

Unite Us Core Actions

Create a Referral

Click the plus sign in the upper right corner and then click **New Referral**.

1. Select the service type and enter a referral description to describe the client's request for service.
2. Click Browse Map to learn more about organizations and program eligibility requirements.
3. Choose one or more In Network organizations to send the referral to.
 - a. It is recommended to check "Auto Recall" if you send to more than one organization
4. Click Add Another Referral to create another referral within the same step.
5. Provide additional information about the client's need through the assessment, then Submit

REFERRAL DESCRIPTION *

Client is in need of food assistance covering 3-5 days for their family of 3.

Please describe your client's current situation and reason for referral.

SERVICE TYPE *

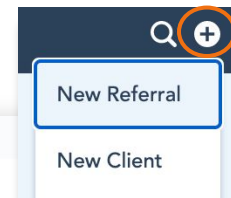
Emergency Food

SUGGESTED IN NETWORK ORGANIZATIONS

We've compiled this list based on the service type you selected. Select one or more recipients for this referral, or [click BROWSE MAP](#) for more options.

Sorted by: Distance

Choose an organization



Browse Referral Recipients

Cancel Browse

SA

Susan Amb

PHONE NUMBER
(336) 555-5555

DATE OF BIRTH
10/13/1975 (Age 45)

HOUSEHOLD SIZE
1

ADDRESS
101 Main st
burlington, NC 27215
Alamance County

Referral

SERVICE TYPE
Emergency Food

16 results for Emergency Food within any distance of 101 N Main St, Burlington, NC 27217, U

Sort by: Distance Service X

S.A.F.E. Food Pantry
Emergency Food
9385 Gerwig Ln J, Columbia, MD 21046 (255.38 mi) 2 more
(443) 741-1060
http://www.safefoodpantry.org

Albany Damien Center
Emergency Food
555 1st St, Brooklyn, NY 11215 (432.46 mi) 1 more
Hours today: 9:00 AM - 5:30 PM
http://www.albanydamiencenter.org

Helping All Clients
Emergency Food
10 Trowbridge Court, Ann Arbor, MI 48108 (481.83 mi)
http://www.communitycare.com/

Gluten Free and Allergy-Friendly Food Distribution
Accepting referrals

Food Assistance
Emergency Food

Physical Health
Chronic Disease Prevention & Management

Description
Food distribution of gluten-free and allergy-friendly foods to those with food allergies, celiac disease, gluten sensitivity, and other related medical conditions.

Hours of Operation: By appointment only.

Eligibility
This program is for people with a chronic illness in need of emergency food.

Unite Us Core Actions

Collect Informed Consent

For clients that are new to Unite Us, you will need to collect informed consent before the referral will be delivered. Consent is captured **one time** for each new client. The Unite Us consent options are as follows:

Informed Consent

If you will be servicing this client or sending referrals on their behalf, you will need to obtain their consent to do so. You may request consent from the client via email or SMS, or you may upload a signed consent document below

Digital Consent

Send Request For Signature By Text Message (SMS)

Send Request For Signature By Email

On-Screen Consent

Paper And Verbal Consent

Upload Signed Paper Form

Upload Audio File (Client Consented Verbally)

User Attestation

On-Screen Consent By Attestation (Client Consented Verbally)

Unite Us Core Actions

Track Sent Referrals

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

1. **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.
2. **Add a note:** Click into a referral to review updates in the Referral Timeline and add a note if you have additional information about the referral.
3. **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 or the recipient organization did not respond. You can then send it to another organization or close it out.
4. **Rejected referrals:** Sometime the recipient organization will reject a referral if they are unable to serve your client. You can review the rejected reason in the Referral Timeline. From there, you can update the referral and send it back to the recipient organization or a new organization. You can also close the referral.

Jon Ryan
DOB 12/1/1970 (Age 50) | EMAIL jonryan@seahawks.com
ADDRESS 800 Occid... | 98134 | HOUSEHOLD 1

Overview Profile Uploads Referrals

Care Team Add Note Or Message Client

PENDING CONSENT

- Send SMS
- Send Email
- Request On-Screen
- Upload Signed Paper
- Upload Audio File
- Provide Attestation

Daniela Anderson's Referral NEEDS ACTION

SENDER	Alliance for Positive Health - Hudson Falls Office	RECIPIENT	Kroger
SENDING NETWORK	Healthy Demo Network	DATE SENT	4/1/2021 at 11:12 am
SERVICE TYPE	Emergency Food	LAST INTERACTION	No Interactions Yet
PROGRAM	Kroger Food Benefits Program		

REFERRAL DESCRIPTION ✎
Daniela is in need of emergency groceries....

DOCUMENTS
No Attached Documents
Attach or Upload a Document

RECALL

TAKE ACTION

- CLOSE REFERRAL
- HOLD FOR REVIEW
- SEND

Unite Us Core Actions

Create an Out-of-Network Case

You can create an out-of-network case from the Cases tab in a client's Face Sheet, or by selecting "Create Out of Network Case" when sending a referral.

1. Select a service type.
2. Then select an out-of-network organization from Browse Map or input a new out-of-network organization; however, any new out-of-network organizations manually entered during this step of the process are not saved for future use.
3. Enter a case description and select a Primary Worker who will keep the case updated.

EMERGENCY FOOD

SENDING NETWORK *
Community Network - California

SERVICE TYPE *
Emergency Food

SUGGESTED OUT OF NETWORK ORGANIZATIONS
Please select an organization from the following list. If you do not find one, enter the name of the organization where you are referring the client.
Click [BROWSE MAP](#) for more options.

Sorted by: Distance
Choose an organization

REFER IN NETWORK

PRIMARY WORKER *

Choose one...

Note: 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.

Unite Us Core Actions

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.

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

The 'Add New Note' form is a light blue interface with three tabs: 'Interaction', 'Service Provided', and 'Other'. The 'Interaction' tab is active. It features three input fields: 'INTERACTION TYPE' with radio buttons for 'Phone' (selected), 'Email', and 'In-Person'; 'INTERACTION DATE' with a calendar icon and the date '04/06/2021'; and 'DURATION' with a dropdown arrow. A light blue informational box contains a warning icon and the text: 'Only include personally identifiable information (PII), protected health information (PHI), or other sensitive information if it is necessary to provide services to the client.' Below this is a 'NOTE' field with a red asterisk and the placeholder text 'Enter your note here...'. A dark blue 'POST NOTE' button is located at the bottom right of the form.

The 'Close Case' form is a light blue interface with a close button (X) in the top right corner. It contains four main sections: 'IS RESOLVED?' with a dropdown menu showing 'Resolved'; 'OUTCOME' with a dropdown menu showing 'Enrolled in Food Benefits Program'; 'NOTE' with a text area containing the text 'I contacted Lift Urban Portland via phone and was able to successfully connect client into local food delivery program.'; and 'EXIT DATE' with a calendar icon and the date '04/06/2021'. At the bottom, there are two buttons: a white 'CANCEL' button and a dark blue 'CLOSE CASE' button.

Unite Us Core Actions

Filter and Search Your Network

Click My Network to find a comprehensive list of organizations in your region.

- Service Type:** Narrow down the list of organizations 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 organizations well-fitted to your client.
- Search Bar:** To find an organization you're already familiar with, type in the organization's name. You can also type in a word or phrase into the search bar to refine the organization's listed.
- Once you've refined your search results, click into each organization to learn more about the services provided and programs offered. It will be important to check whether or not your client would benefit from and be eligible for the organization's services.

Share Organization Information

Share one or more organizations' information with your client from the organization profile or the Network Browse list.

- From Organization Profile:** Click Share and select the client's preferred option – Text, Email, or Print – or click Add to add it to your cart of organizations to share with the client.
- From Network Browse:** Click the + sign to add the organization to your cart of organizations. Then click Share and select the client's preferred option – Text, Email, or Print. Print will open a new tab and a prompt to print, while Text (smartphones only) or Email will prompt you to enter in the client's contact information.

The screenshot displays the UNITE US 'My Network' interface. At the top, there are navigation tabs for 'Dashboard', 'Clients', 'Reports', and 'My Network'. A search bar is visible with a magnifying glass icon. Below the search bar, there are filters for 'Service Type', 'Network Scope', and 'Sort by: Distance'. A list of organizations is shown, including 'Alliance for Positive Health - Hudson Falls Office' and 'Planned Parenthood Mohawk Hudson - Saratoga Springs Center'. A map on the right shows the location of these organizations. A 'Filters' panel on the right includes sections for 'SPECIALIZED SUPPORT' (Populations Specialized in Serving, Accessibility, Language) and 'DISTANCE' (50 Miles, Our Address, 10 LaCrosse Street Suite 12, Hudson Falls, NY 12839). A modal window for 'Healthy Coordination Center' is open, showing options to 'SHARE' (Text, Email, Print) and 'ADD' to a cart. The modal also includes a 'PHONE NUMBER' field and 'CANCEL' and 'SEND' buttons.