

Social Care Best Practices: Learnings from a Technology-Enabled Closed-Loop Referral Network



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What You'll Learn Today...



**Strategies to Improve Adoption
of Referral Network Technology**



**Workforce Impact:
Efficiency and Burnout**



**What's Next: Establishing
Best Practices for Closed
Loop Referral Networks**

How It Works



Proprietary and Confidential

**Organizational
buy-in and
change
management**



0

Tom shows up at Sue's organization.



1

Screening

Sue screens Tom and identifies that he has additional needs.



2

Referral

Sue uses Unite Us **to gain digital consent** and electronically refer Tom to multiple community partners. Through the platform, she can seamlessly **communicate with the other providers** in real time and securely share Tom's information in accordance with his consent.



Resolution

Community buy-in and change management



3

Feedback

As Tom receives care, Sue receives real-time updates and tracks Tom's total health journey.



Lessons Learned: Change Management

Evaluation Questions:

1. What factors support or hinder partner and end user adoption?
2. What factors influence community partner participation in closed loop referral networks??

Process Evaluation Methods

Method	Sample
Focus Groups (n=22)	<ul style="list-style-type: none">● 44 States● Health Systems and Payors (n=22)● Community Based Organizations (n=20)
Key Informant Interviews (n=103)	<ul style="list-style-type: none">● Participants represent the following Unite Us end user types:<ul style="list-style-type: none">○ Community Health Workers (CHWs)○ Social Workers/Case Managers○ Clinical Providers○ Administrative Personnel

Timeline: October 2021 - May 2023

Facilitators

Successful Adoption and Utilization

Theme	Factors
Robust Network	<ul style="list-style-type: none">● Strong CBO participation● Enough of the right services● Community engagement
Clear Objectives	<ul style="list-style-type: none">● Data driven referral volume targets● Specific use case, care pathway, and/or population focus● Appropriate role fit
One System of Record	<ul style="list-style-type: none">● Screening, referral, and follow up documentation in one system● Person-centered care coordination across health and social sectors

"It's much more organized, I know where everything is...before we started using it, our stuff was all over the place. We either had notes written down in this random website that only half of us used, or we would write them down on someone's folder on the inside. So it's nice to have one place where everything lives in harmony."

- Service Coordinator

Barriers

Successful Adoption and Utilization

Theme	Factors
Community Participation	<ul style="list-style-type: none">● CBO responsiveness● Community capacity● Sustainable funding
Change Management	<ul style="list-style-type: none">● Buy-in at all levels of an organization● Inclusion of individuals impacted in decision making● Training and readiness
System and/or Regulatory	<ul style="list-style-type: none">● Interoperability● Regulatory requirements for systems like Homeless Management Information Systems (HMIS)● Product features

"I thought I was going to be our main way to refer all of our clients like our only path. But...not everyone's on there, so there's still some agencies we have to call or email. So, I thought it was going to be that [it was] our main referral source, but it's just half of our referral source, I think now."

– Unite Us End User

"But adopting new systems can be very challenging, and I think many of us, myself most definitely, are managing so many different platforms and so many different processes that any new one can be quite stressful at times."

– Customer End

User



Workforce Impact Results



Workforce Impact: **Efficiency**

Does Closed Loop Referral Technology Increase Efficiency in Care Coordination Compared with Traditional Methods?

Method	Longitudinal Survey (n=101); February 2023 - February 2024
Survey Tool	Internally developed to capture reported time spent across key care coordination activities
Respondents	<p>Unite Us end users meeting the following criteria:</p> <ul style="list-style-type: none"> ● Cross-Sectional: End users with at least 6 system logins ● Longitudinal: <ul style="list-style-type: none"> ○ Baseline: Active user license but no referrals ○ Follow up: At least 6 system logins

Workforce Impact: **Efficiency**



Tom shows up at Sue's organization .

Sue screens Tom and identifies that he has additional needs.

Sue uses Unite Us to **electronically refer** Tom to multiple community partners after capturing digital consent

Organizations serving the client document outcomes.

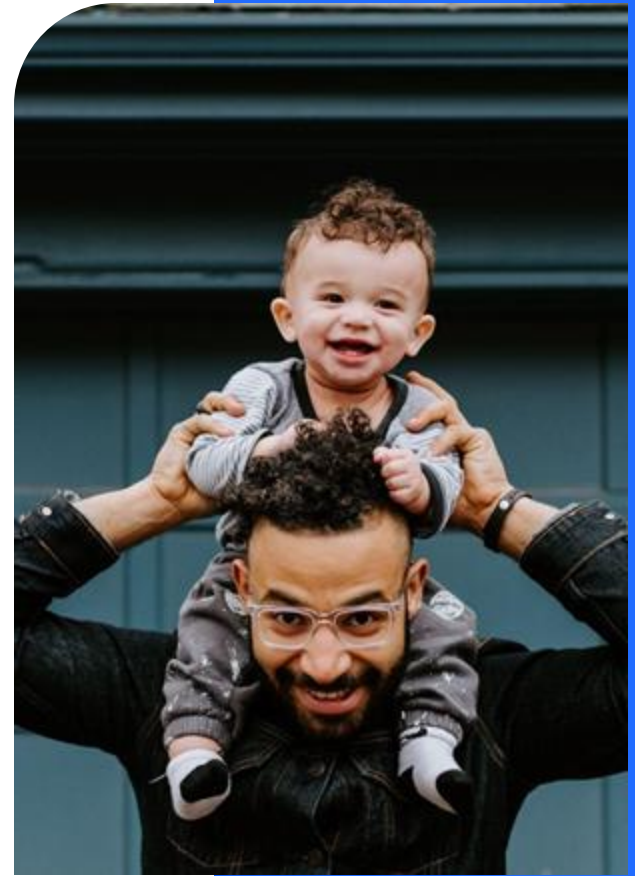
More Clients Served

More Needs Met

Workforce Impact: **Efficiency**

*I appreciate that [the technology] **takes the follow up off of our hands** as we are so busy with other patient needs and don't always have time to make multiple phone calls to connect patients with resources. //*

- **Health System End User & Social Worker**





Workforce Impact: **Burnout**

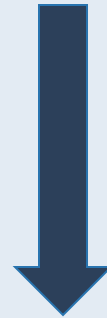
Does Closed Loop Referral Technology Impact Feelings of Burnout Among End Users?

Method	Cross Sectional Survey via email dissemination in May, 2024
Survey Tool	Copenhagen Burnout Inventory (validated, reliable, standardized burnout measure)* <small>*Source: Kristensen, et al. 2007</small>
Respondents	Unite Us end users meeting the following criteria: <ul style="list-style-type: none">● Baseline (n=297): Active Unite Us license but no referrals sent/received● Low Referral (n=427): 1-3 referrals sent/received on average per month● High Referral (n=302): > 10 referrals sent/received on average per month● Resource Directory (n=99): 1+ resource shares sent on average per month

Workforce Impact: **Burnout**

W *Being able to track the outcome of the referrals I send and follow-up with partner organizations has been **beneficial in combating feelings of burnout**. Being able to know and have connections to our partner organizations helps to **foster a sense of community and belonging** for me.*

- **CHW End User**



Statistically Significant Reductions in **Work-Related Burnout***

($p < 0.05$)

**Compared with the individuals not using the Unite Us closed loop functionality features*

2x

More likely to report that **Unite Us reduces feelings of burnout****

***Compared with lower activity Unite Us end users.*

4 Key Takeaways: Closed Loop Referral Network Best Practices



Sustained Community Engagement

- Build on pre-existing network relationships and initiatives.
- Be prepared for a marathon, not a sprint.



Embedding the “Why”

- Articulate the “Why” early and often to workforce expected to implement the new system.



Engaged Champions/Organization Buy-in

- Generate buy-in at every organizational level
- Empower internal trusted peers as “champions” of the work to increase readiness



Data Informed Approaches and Role Fit

- Implement with best fit roles
- Align early on expectations that are informed by data

What's Next:

Considerations for the Future

**1**

Systemic Limitations

Efforts to mitigate include:

- The Gravity Project
- 1115 Medicaid Waivers and California's ILOS
- CMS SDOH reporting regulations

2

Future Evaluation Opportunities

More research is needed in the following focus areas:

- Impact on Client/Patient-Reported Outcomes
- Impact on Community Based Organizations' (CBOs) Capacity to Serve
- Impact on Workforce



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