

## Unite Us End-User FAQs

**Q. Are we able to update client demographic information as needed?**

**A. Yes-** Client information can be updated/edited from their Face Sheet.

**Q. Why would we create a batch referral?**

**A. A batch referral should be done in any instance where the sender of the referral considers it a high priority and/or when there are multiple agencies that could provide the same service to address the client's need. By sending as a batch referral, the first organization to "accept" the referral will keep it and those remaining will be automatically recalled by the platform.**

**Q. When adding a new client will it show other agencies who are working with the client?**

**A. Yes-** If the organization is a part of the Unite Us network and has used the platform to create referrals for the client, they will appear in the client's Face Sheet.

**Q. If an organization accidentally creates a duplicate client account, can they be merged?**

**A. Yes-** email [support@uniteus.com](mailto:support@uniteus.com) the details

**Q. For mental health and substance use providers, will others be able to see those referral descriptions?**

**A. No-** That information will not be visible for non-mental health and substance use providers.

**Q. Will end-users receive email notifications when new referrals are received?**

**A. Yes-** by default you will receive an email to notify you of most referral actions. You can turn on reminders and adjust your notifications settings by Accessing **User Settings** and clicking the **Notification Preferences** tab. Be sure to whitelist Uniteus.com and Uniteus.io.

**Q. Does any end-user within the organization have the ability to update program information and/or on the Organization Profile?**

**A. No-** Every end-user within the organization can view the profile, but ONLY designated end-users can make updates. If an end-user would like to update information, they can either reach out to their main Point of Contact (POC).

**Q. What's the difference between creating a New Referral vs creating a New Screening?**

**A. When you create a New Screening you are asking your client a series of questions to identify multiple needs they may have and based on their responses the platform will suggest referrals that may benefit them. When you are creating a New Referral, you are opting to refer the client to a specific provider solely based on what your client has requested and/or discussed with you.**



**Q. Is it possible to get a CNYCC consent that allows for HealthConnections (HeC) and Unite Us on one document?**

**A.** Not currently. Unite Us is a tool used to help connect individuals to the service(s) necessary to improve their overall well-being and health, addressing both their medical and non-medical needs. HealthConnections is used to share patient's health information with a mission to help providers see patients' complete medical record from all of the providers. CNY Cares and HeC are committed to working together to improve outcomes for patients and are considering measures to jointly improve patient outcomes.

**Q. Regarding the number of days to take action on a referral, what about times when you are out of the office for example, due to illness or vacation?**

**A.** There will be an opportunity for organizations to document hours of operation for programs within the Organizational Profile, calling out unique circumstances so that referring organizations understand when there may be limited response days/times. However, organizations with programs that offer varying hours of operation may want to create workflows to help minimize gaps in response-time.

**Q. Can we include Personal Health Information (PHI) on client referrals?**

**A.** The ONLY time PHI should be included in referrals is in the event that the referral is for a sensitive service type such as: Behavioral Health, Physical Health, and/or Legal. In these instances, the platform is designed to protect the viewing permissions.

**Q. What if I accidentally send out a referral without having the client's consent?**

**A.** The Unite Us referral platform will not send out any referrals without having the client's consent first. The system is designed to ensure that once consent has been gotten from the client, then it will send out a referral.

**Q. Where do I find the Network Standards?**

**A.** Network Standards can be found in the Standard Operation Procedures (SOP) document found here: <https://cnycares.org/media/3723/uu-partner-interface-sop.pdf>

**Q. How do I request training for the CNYCares Referral Network Unite Us end-user training?**

**A.** Please contact [SDOH@cnycares.org](mailto:SDOH@cnycares.org) to schedule new user training or recap training.

