

# Thrive Local NW FAQs

## What is Thrive Local?

Thrive Local is a community partner network that connects health and social service providers to deliver integrated whole person care. The network uses a shared technology platform (Unite Us) to send and receive trackable referrals between providers and community-based organizations – connecting individuals to an array of services such as housing, employment, food assistance, behavioral health, utilities, and more. The HIPAA-compliant platform allows user to track the status and progress of their clients' referrals and the outcomes of the services provided.

## When does Thrive Local NW launch?

For the Portland metro area and SW Washington, we will be launching together with community-based organizations at the end of the fourth quarter of 2019. For the Salem and Eugene/Springfield areas, we will be launching together with community-based organizations in the second quarter of 2020.

## What does the software do?

Unite Us connects organizations in a community through one common software platform. Users of the software can send, receive, and track secure electronic referrals and case information for each client. This allows organizations to easily connect clients to services that are outside of their scope or capacity, and coordinate with other organizations serving their clients through a central client record. Organizations can serve clients simultaneously and can use data to drive better outcomes for shared clients. By doing this, an organization can still help a client get the services they need, and together, organizations can serve the entire community. Organizations are also able to decline referrals in the software to reflect their capacity and eligibility requirements.

## How can Thrive Local help support an organization's workforce and improve overall efficiency?

- Increase collaboration and coordination with other community-based organizations and with health care providers.
- Connect individuals to the services they need when they need them.
- Improve organizational capacity through accurate referrals and access to a wealth of data on local service delivery.
- Track individual and community-wide outcomes to inform policy, investment decisions, and community advocacy.
- Gain visibility into your clients' journeys as they access care over time.

## What are the benefits of using Unite Us?

- Unite Us is a web-based application that is accessible from any device (PC, laptop, mobile); no hardware or download is needed to utilize the system. You can access your Unite Us account anywhere you have internet access and a modern web browser.
- Users can electronically send referrals to the best-fit community partners based on program eligibility requirements, then track their clients' referrals to network partners and see updates in real-time, streamlining referral workflows and saving time on both ends.
- Partners working with shared clients can access central client records and gain insight into other services provided to their client to gain a deeper understanding of their client's situation.
- Secure logins for each user in Thrive Local with configurable roles and permissions that are established prior to a user entering the network, with the availability to update and modify user access.
- Program-level viewing permissions and referral permissions for each organization and user.
- The Unite Us team provides real-time chat support to answer users' questions about the software.
- Ongoing webinar training and e-learning offered to new and existing Thrive Local users; reference materials and learning hub available for all users who have been provided login credentials.
- Configurable, centralized, and standardized data collected through referral and case outcomes, and referral assessments.
- Real-time reports available in the system as well as data exports that allow partner organizations to analyze trends in the community and demonstrate their impact.

## I'm concerned that my organization will be overwhelmed by referrals if we join the network.

Each organization can determine how they are most comfortable participating in the network; you 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. You will be able to reject any referral that is sent to your organization if you 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 patients and clients are referred to programs for which they are eligible.

### What is the cost of Thrive Local to partners?

Thrive Local is free to all community-based organizations (CBOs) and community health centers. Unite Us staff will work with eligible organizations to support their onboarding to the network including workflow reviews, training, troubleshooting, and support.

### How do we join Thrive Local?

Unite Us staff will be conducting outreach and supporting all organizations to register and join the network. Unite Us staff will provide on-going, one-on-one support and training. This includes in-person meetings, workflow troubleshooting, webinars, and live chat support. Anyone interested in joining the network can register at: [uniteus.com/thrive-local-northwest](https://uniteus.com/thrive-local-northwest).

### Who in my organization should use Thrive Local?

This will look different at each organization, but typical users could include anyone who is currently connecting individuals to social services outside of their program or organization, staff who currently process incoming referrals to your organization, and anyone who is directly working with clients on programs you want to receive referrals for. Network partners can be health care providers, social service organizations, faith-based organizations, educational organizations, etc.

### Are there group expectations around how long partners have to answer to a referrals?

The commitment of network partners to comply with network standards is one of the key factors in ensuring the success of the network. Every organization must agree to abide by the network standards for how they will act within the software, which affects client satisfaction, user satisfaction, and adoption rate/participation. Key network standards are developed by the network as a whole and they include:

1. The maximum length of time network partners should take in responding to a referral.
2. How many attempts should be made to contact an unresponsive client before closing a case and/or referral.
3. How regularly organizations should update their program and user information.
4. The maximum length of time for users to take to close clients' cases once they know the outcome.

### What is the role of 2-1-1 Info?

The purpose of Thrive Local is not to replace/displace/absorb 2-1-1 systems. Unite Us has a long history of working with 2-1-1s, and even has some 2-1-1 systems as customers. The role a 2-1-1 could play in Thrive Local will likely look different in each region, depending on the strengths and interests of the 2-1-1.

### How does Thrive Local and the Regional Community Health Network (RCHN) work together?

Thrive Local provides the technology infrastructure to meet RCHN's vision of:

- **Closed Loop Referrals:** The Unite Us platform allows users to send referrals across and between social services and healthcare organizations with standardized outcomes to enhance care coordination and provide whole person care.
- **A Community Resource Directory:** The Unite Us platform contains a resource directory that is easily searchable by service type and location.
- **Community Health Record:** Every referral or case in Unite Us contains information about the client with respect to their needs. As clients continue to request and receive services in the network, those records become part of their history of care. We believe knowing that history provides meaningful context for you as you work to deliver services and resolve needs. With this transparency comes the vital task of protecting sensitive client information. To this end, certain service types are only visible to those sending and receiving the referral.

Registering our organization and programs seems overwhelming; we have a lot of programs that might participate and program eligibility changes often. Are we able to start with a small amount of our programs and grow from there?

Organizations can choose to participate in whatever way makes the most sense for them. You can start by registering as many users and programs as you want to. We ask you to keep your organization and program profile updated so you can receive the most appropriate referrals that match eligibility, race/ethnicity, language, geographic location, and any other qualities that are relevant to your services. Unite Us staff is available to troubleshoot any questions.

How do community members access Thrive Local?

Thrive Local is a care coordination network for health care and social service providers to address the social determinants of health. The platform does include functionality to allow community members to directly request services, and we are exploring how this could be implemented in the region, but it is not yet a feature.

Will Thrive Local be available to all health systems and across the state?

Kaiser Permanente is currently engaging with the Oregon Health Leadership Council to develop a vision for how all of Oregon's health systems can participate in Thrive Local to create a seamless care coordination platform for all Oregonians. The current Kaiser Permanente Thrive Local roll out includes the Portland metro area, Salem and Eugene/Springfield areas, and SW Washington.

Is Unite Us secure/compliant?

The Unite Us platform is HIPAA, FERPA, 42 CFR Part 2, and SOC 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 partners 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.).

### How do you protect clients' personal information?

The system is built based on a set of permissions for each organization and user, only allowing users to access information related to clients that have been referred to their organization AND their organization is serving clients (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 Thrive Local, those records become part of their history of care. Knowing that history provides meaningful context as you work to deliver services and resolve needs. Within our [Service Type Taxonomy](#), however, we have 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.

### What does consent look like in Unite Us?

Before a client's information is shared to connect them to services through Thrive Local, their digital signature must be obtained to consent to share information with any Thrive Local 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.

### How can domestic violence and sexual assault service providers use Unite Us?

Domestic violence and sexual assault service providers can list their organizations under the sensitive type organizational category, where only the organizations who send and receive the given referral will know that a referral has been made and a case has been created. Additional safeguards that can be implemented are creating two separate organizations, one for making and another for receiving referrals; using an alias where appropriate; or utilizing a Coordination Center (if the network has one) as a referral intermediary or alias. Unite Us staff will work closely with domestic violence and sexual assault service providers to meet their needs and determine best workflows.

## Who owns the data generated through Thrive Local?

As stated in the Unite Us Network Participation Agreement, “Each service provider shall remain the owner of any data of all individuals or natural persons registered with a service provider as clients.” Unite Us houses the data generated by the network.

The system is built based on a set of permissions for each organization and user, only allowing ownership of client data to organizations that have been referred to AND are serving clients (referral accepted), or have input a client (to refer or serve) in the system. If an organization is not serving a client, they will not be able to see that client and any related data, nor own the relevant data for that client.

## How do you 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.

## My staff 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 my staff’s plate.

We’ve heard from many of our existing partners that much of the existing work to send and receive referrals, and follow up on the outcomes of those referrals, occurs outside of any case management system (identifying other services, reaching out to other organizations, following up with clients or other organizations to learn what happened). The referral process itself is a huge pain point for them and their staff members and can be extremely time-consuming and frustrating.

Many of our users (and related partners) have found that they save significant time even as they use multiple platforms, because of the time saved by no longer going through this manual process. Rather than spending time searching for programs online or in a binder, and making phone calls and sending emails or faxes, your staff will be able to use Unite Us to create a referral in a few moments, and track what happens to the client simply by receiving email notifications and logging into the platform.

We recognize that it’s a struggle to search for the best programs to serve your clients and to spend the time looking for resources. Our goal is to help you spend less time on making referrals and more time on your day-to-day job, thus increasing your impact on your clients.

Additionally, 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.).

### 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 we integrate with other software systems. However, our ability to integrate with other software systems is also dependent on that system's ability/desire to integrate with us and resources available for this effort. In Thrive Local, Unite Us has an active integration with Epic.

### What are the differences between Epic's Community Resource Directory and Unite Us?

Epic's Community Resource Directory is a tool in Epic that allows organizations to upload a list of social service providers to be viewed by Epic users. There are several major differences between this tool's capabilities and the ones provided by Unite Us:

1. Epic's Resource Directory is merely a tool to surface a list of resources, but the list of resources themselves have to be provided and maintained up to date by the health system or another external party.
2. Epic's Resource Directory, as its name suggests, is merely a resource directory that does not provide the health system with a comprehensive, longitudinal view of the patient's social care journey. Unite Us can send a referral and track it throughout the full care cycle and until care is provided, and then the outcomes are communicated back to the care episode originator. Unite Us does provide resource directory capabilities, but these are merely the first phase towards a comprehensive coordinated social care solution that includes closed loop referrals with measurable progress and outcomes.
3. With Epic's Resource Directory, Epic users lose visibility as soon as the referral leaves their four walls. Community partners do not have access to Epic to be able to act on referrals and provide updates. In Unite Us, community-based organizations participate in the network to act on referrals sent to them, provide updates, and send their own referrals to address needs they've identified for their clients.
4. Unite Us provides access to network-wide data so communities can understand what needs are being identified by the community members, and how those needs are being met or not. This data can be used to optimize the care provided to community members, as well as identify where service gaps exist in the community. Epic's Resource Directory does not have the outcomes data required for generating meaningful and useful statistics.

### How is information kept up to date in Thrive Local?

Each community-based organization is responsible for updating their own information. This ensures that organization profiles are up to date and appropriate referrals are being sent.