# Managing CIE User Profiles

## What is a CIE User Profile?

Login access for staff from your agency that is appropriate for their role-based permissions and utilization of the CIE Partner Community

Users are either a Referral Manager or Care Coordinator

## Actions user can take in the CIE's Partner Community

CIE Partner

- Look-up clients in CIE
- Create and consent new clients into CIE
- Add to a client's record what program they are accessing at your agency ("Program Enrollment")
- Add to a client's record who from your agency is working with them ("Care Team")
- Warm referral to 2-1-1 San Diego for client connection to other services
- Edit Agency's profile or service listing profile

## Initial steps to set up your staff's CIE Profiles:

1. Identify and compile a list of staff that need a login to CIE
2. For each staff:
   - Indicate whether they need to see health information or not
   - Indicate what service/program that staff person is associated with
3. For programs that are going to receive direct referrals, indicate each user's role:
   **Referral Manager**, the person who initially accepts or declines referrals, and assigns active referrals to a **Care Coordinator**, who will then coordinate access to services for the client or patient and/or document the outcomes
4. Email your list (preferably an excel file) to CIEhelpdesk@211sandiego.org with the subject New CIE User Request
   - In the body of the email, include your contact information and your agency

Please note* New users will need to complete e-learning modules before they can be granted access to the Partner Community. Invitations to the E-learning will be sent to the list.

## How do I update CIE user access when I have changes in staff?

Go to the CIEhelpdesk found on
CIEsandiego.org/cie-helpdesk

# Administrators can direct staff to the CIEhelpdesk to request their own changes or submit changes on their behalf:

The CIEhelpdesk can be used to:

- Upload a list of new users that need e-learnings and access to the Partner Community
- Request to remove a user who no longer requires access
- Request to change a user from a Referral Manager to a Care Coordinator and vise versa
- Request to add or remove permission to view health information

# Other CIEhelpdesk Uses:

- Reset passwords to the E-learning
- Reset passwords to the Partner Community
- Report a bug/error in the Partner Community and get technical support
- Provide feedback on the Partner Community or Request a new feature