UNITE NEW YORK

Network Standards

Network standards are agreements made by partners to appropriately manage referrals, care coordination, and organization information with the Unite Us software. The Unite New York network standards were informed by partner feedback to set user guidelines and best support the communities we serve. Partners' commitment to comply with network standards and their accountability to one another is one of the key factors in network success.

Network standards include:

The maximum length of time partners should take to respond to a referral ("accept," "reject," or "in review")	**Within one day**
The maximum length of time a referral should be held "in review"	**Three days**
The maximum length of time a referral can be in "needs action" before a coordination center user reaches out to the recipient for a status update	**Two days**
How many attempts should be made to contact an unresponsive client before closing a case or referral	**Three attempts within one week**
How regularly organizations should review/update their organization and program information	**Once a quarter; regularly review as needed**
How regularly organizations should update their user information when users leave the organization/should no longer have access	**Within two days of change in user access**
The maximum length of time users should take to close clients' cases once they know the outcome	**Within two days of resolution**

Recommended Best Practices

- Conduct a social determinants of health screening to identify your client's needs.
- Review the "message" and "notification" preferences with your client and indicate if your client is comfortable with these forms of communication in their contact information. This option creates additional opportunities to connect with your client.
- Prepare the client to expect a call from another network partner.
- Write a referral description that clearly and fully explains the client's need – **do not include PHI in the description or the notes unless the referral/case is for physical health, mental/behavioral health, substance use, or legal services.**
- Create a separate referral for each client need within the Unite Us platform.
- Review existing referrals and cases on the client's Face Sheet before sending a referral to avoid duplicating services.
- If you send a referral to a partner organization rather than the coordination center, **carefully review the organizational profile, including program eligibility requirements and service area, to ensure the services match the client's needs.**
- Monitor referrals after you send them:
    - If a referral you send is rejected, or if you recall a referral, send the referral on to the coordination center or another organization in a timely manner.
    - Monitor notes and requests for additional information from other network partners.
- Record all forms of interaction (phone, email, office visits, etc.) and status updates in the notes of the referral or case, including all attempts to contact an unresponsive client.
    - Remember, notes ensure network partners know what's happening with the client.
- Utilize all contact options to connect with your client – email, phone, and messaging.
- Don't use abbreviations, as they can be difficult to interpret.
- Don't use personal names when referring to fellow colleagues working with the client, as staff positions may change.
- Cases typically close at time of first service provision/appointment, or at time of application/waiting list (i.e. housing). Routinely document case notes to ensure the feedback loop to partners, especially in cases where the case is open for an extended period.

Reminders

- If a referral is not responded to in a timely manner, a Coordination Center staff person can work with you to recall and resend the referral to another organization.
- If you receive a referral that does not contain enough information to know if you can accept it, you can reach out to the sending organization or the client for follow up.