# 851	UNITE US PROTOCOL	
	☒ **Workflow**	
Date of Inception:	7-31-2023	**_____ Approval:**
Current Approval Date:	7-31-2023	**CMO Approval (If Required):**

STEPS	WHAT	WHO
1.	Identify social determinant of health (SDoH) need(s) (housing, food, utilities, safety and/or transportation) using assessment within Electronic Health Record (EHR).	Case Manager (CM), Clinical Coordinator (CC), Clinical Director (CD)
2.	Ask the member if they want services based on the SDoH issues identified.	CM, CC, CD
3.	Member accepts or declines SDoH services. Member is informed that they can change their mind at any time regarding the need for additional supports. A. <u>If member declines:</u> Document in EHR that member declines services at this time. B. <u>If member accepts:</u> Navigate out of the EHR and open the SDoH platform, Unite Us (https://app.auth.uniteus.io/), utilizing a web browser.	CM, CC, CD
4.	==Use Single Sign On (SSO) to log onto Unite Us.== 1.1 G	CM, CC, CD
5.	Selects "New Referral" from the home screen.	CM, CC, CD
6.	Search for the member in the platform using First Name, Last Name, DOB. A. <u>If the member is in platform:</u> Select member and review/update demographic information (phone number, address, preferred contact method). B. <u>If the member is NOT on the platform:</u> Provide demographic (First Name, Last Name, DOB) and contact information (phone number, address, preferred contact method for the member). If applicable and not required: Complete additional	CM, CC, CD

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STEPS	WHAT	WHO
	supplementation information section with member's health insurance and/or military service.	
7.	Enter the SDoH need (identified in step 2) service type and a referral description to describe the member's request for service.	CM, CC, CD
8.	Ask the member if they have a preferred Community Based Organization (CBO). A. _If Member has a preferred CBO:_ Is the member's preferred CBO in the platform? a. Yes: Continue to Step 9 b. No: Complete Appendix A Steps* B. _If Member does not have a preferred CBO:_ Continue to step 9.	CM, CC, CD
9.	Pull a list of available CBOs on the platform and search for CBOs that meet the member's need(s). 1.1 E	CM, CC, CD
10.	Share with member the CBOs that can address the identified need and work with member to determine which CBOs to send the referral(s) to.	CM, CC, CD
11.	Review the information and click submit.	CM, CC, CD
12.	Collect member consent to using the Unite Us portal. Members can provide their consent via email, text, on-screen, hard copy, verbally (recorded) or via user attestation (preferred). 1.1 F A. _If the member does not consent:_ Do not share member's information with providers to receive services. Provide the member with information that they could use directly by scheduling their own visit or with staff assistance. Staff to add in the EHR record that member declined to provide consent and CBO information was provided to the member. B. _If the member does consent:_ Hit Submit and provide member with the list of CBOs that their information was shared with. Staff member to add CBO information in the member EHR record.	CM, CC, CD
13.	Staff will receive notice from CBO on referral status (Rejected, Recalled, Needs Action, In Review, Closed).	CM, CC, CD

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	A. <u>Rejected</u>: Referrals the CBO declined. Staff can either send these referrals to another organization or close them. B. <u>Recalled</u>: Referrals sent but then recalled so that they could edit the referral or send it elsewhere. C. <u>Needs Action</u>: Referrals for staff sent that have yet to be serviced. The CBO still needs to accept or reject these referrals. If referrals stay in this status for too long (generally for more than two business days), send the referral to a different organization. To do this, open the referral, select Take Action > Send and choose an action. D. <u>Closed</u>: Referrals for which the CBO has provided a resolution and outcome. The resolution can be resolved or unresolved, meaning that the need was or was not met. Review the resolution and outcome of referrals and send them to other organizations if member's needs have not been met.	
14.	Follow up with the member to ensure they were scheduled for the service and/or satisfied with services that were provided. Document this information in a contact note in EHR.	CM, CC, CD
	Appendix A 1.1 G *If CBO is not in the platform	
1.	Collect agency's contact information utilizing available resources (internet search, CBO outreach, word of mouth, staff recommended).	CM, CC, CD
2.	Contact CBO for referral requirements.	CM, CC, CD
3.	Work with member to create a referral for CBO.	CM, CC, CD
4.	Get Member consent and Release of Information (ROI) signed by member and upload documents in the EHR.	CM, CC, CD
5.	Document interaction and referral information in member's EHR chart.	CM, CC, CD
6.	Send CBO information to Provider Health Digital Project Manager (DPM)	CM, CC, CD, DPM
7.	Provider Health DPM sends CBO contact information to Unite Us Project Manager (PM).	DPM, Unite Us PM
8.	Unite Us PM works with CBO to get them added to the Unite Us Platform.	Unite Us PM

STEPS	WHAT	WHO
9.	Follow up with member to ensure they were scheduled for the service and/or satisfied with services that were provided. Document this information in contact note in EHR.	CM, CC, CD
10.	Follow up with CBO for service status. Document this information in contact note in EHR.	CM, CC, CD