CIE-User Guide for Case Management:
PATH- Homeless Veteran Reintegration Program (HVRP)

<u>Background</u>: **When & how do clients consent to CIE?**

- CIE consents are included within the enrollment packet for PATH Services.
- CIE users upload the consent to create a client in the CIE or can send the consent via secure e-fax (858) 408-7517 and 211 will create the record. *Please note consents via e-fax will have a delayed profile creation date*
- Clients can also consent to be in CIE with other CIE Partners including 2-1-1.

Employment Coordinators:
For Over-the-phone or Walk-in Screening

- Look-up the client by searching their first and last name (or other identifiers)
- View personal <u>Details</u> on their profile to help screen for program eligibility

Francis James

Age
71

Phone
(619) 230-0063

DETAILS   REFERRALS   FEED

Demographics	Income & Benefits	Health Information
Primary Language ❶	Employment Status ❶	Health Insurance Provider ❶
English	Unemployed	Other
Age	Sources of Income ❶	
25	No Income	Health Insurance Type ❶
Gender Identity ❶	Percent of FPL	County Medical Service;COBRA
Woman	57.75%	Medi-Cal Recertification Date

Document Uploads:
During in-person Enrollment Appointment
- Before or during the appointment, look-up client profile and check if any necessary documents are already available
- Add documents collected during appointment to CIE by clicking "Upload Files."

Notes & Attachments (1)   Upload Files

SSN_Card
Jan 31, 2019 • 60KB •

View All

During Enrollment Assessment & as a part of Case Management:

When assessing areas of need, view Assessments:

Assessments show clients' responses about their needs across 14 domains e.g. housing, nutrition, safety, income & benefits, etc.

Assessments show barriers to services and client's strengths and available resources.

Steps to View:

1. Click on the label e.g. Nutrition
2. View the client's responses

DOMAIN...	RISK INDIC...	ACTIONS	REFERRALS
Health Ma...	● Vulnerable	0	0
Transporta...	● Critical	1	2
Activities o...	● Critical	0	0
Social/Com...	● Stable	1	10
Nutrition	● Critical	1	1
Housing		0	0

Domains (6+) — View All

When identifying needed and appropriate resources, find answers to:

- **What is already being accessed?**
  View Program Enrollments.
  Click on an individual Program
  Enrollment to see Entry and
  Exit date.

ENROLL...	SERVICE N...	STATUS	PROGRAM ...
PE-00008212	Education an...	Active	11/5/2010
PE-00008199	PATH Connec...	Active	9/7/2018
PE-00008197	Outreach Team	Active	8/30/2018
PE-00008195	Outreach Team	Closed	8/1/2018

Program Enrollments (6+) — New

- You can also show how you are working with a client by clicking "New" to add Homeless Veteran Reintegration Program to Client's Program Enrollments.

- **Where have they been referred before?**
  View Referrals that the client has been
  provided so far. This could be an
  opportunity to confirm with the client
  if they were able to access services.

REFERRA...	DOMAIN	ACTION	SERVICE N...
Referral-00...	Housing	00315449	Safe Parking ...
Referral-00...	Income & Be...	00352473	VITA
Referral-00...	Nutrition	00360185	Enrollment an...

Referrals (6+) — View All

Identify appropriate resources needed:

- To find appropriate resources review the Client Details. Tip: Many resources have specific eligibility criteria (see screenshot on Page 1).

Connect Client To Resources Via CIE:

Refer clients to other services:
- San Diego Workforce Partnership
- EDD/ America's Job Center
- Other supportive services such as the San Diego Food Bank or Family Health Centers

Client Details

Jay Pritchett
Age: 72
FPL: 57.75%
Monthly Income: 1000
Household Size: 3
Home Zip Code: 92120-4628
Health Insurance Type: Medi-Cal;Medicare
Health Condition: Physical Disability;Sensory Disability;Dental

Reset Search

Employment and Training | enter location

Print this list | 1 results
sorted by: Relevance | Distance | Direct Referral: ☐

Employment and Training Services; San Diego Workforce Partnership
San Diego Workforce Partnership
Provides targeted employment services designed to help eligible adult job seekers identify, or regain, a career that will promote ... Eligibility

(619) 228-2900
3910 UNIVERSITY AVE
STE 400
Suite 400
SAN DIEGO, CA 92105

Add Referral

Steps to Send or Add Referrals
- Search for referrals using filters and sorting features
- After you've found a referral, click "Add Referral"

- If available, select "Direct Referral" and this will send an electronic notification to the CIE Partner

    Or

    For non-direct referrals, select "Provide Program Details," then...

- Choose a domain (area of need)
- Write any important notes for the receiving party
- Select related Taxonomies and Target Populations (if applicable)
- Select "Next" and/or "Save" to finish sending the referral.

Add Referral

No Internal Staff Notes for this service

* Referral Method
Direct Referral

* Choose domain(required)
Nutrition

Additional Notes:
Client struggles with carrying anything over 15 pounds. May need help carrying their food box
Max 2000 characters

Protected Health Information/Notes:
Type here...
Max 2000 characters

Choose Taxonomy/Taxonomies:
- ☑ Commodity Supplemental Food Program
- ☑ Low Income
- ☐ Ongoing Emergency Food Assistance
- ☑ Older Adults 60 and over

Cancel | Next

How to Refer to 2-1-1 via CIE:

- At the top of the client's profile, find and click on **"Refer to 2-1-1"** and a window will appear.

- Type a short description of what services the client is looking for and/or briefly describe their need(s).

- Select the area of need called a "Domain" and click "Save."

Refer to 2-1-1

* Description (include best time to contact Client)

Domain Type (Ctrl+click to select multiple)
Housing
Nutrition
Primary Care
Health Management
Social/Community Connection
Activities of Daily Living
Criminal Justice/Legal

Cancel | Save

Retention Support:

• See if someone was successfully connected to the services you referred them to.

• Review individual client profiles or receive client outcome reports for insight into how a client is doing after they leave your program.

• Provide ongoing referrals to other supportive services.

Be Alerted if Anything Changes in Their Situation

• **Add yourself to the client's <u>Care Team</u>:** You'll get an Alert if the client is transported by EMS or if there is an arrest.

• Just click **"New,"** to add your information and list yourself.

• Tip: To collaborate with others on the Care Team, click on their name to see their contact information.

Care Teams (6+)				New
CARE TE...	CASE MAN...	AGENCY	DATE ASSI...	
CT-000002...	AideeCommu...	2-1-1 San Diego	12/19/2018	▼
CT-000001...	Tier 3 Referra...	2-1-1 San Diego	11/7/2018	▼
CT-000000...	zzzTier 3 zzzR...	2-1-1 San Diego	10/10/2018	▼
CT-000000...	zzzTier 3 zzzR...	2-1-1 San Diego	9/7/2018	▼
CT-000000...	zzzTier 3 zzzR...	2-1-1 San Diego	8/29/2018	▼
CT-000000...	Tier 3 Care C...	2-1-1 San Diego	6/26/2018	▼

View All

Check back in the CIE periodically, to see if there is any new information about your client's situation:

• Assessments
• Eligibilities
• Data Sources
• Other Care Team Members

Managing Direct Referrals To HVRP:

Referral Manager: Reviews incoming direct referrals within 1 business day of receiving email notification from CIE-

- If the client meets eligibility criteria based on information in the client profile and there is capacity, the referral manager marks "Yes" for appropriate, selects "Evaluating," and assigns the client to the appropriate staff member in CIE
- The Referral Manager may decline the referral if the client:
  - o does not meet eligibility by marking "No" for appropriateness and select "Decline-Ineligible"
  - o has been referred to the same program more than once, by selecting "No" for appropriate and "Decline- Duplicate"
  - o meets eligibility but cannot be accepted due to no capacity, by selecting "Yes" for appropriateness and "Decline- No Capacity"
  - o Declined referrals are returned back to the sending agency's queue

Care Coordinator: Within 2 business days of the referral being sent, the employment coordinator will attempt to contact the client 3 times before closing out the referral.

- After 3 attempts, the staff member will close out the referral-
  - o If enrolled in HVRP, then the staff will select "Receive/receiving services" as the outcome & select the "Program Enrollment" checkbox
  - o If not enrolled in HVRP, then staff will select "Did not Receive Services" and indicate the reason the client did not get services, for example, "Unable to Contact".