Getting Started- Login to CIE

1. Enter your username (your chulavistaca.gov email address)
2. Enter your password
3. Click "Log In"

Having trouble? Contact CIEhelpdesk@211sandiego.org

Search for the Client

1. Once you login, click “Search Client” in the top right corner.

2. Script: "To make it easier for you to access services, we’d like to coordinate directly with their staff on your behalf. This means the service's staff would receive some of your information so that they can possibly call you, schedule services or prepare for your arrival. I'll need to gather some information about you. May I have your first and last name?" (confirm spelling)"

Enter the client's First and Last name and click “Search.”

a) If the client’s name appears under Results with a matching DOB and/or last 4 of SSN/Pin, click on the Name and skip to instructions for sending the referral.

b) If the client's name does not appear, CONTINUE to next page to create a new profile.
Create a Client Profile

1. Enter the remaining profile information

**Script:**
"What is the best telephone number for you and your email? What is your DOB and your last 4 digits of your social security number?"

If they cannot share the last 4 digits of their SSN, create a 4-digit pin using their year of birth.

- a) Last 4 of Social Security Number/Pin (Required)
- b) Birthdate (Required)
- c) Phone Number (recommended)
- d) Email Address (recommended)
- e) Last 4 of SSN/4 digit-pin

2. Complete the Telephonic Authorization

**Suggested introduction:** Next, I"m going to read a document that asks for your permission to share your information with partners so that we can coordinate your meal deliveries with other organizations. Some statements about sensitive health information may or may not be applicable.

See the script here, once the client completes the telephonic Authorization, continue to 3.

3. Finish these next steps to create the profile
   
   a) For Privacy Method, select “Telephonic”
      
      Click “Choose File” and upload the Telephonic Authorization template
   
   b) Select the Language: English or Spanish
   
   c) Select “No” for “Enroll in Care Team?”
   
   d) Click “Create Client.”
Update the Client Profile

Click the "Edit" button to update the Address and other eligibility or contact information e.g. Income, Household size, and telephone number and/or email (if outdated).

ex. Scroll to down and update the following:

a) Home Street
b) Address Line 2 (if applicable)
c) City
d) State
e) Zipcode

Scroll down to the bottom of the page and click "Save Changes"

Send the Direct Referral

1. Click "Find Referral."

2. Search for results by category or keyword and zipcode

3. Click “Add Referral” on the chosen Direct Referral
   - Under domain: Choose "Nutrition"
   - Write important notes for the receiving party; e.g. best hours to reach the client
   - Select related Taxonomies and Target Populations (if applicable)
   - Select “Next”
   - Update the client’s email (if applicable) and click "Save"
**Troubleshooting/ Help Tips**
Sometimes when CIE doesn’t work as expected, there are steps you can try to resolve the issue. Other times, CIE Support will be necessary.

Here are a few common issues that users experience and potential ways to solve the issue. Need more information that what's provided below? Enlist help from your IT department or reach out to ciehelpdesk@211sandiego.org

For more training materials or to report an error you may also visit: [https://ciesandiego.org/partnering-with-cie/training-technical-support/](https://ciesandiego.org/partnering-with-cie/training-technical-support/)

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
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<tbody>
<tr>
<td>Forgot the link to login to CIE</td>
<td>Visit: <a href="https://ciesandiego.org/partnering-with-cie/">https://ciesandiego.org/partnering-with-cie/</a> and click on the “Partner Community Sign-on” link</td>
</tr>
<tr>
<td>Forgot Username</td>
<td>Your username should match your work email address</td>
</tr>
<tr>
<td>Forgot password</td>
<td>To reset your password:</td>
</tr>
<tr>
<td></td>
<td>1. Click “Forgot Password”</td>
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<tr>
<td></td>
<td>2. Enter your work email address</td>
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<tr>
<td></td>
<td>3. Click “Send Password Reset Email”</td>
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<td></td>
<td>4. Check your email inbox for a link to reset your password</td>
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<tr>
<td></td>
<td><a href="#">Note: Do Not Enter your birthdate</a></td>
</tr>
<tr>
<td>The page is taking too long to load.</td>
<td>Switch to Chrome <a href="#">Chrome</a> or Firefox <a href="#">Firefox</a> browser</td>
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<tr>
<td></td>
<td>Find and click the refresh icon</td>
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<tr>
<td></td>
<td>Clear your browser's cache</td>
</tr>
<tr>
<td>I clicked on a link in my email to login to CIE and it takes me to an Invalid page or a different website.</td>
<td>Your IT department may have a firewall in place that is meant to protect your system from hackers, spam, and/or malicious activity. Sometimes this means that the firewall alters the link from CIE. Try logging in from the regular link. If the problem persists, please contact our Helpdesk as shown below.</td>
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| I tried making an update or using a feature in CIE and then an Error page. | If you encountered an error code, please report it by visiting: https://ciesandiego.org/contact-helpdesk/  
1. Enter you information so that the CIE team knows how to follow up with you  
2. Click “Partner Community Support”  
3. Click “Report a bug/error (troubleshooting)”  
4. Provide a short description of the error  
5. Upload a screenshot of the screen |
| Other | Visit: https://ciesandiego.org/contact-helpdesk/  
1. Enter you information so that the CIE knows how to follow up with you  
2. Click “Partner Community Support” and select an option:  
   - “Reset Partner Community Password”  
   - “Provide Feedback or suggest a new feature”  
   - “Update access (change or remove a user’s access)”  
   
   Or  
   Click “Other” and briefly describe how CIE can help. |