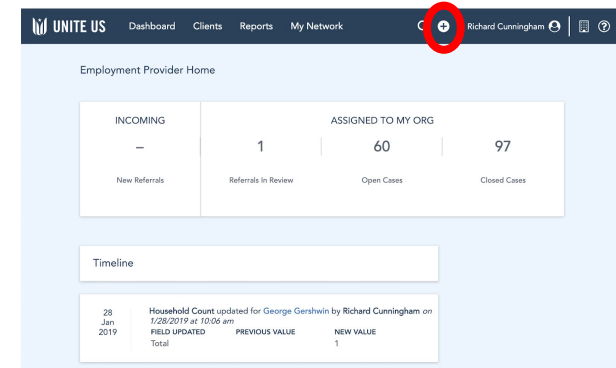


Create New Referral

From the upper-right corner of your Home Page, click  and select New Referral.

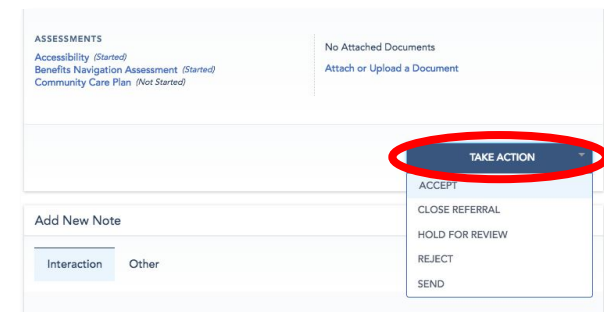
1. Enter client's First Name, Last Name, and DOB
2. Provide demographic and contact information for the client (or review if existing client)
3. Complete the Supplemental Information section to enter the client's **Medicaid ID (if applicable)**
4. Enter the service type and a referral description to describe the client's request for service
5. Choose which network organization to send the referral to, or send to the Coordination Center, if available in your network
6. Provide additional information about the client's need through the assessment
7. Review the information you've added and press Submit
8. Collect the client's Informed Consent using one of six options (if first referral made in Unite Us)



Take Action on an Incoming 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. You have five options on an incoming referral:

1. **Accept** – you are able to work with the client on the identified need; accepting the referral automatically creates a *New Case*
2. **Close Referral** – you can close the referral if you're unable to contact the client after ten business days, or if you contact the client and they no longer need services.
3. **Hold for Review** – an interim status that signifies you are working on the referral and need time to determine referral acceptance; you'll still need to eventually Accept or Reject
4. **Reject** – you cannot work with the client on the identified need; referral is sent back to the organization that sent it to you
5. **Send** - you cannot work with the client on the identified need, but know someone else in the community who can



Manage and Close a Case

Once you have accepted a referral, you can document the services you provide and, eventually, close the case.

- Add Interaction or Service Provided notes within the case or from the client’s Face Sheet
 - 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.

- Locate the open case you would like to close in the Open Cases section of your Dashboard or within the client’s Face Sheet
- Select a Resolution: Did the client receive the service they were seeking? If yes, select Resolved
- 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 to be added!

Update your Organization and User Profile

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 **Org Settings**.

To edit your email notifications, phone number and email, or change your password, click the three dots in the upper-right corner and select **User Settings**.