



UNITED WAY MONTEREY COUNTY SMART REFERRAL NETWORK

A regional solution developed to foster collaboration, strengthen referral pathways, and enhance community alignment.



UNITED IN PURPOSE: LOCAL PARTNERSHIPS & MEASURABLE PROGRESS

Outcomes & Goals

- **Enhanced Access & Navigation:** Help residents efficiently connect to and enroll in essential services through referral networks.
- **Improved Resident Outcomes:** Support individuals in progressing from crisis to stability in key areas: employment, education, job retention, income, financial management, credit, housing, childcare, food security, substance use disorder (SUD) services, and community leadership.
- **Higher Quality of Care:** Enable community organizations to provide better support through Smart Referral Network's bi-directional, closed-loop referrals, and collaborative tools.
- **Strengthened Community Collaboration:** Foster stronger partnerships between organizations to improve service coordination, referral relationships and impact.

Local Referral Relationships

- Enhancing **sustainability, impact, and scale** through streamlined service connections.
- **Closed-Loop Referrals:** SRN partners and residents make referrals that lead to direct services.
- **Seamless Service Search:** Users access the **2-1-1 Monterey County** database via:
 - **Website or Chatbot** (onramp to services)
 - **Smart Matching:** Generates prioritized service lists based on demographics and eligibility.
- **Electronic Referral & Outcome Tracking:** Users send referrals, while network partners document:
 - Services referred
 - Services received
 - Impact on Social Determinants of Health

THE HEART OF THE NETWORK: OUR SRN USER COMMUNITY

Types of Services/ Organizations Represented in the SRN:

- Asset Building & Access to Services
- Adult Education
- Disability Services
- Domestic Violence Supports
- Early Care and Education
- Family Resources
- Financial Education
- Health Care
- Housing
- Immediate Needs
 - food, shelter, rent, utilities
- Legal Assistance
- Local Government
- Mental Health
- Senior Services
- Student Services
- Substance Use Disorder
- Transitioning from Incarceration
- Transportation
- Utility Assistance
- Workforce Development

45 Participating Agencies

125 Services Available



18,317 Referrals Made

KEEPING THE NETWORK SAFE: CYBER POLICIES & BEST PRACTICES

Access & Permissions

- **Tailored Onboarding:** Customized setup for each partner.
- **User Roles & Permissions:** Access levels assigned by organization, program, and user type.
- **Secure Authentication:** Enforced password policies, expiration protocols, and multifactor authentication.
- **Identity Protection:** Multifactor client de-duplication methods.
- **Client Authorization & ROI Forms:**
 - Available in **English & Spanish**
 - Multiple consent options
 - Defined **rights & recourse**
 - **One-year expiration**
 - Full control to access, edit, or delete profiles
- **Partner MOUs:** Ensuring compliance with **client confidentiality, HIPAA, and data-sharing protocols.**

Infrastructure & Security

- **Secure Data Storage:** Hosted on **AWS Cloud**, encrypted at rest and in transit, **with Amazon security oversight** and **redundant backups** for disaster recovery.
- **Cybersecurity Protection:**
 - **Insurance coverage**, including **Security Breach Response**
 - **Managed Security Services:**
 - Risk & vulnerability assessments
 - Policy development
 - Third-party risk evaluations
 - Penetration testing
- **Data Privacy & Compliance:**
 - Protected Health Information (PHI) & Personally Identifiable Information (PII) secured
 - Referral outcomes **to/from health services obfuscated**
 - **Additional consent required** for agencies not involved in client creation or referrals to access profiles

SUPPORT IN ACTION: TRAINING & ASSISTANCE THAT MOVES US FORWARD

Referral & Care Management Workflows

- **Referral Strategy Support:** Guidance on making, receiving, analyzing, and sharing referrals and data.
- **Data Collection & Management:**
 - Develop **referral & social determinants of health (SDoH) data strategies**
 - Implement **data management, exchange, and integration services**
 - Design analytics to measure **SDoH impacts on specific populations**
- **Training & Best Practices:**
 - Bi-directional referrals & closed-loop tracking
 - Updating records, collecting consent & generating reports
 - Improving care outcomes through data-driven insights
- **Operational Framework:**
 - Agreements, consent protocols & structured agendas

Training Learning Objectives

- **Referral Workflow Mastery:** Create actionable plans to **make, receive, follow up on, and respond to closed-loop referrals.**
- **Client Service & Eligibility:** Assess client needs, identify **eligible local programs**, obtain **consent**, and submit **electronic referrals.**
- **Collaboration & Agreements:** Work with **community benefit organizations** to develop care plans and establish **referral agreements.**
- **Case & Data Management:**
 - Document **client interactions, cases, and referrals**
 - Track **social determinants of health (SDoH) outcomes** to improve client services
- **Outcome Reporting & Billing Support:**
 - Use referral data to connect members with **appropriate services**
 - Report outcomes to support **Medi-Cal billing for preventive services and care management**

CONNECTING THE COMMUNITY: TOTAL REFERRALS AT A GLANCE

Report Referrals Language: English ▼ [Support](#) [Downloads/Info](#)

Start Date: 2024-12-01 End Date: 2025-01-15

[View Referrals in Table](#) [Export](#)

All

10 Column Search

Search Table 🔍

Total ◯	Incoming ◯	Outgoing ◯	Declined ◯	Enrolled ◯
14	3	7	3	0

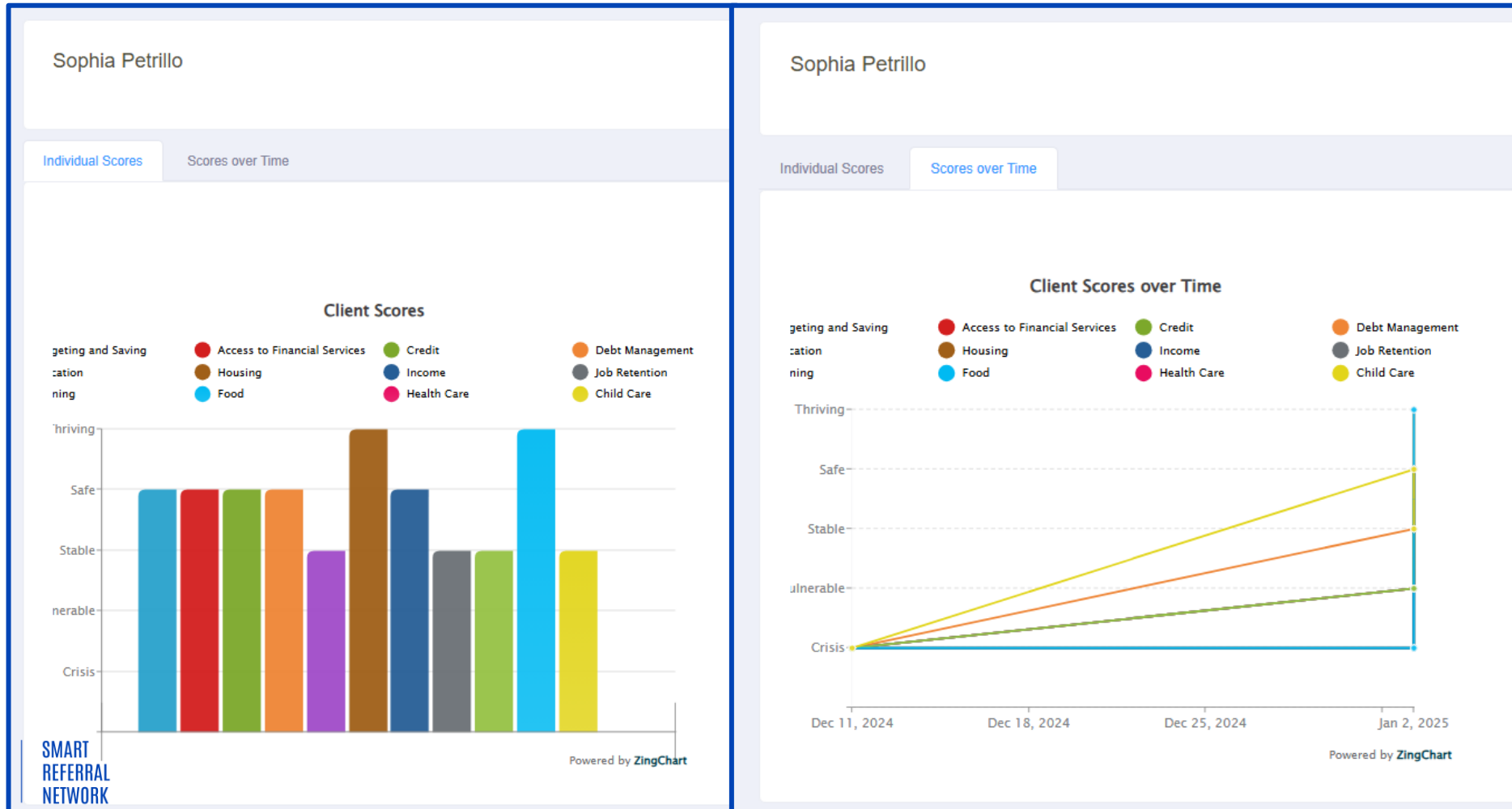
0 selected / 1 total

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FROM REFERRALS TO RESULTS: UNCOVERING HEALTH DETERMINANTS

	Crisis	Vulnerable	Stable	Safe	Thriving
Employment					
Education					
Training					
Job Retention					
Income					
Budgeting and Saving					
Etc...					

FROM DATA TO DIRECTION: SRN TRENDS SHAPING HEALTH EQUITY

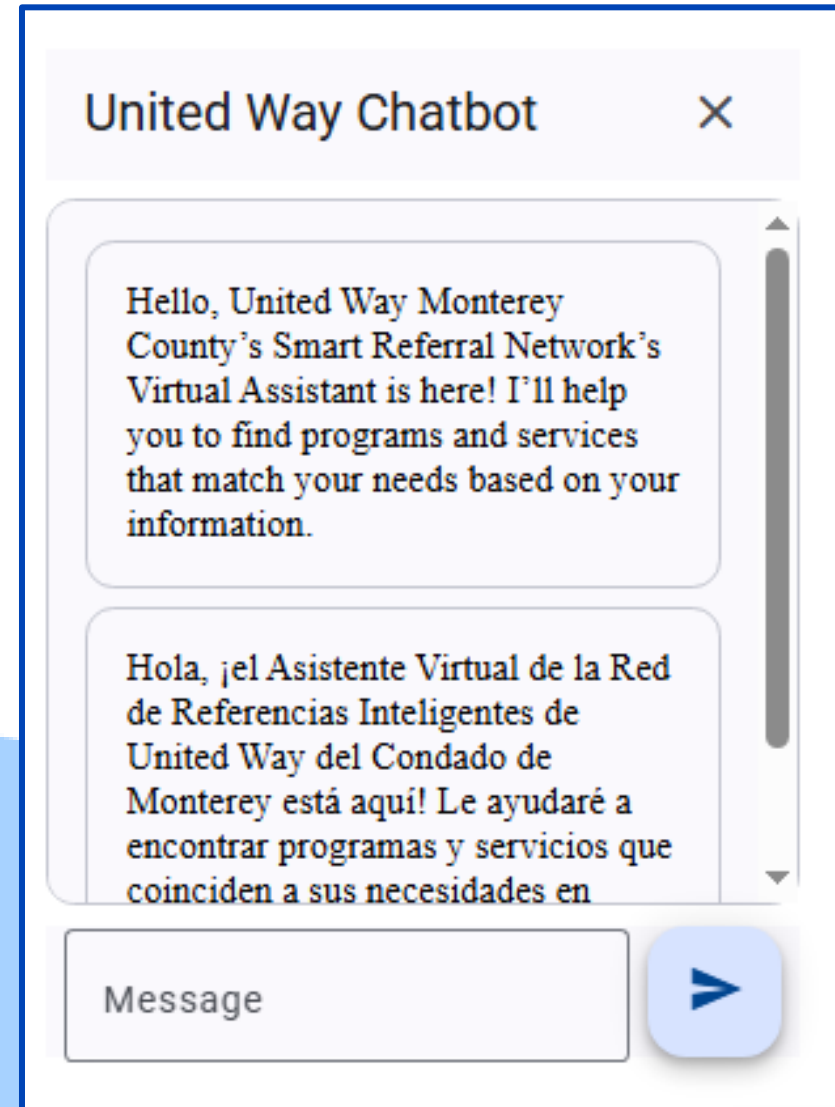


Your Path, Your Pace: Navigate Services with Our New AI Chatbot

Empowering Access Through Innovation

Our new AI-powered chatbot expands access to services by guiding users through self-referrals, benefit information, and resource navigation—directly from the 211 Monterey County website.

- Available now on the 211 Monterey County website for convenient access
- Provides reliable information about local resources and services
- Enables individuals to initiate self-referrals independently
- Offers up-to-date details about Medi-Cal benefits and eligibility
- Delivers a user-friendly, guided experience through an AI-powered chat interface
- Accessible 24/7 to support individuals anytime, anywhere



THANK YOU FOR JOINING US!

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UNITED WAY
Monterey County