



Web Platform: Core Actions Guide for Organizations Transitioning to Unite Us

This document contains a guide to the core actions of the Unite Us Platform. This guide applies only if you're transitioning from NowPow to Unite Us. Different users will use different actions based on workflow. You may or may not use all of these actions in serving your clients. Please navigate to and use the actions relevant to your workflow.

Curating and Sharing Program Resources with Clients

Finding Resources

Curating and sharing program resources with a client can help them get connected to needed programs and services. Once created, selected resources can be edited to create the best and most appropriate resources to be shared with the client, and you can create referrals for those needs. To begin finding resources for a client either click **+New Referral** or click on the **Refer** button in the client's face sheet.

- 1 Scroll through the recommended programs and click **Add Resource** to add the program for the client.
 - a. The **Service Types** dropdown or search bar allows you to search for programs specific to a service type.
 - b. Programs are automatically sorted by Favorite Status and Relevance.
 - c. Additional filters can be used to further narrow down your search.
 - d. Once you click on a resource, select the specific service type.
- 2 Once all programs have been added click the **Added Resources** button to review.
- 3 Click the **Save** button to save the resources to the **Resources** tab in the client's face sheet. The resources will reflect the date they were saved.
- 4 Click the **Share** button to share the resources with the client.
- 5 Click the **Create Referrals** button to create referrals for those needs.
 - a. Click on the three-dot icon within the numbered referral box to edit referral groupings or remove a referral.
 - b. Referrals will automatically be grouped if they are in the same service type and within the same network.
 - c. The referral box will note if the referral is for an On-platform or Off-Platform organization. Off-Platform referrals have a note reminding you the program is not receiving referrals through the Unite Us platform and should be contacted directly.

A screenshot of the Unite Us web platform interface. The top navigation bar includes the Unite Us logo, 'Dashboard', 'Clients', 'Exports', and 'My Network'. On the right, there are icons for email, search, and a user profile for 'Bryan Jimenez'. The main content area displays the profile for 'Lee Seanna' with a green 'CONSENT ACCEPTED' badge. Below the name, it shows 'DOB 10/30/1980 (Age 43) | TEL (252) 698-9632 | EMAIL lee@none.com | ADDRESS New Orleans, LA | HOUSEHOLD 1'. To the right of this information is a checkbox labeled 'Client requires action' and a 'REFER LEE' button. At the bottom, there is a tabbed interface with 'Overview' selected, and other tabs for 'Profile', 'Cases', 'Forms', 'Uploads', 'Referrals', and 'Resources'.

Taking Additional Actions on Saved Resource Recommendations

Previously saved resources can be accessed and edited by clicking the **Resources** tab on the client face sheet. Click into saved resources to take the following actions:

- Click **Find More Resources** to add resources to an existing group.
- Click **Create Referrals** to create referrals for those needs.
- Click **Share** to share the program resources with the client.
- Click **Edit** and the **Delete** icon to remove programs that have been selected.
 - Clicking Undo will add the program back.
 - Clicking Save will save the updated resources.
 - A previously created list of resources cannot be entirely deleted. If there is only one program and it needs to be deleted, another program will need to be added before that program can be deleted.

To learn more about how to find and share program resources with your clients, take our **Adding and Sharing Program Resources** course in Unite Us Learn.

My Network Tab

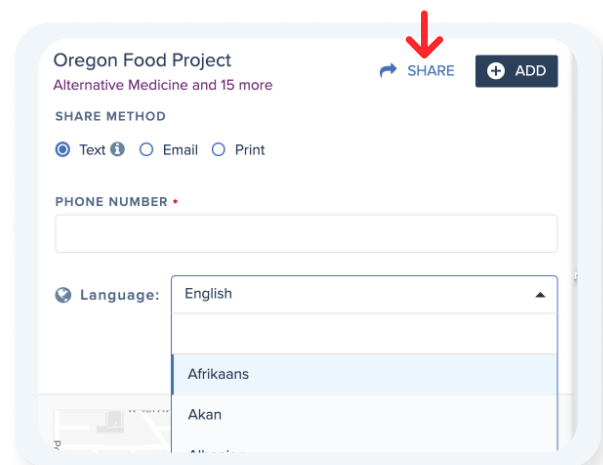
Click **My Network** to find a comprehensive list of programs in any network you are working in:

- **Service Type:** Narrow down the list of programs by selecting one or more service types that correspond to your client's needs.
- **Filters:** Use structured filters like specialized support, accessibility, and distance to find the best programs for your client.
- **Search bar:** To find a program you're already familiar with, type in the program name. You can also type a word or phrase into the search bar to further refine the programs listed.
- **Available Organizations:** Once you've refined your search results, click into available programs to learn more about the services offered and whether they will benefit your clients. It's also important to ensure your clients are eligible for the program's services.

Share Program Information

Share information for one or more programs from the program profile or the Network Browse list:

- **From the Program Profile:** Click Add Program then close the program profile box. Click Share and select the client's preferred option: text, email, or print. Select the client's preferred language from the drop-down.
- **From Network Browse:** Click the Add Program button for any programs you want to share. Click Share and select the client's preferred option: text, email, or print. Select the client's preferred language from the drop-down.



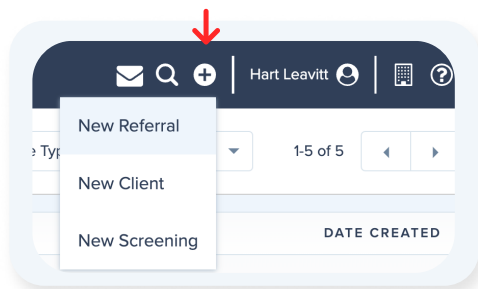
The screenshot shows the 'Oregon Food Project' profile with the text 'Alternative Medicine and 15 more'. A 'SHARE' button with a right-pointing arrow is highlighted with a red arrow. Below it, the 'SHARE METHOD' section has three radio buttons: 'Text' (selected), 'Email', and 'Print'. There is a 'PHONE NUMBER' field with a red asterisk. Below that is a 'Language' dropdown menu currently set to 'English', with a list of other languages including 'Afrikaans' and 'Akan' visible.

Take a deeper dive into the My Network tab by accessing the **My Network** course in Unite Us Learn.

For more information around service types, please take our **Service Type Essentials** course in Unite Us Learn.

Create a Client Profile

- 1 Click the plus sign (+) in the upper right corner of the navigation bar and select New Client.
- 2 Enter the client's name and date of birth to check for an existing client record.
- 3 Complete client demographic, contact information, address information, and contact requirements sections.
- 4 Complete the supplemental information section to enter the client's health insurance or military service information (if applicable).
- 5 Click Save Client.
- 6 Collect consent by following instructions in the Informed Consent section below.



Learn more about creating and using the client profile in the **Client Profile** course in Unite Us Learn or in the **Harnessing Client Information** live online training.

Collect Informed Consent

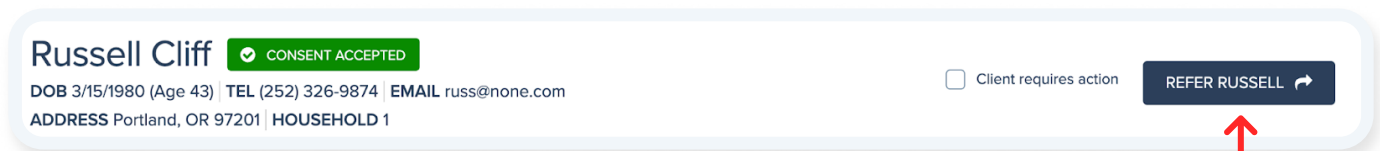
For clients who are new to Unite Us, you'll need to collect informed consent before the referral will be delivered. Consent is captured **once** for each new client.

You can learn more about consent and the options for capturing it by accessing our **Capturing and Reviewing Consent** course in Unite Us Learn.

Create a Referral

There are two ways to start a referral:

- 1 Click the **+Plus** sign in the right corner of the navigation bar and select New Referral. Enter the name and date of birth to check for an existing client record, or create a new client record. **Or:**
 - Use the Search in the Navigation Bar to go to a client's face sheet and click the Refer button.

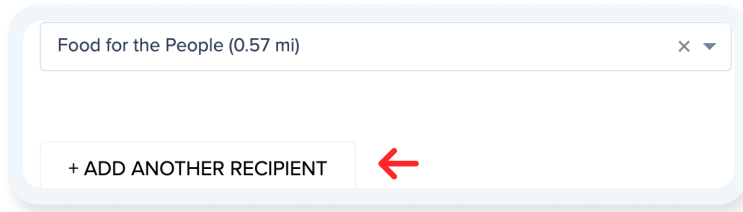


- 2 Select the Service Type.
- 3 Select an organization from the Suggested Organization drop-down or click Browse Map to learn more about organizations and program eligibility requirements.
- 4 Choose one or more in-network organizations to send the referral to.
- 5 Enter a referral description to describe the client's request for service, including Need, Specific Details, and needed Accommodations.
- 6 Provide additional information about the client's need through the Client Supplemental Information and Referral Assessment forms, then click Confirm and Submit.

Learn more about sending referrals in the **Sending Electronic Referrals** course in Unite Us Learn.

Create a Grouped Referral

In the referral creation process, you can select two or more organizations by selecting Add Another Recipient to create a grouped referral. This is especially helpful when the need is urgent or when you're aware of capacity issues within the network.



You can watch a video of the process in the **Sending Electronic Referrals** course in Unite Us Learn.

Manage Sent Referrals

In the Unite Us dashboard, track referrals you've sent and follow up on referrals that require your action:

- **Recall a referral:** Click Recall within the referral to take the referral back from the recipient organization. You might do this if the referral was sent by mistake, the client self-resolved, or the recipient organization did not respond. You can then send it to another organization or close it out.
- **Rejected referrals:** Sometimes the recipient organization will reject a referral if they are unable to serve the client. You can review the rejected reason at the top referral. Click the Take Action button to send the referral to a new organization. You can also close the referral.
- **Pending consent:** Send an additional request for consent from the client's face sheet by clicking the consent status button and choosing one of six options.

Learn more on these statuses by accessing the **Managing Sent Referrals** course in Unite Us Learn.

Create and Manage an Out-of Network Case

Out-of-network cases are meant to document traditional referrals (email, phone, fax) to partners that are not active in the network. This function is for tracking purposes, and the client will need to be connected to the organization outside of the Unite Us Platform.

Create an Out-of-Network Case: You can create an Out-of-Network case from within the referral workflow by clicking the Program Status filter and selecting Receiving Off-Platform Referrals:

- 1 Click Add Resource for the selected resource.
- 2 Click Added Resources.
- 3 Click Create Referrals.
- 4 Enter a Referral Description and select a Primary Worker who will make updates to the case and close it after learning the resolution.
- 5 Click Next to review.
- 6 Click Confirm and Submit to create the Out-of-Network case.

Manage an Out-of-Network Case: From within the Unite Us Dashboard or client's face sheet, follow up on out-of-network cases that require your action:

- **Add a note:** Click into a case to add a note when you have additional information on the process of getting the client connected with the out-of-network organization, and whether or not they received services.
- **Close a case:** Click Close within the case when work has been completed with the client. Choose a resolution and an outcome, and then add a note. Click Close Case to complete the action.

Learn more in our Out-of-Network Cases course in Unite Us Learn.

Take Action on an Inbound Referral

You must take action on every referral sent to your organization. To do so, follow the link in the email notification from Unite Us, log in, and view the referral. If you're already logged in to Unite Us, you'll find new referrals in the Needs Action section of Inbound Referrals in the Dashboard. You have four options on an incoming referral:

- **Accept:** You can work with the client on the identified need. Accepting the referral automatically creates a new internal case.
- **Hold for Review:** This interim status signifies that you're working on the referral and need time to determine whether you can serve the client. You'll need to accept or reject the referral once you make a determination.
- **Reject:** You cannot work with the client on the identified need. The referral is sent back to the organization that sent it to you.
- **Send:** You cannot work with the client on the identified need, but you know of another partner organization who can.

Learn more in the **Taking Action on Inbound Referrals** course in Unite Us Learn.

Manage and Close a Case

Once you've accepted a referral, document the services you provide and close the case when there is a resolution.

- Add Interaction or Service Provided notes within the case.

Tip: Track units of time, money, or items in Services Provided notes and later export the data for reporting purposes.

Close the case when service delivery has ended:

- 1 Locate the open case you would like to close in the Open Cases section of your Dashboard or within the client's face sheet.
- 2 Select a Resolution. Select Resolved if the client received services, and select Unresolved if they did not.
- 3 Select an outcome that most accurately reflects the client's situation. Don't see an applicable outcome? Chat Unite Us to suggest an additional outcome be added!

Access the **Managing Cases in Unite Us** course to learn more!

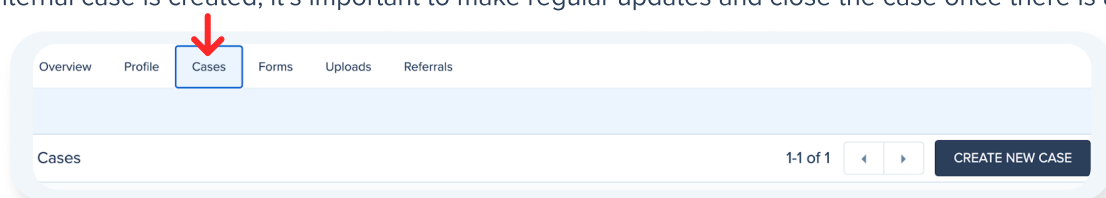
Internal Cases

If you're serving a client at a program within your organization, you'll create an **internal case** to document the outcome and any services provided. This allows you to capture the full journey of connecting the client to the needed services.

Within the client's face sheet:

- 1 Click on the Cases tab.
- 2 Click on Create New Case.
- 3 Select the Program, Service Type, and Primary Worker.
- 4 Enter a Case Description describing the client's needs.

Once an internal case is created, it's important to make regular updates and close the case once there is an outcome.



To learn more, access the **Managing Cases in Unite Us** in Unite Us Learn.

Client Face Sheet

The Client Face Sheet provides important information and opportunities to engage with the client.

To create a new client profile, click the **+Plus** sign in the navigation bar and select New Client:

- 1 Capture complete demographic and contact information for communication with the client and to demonstrate the impact of the work you are doing.
- 2 Encourage the client to allow the Message feature to receive text or email messages from partners they are working with.
- 3 Use the Notes section to document general notes or interactions with a client.

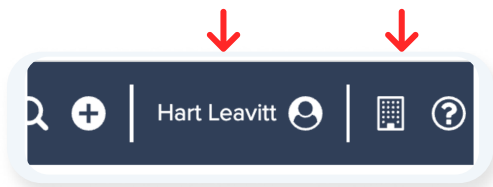
To learn more about the ways you can use the face sheet to support your work with clients, access the **Client Face Sheets** eLearning or the **Harnessing Client Information** live online training through Unite Us Learn.

Update your Organization and User Profile

Keeping your information up to date ensures accurate information appears in search results, which streamlines the referral process and makes your network more efficient:

- > You can edit your organization and/or user profile at any time.
- > To edit your staff, programs, or organization description, click the building icon in the upper-right corner and select Organization Profile.

To edit your email notifications, phone number, and email—or to change your password—click your name in the upper right corner and choose User Settings.

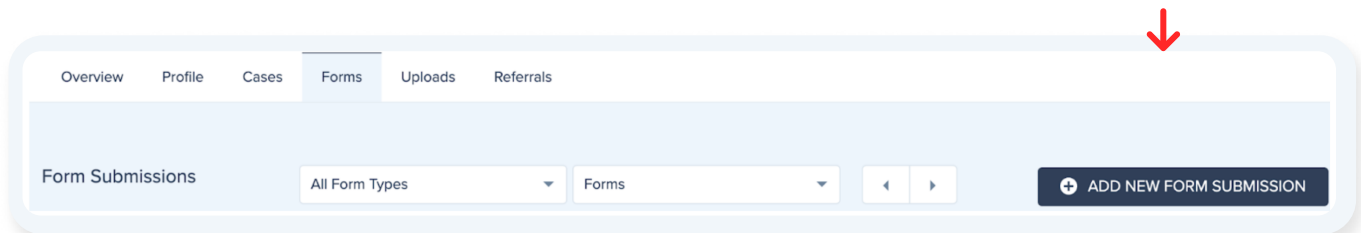


Access the **Organization Administrator Settings** course in Unite Us Learn or attend the **Updating Your Organizational Profile** monthly live online training.

Screenings

If your organization uses screenings to support your work with clients, follow these steps:

- To start a new screening, click the **+Plus** sign in the navigation bar and select New Screening. Or, on the Forms tab within the client's face sheet, use the All Form Types drop-down to select Screening. Alternatively, use the Forms drop-down to select the specific screening, and then click + Add New Form Submission. You can see the history of form submission in the table below.
- Filter for form types or a specific type of form by using the drop-downs



For more information, take our **Using Screenings** course in Unite Us Learn.

Assistance Request Forms

If your organization is receiving assistance request forms from potential clients requesting services, follow these steps:

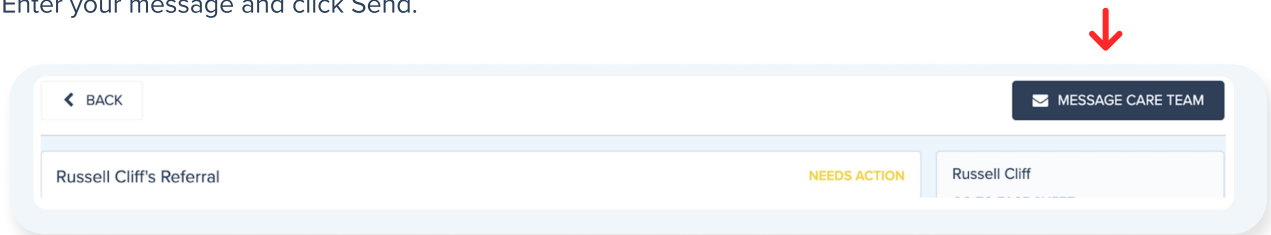
- Click on the assistance request in the Dashboard to learn more about the request.
- Click the Take Action button and choose from the options available:
 - **Serve** the client if you are able to serve them and they meet your program eligibility requirements.
 - **Refer** a client to another partner organization if you are unable to serve them.
 - **Close** the request if the client got connected to service on their own or you are unable to contact them.

Unite Us Chat

Unite Us Chat allows you to message Unite Us users directly within the web platform.

To chat with another Unite Us user:

- ➊ Open a client's referral or case and click Message Care Team.
- ➋ Confirm your message is about the right client and topic.
- ➌ Select a recipient from the To drop-down.
- ➍ Enter your message and click Send.



To read and respond to a chat from another Unite Us user:

- ➊ A notification badge will appear on the letter icon in the navigation bar when you have a message.
- ➋ Click on the **letter icon** to access messages. Unread messages have a blue dot under the date or time they were sent.
- ➌ Enter your response and click Send.

To learn more, read our [Unite Us Chat FAQ](#).

Key Terms

- **In Network or On-Platform Organizations:** On-platform organizations are organizations that have joined a Unite Us network and have access to the Unite Us Platform. Unite Us users can electronically send secure referrals to other partners within their networks.
- **Out-of-Network or Off-Platform Organizations:** Off-platform organizations are organizations that are not part of a Unite Us network, and therefore do not use the Unite Us Platform. Unite Us users can document when they have created cases at an off-platform organization, but referrals to those organizations must be made manually (e.g., phone, email, etc.).
- **Internal Cases:** Internal cases are assigned to your organization. Your staff is responsible for following up with the patient and updating and closing the case. Internal cases are either cases created by your organization for off-platform programs (the main case for SMART on FHIR users), or cases created by your organization, which is accepting referrals sent from other organizations through the Unite Us Web App (currently not the case for most SMART on FHIR users).
- **External Cases:** External cases are assigned to other organizations. Their staff is responsible for following up with the patient and updating and closing the case. External cases are created by other organizations accepting referrals sent through the Unite Us Web App, or by other organizations creating off-platform cases for a patient.