Unite Us End-User Quick Tips

Sending a Referral:

- **Be sure to document clearly and concisely without including any PHI or sensitive information. Be mindful not to include abbreviations that may not be obvious to others.**

- **Capture Consent to ensure the referral will get to the receiver.**

- **If you want to follow up on a referral, put the notes on the Referral/Case as opposed to the Client's Face Sheet.**

- **If you need to contact the person who is working your Referral/Case you can get their contact information from the Network section under the Users tab.**

- **Monitor your Referral/Case by going to your Sent folder and when a case hasn't been acted on within the appropriate time frame, Recall it and Resend it to a different organization or to the CNY Referral Network.**

- **Do not create a new referral in response to a referral that hasn't been responded to. Recall the referral and send that referral onto a different organization. Be sure to select the appropriate reason for the recall.**

Working a Referral/Case:

- **If you need to contact a client to verify information before you can decide if you can take the referral, put the referral in Review status and document in the Referral notes section.**

- **Remember to add notes to the referral/case as you are working it. Notes should be clear and not include abbreviations that would not be clear or obvious to others.**

- **Have internal conversations with your organization to determine when it's appropriate to close a case. IE: Will you close the case as soon as you've made contact with the client and confirmed that your organization will be able to satisfy the need for the referral? Or will you keep the case open until the client has received the services to satisfy the need?**