ADK Wellness Connections Network Standards

Responding to a Non-Urgent Referral. A standard will be set and agreed upon regarding the response time to referrals sent in the network. Partners will be expected to respond to a non-urgent referral within two business days. If the referral is pending after two business days, the Coordination Center will call/email the partner. If the partner cannot be reached within 3 business days, the Coordination Center will recall the referral and send it to a different partner. Partners have multiple options when responding to a referral:

1. **Accept** - If the referral is accepted by the partner, they have agreed to serve the client.
2. **Close Referral** – The network partner can close the referral if they are unable to contact the client after ten business days, or if they contact the client and he/she no longer needs services.
3. **Hold for Review** - If the partner needs to have an additional conversation with the client and/or is checking their organization’s capacity, they can choose to “hold for review” to let the referring organization know they’ve seen the referral and are taking action.
4. **Reject** - If the referral is rejected, it is routed back to whoever sent the referral (the Coordination Center or other network partner). It is this organization’s responsibility to identify a different partner to send the referral to, or communicate to the client that no services can be identified. When referrals are rejected the client is unaware.
5. **Send** – If the network partner is not able to serve the client, but knows someone else in the community who can, they can send the referral on to another network partner.

If the referral is pending after two business days, the sending organization (which could be the Coordination Center or a network partner) will call/email the recipient organization. If the partner cannot be reached within three business days, the sending organization will recall the referral. Once the referral is recalled on the fourth business day, the subsequent referral will follow the high-urgency referral pathway identified below.

If the referring partner identifies a service delivery option for the client outside the ADK Wellness Connections Referral Network, the referring partner must close the referral in the system. Notes can be added to the closure to indicate that the client did receive service. The client’s profile will remain in the ADK Wellness Connections Referral Network for future requests.

Responding to a High-Priority Referral. For high-priority referrals (priority assigned to any/all services that would otherwise jeopardize a patient’s physical or emotional health – e.g. housing, food services and crisis intervention services), batch referrals will be sent to ensure all partners able to provide care will see the referral as soon as possible. Once a high-priority referral is received, the standard of care is for partners to respond within one business day. If the referral remains pending on the subsequent business day, the sending organization will proactively engage (call/email) the partners that received the initial batch referral request to assure responsiveness and complete the referral process. If no partner can be reached within two business days, the sending organization will recall the referral and out of network services partners will be identified. Direct contact will be made with the client on the third business day to provide assurances that services are being identified.

Contacting an Unresponsive Client. The standard of care is to make a total of three attempts over 10 business days to contact clients by accepting agencies. If a client cannot be reached within 10 business days, users will close the assistance request or referral with the status “Unable to Contact.” For example, if a partner receives a referral and needs additional information from the client to determine eligibility and interest, the following workflow is recommended:

1. Partner calls client, and leaves voicemail if client does not answer. All outreach attempts can be documented as an interaction case note in Unite Us.

2. If the client does not return the partner's phone call within three business days, partner sends client email, or calls client again and leaves a voicemail if no email address is provided.
3. Partner reaches out by phone to client again in three business days if no response has been received. Partner leaves another voicemail. If no response is received in the four days after this last attempt, partner closes referral with status "Unable to Contact."
4. Where/when additional contact information is available for support entities (family, friends, case/care managers) contact will be made in parallel with step #3 above. If a client's home address is known, additional coordination will occur between Alliance and 211 to attempt in person/home visit to further understand the client's barriers to coordinating services.

Making Updates to Your Organization's Profile. Critical to timely services delivery is accurate profile information for the network partners. To make the network as effective as possible, updates to organizations' general information (location, contact information), programs, and users will be made regularly. Organizations should review and update their organizational profiles and program eligibility information on a quarterly basis. However, changes to user information, should be made within one business day of a user leaving the organization/role or for the onboarding of a new user.

Closing a Case. The creation of a "case" in the ADK Wellness Connections Referral Network indicates that a network partner is actively working with that client. Cases are created automatically from an accepted referral, or simply by the partner him/herself within the software system. To close a case, the partner indicates a status of "resolved" or "unresolved" and the outcome within the client's profile in Unite Us.

1. *When During Service Provision to Close:* The general recommendation is for providers to close a case when their service delivery model ends. For example:
 - For services that are ongoing, such as primary care or individual counseling, a case could be considered closed once the client comes in for their first appointment and the relationship is established.
 - For services such as applying for Social Security Disability (which can take up to a year or more to receive a determination), a case could be considered closed once the network partner has assisted the client in submitting the application.
 - For job search/placement services, a case could be considered closed once the network partner has assisted the client in securing employment, as service provision continues during that period.
2. Once the resolution is known, the network standard is for primary workers to close a client's case within two days of knowing the case's resolution (again this could occur after three weeks of service provision, three months, etc.).