One Degree Referrals: Closing the Loop

Easily create and share a plan for each of your clients and track their progress - all from one place!

Get started in 3 easy steps on www.1degree.org

1. Add your clients
   Click the “Add new client” button under My Clients. Add their name and, optionally, their contact information. Instead of full names, you could use your own internal code for each client, e.g. John 5.

2. Build a referral list
   Refer the right resources to your clients from 10,000+ updated community resources on One Degree. The details for each resource can be sent to your client, as well as printed.

3. Track progress
   We automatically follow up with your client to track their access to the resources you referred. You will be able to see their progress and follow up as needed.

If you need help getting started, contact us at help@1degree.org.

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Adding your clients is easy and safe

1. **Add your client’s contact info**

   We use client contact information to share referrals you create and to follow up on their progress. Add as little or as much information as you want. Instead of full real names, you could use your own internal codes for each client, e.g. John 5.

2. **Set language preference**

   You can make referrals in Spanish even if you don’t speak the language! You can do a search in English, then simply select “Spanish” as your client’s language and your client will receive the referral in Spanish.

3. **Rest assured your client’s data is safe**

   One Degree is HIPAA Compliant — the same level of security hospitals use for their patient’s records. Your client information is secure and will never be shared without your permission.

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Turn your referrals into an action plan for your clients!

1. Search & refer resources

Select the best resources for your client from 10,000+ resources on our platform. Use our tools to narrow by location, eligibility requirements and more. Add resources by clicking the “Refer” button.

2. Share plan with client

Review and edit your referral, then share it via email or text message with your client or simply print it out for them. Your client will receive all the details they need to access the services you recommended.

3. Track their progress!

We follow up with your clients to track their access of the services you referred them to. You can also update the status of a referral at any time so you can see what they’ve accessed or need help with.

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What do referrals look like to my client?

1. Your client gets an invitation to join One Degree
   With their own free One Degree account, your clients can browse all the resources available in their area, and add more to their plans at any time. (Your clients are not required to join One Degree.)

2. They see your referral
   Your client will be able to see your referral in their “My Plan” area of One Degree. There they have all the info needed to access each resource and read reviews about other people’s experiences with them.

3. They can share their progress
   With two clicks, your clients can let you know if the resources you referred them to were helpful and where they are in the process of accessing them. With that information reported to you live, you can send them new referrals or follow up as needed.

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Syncing with Salesforce

1. Connect your account

Make sure your One Degree account is affiliated with your organization and that you’ve been approved by your organization’s administrator. Then add your Salesforce user ID to your Settings, under My Account.

2. Import your clients

From Salesforce on any client Contact or Case Record page, click the “Add/View on One Degree” button. If the client already exists in your One Degree account, you’ll be taken to their page or asked to import their information. Be sure to select the Case Record to which you want to attribute referrals you make on One Degree before saving the client.

3. Make referrals, synced to Salesforce

Make referrals as normal on One Degree. After you create the referral you should see it in the client’s Salesforce Case Record as an Outbound Referral, which has high-level details about the referral you made. If you update the referral status in One Degree, it will update the status of the Outbound Referral in Salesforce.

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