UNITE US

Glossary: General Platform Terms with Definitions

Unite Us uses specific terminology to describe parts of the software. Here is a comprehensive list of those terms and their definitions:

1. **Assessment** is a set of questions related to a client record that can be general or associated with referrals for one or more service types or subtypes.
2. **Assistance Request** is a request generated by clients themselves for any service. An organization can receive incoming assistance requests and can manage the transition from an assistance request to an intake or referral sent to a partner in the network.

   Also known as: self-referral
3. **Case** is a record that documents the time spent with a client while working to provide them with the requested service(s). The case is made up of case notes, notes for interactions with the client (ex. phone call, email, in-person meeting), services provided, appropriate assessments, and uploaded documents.
4. **Client** is a person who has been added to the system to receive assistance from an organization in the network.

5. **Face Sheet** is the full client record, containing profile information, assessments, cases, referrals, document uploads, and notes/interactions logged by organizations.
6. **Organization** is a collection of one or more programs and users who work on those programs.
7. **Out-of-Network Organization** refers to an organization that is not part of a network and therefore not using the Unite Us Platform. Users of Unite Us can document when they have created cases at the out-of-network organization but referrals to those organizations must be done manually (ie. phone, email, etc.). Not to be confused with the healthcare industry term (i.e. providers considered out-of-network by a health insurance plan).
8. **Primary Worker** is the software user assigned to a case. Although anyone in the program for that case can work on the case, assume that the primary worker would be “responsible” for this case.
9. **Program** is a unit within an organization containing services or a grouping of services that an organization offers; each program is associated with service types and contains a program description and eligibility criteria.
10. **Referral** is a one-time vehicle for delivering information about a person and the need they have, from one software user to another. Each referral is related to a client record.
11. **Service Episode** is a representation of an individual unique need for a client, and the journey of a client’s access to services related to that need (i.e. it would include the original referral and the subsequent case created).

12. **Service Type** is the category or domain of need for a referral or case. They may also be used to classify assessments. Subtypes are more specific services categorized within a service type.
13. **Uploads** are documents related to cases or referrals that are uploaded and digitally stored within the client's Face Sheet.