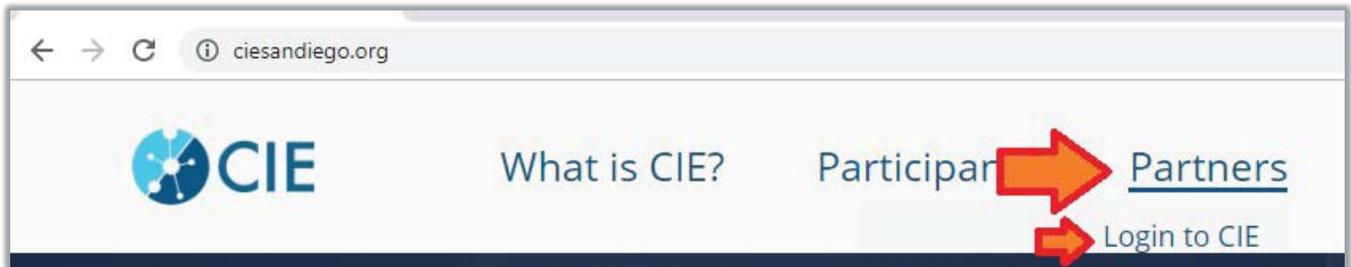
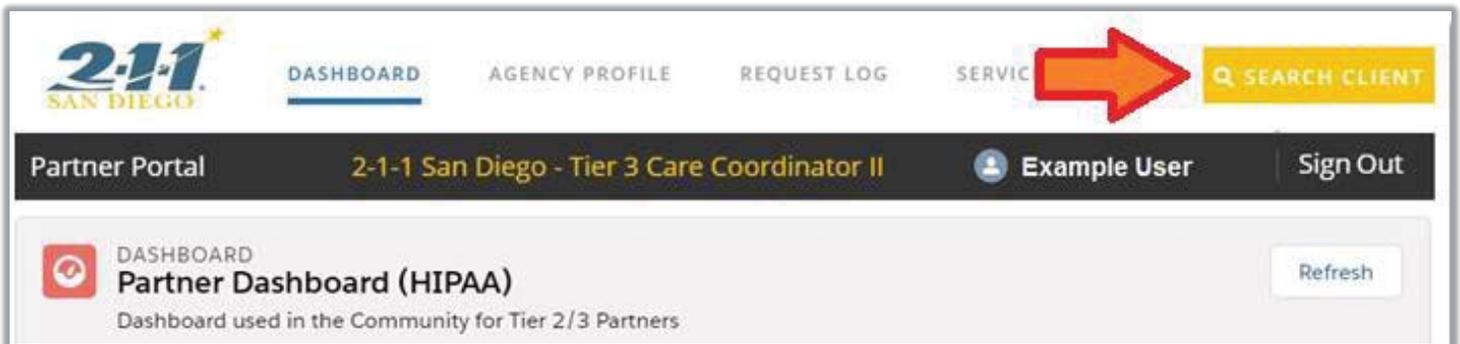


## How to add clients into CIE

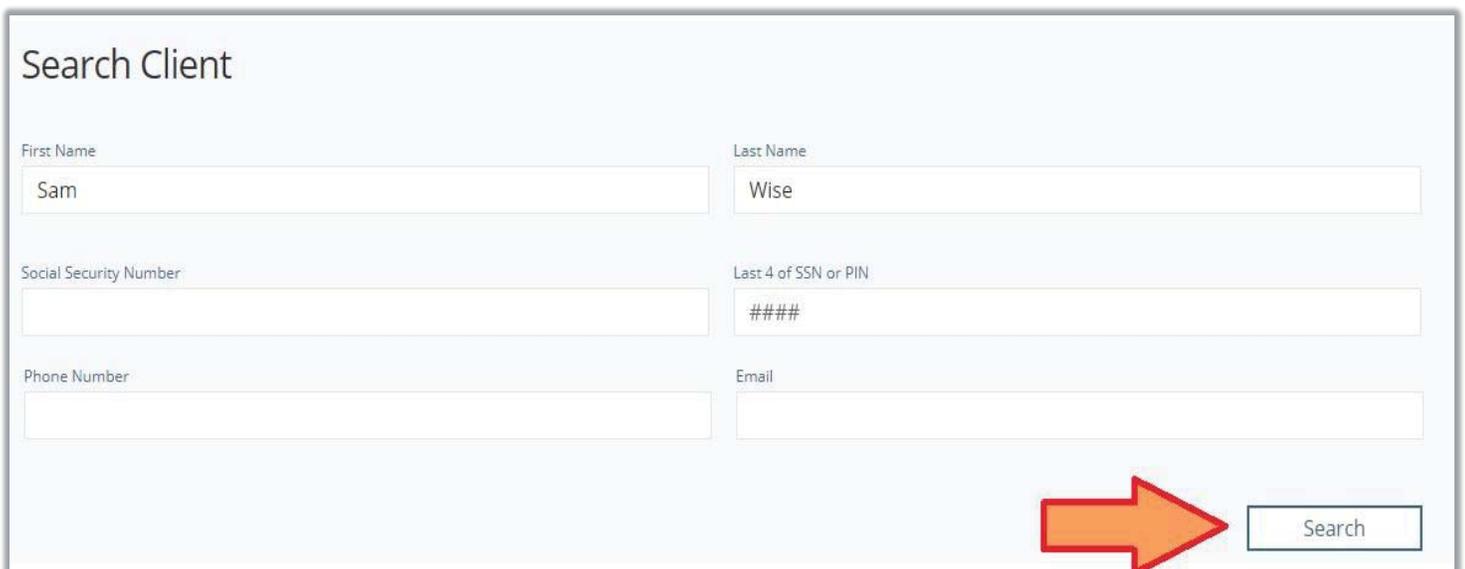
1. Once the client signs an authorization form, scan and upload the form to a drive for temporary storage.
2. Login to CIE (Visit [ciesandiego.org](http://ciesandiego.org) and hover over "Partners". Click "Login to CIE")  
Note: You will need to enter your username and password on the next page.



3. Once you login, click "Search Client" in the top right corner.



4. On the next screen, enter the client's first and last name and click "Search."

A screenshot of the 'Search Client' form. The form has several input fields: 'First Name' (containing 'Sam'), 'Last Name' (containing 'Wise'), 'Social Security Number', 'Last 4 of SSN or PIN' (containing '####'), 'Phone Number', and 'Email'. A red arrow points to the 'Search' button at the bottom right of the form.

If the client's name appears under Results with a matching DOB and/or last 4 of SSN/Pin, they have already consented. To view the profile, click on the Name.

If the client's name does not appear, CONTINUE...

Results				
NAME	PHONE	BIRTH MONTH/YEAR	LAST 4 OF SSN OR PIN	EMAIL
Samual Wisely		01/1950	1111	SWisely@demo.com

**5. Enter the client's profile information** (As found on the Authorization form)

- a) First Name (Required)
- b) Last Name (Required)
- c) Last 4 of Social Security Number/Pin (Required)
- d) Birthdate (Required)
- e) Phone Number (recommended)
- f) Email Address (recommended)
- g) Full Social Security Number (recommended)

**6. For Privacy Method, select "Paper"**

- a) Click "Choose File" and select the correct Authorization form for the patient

**7. Select the Language: English or Spanish**

**8. Select "Yes" or "No" for "Enroll in Care Team?"** (Selecting "yes" means you will get Alerts)

**9. Click "Create Client."**

### Search Client

First Name Sam	Last Name Wise
Social Security Number	Last 4 of SSN or PIN 1111
Birthdate 1980-02-13	Birth Month/Year MM/YYYY
Phone Number 858 000 0000	Email

Privacy Method  
Paper

Language  
English

[Choose File](#) English Auth...n wcheck.pdf English Authorization wcheck.pdf

Please confirm that you have attached the correct document. After clicking "Create Client", the individual will be shared with the CIE network.

Enroll in Care Team?  
Yes



# The Client Profile

This is the DETAILS view of the Client Profile.

On the left side, scroll down to view Contact Information, Demographics, Household, Income and more.

Scroll down to view the following on the right side: Care Team members, Alerts, Program Enrollments, Past Referrals, and more.

## Sadie Blue

Age 25 | Phone (619) 858 3000 | Email sbblue@ciemosd.org | Gender Identity Transgender Woman

**Select the "Edit" button to open the fields on the left and make updates. Select "Find Referral" to search and provide referrals.**

[Edit](#) [Find Referral](#)

DETAILS | PRIVACY | SDOH | REFERRALS | FEED

### Individual Information

Privacy Status Icon:

Client Name: Sadie Blue

Email: sbblue@ciemosd.org

Last 4 of SSN or PIN: 1234

Client Phone: (619) 858 3000

Mobile: (619) 858 3000

Birthdate: 01/01/1994

Birth Month/Year: 01/1994

### Address Information

Home Street: 12345 Pineapple

Home City: San Diego

Home State/Province: [i]

Agency/User	Date	Value
211 San Diego	10/16/2019 05:13 PM	12345 Pineapple
211 San Diego	10/16/2019 05:13 PM	3860 CALLE FORTUNADA
211 San Diego	09/18/2019 02:19 PM	
211 San Diego	09/18/2019 02:19 PM	4600 LAMONT ST
211 San Diego	09/18/2019 01:46 PM	

[View All](#)

### Demographics

Primary Language: English

Age: 25

Race: White/ Caucasian

Ethnicity: Non-Hispanic/Non-Latino

**Domain Shortcut- Select one of the 14 domains from the dropdown and click "Next."**

\*Select a domain:  
Activities of Daily Living

[Next](#)

### Domains (6+)

DOMAIN ...	RISK INDIC...	REFERRALS	LAST ASSES...
Utility	Stable	4	10/30/2019 3:...
Transporta...	Critical	0	9/13/2018 11:...
Social/Com...	Critical	6	8/17/2018 12:...
Safety & Di...	Vulnerable	1	9/28/2018 1:2...
Primary Care	Stable	2	5/10/2019 9:2...
Personal H...	Critical	0	7/31/2017 2:4...

[View All](#)

### Privacy Records (6+)

PRIVACY ...	PRIVACY TY...	STATUS	EXPIRATIO...
P-133757	Authorization	Complete	10/15/2029
P-132264	Authorization	Renewed	10/3/2029
P-132063	Authorization	Pending	
P-132062	Authorization	Renewed	10/2/2029
P-131876	Authorization	Renewed	10/1/2029
P-131547	Authorization	Pending	

**Hover over the floating "i" to view previous data entry, source, and date of entry.**

## Locate & Provide Referrals

1. Verify that the patient's profile reflects accurate contact information, income and household size.
2. To make updates to profile information, click the Edit button.
3. To search for Referrals, click "Find Referral."

**Sadie Blue**

Age: 25 | Phone: (619) 858 3000 | Email: sblue@ciedemosd.org | Gender Identity: Transgender Woman

Buttons: Edit, Find Referral

Instructions: Select the "Edit" button to open the fields on the left and make updates. Select "Find Referral" to search and provide referrals.

Navigation: DETAILS, PRIVACY, SDOH, REFERRALS, FEED

4. Search database for referrals by keyword (and zipcode)
  - Food insecurity Direct Referrals: "CalFresh," "WIC," and/or "Senior Food"
  - Utility assistance, Housing and Homeless services: 2-1-1 San Diego, Information & Referral

**Client Details**

**Jay Pritchett**  
 Age: 72  
 FPL: 57.75%  
 Monthly Income: 1000  
 Household Size: 3  
 Home Zip Code: 92120-4028  
 Health Insurance Type: Medi-Cal/Medicare  
 Health Condition: Physical Disability/Sensory Disability/Dental

**Search Results**

Enter Keyword: [enter location] [Search]

1 results

sorted by: Relevance | [Filter]

**Employment and Training Services; San Diego Workforce Partnership**

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

Provides targeted employment services designed to help eligible adult job seekers identify, or regain, a career that will promote Eligibility

Buttons: Add Referral

5. Locate an appropriate referral from the results

6. 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

\* Choose domain(required)

Additional Notes: ?  
  
Max 2000 characters

Protected Health Information/Notes: ?  
  
Max 2000 characters

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