Meeting time: 9-10:30am, 4ʳᵈ Thursday of the month.
Meeting location: 2-1-1 Connections Center, 3860 Calle Fortunada, San Diego, CA 92123
Agencies in attendance: 2-1-1 San Diego, San Ysidro Health Center, St Paul's PACE, Community Catalyst, Episcopal Community Services, UCSD Health, Legal Aid San Diego, North County Health Center, Child Development Associates, NAMI San Diego, PATH San Diego, Reboot, Molina Healthcare, First Presbyterian Church San Diego, Southern Caregiver Resource Center, Salvation Army, Father Joe's Village, San Diego Workforce Partnership. Arboreta Group, LLC

Welcome and Introductions

John Ohanian, President and CEO of 2-1-1 San Diego and Bill York, Executive Vice President of 2-1-1 San Diego opened the CIE Partner Network meeting and spoke about the importance of CIE at a local and national level.

New CIE Partners

- Lyssa from Ladle Fellowship attended the meeting and spoke about programs and services. They provide a variety of free services to low-income and homeless San Diegans, including community meals, clothing, hygiene products and more. They joined CIE on January 24, 2019 to leverage CIE for their street outreach medicine program. Jonathan from PATH encouraged or championed for them to join.

- Home Start - Provides comprehensive services to children and families who need prevention and intervention services to ensure safety and enhance resilience. They joined CIE on February 12, 2019 to leverage CIE for the Homeless Emergency Aid Program (HEAP), a joint effort amongst other partners and provides continuum of care for homeless clients.

System Functionality

Client Profile Edits
- Partners can now edit all fields on a client's profile and can view previous history of edits to the client's profile.
- Here's a video example: http://www.screencast.com/t/AJBBOiYaAAiw
- Here's a video example of how to request to revoke a client's consent to participate in CIE: http://www.screencast.com/t/q4F8Zso2M

Global CIE Partner Network Referrals
- Going live on March 4, 2019
- Goal is to facilitate inter-agency direct referrals across the CIE Partner Network and referrals to other resources that are listed in the 2-1-1 San Diego database
- CIE global referrals allows real-time feedback and warm client hand-offs between CIE Network Partners about shared clients and all of the referrals viewable on a person's record
- CIE Network Partners that have direct referral functionality will also be able to view, report on, and track referral outcome information to allow for care coordination and planning.
- Partners will receive email notification for the following activities:
    1) Declined Referrals (Declined-ineligible, Declined-Duplicate, Declined- No Capacity)
    2) Accepted Referrals
    3) For Outcome: Received/Receiving Service
    4) For Outcome: Did Not Receive Service
    5) For Outcome: Legal Privilege

- Partner Direct Referral "Sender" dashboard will be developed after feedback from partners.
- E-learning Preview of Global CIE Partner Network Referrals will be available on March 4, 2019
- In-House workshops will be offered to Partners. The following partners showed interest in the workshop: SCRC, St Paul's PACE, UCSD, Blue Shield, San Ysidro Health Center
- A partner at Legal Aid asked how the inter agency referrals would be handled for legal partners. An extended e-learning training will be developed to address how to handle these referrals.

A preview of the Global CIE Partner Network Referrals can be found here: https://ispring-cloud-31.ispringcloud.com/acc/c9itHEgyMzExMQ/s/23111-hMhCp-Q99pt-hCLJn

Client Community
CIE currently developing client patient portal to access CIE. Target launch date is April 2, 2019. Key features of the Client Community includes:
- Update their profile in CIE
- Consent to be in CIE and authorize CIE to share information with other partners
- See program enrollments and referrals
- Contact care team
- Search and favorite referrals in CIE

To get a preview of the Client Community go to: http://www.screencast.com/t/CwlBetGj623c

2-1-1's CIE team needs your help!
Before launching, 2-1-1 CIE team needs input from users in the community. They are requesting to identity three sites where users from the community can test the partner community. Their target groups include: Older Adults, Homeless Adults, Youth.

- 2-1-1 is currently working with San Diego Workforce Partnership
- Salvation Army mentioned that they host several congregate meals sites for seniors and homeless client can serve as potential sites.
- A partner at Molina Health mentioned that the downtown library hosts a variety of community advisory groups where a booth can be set up for users to test the partner community.
- San Ysidro Health asked if the client community was available in Spanish because there is potential for their clients to test it but their client base is mostly Spanish speaking.
- Salvation Army suggested that it would be great to have functionality to switch from Partner Community to a Client's Community view.

Other partner suggestions about the Client Community include:
- System alerts or text messages to remind client's about their activity in CIE.
- System alerts or text to clients to renew their CIE consents.
- Make CIE kiosks (or tablets) available at several locations throughout the county that clients can access
- Develop a CIE application for ease of access
- Develop functionality that enables Partners to toggle between the Partner Community and the Client Community-When a Partner is logged into CIE and is viewing a client's profile, they would like to have a button that will switch to the Client Community view of the record. Salvation Army and Father Joe's representatives said that this would allow for partners who serve clients/patients in person to easily ask the client if their information is

up to date and to be able to easily refer to and discuss information available within CIE without having to worry about sharing or showing information that should not be shared with a client such as case notes.

For additional questions or feedback, send an email to: CIEpartners@211sandiego.org

Use Case/Training Update

Rox, the Partner Integration Manager shared experiences with training and shared a variety of training tools that are accessible to partners that are currently onboarding into CIE.

Most recently, she worked with San Ysidro Health where she met with SYHC program managers to review CIE and worked with them to train a team of 35 individuals, who will be leveraging CIE's Social Determinants of Health (SDoH) screener to identify what supports the patient should be connected to

In addition, Rox also shared her experience working with YMCA Child Care Resource Services, a team that is currently transitioning their entire team to a "Strengthening Families" approach and will be leveraging CIE as part of their long-term strategy and culture shift. They will begin by using CIE to identify needs and refer to 2-1-1, with the long-term goal to increase follow-up opportunities and incorporate CIE assessments and screening tools within their workflows.

The training tools accessible to partners include:
- Personalized user manuals
- Screening Tools (SDoh)
- Onsite personalized trainings
- Cohort-or function-based Workshops
- Webinars and more

Other training material can be found online: https://ciesandiego.org/partnering-with-cie/training-technical-support/

Community Initiatives Using CIE

CIE is working Salvation Army, Catholic Charities, IFC, Community Resource Center, and other sub-contractors of the Homeless Emergency Aid Program (HEAP)* to leverage CIE on building a prevention screening, and have a place where providers can collect data and refer clients to the prevention program partners. In addition, CIE is collaborating with UCSD and other hospitals to share outcomes and data on a shared platform.

* HEAP is a $500 million block grant program designed to provide direct assistance to cities and counties to address the homelessness crisis throughout California.

A partner from Father Joe's Village asked about the status of the data integration between CIE and Clarity. Alana from 2-1-1's CIE team said the goal is to make the data accessible within 1 month.

Announcements

The Center needs your help! They reached out to 2-1-1 looking for partners that can provide wheelchairs.
- A partner suggested Access to Independence.
- For additional ideas on who they can reach out to, please connect with Rox, rsuarez@211sandiego.org

CIE Summit is **April 24-26, 2018-Marriot Marquis**
- **Regular Rate-$695**
  - $500 for CIE Network Partners (up to two registrations)
  - CIE partners can register [here.](#)

Next Meeting: March 28, 2019 @9:00 am