

# NYC REACH UniteUs Training Curriculum

## March 2026

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## Purpose and Goals

### Objective

- This training curriculum will familiarize your organization with the main features of the UniteUs resource directory

### Audience

- NYC REACH partner organizations live on the UniteUs resource directory
- NYC DOHMH UniteUs users

### Prerequisites

- Make sure you have a UniteUs username and password
  - If you have an existing account, you may click “forgot password”
  - If you are unsure, ask the system administrator at your organization
  - If you do not know who this is, email [nycreach@health.nyc.gov](mailto:nycreach@health.nyc.gov)
- *Healthcare providers and City agencies must email [nycreach@health.nyc.gov](mailto:nycreach@health.nyc.gov) if they request to create more users*
- *Community-based organizations are allowed to create additional users via their organization administrator (see page 5)*

### Timeline

- **UniteUs users onboarded in 2026:** complete all required phases within 3 weeks of going live
- **UniteUs users onboarded between 2024-2025:** spend 3-4 weeks reviewing the required phases
- *Supplementary materials and the optional phase should be reviewed within two weeks of completing the required phases*

### Guidelines

- Do NOT create fake clients within UniteUs
- Do NOT make fake referrals within UniteUs
- Be sure to properly handle PHI. The latest UniteUs privacy version can be found here: <https://uniteus.com/privacy-policy>

Please notify your NYC REACH contact when you complete each phase of the training

## Phase 1: Browsing Resources

### Audience

- All UniteUs users

### Timeline

- One week

### What you will learn

- Look through the various folders of the dashboard to find exactly what you need.
- Learn about partner organizations who offer services in your area.
- Share partner information with your patients or clients.
- Update your own programs to keep the information current.

## Content

1. Microcourse “Navigation” <https://learnsso.uniteus.com/courses/navigation-nx>
2. Microcourse “Browse Resources” <https://learnsso.uniteus.com/courses/browse-resources-nx>
3. Article “Browse Resources Overview” <https://support.uniteus.io/en/articles/10092775-browse-resources-overview>
4. Article “Share Resource Information” <https://support.uniteus.io/en/articles/9948332-share-resource-information>

## Practice application

- Find three commonly shared resources and add them to your favorites

## Phase 2: Client Profiles

### Audience

- All Unite Us users

### Timeline

- One week

### What you will learn

- Create and update client profile information.
- Update and view a client's contact preferences.
- Flag a client who requires action.

## Content

1. Microcourse "Client Profile" <https://learnsso.uniteus.com/courses/client-profile-nx>
2. Article Collection "Clients and Face Sheet" <https://support.uniteus.io/en/collections/3046094-clients-and-face-sheet>

## Practical application

- Review the profile information for your next patient or client and make sure their information is up to date

## Phase 3: How to Access UU Support, Microcourses, and Live Trainings

### Audience

- All UniteUs users

### Timeline

- Two weeks

### What you will learn

- View an array of on-demand microcourses and live trainings
- Search for articles walking you step-by-step through UU workflows
- Open a support ticket to troubleshoot technical issues or workflow challenges

### Content

1. Microcourse “UU Learning and Support Options”  
<https://learnsso.uniteus.com/learn/course/your-unite-us-learning-and-support-options/>
2. Web page “Resources for UU Users” <https://uniteus.com/user-resources/>
3. Web page “UU Support” <https://support.uniteus.io/en/>
4. Article “Submit a Ticket to the Technical Support Team”  
<https://support.uniteus.io/en/articles/10579401-submit-a-ticket-to-the-technical-support-team>
5. Flyer “UU Docs” <https://uniteus.com/document/unite-us-docs-flyer/>

### Practical Application

- Bookmark at least three microcourses or articles that you and your team plan to review at a later time

## Phase 4: Closed Loop Referrals (Optional)

### Audience

- UniteUs users interested in sending or receiving referrals through the platform

### Timeline

- Two weeks

### What you will learn

- Manage inbound and outbound referrals.
- Manage internal, external, and off-platform cases.

### Content

1. Article “Dashboard Overview” <https://support.uniteus.io/en/articles/2812604-dashboard-overview>
2. Microcourse “Sending Electronic Referrals” <https://learn.uniteus.com/courses/sending-electronic-referrals-nx>
3. Microcourse “Managing Sent Referrals” <https://learn.uniteus.com/courses/managing-sent-referrals-nx>
4. Microcourse “Taking Action on Inbound Referrals” <https://learn.uniteus.com/courses/taking-action-on-inbound-referrals-nx>
5. Microcourse “Managing Cases in UniteUs” <https://learnsso.uniteus.com/courses/managing-cases-in-unite-us-nx>
6. Article “How Cases Work” <https://support.uniteus.io/en/articles/10280233-how-cases-work>

### Practical application

- Decide amongst your organization if you would like to send and/or receive referrals. If you would like to do either, familiarize your team with their specific roles and ensure understanding.

## ***Appendix A: Glossary of Available Service Types***

### **Audience**

- All UniteUs users

### **What you will learn**

- All available service types and subtypes
- Definitions and examples of service types and subtypes

### **Content**

1. Microcourse “Service Type Essentials” <https://learnsso.uniteus.com/learn/course/service-type-essentials/main/service-type-essentials>
2. Article “Service Types Glossary” <https://support.uniteus.io/en/articles/2812619-service-types-glossary>

## ***Appendix B: UU Screenings***

### Audience

- Organizations that conduct screenings within UniteUs

### What you will learn

- Screen clients within your organization to learn about their risk factors and needs.
- Refer a client based on their screening responses.

### Content

1. Microcourse “Screenings” <https://learnsso.uniteus.com/learn/course/screenings-nx/>
2. Article “Screen Clients to Determine Needs” <https://support.uniteus.io/en/articles/10358978-screen-clients-to-determine-needs>

## Appendix C: Data Analysis Tools – Exports and Insights

### Audience

- UniteUs organization administrators and oversight administrators

### What you will learn

- Review data about your clients’ journey in requesting and receiving services in your network
- Analyze your organization’s activity and impact on the community and identify areas for improvement
- Utilize dashboards go gain a deeper understanding of user performance and health equity of clients

### Content

1. Article “Understand Your Organization’s Data Through In-App Exports” <https://support.uniteus.io/en/articles/6586314-understand-your-organization-s-data-through-in-app-exports>
2. Article “Work With Exported Data in Excel” <https://support.uniteus.io/en/articles/13412552-work-with-exported-data-in-excel>
3. Article “Insights Key Terms and Definitions Guide” <https://support.uniteus.io/en/articles/7339378-insights-key-terms-and-definitions-guide>
4. Article Collection “Insights” <https://support.uniteus.io/en/collections/3046098-insights>

## ***Appendix D: Organization Administrator Tools***

### **Audience**

- UniteUs organization administrators

### **What you will learn**

- Configure your organization’s programs, locations, and users\*
- Keep your program information up to date such as the hours of operation, description, and contact information

### **Content**

1. NextMicrocourse “Organization Administrator Settings”  
<https://learnsso.uniteus.com/courses/organization-administrator-settings>
2. Article “Configure Your Organization’s Locations, Programs, and Users”  
<https://support.uniteus.io/en/articles/6078997-configure-your-organization-s-locations-programs-and-users>
3. Article Collection “Organization Administrator”  
<https://support.uniteus.io/en/collections/3332679-organization-administrator>
4. Article “User Roles and the Permissions They Grant”  
<https://support.uniteus.io/en/articles/10165364-user-roles-and-the-permissions-they-grant>

\*Healthcare providers and City agencies must email [nycreach@health.nyc.gov](mailto:nycreach@health.nyc.gov) if they request to create more users