FAQ for Network Partners

What is Unite Us?

Founded in 2013, Unite Us is a technology company that builds coordinated care networks of health and human service providers to address all determinants of health. What was originally created to serve veterans has grown into a national movement to connect everyone to the care they need. Unite Us' intuitive platform supports meaningful collaboration, community-wide care coordination, and secure, bidirectional data sharing. In addition, our comprehensive network-building and change management process creates value for network partners with a focus on increasing public access to services and empowering people in the community to take ownership of their own health. Unite Us recognizes that medical care alone does not equate to wellness; people don't live in hospitals, they live in communities.

What does the software do?

The Unite Us platform aligns those who deliver services in one standardized ecosystem. It facilitates simple, secure, electronic referrals between health and social care providers and can be integrated with their existing systems. In addition to providing a resource directory, the technology enables real-time, actionable metrics on individuals, outcomes, and provider performance, enabling partners to proactively address the complex needs of the most vulnerable populations across the country. The platform gives partners visibility into their clients' care journeys outside of their organization, allowing partners to coordinate care for shared clients across a range of service types. The Unite Us platform streamlines workflows and gives people the ability to serve those in need faster and more efficiently, ultimately leading to improved health outcomes.

What are the benefits of using Unite Us?
- A web-based application that's accessible from any device (PC, laptop, or mobile), so no downloads necessary
- Configurable, centralized, and standardized data intake screenings and assessments

- Secure logins for each network partner with configurable access and permission settings at the organization and user levels
- In-person and webinar training prior to network launch, ongoing webinar training, reference materials, and a learning hub available to all network partners
- Real-time data exports and reports including individual demographics, military history, and needs assessments that highlight trends and show the impact of outcomes within the community to inform funding
- Data analysis services to help network partners understand their community's needs so they can better serve each person and population

Do I have to log into this system every day?
This depends on your organization and how you serve the community. Unite Us will automatically send you email notifications to keep you informed and prompt you to log into the software when something needs your attention. You can utilize the system as much as you want.

How do people seeking services enter the network?
The Unite Us network allows for a "no wrong door" approach to connect people with the services they need. A person can enter a network through walk-ins, phone calls, submitting a website form, or a digital referral from another provider via Unite Us. This means that people can get the assistance they need quickly, easily, and through any one of many possible entry points. This saves everyone time, increases efficiency, and allows a network to help more people, no matter their communication preference.

Who works with Unite Us?
Unite Us works with public, private and nonprofit organizations, government agencies, social service and health institutions, and businesses that address holistic coordinated care and deliver health, human, and social services.

- Organization: A network organization is a partner (social service agency, healthcare provider, local or state government agency, etc.) that works directly with community members to provide services. Organizations can participate to send referrals, receive referrals, or both; in order to engage in the network, organizations just need to identify at least one program that will participate (employment services, housing, legal services, public benefits navigation, primary care, etc.), and the staff (users) associated with those programs who should have access to the network.

- Network: A network is a collective, curated group of trusted community partners (organizations) on a common platform (Unite Us).

- Coordination Center: A Coordination Center is a local network partner that helps ensure smooth network operations and maintain a standard of high quality referrals through operational oversight. Coordination Center users log in to Unite Us daily in order to facilitate referrals between partners (when requested), monitor network referrals, and follow up with partners when necessary to keep partners accountable for timely network actions. The team at the Coordination Center has a deep understanding of the eligibility requirements and services provided by each of the organizations participating in a network. There may be one or more network partners working as a Coordination Center within a given region.

How does the Unite Us software help improve an organization's workforce and overall efficiency?

Using the software improves an organization or case manager's workflow by automating manual processes - no longer needing to manually connect or search for organizations to fulfill a person's request for assistance that is outside of their organization's capacity. This allows case managers, intake specialists, and social workers to provide wrap-around services to people by leveraging the web of community organizations that exists within the curated network. This removes the possibility of requests and people "falling through the cracks."

Organizations and networks can:
- Track people's entire health journeys; insight into cases, ability to add case notes and documents associated with each unique person.
- Close the loop on referrals with transparency and insights into service outcomes; with the ability to filter by service type and/or organization.
- Enable data-driven decision-making and identify gaps in service delivery across the community.
- Make and receive secure, real-time referrals.

Is this going to be a time drain?

No. You're already doing this work; our software streamlines the referrals you send to and receive from your network partners, while giving you more time to help people! Rather than making phone calls, sending emails, and spending time flipping through a rolodex, you can use our software to create referrals instantly. The trusted partners in your community have already been added to our platform and are ready to receive

your referrals. Additionally, the referrals you receive will be comprehensive and complete. You will receive information about individuals and the services they need once you accept the referral.

How does the network address concerns that partners will be overwhelmed by referrals if they join the network?
Each organization can determine how they are most comfortable participating in the network. Network partners do not have to agree to receive referrals for all services to participate. Additionally, the Unite Us platform allows partners to manage the flow of referrals coming to them from other network partners. Network partners will be able to reject any referral that is sent to their organization if they do not currently have the capacity (selecting a structured note demonstrating that this is the reason), which will send the referral back to the user/organization that sent the referral (and can then be sent back out to another partner to address the need). Network partners are also able to update their own network profiles to stop referrals from being sent for certain services when they are at capacity. Finally, each organization's profile in the software contains structured eligibility information about their programs that can be updated at any time to ensure that clients are referred to programs for which they are eligible.

Registering an organization and its programs can seem overwhelming; organizations can have a lot of programs that might participate and program eligibility changes often. Can community organizations start with a small amount of programs participating and grow from there?
Organizations can choose to participate in whatever way makes the most sense for them. Network partners can start by registering as many users and programs as they want to. Network partners should keep their organization and program profile updated so they can receive the most appropriate referrals that match eligibility, language, geographic location, and any other qualities that are relevant to their services. Unite Us staff is available to troubleshoot any questions through email and the software's live chat capabilities.

How does Unite Us verify/vet service providers that join a network?
Any organization that provides a direct service can request to join a network. All approved providers are held to network standards to ensure that referrals are being acted on within a predetermined time frame. Approved providers undergo registration, approvals, and software training.

How is information kept up to date in the network?

Each network partner has identified staff that can update their information at any time. Network standards are created around how often information should be updated, and users are also incentivized to keep this information up to date to ensure that they do not have to be bothered with inappropriate referrals sent to their organization that they then have to reject. Unite Us also keeps an eye on aggregate referral rejection data to provide support and reminders to those organizations that may need to update their data. Information on "out-of-network" organizations that do not yet participate in the network are kept up to date through a quality review process by the Unite Us team.

Is the Unite Us system secure?
Yes, the Unite Us platform is HIPAA, FERPA and SOC 2 Type 2 compliant, addressing the necessary criteria to ensure the safety and security of the information that flows throughout the system. Unite Us takes Personally Identifiable Information (PII) and Protected Health Information (PHI) very seriously. We encrypt and secure all data in our platform, in-transit and at rest. We have implemented internal and external privacy and security policies adhering to HIPAA guidelines, and we work with third-party consultants to regularly review our administrative, physical, and technical safeguards. In accordance with HIPAA guidelines, we undergo an annual Risk Assessment and Penetration Testing. Additionally, we sign Business Associate Agreements (BAAs) with providers in our networks that provide health-related services and are considered a Covered Entity under HIPAA, as well as any applicable workforce member (Amazon Web Services, Google, etc).

Below is a brief overview of how Unite Us covers the security rule safeguards:

1. Technical - Information is encrypted in-transit and at rest and is stored on leading Type II SAS Servers via Amazon Web Services.
2. Physical - Physical access at Unite Us is controlled by using person-specific keycards, video surveillance, and locks.
3. Administrative - Internally at Unite Us, each team member receives training on HIPAA Security Awareness and are only allotted pre-determined access to the system per their job description. Additionally, Unite Us has numerous privacy and security policies and procedures in place to mitigate potential risks.

How does Unite Us protect clients' personal information?
The platform is built based on a set of permissions for each organization and user (i.e. network partner staff), only allowing users to access information related to clients (i.e. community members, patients, etc. served by network partners) that have been referred to their organization AND their organization is serving (i.e. the referral was

accepted), or those clients they have added to the system (to either refer externally or document services provided internally). If an organization is not serving a client, they will not be able to see that client and any related data.

For those clients that users do have access to, every referral or case in the Unite Us platform contains information about the client with respect to their needs. As clients continue to receive services in the network, those records become part of their history of care. Knowing that history provides meaningful context as network partners work to deliver services and resolve needs. Within the Unite Us Service Type Taxonomy, however, there are protected and sensitive service types to limit access to information about certain types of services. For protected types (physical health), users without viewing permissions can only see that the referral has been sent to an organization and a case has been created. For sensitive types (mental/behavioral health, substance use, legal services), only the organizations who send and receive a given referral will know that a referral has been made and a case has been created for these services.

How does an individual consent to participating?
Before a client's information is shared to connect them to services through Unite Us, their digital signature must be obtained to consent to share information with any network partners. The Unite Us informed consent form notifies the client that their information will be stored digitally, in confidence following all federal, state, and local privacy laws. Clients can provide their signature for consent via email, text, on-screen, hard copy, verbally (recorded) or via user attestation. If a client does not provide consent, their information will not be shared with in-network or out-of-network providers to receive services.

How does Unite Us manage data integrity and make sure clients aren't duplicated?
Every time a user enters a new client into Unite Us, the user is required to enter the client's first name, last name, and date of birth. The system then checks these data points against the entire Unite Us database to see if the client already exists in the system. If an existing client with a similar name and same date of birth exists (the system checks for nicknames, misspellings, common variations of names, etc.), the system will present the user with the existing client's name, phone number, and address and ask if the user wants to "use this record." After determining whether the "new" client and the existing client match, the user can either click "use this record" and move forward within the existing client file or create a new client record if it's not a match.

Is the software accessible to those with disabilities? Is it ADA compliant? Is it 508 compliant?
Unite Us is Rule 508 Compliant and uses a variety of self-assessment screenings to ensure access for people with physical, sensory, or cognitive disabilities.

The Unite Us Product team is focused on standardizing the way we approach and check for accessibility, including testing for WCAG 2.0 compliance when updates are made to the platform's interface.

How do I contact Unite Us?
- Chat live on the Unite Us platform via the chat bubble on the bottom right corner and connect directly with the Unite Us Support Team.
- Reach out directly at www.uniteus.com/contact.
- Send us an email at support@uniteus.com.

Supplemental Questions - included as needed, per network

How will Unite Us work with 2-1-1s and other community initiatives?
The purpose of the coordinated network supported by Unite Us is not to replace, displace, or absorb 2-1-1 systems and existing community initiatives that aim to connect the community with social need resources. Unite Us has a long history of working with and directly serving community initiatives including 2-1-1s. The role these partners could play in a coordinated network will likely look different in each region, depending on the strengths and interests of the partners.

What are the differences between Epic's Community Resource Directory and Unite Us?
Epic's Community Resource Directory is a tool that allows users to upload a list of social services providers so that they can be viewed in Epic. There are several major differences between this tool's capabilities and those provided by Unite Us:
1. The list of resources needed for Epic's Resource Directory requires regular updating and maintenance by the health system.
2. Epic's Resource Directory does not provide health systems with a comprehensive longitudinal view of their patients' social care journeys. It also doesn't allow partners to send referrals and track them through to completion. Unite Us provides the resource directory, closed-loop referral capabilities, and detailed service reports – ensuring that outcomes are communicated back to the original referral sender.

3. CBOs use Unite Us to receive referrals from health systems, respond to them, and report their interactions with the member. CBOs do not have access to Epic's Resource Directory.
4. Unite Us generates statistics on the efficiency of care provided by every network partner receiving referrals from the health system. This data is used to optimize patients' social care. Epic's Resource Directory does not generate statistics to inform care delivery in the community.

Can Unite Us integrate with Electronic Medical Records, Case Management Systems, and other software?

Unite Us is built on application program interfaces (APIs) which allows us flexibility in terms of how well Unite Us integrates with other software systems. However, Unite Us' ability to integrate with other software systems is also dependent on that system's ability/desire to integrate with the platform and resources available for this effort. Unite Us currently has active integrations with platforms such as Epic, Cerner, and Salesforce.

Many organizations already have to enter information into software platforms (e.g. HMIS) — is there any way to mitigate this double entry? It seems like this might add work onto staff's plate.

Though there may be necessary double entry, the Unite Us software streamlines the referrals you send to and receive from your network partners, while giving you more time to help your clients. Rather than making phone calls, sending emails or faxes, and spending time searching online or flipping through a binder, staff can use the software to create referrals instantly and track what happens to the client simply by receiving email notifications and logging into the platform. Unite Us has heard from many existing network partners that this time saved allows their staff to focus on supporting the client with the referrals suggested, and conduct more targeted follow-up to meet the individual's social needs or help connect additional clients to services.

It's a struggle to search for the best programs to serve an organization's clients and to spend the time looking for resources. The goal of the community network is to help network partners spend less time on making referrals and more time on their day-to-day job, thus increasing the organization's impact on clients. Additionally, network partners using other software systems will receive referrals in the Unite Us platform with service-relevant data, which will save significant time as staff won't have to re-collect data once the client arrives to be served (e.g. information specific to healthcare, homelessness, etc.).