

Getting the Most Out of Unite Us: A Quick Guide for CBO Partners

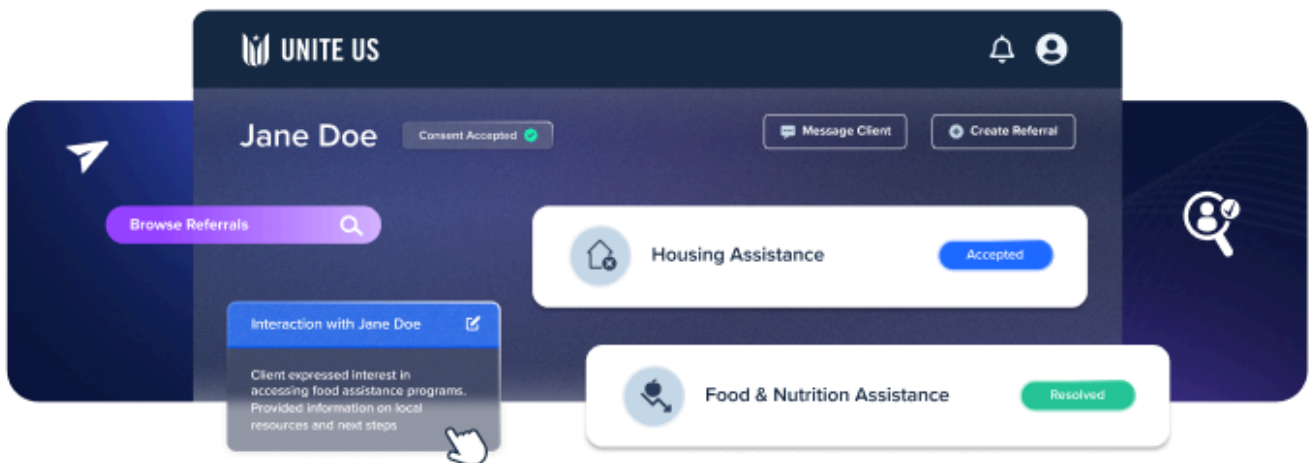
Simple best practices to help you serve clients quickly and effectively

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Why This Matters

Every action you take in Unite Us helps connect someone to care. Following these best practices keeps referrals moving, strengthens partnerships, and ensures clients get the support they need without delays.



1. Start Here: Take Action on Every Referral

James Hope's Referral ● NEEDS ACTION

SENDING ORGANIZATION	Building Futures - Demo	CASE RESOLUTION	Pending
SENDING USER	Larry June Email: @demo.org Phone: (510)	RECIPIENT	Vets Deserve More
SENDING NETWORK	Unite California DEMO	DATE SENT	6/6/2025 at 1:23 pm
SERVICE TYPE	Individual Counseling	PROGRAM	Mental Health

REFERRAL DESCRIPTION ✎

James is in need of counseling for a family matter

DOCUMENTS

No Attached Documents

[Take Action](#) ▼

When you receive a referral, it will appear in:
Inbound Referrals → Needs Action

SENDING ORGANIZATION	CLIENT NAME	SERVICE TYPE	DATE RECEIVED	LAST UPDATED
Customer Success Coordination Center	CAROL INGRAM	Dental Care	Jun 25, 2025	Jun 25, 2025
Metro Coalition	James Abraham	Housing Case Management	Jun 6, 2025	Jun 6, 2025
Care for the Underserved - Demo	Jessica Roberts	Housing Case Management	May 12, 2025	May 12, 2025

👉 The most important step is simple: **don't let referrals sit.**

Referral for Gabriella Solis ● NEEDS ACTION

SENDING ORGANIZATION	Housing 4 All	CASE RESOLUTION	Pending
SENDING USER	Benita Hamilton Email: benita@demo.org Phone: (555) 555-0000	RECIPIENT	Network Hub Premium Support
SENDING NETWORK	United We Stand Demo Network	DATE SENT	12/6/2024 at 3:35 pm
SERVICE TYPE	Food Pantry	PROGRAM	NHS Premium Support

REFERRAL DESCRIPTION

Client is in need of emergency food (groceries) from the local food pantry.

ATTACHED DOCUMENTS

No attached documents

Hold For Review
Hold the referral until you're sure you can help.

Send
Send the referral to another program.

Accept
Accept the referral to start working with the client.

Reject
Let the sender know you can't help the client.

[Take Action](#) ▲

What to do:

- Open the referral
- Click **Take Action**
- Choose the option that fits your next step

Your options:

- **Accept** → You can help and the client is eligible
- **Reject** → You cannot help or the client is not eligible
- **Hold for Review** → You need more time to decide
- **Send** → Another organization may be a better fit

Best practice: Take action within **2 business days**

2. Accept vs. Reject: A Quick Tip That Makes a Big Difference

This is one of the most common areas of confusion.

Close case

IS RESOLVED*
Unresolved

OUTCOME*

- Client Declined Services
- Client Relocated Out of Service Area
- Duplicate Case Record
- Ineligible to Receive Financial Counseling Services
- No Financial Counseling Services Available
- Not Resolved
- Unable to Contact Client
- Other

NOTE*

- Include any additional information about why you're closing this case. Don't include any sensitive information (such as details about interpersonal violence, substance use, or legal services).

OPENED DATE* 02/04/2026

CLOSED DATE* 03/24/2026

✓ Accept the referral if:

- The client is eligible
- You have the capacity to serve

Even if you cannot reach the client:

- Accept the referral
- Try outreach (at least 3 times)
- Close the case as **“Unresolved – Unable to Contact”**

✗ Only reject if:

- The client is not eligible
- Your organization cannot provide the service

💡 Rejecting sends the referral back and can delay care. Accepting keeps things moving forward.



Do you want to learn more about Taking Action on Inbound Referrals? Here is a direct link to our microcourse in Unite Us Learn: <https://learnsso.uniteus.com/learn/enroll/132ed171-ad57-4aec-a513-d522b3825254>

3. Reaching Clients

Once you accept a referral, outreach is the next step.

Best practices:

- Try to contact the client within **1 week**
- Make **at least 3 attempts over 10 days**
 - *Consider varying outreach by contacting at different times of day (for example, morning and afternoon) and trying different kinds of contact methods when possible, such as phone calls, texts, and emails*
- Document **each attempt** in the case notes

If the client does not respond, you can still close the case appropriately after outreach by marking the case as **“Unresolved – Unable to Contact”**.

4. Keep Everyone in the Loop with Notes

The 'Add Note' form is titled 'Add Note' and has a 'General' tab selected. It includes the following fields and options:

- INTERACTION TYPE:** Radio buttons for Phone (selected), Email, and In-Person.
- INTERACTION DATE:** A date picker set to 11/01/2024.
- DURATION:** A dropdown menu.
- Note:** A text area with a placeholder 'Enter your note here...'. A warning icon and text state: 'Include only the minimum information necessary to provide the requested services. Do not include sensitive information (e.g., interpersonal violence, substance use, or legal services information).'.
- NOTE VISIBILITY:** A checkbox for 'Private to my organization' which is currently unchecked.
- Buttons:** 'Cancel' and 'Post Note'.

Notes help the entire care team understand what is happening.

Add a note when:

- You contact the client
- Services are provided
- There are updates or delays

Tips:

- Keep notes clear and timely
- Avoid including sensitive or protected information
- If a case stays open for a while, add regular updates

5. Closing the Loop: Close Every Case

The 'Close case' form is shown in a modal window. It includes the following fields and options:

- IS RESOLVED:** A dropdown menu set to 'Resolved'.
- OUTCOME:** Radio buttons for Client Self-Resolved, Received Gift Cards/Financial Assistance to Purchase Food, Received List of Local Food Pantries/Banks, Received Supplemental Food from Food Pantry/Bank (selected), Signed Up to Receive Food Pantry Distribution, and Other.
- Note:** A text area with a placeholder 'Client visited the food pantry on 1/16 and received one large food box with shelf stable items, and fresh fruits and vegetables.' A warning icon and text state: 'Include any additional information about why you're closing this case. Don't include any sensitive information (such as details about interpersonal violence, substance use, or legal services).'.
- OPENED DATE:** A date picker set to 01/11/2026.
- CLOSED DATE:** A date picker set to 01/16/2026.
- Buttons:** 'Cancel' and 'Close Case'.

Closing a case is how you let partners know what happened.

Close a case when:

- The client received services
- Or you could not reach them after outreach

When closing:

- Select **Resolved** if the client received the services needed.
 - Note: This includes instances where your organization did not provide the services, but you identify the client was able to resolve the need on their own
- Select **Unresolved** if the client did not receive the services needed
- Add a short note explaining the outcome

Best practice: Close cases within **2 business days** of learning the outcome (and do your best not to select “Other” as the outcome, if possible.)



Do you want to learn more about Managing and Closing Cases in Unite Us? You can access the following courses within Unite Us
Learn:

Managing Cases in Unite Us

<https://learnsso.uniteus.com/learn/enroll/37e23a13-cb43-4061-8c0a-07a41ac548f9>

Closing the Loop - Choosing Resolutions and Outcomes

<https://learnsso.uniteus.com/learn/enroll/e5328f07-57ed-47b4-8de4-488078de6bf1>

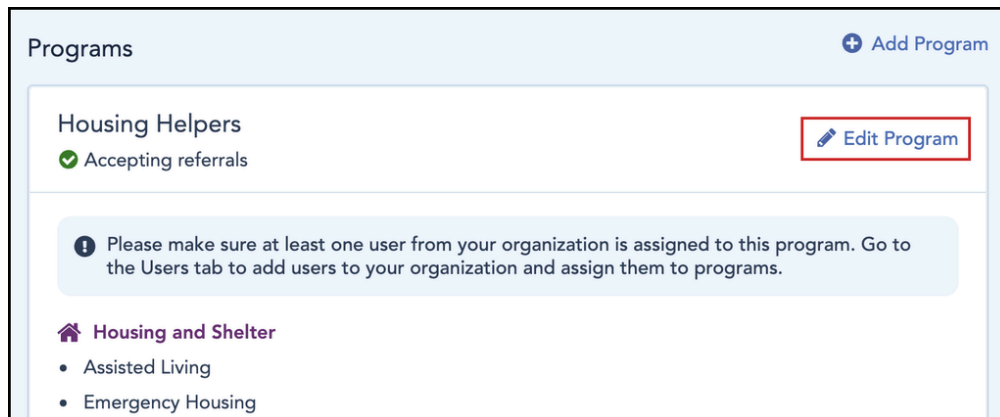
6. Keep Your Programs Up to Date

Accurate program information helps ensure you receive the right referrals.

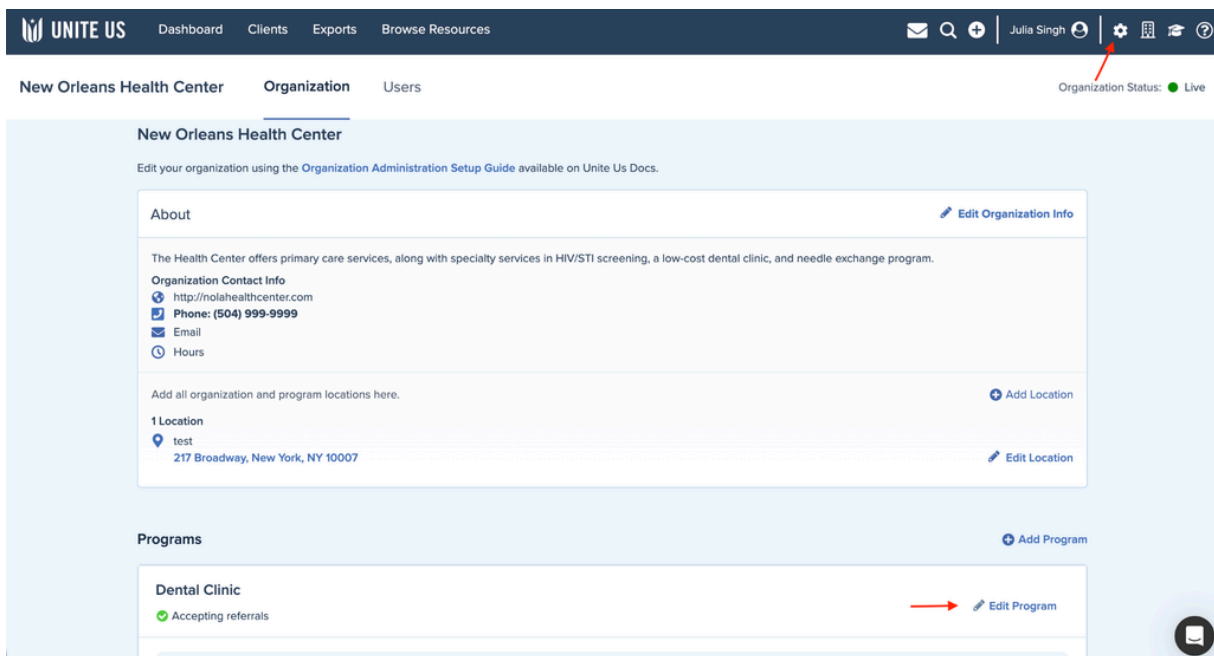
An Organization Administrator can make updates when:

- A new program is available
- A program is at capacity
- A service is temporarily unavailable
- You no longer offer a service
- Information changes such as hours or eligibility criteria

How to update:



- Go to the **gear icon** → **Programs** → **Edit Program**



🔑 Only **Org Admins** can make these changes. If you are unsure who your Org Admin is, Unite Us support can help.



Do you want to learn more about Updating Program information?

Here is a direct link to our microcourse in Unite Us Learn:

<https://learnsso.uniteus.com/learn/enroll/6e08b7ef-60b6-4f24-9994-f80d9b3862aa>

7. Communicate with Your Partners

← BACK MESSAGE CARE TEAM

Lissa Reichert's Referral NEEDS ACTION

SENDING ORGANIZATION	Yale	RECIPIENT	Princeton	Lissa Reichert
SENDING USER		DATE SENT	3/15/2023 at 12:54 am	DATE OF BIRTH 7/4/1992 (Age 30)
SENDING NETWORK	Ivy League Network			RACE Native Hawaiian or Pacific Islander

Inbox ▾ New messages can be created from cases and referrals.

Search for people, clients or organizations

No conversations found.

TO

Search for a recipient...

- Julia Singh (New Orleans Health Center) - Sending user - Care Coordinator
- Kevin Asbury (New Orleans Health Center) - Software Engineer
- Tim Barker (New Orleans Health Center)
- Andrew Bell (New Orleans Health Center) - Resource Coordinator
- Randy Donovan (New Orleans Health Center) - Volunteer

Enter your message here...

Please avoid including sensitive information (including PHI) in your message

Send

Have a question about a referral? You can message other providers serving the client directly in the Unite Us platform.

How:

- Open the referral or case
- Click **Message Care Team**

This is a quick way to:

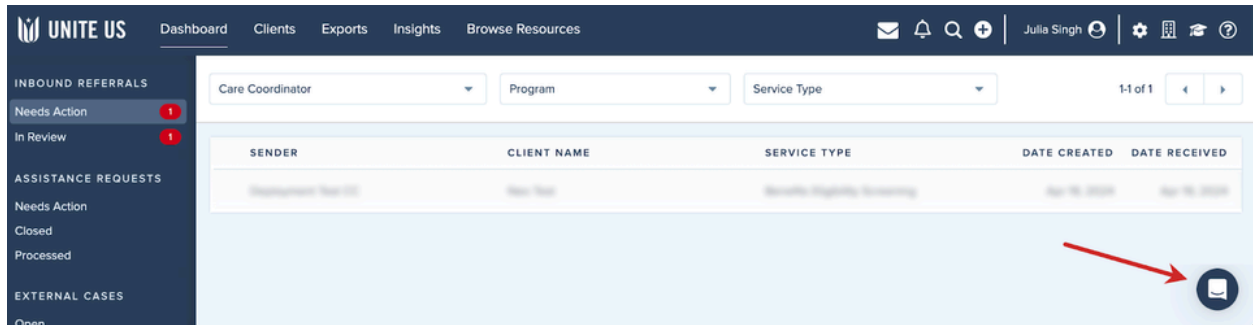
- Clarify details
- Ask questions before taking action
- Stay aligned with partners

Need Help? We've Got You Covered

Our support team is here and ready to help.

💬 Use the **blue chat bubble** in the bottom right corner of the Unite Us platform

✉ Or email support@uniteus.com



The screenshot shows the Unite Us dashboard interface. At the top, there's a navigation bar with 'UNITE US' logo and menu items: Dashboard, Clients, Exports, Insights, Browse Resources. On the right, there's a user profile for 'Julia Singh' and various utility icons. Below the navigation bar, there are filter dropdowns for 'Care Coordinator', 'Program', and 'Service Type', along with a '1 of 1' indicator. A table displays a single row of data with columns: SENDER, CLIENT NAME, SERVICE TYPE, DATE CREATED, and DATE RECEIVED. The table content is partially obscured by a light blue overlay. In the bottom right corner of this overlay, a red arrow points to a blue chat bubble icon.

You can reach out for:

- Access or login help
- Program updates
- Platform questions
- Anything else you need

Learn More

Want to build your skills and confidence?



Access on-demand training:

<https://uniteus.com/document/unite-us-learn-flyer-web-app/>



Attend live training sessions and events:

<https://events.uniteus.com/>