User roles and permissions overview

Program roles

Every user has one role: supervisor or case manager. These roles do not limit what a user can or cannot view—rather these roles prioritize certain information within that user's dashboard. For example, supervisors see aggregate numbers for the organization, whereas case managers see numbers pertaining to only their workload.

Program Role	**Description**
supervisor	Users can supervise case management and staff activity, review caseloads by staff member, program, and department. Supervisors can delete documents, care team members, and household members for a client, and pull real-time exports from the software and draw client and service insights.
case managers	Users can create clients and case files with note tracking. Case managers may also track a case file through its lifecycle and collaborate with in- network providers. Case managers are not able to pull exports from the software.

Organization roles

Unite Us can give every user within an organization add-on permissions to expand their abilities beyond creating new client records and cases.

Organization Role	**Description**
referrals user	Users can create new referrals from the client Face Sheet or the button next to the search bar. Users have access to the Draft Referrals and Referrals Sent sections of the Dashboard. This is the minimum required user role to view referrals; without this role, all referrals will appear locked.
Referrals admin user	This role is an add on to referrals user role. This role allows users to take action on referrals on behalf of their organization. It gives users access to the New Referrals and Referrals in Review section of the Dashboard. Users will also be sent an email notification when a referral has been sent to their organization. Note: the referrals admin user must be applied with the referrals user.
Network directory user	Users can access the My Network feature. My Network displays information about the overall network, organizations, and users.
Organization administrator	Users can access the Organization Settings page, where they can add new users and remove user's access to programs. Users can add and edit the organization's programs and profile. Each organization should have at least one administrator, but there is no limit to the number they may have.

Specialized organization roles

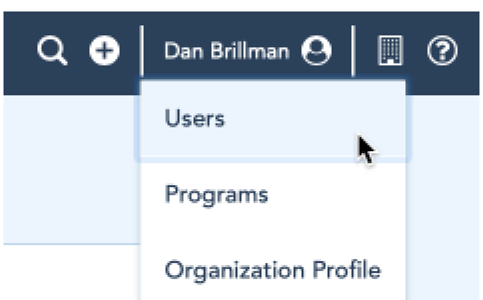
Specialized organization roles fall outside of typical user configuration and should only be used after consulting with the Unite Us customer success team.

Organization Role	**Description**
exports user	This role gives users access to the Exports feature within the Reports section. Users with this role can generate exports in the form of spreadsheets containing data that has been pulled from Unite Us.
assistance request user	This role is reserved for those users who should receive submissions of the online assistance request form. In most networks, this is a coordination center staff person. Users can view and take action on assistance requests.
insurance user	This role allows a user to add client health insurance information when creating a new referral. View a client's health insurance information within the Face Sheet. View the health insurance ID column in client Exports. Note: This role is only added to users who are part of a health insurance focused network.
intake user	This role is often reserved for users who provide care coordination services but can be given to any user. Users can create new intakes, which allow them to gather aggregate information about a client in one space.

	Note: Intakes are organization specific. A completed intake is only visible to the organization that created it and is not shared with the client's Face Sheet.
Out-of-network cases user	This role can create out-of-network cases in the referral process or when creating new cases from existing clients. This user role in combination with the supervisor role allows a user to add organizations to the out-of-network organizations list.
screening user	Users can create new screenings and view saved screenings in the client Face Sheet. This must be coupled with a configured screening.

In Unite Us, organization administrators can edit user roles and permissions. These determine how staff members at the organization send and receive referrals, interact with their Dashboard, and interact with a client's record.

Edit users



If you are an organization administrator, a building icon appears next to your name in the top right-hand corner of the screen. Click the building icon > Users to edit user settings. There, you can edit their roles and other permissions.