



Unite Us Post User Guide

Before using Unite Us, make sure your notification settings are correct. The Unite Us Post Notification Settings instructions are located here [Post Service Officers PSO – The American Legion Department of Minnesota \(mnlegion.org\)](https://mnlegion.org/post-service-officers-psycho-social-operations-the-american-legion)

Please follow the workflow based on the scenario below.

Veteran enters post and needs assistance

1. Post Service Officer determines eligibility with MVAFF grant, connects individual to local CVSO, and uses Unite Us to confidentially refer the individual to other service providers
2. Log in to Unite Us <https://app.uniteus.io/>
3. Click the + on the dashboard upper right to add “new client”
4. Add client information - make sure to input an email and/or phone number
5. Obtain consent
6. Make referrals to local, regional, state, and national providers who can assist the Veteran (client)
7. Select the client then click the “Refer” client blue box in the upper right-hand corner
8. Select the service type needed
9. Select BROWSE MAP
10. Optional: click on the filter button just above the map in the right corner, select the drop-down “Populations Specialized in Serving”, select Veterans and military families
11. Select a provider, complete the referral description, review, and select the blue box “confirm and submit”
12. In the client’s face sheet, use the notes section to add any other relevant information that will be able to be seen by both you and the Department (or any other Post that the individual may visit). If the note is personal in nature, please check the box that says “Private to my organization” before you post the note.

If the veteran is eligible for the MVAFF grant:

13. Click the + on the dashboard upper right to add “new client” (if you have not already done so)
14. Go to Cases Tab
 - Click Create new case
 - Choose the MVAFF
 - Select Emergency/One-time Financial Assistance
 - Select Primary Worker - American Legion Dept of MN Adjutant Mike Maxa
 - In the case description give a brief overview of the need
 - Attach supporting documents to support the requested grant along with the **completed MVAFF application.**



- Click next
- Skip for now if asking for consent (consent only needs to be completed if you are referring to an “outside organization”)
- Optional to add other information such as Pronouns, Tribe, etc.
- Click next
- Review and Click Confirm and Submit

Department refers a Veteran to the Post to get support

1. Post Service Officer will receive an email from Unite Us that you have been assigned as a Primary Worker for the Veteran (client)
2. Log in to Unite Us <https://app.uniteus.io/>
3. Click on Client in the Unite Us Dashboard
4. Obtain consent (if still needed)
5. Reach out to the Veteran (client) to schedule an in-person meeting (document this meeting in the notes section in Unite Us) regarding the MVAF application and to determine other needs they may have. Contacts and meetings should be documented as notes.
6. Make referrals to local, regional, state, and national providers who can assist the Veteran (client)
7. Select the client then click the “Refer” client blue box in the upper right-hand corner
8. Select the service type needed
9. Select BROWSE MAP
10. Optional: click on the filter button just above the map in the right corner, select the drop-down “Populations Specialized in Serving”, select Veterans and military families
11. Select a provider, complete the referral description, review, and select the blue box “confirm and submit”
12. In the client’s face sheet, use the notes section to add any other relevant information that will be able to be seen by both you and the Department (or any other Post that the individual may visit). If the note is personal in nature, please check the box that says “Private to my organization” before you post the note.

If the veteran is eligible for the MVAF grant:

13. Click the client’s name from the Dashboard tab - Internal Cases- Open
14. Click Attach or Upload a Document. Please attach all supporting documents to support the requested grant along with the **completed MVAF application.**
15. Click on the pencil EDIT for the Primary Worker and change it to American Legion Dept of MN Adjutant Mike Maxa
16. DO NOT CLOSE THE CASE
17. Mike Maxa will close the case and update the outcome based on the decisions made

If the Veteran is NOT eligible for the MVAF grant:

18. Click the client’s name from the Dashboard tab - Internal Cases- Open
19. Select Close Case



- 20. Is Resolved? - choose Unresolved
- 21. Outcome? - Ineligible to receive Emergency/One-time Financial Assistance
- 22. In the note section - give a brief reason why
- 23. Click Close Case

Make a note every time you contact the veteran so that Department knows the veteran is being helped.