



## CIE Partner Network Monthly Meeting Minutes August 22, 2019

**Meeting time:** 9-10:30am, 4<sup>th</sup> 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, Child Development Associates, Blue Shield of California Promise Plan, UCSD Healthcare, San Diego Workforce Partnership, Fraternity House, Salvation Army, MCA Child Resource Services, South Bay Community Services, San Diego LGTBO Community Center, Community Resource Center, Samahan Health Center, Imperial Beach Community Clinic, Interfaith Shelter Network, Father Joe's Village, North County Health Services, Molina Healthcare, Pacific Southwest CDC

### Welcome and Introductions

#### New CIE Partners

As of this month, CIE has 71 partners in the network. The newest partner is:

- Interfaith Shelter Network (ISN) – Coordinates the efforts of participating congregations, social service agencies and governmental programs in order to provide shelter and other resources to homeless individuals and families and to enable those we serve to move toward self-sufficiency. They joined CIE early August. ISN is one of the providers that was awarded HEAP funding.
  - HEAP providers will utilize CIE to process Homeless Prevention referrals from partners
  - All partners in CIE will have access to the homeless prevention tool that will be used to screen clients for potential HEAP eligibility
  - HEAP's homeless prevention tool will be available in CIE in September

#### Utilization Report

CIE Utilization reports are sent to CIE partners that are using CIE on a monthly basis. Based on feedback from partners, the 211 San Diego's informatics team launched a new version of the CIE Utilization reports which includes new features, content, customizations options and language.

Rebecca De Andrea, Resource Analyst walked the group through the updates and changes to the utilization report.

The new report features icons that represent the adoption, engagement, and interventions represented in the report.

Starting in September, partners will receive the new standardized report on a monthly basis. The report will include a monthly summary of the previous month detailing utilization trends and a list of users with active user license in the selected timeframe.

Partners in the CIE network can request a customized report for the following options:

- Department/Service Site Summary – Summary and Trend data on utilization within the CIE for departments/sites
- Login Trends by Users, Department or Site Location (when available)
- Search Trends by Users, Departments, or Site Location (when available)
- Client View Trends by Users, Departments, or Site Locations (when available)
- Consents Trends by Users, Departments, or Site Locations (when available)
- Referrals Sent by User (when available)
- Social Determinants of Health Screenings (when available)



## CIE Implementation Plan

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The 211 San Diego CIE team works to engage partners in the community and creates an implementation plan to memorialize the conversations, commitment and participation from every agency that has joined the CIE network.

During the meeting, partners reviewed and completed the questions in the CIE implementation plan to get a general idea of the process.

The CIE Implantation Plan covers:

- 1) Agency Overview
- 2) Overview of the functions of CIE including: Look-ups/Searches, Consents, Direct Referral, and Data Sharing
- 3) Questions about current workflow to help determine a starting point for an agency
- 4) System Utilization
- 5) Expectations and Goals

**Agency Overview:** To get a general understanding of where the agency is at with staffing, workflow, target populations served, technology platforms they currently use, etc.

**Look-up/Searches:** Partners with access to CIE, can look-up/search for clients by their First, Last Name, DOB, SS#, phone, and, Email.

- When covering client look-ups/searches section, partners that have completed an implementation plan shared their experience with using the look-up/search function.
- A representative from YMCA mentioned that they currently use this function to search every single client that they serve as part of their workflow.
- A representative from PATH mentioned that they look-up clients in CIE upon receiving a direct referral. When searching for clients, they look to find out what other partners the client is currently working with or where the client has been referred to in the past.
- A representative from Salvation Army mentioned that they look-up/search clients to see who currently has a CIE profile and who they are engaging with to find the resources that are most helpful to them.
- Partners shared that participants appreciate being able to look them up in CIE.
- A Whole Person Wellness report created by 211, found that users of the WPW program are already or have engaged with multiple housing service providers in the CIE Network including ICS, Rescue Mission, Salvation Army, Father Joes, PATH, etc. This speaks to the need for care coordination across these agencies.
- A representative from Blue Shield mentioned that one of the concerns with looking up people in CIE is how to communicate/explain to the client that they are also in another system.
- A partner suggested that it would be great if the CIE team can work on common use language to start up that conversation with the client so that other partners feel equipped to explain to clients why they found them in CIE or why it is a benefit for them to participate in CIE.

**Authorizations:** Partners can consent or update a client's consent in CIE. Some of the ways that partners can consent clients in CIE now are:

- 1) Uploading signed paper consents
  - 2) Adobe Sign – An electronic way that that client can receive the consent by email and sign the consent electronically
- Partners that currently consent clients into CIE also shared their experience about how and when it is appropriate to offer to consent a client into CIE.
  - A representative from YMCA mentioned that if they find that a client is not consented in CIE, they will offer to consent the client so that the client can connect to other agencies that can help them navigate services.
  - At the meeting in June, partners were provided with a sheet of best practices and FAQs to help them answer some of the questions that clients may have and some ideas on how to steer the conversation.
  - Partners with access to CIE are now able to update a client's consent by clicking on the Privacy tab on the Client's profile. They are able to renew, revoke, or add an updated Authorization form.
  - For more details about Authorizations, partners can go to: <https://ciesandiego.org/cie-authorization-forms/>

**Data sharing:** Partners can share a multitude of data with CIE through various methods including: manual connections, batch connections, and API connections. Some of the data that can be shared includes: Client Profile Information, Contact Information, Military Status, Income and other demographics, Domain Summary shared language data fields, care teams, Alerts, Program Enrollments, client records (with authorizations) and more.

- Partners that current share data with CIE shared their experience.
- Father Joe's currently shared data with CIE through their system's (c-star) API. The data that is captured in CIE includes: program enrollments and client profile information.
- Direct Referrals: Partners in CIE can receive and send referrals to an agency's programs and service electronically to ensure that individuals are proactively connected to your services through a coordinated system.

**System Utilization:** Partners in CIE are asked to work with their team to determine roles, departments, teams, and a function of CIE that can be prioritized. A best practice is to identify a person within the agency that can champion CIE to ensure utilization.

- A representative from YMCA shared that what made the difference in their organization's ability to adopt the system is that they identified a group of champions within their organization that worked with Roxanne Suarez, 2-1-1's Integration Manager to map out a workflow standardizing the process.
- YMCA also created a CIE Workgroup within their agency that meets every month (from their alternative payment program) to discuss the CIE rollout and shape the way that their peers can use it.
- CDA, also worked on a roll-out strategy to implement the utilization of CIE. Their team identified a way they can enhance family stability, visual presentation. They established a pilot group and plan to launch using CIE in September 2019.

**Expectation and Goals:** Partners can set up their own expectations and goals about their utilization of the CIE platform.

- These goals are meant to help define success based on the team's capacity and to determine benchmarks that would indicate readiness to expand CIE utilization to other programs/services.
- Partners that haven't completed an Implementation plan or are ready to expand on their CIE utilization can contact Tanissha Harrell at: [tharrell@211sandiego.org](mailto:tharrell@211sandiego.org).

### CIE Direct Referrals/Sending and Accepting

CIE leverages the 211 San Diego database to search for resources. These resources are updated at least once a year by 211's Resource team.

One of the biggest benefits of using CIE Global referrals is leveraging the 211 database, which is a robust catalogue of available resources. Documenting direct and non-direct referrals on client profiles assists community-wide care coordination. When case managers can see referrals made by other organizations they are able to re-direct the client to resources and increase the odds of true connection to services.

#### Direct Referrals

Partners that receive direct referrals from other partners in CIE receive an email alert every time a client has been referred to their programs. This triggers staff reaching out to the client within a certain time frame. These partners can also provide outcome information about their interaction with the client.

When making a direct referral to a partner, a partner can choose to include general case notes or include health related case notes using a health protected case notes field.

#### Non-Direct Referrals (Provide Program Details)

- Users of CIE can also document referrals to services that are not part of CIE partners and to CIE partners that are not set up to receive direct referrals. However, these referrals are not direct referrals. By providing clients with programs details, the responsibility of connecting with the agency is on the client. In addition, these referrals may not result in an outcome visible within CIE.
- Clients that provided an email or phone number can receive an email alert with next steps when a referral has been made through CIE.
- For more information on CIE global referrals, please visit: <https://ispring-cloud-31.ispringcloud.com/acc/c9itHEgyMzExMQ/s/23111-hMhCp-Q99pt-hCLJn>

For more information on how to search for resources, visit:





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Partners with access to CIE, can update their services in the partner community by clicking on agency profile: <https://my211.force.com/s/agency-profile>

For more information on how to update your services, please visit:  
<https://211sandiego.org/partners/>

### **Feedback:**

A partner from South Bay Community Services asked if the service information was available in Spanish. Currently language translation in CIE Salesforce is not available but is a future goal.

### **Roundtable Discussion**

Fraternity House is hosting a Summer Luau on Friday, September 13, 2019 from 1:00 pm-5:00 pm at 687 Riviera Court, Vista, CA 92084.

RSVP to Nikki: (760) 268-9174

See Flyer for details:



FHI Summer Luau  
2019 Flyer.jpeg

**Next Partner Meeting:** September 26, 2019 from 9:00 am-10:30 pm at the 2-1-1 Connections Center, 3860 Calle Fortunada, San Diego, CA 92123.