

Creating an Out of Network Referral- In the Unite Us Platform

The Unite Us platform allows participating network providers to create referrals to providers outside of the network. This type of referral is referred to as an out of network (OON) referral.

Every time a client is entered into the platform the information that is collected is used to compile a profile for the client, this is referred to as a Face Sheet. The Face Sheet contains the client’s demographic information as well a history of all the referrals that are associated to them. When participating providers take the time to create and track an OON referral they are helping to provide a clear “whole” picture for that client within the Face Sheet (profile) while maintaining consistent documentation.

Another benefit to creating and tracking OON referrals is that it presents an opportunity for us to continuously expand and grow the network. All referrals that are created in the platform contribute data that can be pulled for reporting and analytics. CNY Cares will utilize this data to track and engage OON providers whose participation will enhance the network.

Please Note: *OON referrals cannot be sent within the system and must be made as you would have prior to having access to the Unite Us platform.*

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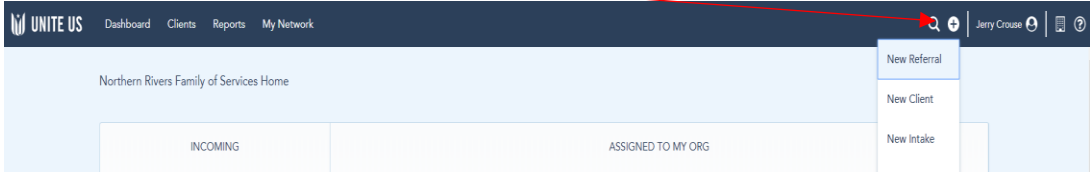
Adding an OON Organization to Your Network:

In order to send a referral to an OON provider you MUST first manually add that organization to your Network in the Unite Us platform.

Step	Instructions
1	Access the My Network menu from the top menu bar
2	Click the Organizations tab
3	Select the Add Out Of Network Organization button
4	Complete the form
5	Under Status – select Publish

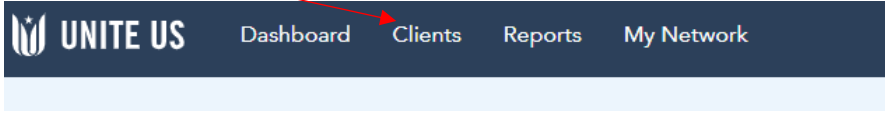
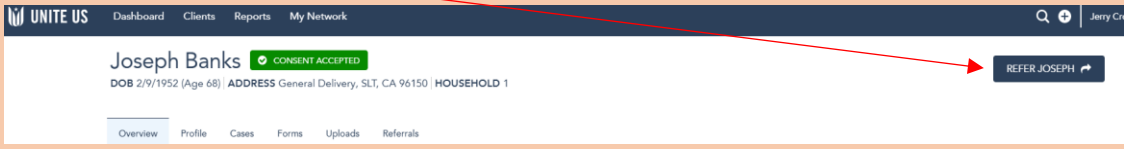


Sending an OON Referral for a New Client:

Step	Instructions
1	<p>Click the + icon in the top menu bar and select New Client</p> 
2	Complete ALL the required fields
3	Obtain client consent
4	Complete the Screening form
5	Select the intended referral (Based on the client’s response(s) to the screening form you will have referral options displayed.)
6	Choose the Service Type from the drop-down menu
7	Click the Create Out Of Network Case button
8	Refer to the drop-down menu in the Sorted by: Distance field to select an OON provider.
9	Make detailed notes in Referral Description NOTE: Don’t include any PHI or PII
10	Select the Primary Worker from the drop-down menu
11	Click Create Case
12	Complete any additional forms/screens and Select Save



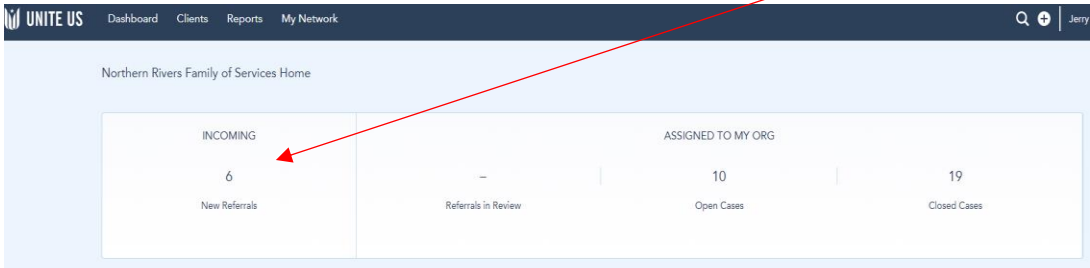
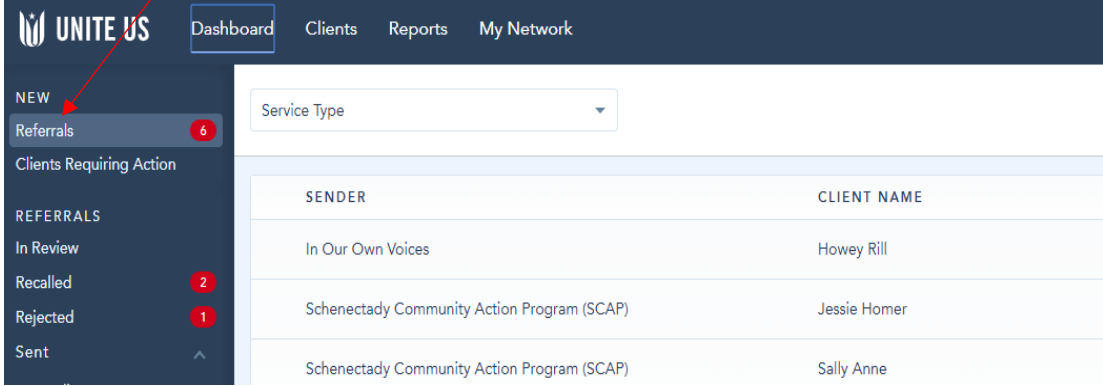
Sending an OON Referral for an Existing Client:

Step	Instructions
1	Select Clients from the top menu bar 
2	Filter by last name, or scroll through the list to locate your client
3	Review the client's Face Page as needed
4	Click the Refer "client name" box at the top of the screen 
5	Choose the Service Type from the drop-down menu
6	Click the Create Out Of Network Case button
7	Refer to the drop-down menu in the Sorted by: Distance field to select an OON provider.
8	Make detailed notes in Referral Description NOTE: Don't include any PHI or PII
9	Select the Primary Worker from the drop-down menu
10	Click Create Case
11	Complete any additional forms/screens and Select Save



Sending an OON Referral for a Received Referral:

If you receive a referral that would be better suited for another organization that is OON, you can send the referral to them.

Step	Instructions
<p>1</p>	<p>Access your received referrals from the Home Page by clicking in the Incoming section</p>  <p>Or from the Referrals section on the Dashboard</p> 
<p>2</p>	<p>Click the drop-down arrow in the Take Action box</p>
<p>3</p>	<p>Click the Create Out of Network Case button</p>
<p>4</p>	<p>Refer to the drop-down menu in the Sorted by: Distance field to select an OON provider.</p>
<p>5</p>	<p>Make detailed notes in Referral Description NOTE: Don't include any PHI or PII</p>
<p>6</p>	<p>Select the Primary Worker from the drop-down menu</p>
<p>7</p>	<p>Click Create Case</p>



Revision History

Created/Edited/Updated	By	Date
Created	Ebony Pengel	4-30-2020
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