



Community Information Exchange

Referral Management Guide

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
sblue@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

DETAILSPRIVACYSDOHREFERRALSFEED

Individual Information

Privacy Status Icon
A

Client Name
Sadie Blue

Email
sblue@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

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

Select a domain:

Activities of Daily Living

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

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.

Managing Incoming Direct Referrals to your Program:

1. Referral Manager will get an email notification that you have received a new referral
2. Login to CIE to review the referral on your dashboard
3. Click on the client's name from your dashboard

The screenshot shows the 2-1-1 San Diego Partner Portal dashboard. At the top, there's a navigation bar with links for DASHBOARD, AGENCY PROFILE, REQUEST LOG, SERVICE DIRECTORY, and a SEARCH CLIENT button. Below this, a header bar identifies the user as 'Example User' and provides a 'Sign Out' link. A notification banner states: '2 New Referrals were added since your last visit. 2 Pending Referral(s) overdue.' The main section is titled 'New Referrals' and contains a table with the following data:

NAME	NEW	SERVICE NAME	REFERRAL DATE
Jay Pritchett		On the Go: Transportation Solutions for Older Adults...	03/01/2019
sam wise		Foodmobile-1	02/15/2019

4. On the profile, check if the client meets your program's eligibility e.g. Household size, income, gender, location, etc.

The screenshot displays three panels of client information for Jay Pritchett:

- Demographics:** Primary Language (English), Age (25), Gender Identity (Woman).
- Income & Benefits:** Employment Status (Unemployed), Sources of Income (No Income), Percent of FPL (57.75%).
- Health Information:** Health Insurance Provider (Other), Health Insurance Type (County Medical Service; COBRA), Medi-Cal Recertification Date.

5. To view the referral and related details, go to the client's Referral tab and Pending Referrals subtab.

The screenshot shows the client profile for Jay Pritchett with a red arrow pointing to the 'REFERRALS' tab. The 'REFERRALS' tab is active, and the 'PENDING REFERRALS' subtab is selected. Other tabs visible include DETAILS, FEED, SDOH, OPEN REFERRALS, PROGRAM ENROLLMENTS, CLOSED REFERRALS, and DECLINED REFERRALS. Buttons for 'Edit' and 'Find Referral' are located at the top right of the profile section.

Accepting a Referral

Select "Yes" for appropriate and select "Evaluating" under referral status
Then assign the client to the appropriate staff member in CIE, and click "Save."

See screenshot

DETAILS REFERRALS FEED

PENDING REFERRALS OPEN REFERRALS PROGRAM ENROLLMENTS CLOSED REFERRALS DECLINED REFERRALS

NEED: HEALTH MANAGEMENT
SERVICE NAME
WHOLE PERSON WELLNESS PROGRAM
TAXONOMIES
LONG TERM CASE/CARE MANAGEMENT, HOMELESS MEN
AGENT NOTE
Direct referral to WPW from 2017 county supplied list

Was this an appropriate referral?

Referral Status:
Evaluating

Case Manager:
Select Owner
Sandra Wieder
Noelani Dizon
Chris Lopez
Joanna Quezada
Madeline Lewis

Add a Case Note...

Show Feeds

Add a Case Note... Save

Declining a Referral

- If the client does not meet the above eligibility:
Select "No" for appropriateness and select "Decline-Ineligible"
 - If the client was referred to the same program more than once:
Select "No" for appropriateness and select "Decline- Duplicate"
 - If the client meets eligibility but cannot be accepted due to no capacity:
Select "Yes" for appropriateness and select "Decline- No Capacity"
- **Declined referrals are returned back to the sending agency's queue*

Please Note** If declining a referral due to ineligibility, please indicate in the case note field, what made the client ineligible.

Assigned Case Manager: The assigned case manager will receive an email notification about the assigned referral.

1. Locate the referred client on your dashboard under Open Referrals.

The screenshot shows the 2-1-1 San Diego Partner Portal dashboard. At the top, there's a navigation bar with links for DASHBOARD, AGENCY PROFILE, REQUEST LOG, SERVICE DIRECTORY, and a SEARCH CLIENT button. Below this, a dark banner displays 'Partner Portal', the user's role '2-1-1 San Diego - Tier 3 Care Coordinator II', the user name 'Example User', and a 'Sign Out' button. A notification bar states '1 New Referral was added since your last visit.' The main section is titled 'Open Referrals' and contains a table with the following data:

NAME	SERVICE NAME	CASE MANAGER	ACCEPTED DATE
Jay Pritchett	On the Go: Transportation Solutions for OL...	Thomas Lacoste (Alias)	03/20/2019

2. Visit their Profile for more information, such as their contact information and background information about their situation.
3. To close out the referral with an outcome, go to the Referrals tab and Open Referrals subtab

The screenshot shows the client profile for Jay Pritchett. At the top, there's a header with the name 'Jay Pritchett' and buttons for 'Edit' and 'Find Referral'. Below this, client details are listed: Age 72, Phone (858)0000000, Email jpritchett@email.com, and Gender Identity Man. A large red arrow points down to the 'REFERRALS' tab in the navigation bar. Below the tabs, another red arrow points down to the 'OPEN REFERRALS' subtab.

Received Services Outcome

When the client is enrolled in the program, update the referral as follows:

- Select "Receive/receiving services" as the outcome
- Select One-time or Ongoing (depending on your program's service delivery)
- Select the "Program Enrollment" checkbox
- Select "Save"

Staff are recommended to place themselves on the client's Care Team to get alerts if the client is arrested or transported by ambulance

See screenshots on next page

DETAILS REFERRALS FEED

PENDING REFERRALS OPEN REFERRALS PROGRAM ENROLLMENTS CLOSED REFERRALS DECLINED REFERRALS

NEED: HEALTH MANAGEMENT
SERVICE NAME
WHOLE PERSON WELLNESS PROGRAM
TAXONOMIES
LONG TERM CASE/CARE MANAGEMENT, HOMELESS MEN
AGENT NOTE
Direct referral to WPW from 2017 county supplied list

Case Manager: CIE DemoUser3 Outcome: did the individual receive the service? Receiving/Received Services

Type of Service Received Ongoing

Include in Care Team ☒

Create Program Enrollment ☒

Outcome Note

Save

Did Not Receive Services Outcome

If the client will not receive services:

- Select "Did not Receive Services"
- Select a reason from the dropdown, for example, "Unable to Contact".
- Select "Save"

DETAILS REFERRALS FEED

PENDING REFERRALS OPEN REFERRALS PROGRAM ENROLLMENTS CLOSED REFERRALS DECLINED REFERRALS

NEED: HEALTH MANAGEMENT
SERVICE NAME
WHOLE PERSON WELLNESS PROGRAM
TAXONOMIES
LONG TERM CASE/CARE MANAGEMENT, HOMELESS MEN
AGENT NOTE
Direct referral to WPW from 2017 county supplied list

Case Manager: CIE DemoUser3 Outcome: did the individual receive the service? Did not Receive Services

Reason Client was not Connected

Outcome Note

Additional context can be provided here

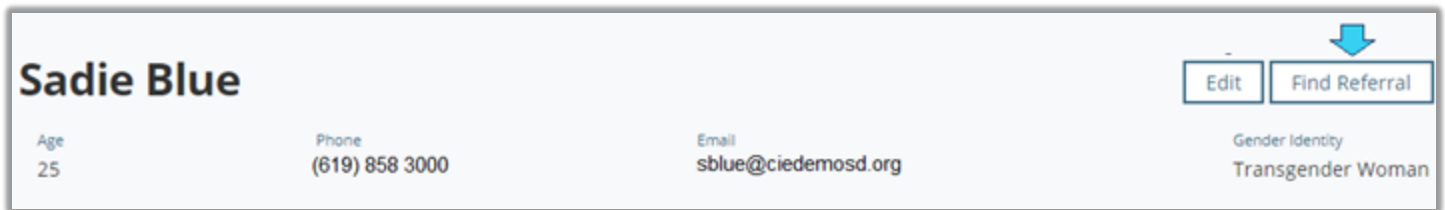
Save

Select Reason

- Select Reason
- Client no longer interested
- Funding Limitations
- Ineligible
- No Show
- Failure to Provide Documents
- Referred to Other Agency
- Referred to Other Internal Program
- Unable to Contact
- Other

Providing Referrals through CIE

1. From the Profile, Click “Find Referral”



Sadie Blue

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

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

2. Search for referrals using keyword, location and/or category filters



Client Details

Jay Pritchett
Age: 72
FPL: 57.75%
Monthly Income: 1000
Household Size: 3
Home Zip Code: 92120-4628
Health Insurance Type: Medi-Cal; Medicare
Health Condition: Physical Disability; Sensory Disability; Dental

[Reset Search](#)

Employment and Training

Print this list 1 results

sorted by: [Relevance](#) | [Distance](#) Direct Referral: ☐

Employment and Training Services; San Diego Workforce Partnership
San Diego Workforce Partnership
Provides targeted employment services designed to help eligible adult job seekers identify, or regain, a career that will promote ...
Eligibility

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

[Add Referral](#)

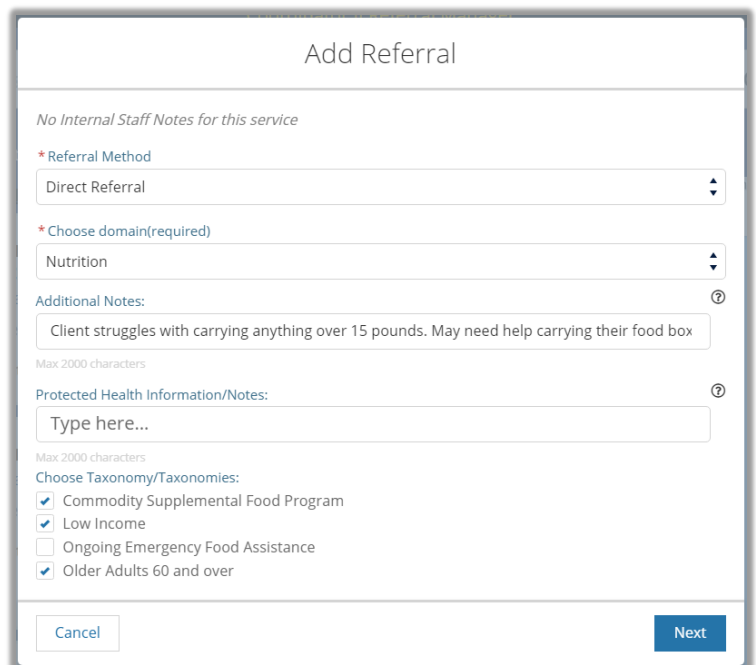
3. After you’ve found a referral, click “Add Referral”

- 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
Direct Referral

* Choose domain(required)
Nutrition

Additional Notes:
Client struggles with carrying anything over 15 pounds. May need help carrying their food box
Max 2000 characters

Protected Health Information/Notes:
Type here...
Max 2000 characters

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

[Cancel](#) [Next](#)

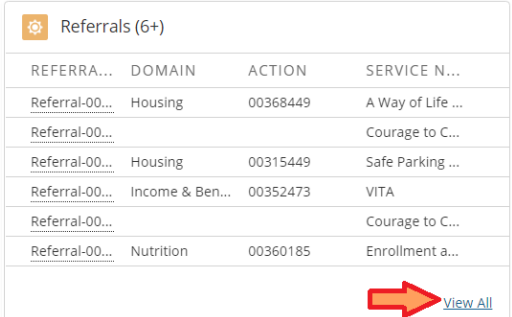
Reviewing Past Referrals

- See if someone was successfully connected to the services you referred them to.

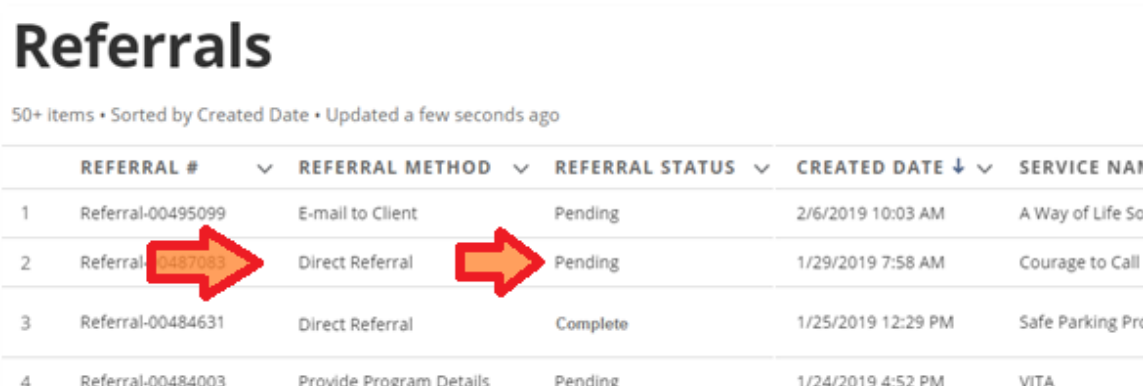
Steps to View

- From the client's profile, scroll down to the Referrals section and click "View All."
- This will take you to a page with more details of all referrals.

*Note: This will show **ALL** referrals captured in CIE including Direct Referrals and non-direct referrals provided by any CIE Partner including 2-1-1.*



REFERRA...	DOMAIN	ACTION	SERVICE N...
Referral-00...	Housing	00368449	A Way of Life ...
Referral-00...			Courage to C...
Referral-00...	Housing	00315449	Safe Parking ...
Referral-00...	Income & Ben...	00352473	VITA
Referral-00...			Courage to C...
Referral-00...	Nutrition	00360185	Enrollment a...



Referrals

50+ items • Sorted by Created Date • Updated a few seconds ago

	REFERRAL #	REFERRAL METHOD	REFERRAL STATUS	CREATED DATE	SERVICE NAM
1	Referral-00495099	E-mail to Client	Pending	2/6/2019 10:03 AM	A Way of Life So
2	Referral-00487093	Direct Referral	Pending	1/29/2019 7:58 AM	Courage to Call
3	Referral-00484631	Direct Referral	Complete	1/25/2019 12:29 PM	Safe Parking Pro
4	Referral-00484003	Provide Program Details	Pending	1/24/2019 4:52 PM	VITA

- Review with the client if they were able to receive services referrals not showing an outcome.
- For Direct Referrals, click on the Referral # to see any case notes between the sender and recipient.
- For Direct Referrals that have remained in Pending Status, reach out to their staff for an update.
- Encourage the client to re-engage programs as needed.
- Provide ongoing referrals to other supportive services.
- Check back periodically for any new information about your client's situation:
 - ✓ Assessments
 - ✓ Eligibilities
 - ✓ Data Sources
 - ✓ Other Care Team Members