

Glossary of Terms

Term	Definition
Agency Dashboard	The main dashboard and initial login screen for any Partner Community user (Referral Manager or Care Coordinator). From here, the user may view direct referrals assigned to themselves or to their agency along with the referral's status within the referral flow.
Appropriateness of a Referral	The question, "Was this an appropriate referral?" with the answers, "Yes" and "No" is a newly added field. This means, based on the client's details, does it make sense, in other words, was it appropriate or not that this client was directly referred to that specific service?
Assessments	Partner Community Users can access any completed assessments from a client's profile. There is an assessment for each of the 14 domains, which are based on the social determinants of health. Each assessment contains a summary of the client's need, immediacy of need, and barriers and supports, and the client's knowledge of resources and their ability to use them. Assessments can provide additional context when reviewing a direct referral.
Care Coordinator	The Care Coordinator may login to the Partner Community to review cases that have been assigned to them by their program's Referral Manager.
Care Team	A section within the Client Profile that shows the service providers working with the client and can be used as a point of contact for care coordination. Care Team members automatically receive alerts EMS and the Public Safety Group.
Client Profile	The whole client record that includes client details, such as contact details, household information, demographics, and income and benefits. From the Client Profile, Partner Community users can access various features of care coordination such as referrals, assessments, the Care Team, and Program Enrollments.
Domains	The "Domain" section of The Partner Community is comprised of 14 categories of a person's life that are based on the social determinants of health. The categories are Activities of Daily Living, Criminal Justice/Legal, Education, Employment, Health Management, Housing, Income and Benefits, Nutrition, Personal Hygiene/Household Goods, Primary Care, Safety & Disaster, Social Community Connection, Transportation and Utility.
Direct Referral	An electronic "warm hand-off" between service providers sent within the Partner Community. This alerts a Referral Manager that a client has been referred to their services and requires action. Direct referrals provide a closed loop within care coordination for client access to services.

Eligibilities	This is a section on the client profile that flags specific services a client is likely eligible for.
Indirect Referrals	These are documented instances where a client has been referred to a service by being provided information, and the client is responsible for initiating contact.
“Legal Privilege”	This outcome is meant for professional legal advisers, such as attorneys, who cannot lawfully disclose or communicate information about their clients’ access to services.
“On Wait List”	This is a referral status for when a client meets all eligibility and has likely completed all intake processes, is essentially eligible for services, and is positioned to receive the services they were referred to as they become available.
Partner Community	The CIE Network Partner user interface that requires a login to look-up, consent, or directly refer CIE participants for the purpose of community-wide care coordination. The Partner Community leverages technology to exchange data in a secure manner across sectors.
Partner Community User	There are currently two different user types within the Partner Community, the Referral Manager and the Care Coordinator roles. Both user types may look up consented clients, create a client profile, and directly refer a client to 2-1-1 and other CIE Network Partners for care coordination.
Program Enrollment	<u>On the Client Profile:</u> A section of the client profile that lists services the client is accessing. Partner Community Users can populate a service to the “Program Enrollment” as part of the direct referral flow or by clicking “New” on the client’s profile under the Program Enrollment Section. <u>On the Agency Dashboard:</u> This is the section on a Partner Community user’s agency dashboard that lists program enrollments created through the direct referral flow.
Referral Manager	The Partner Community user who initially receives alerts for new referrals and either accepts or declines the referral based on appropriateness or capacity. After accepting the direct referral, Referral Managers may assign the client to themselves or to a Care Coordinator. Referral Managers can view the referral status for all direct referrals sent to their service(s).
“Referral Outcome”	This field is used to document whether an active referral resulted in the client receiving services. If the client was not connected, a second drop-down will appear for the user to document the reason.
“Referral Status”	The initial status after a referral has been marked as appropriate or not. This status indicates whether a referral has been accepted or declined.
Referral Visibility	This functionality makes referrals provided to a client visible within the “Referrals” section of their profile. This section captures both Direct and Indirect referrals across time and service providers.