Community Information Exchange (CIE)
Advisory Board Meeting

September 21, 2021
CIE Advisory Board Meeting
AGENDA
September 21, 2021 • 8:30 AM – 9:30 AM

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Presenter</th>
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<tbody>
<tr>
<td>8:30 – 8:45 AM</td>
<td>Membership Workgroup Update</td>
<td>Mathew Packard</td>
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<td></td>
<td>• Opportunity for Community Input</td>
<td>Chair 2-1-1 Advisory Board</td>
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<tr>
<td>8:45-8:55 AM</td>
<td>Introductions &amp; Agenda Overview</td>
<td>Mathew Packard</td>
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<td>Chair 2-1-1 Advisory Board</td>
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<tr>
<td>8:55–9:10 am</td>
<td>CIE Trends &amp; Utilization Updates</td>
<td>Karis Grounds</td>
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<td></td>
<td>• CIE Summit Recap</td>
<td>VP of Health and Community Impact</td>
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<td></td>
<td>• Utilization Data</td>
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<td></td>
<td>• CalAim Update</td>
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<tr>
<td>9:10-9:20 am</td>
<td>Coordinated Action for Financial Assistance Overview</td>
<td>Katie Rast</td>
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<td>The San Diego Foundation</td>
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<td>Alana Kalinowski</td>
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<td>Director of Partner Integration</td>
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<td>9:20-9:30 am</td>
<td>Action Items &amp; Meeting Adjournment</td>
<td>Mathew Packard</td>
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<td>Chair 2-1-1 Advisory Board</td>
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Membership Update: Opportunity for Community Input
Re-Cap Membership Workgroup Update

Updates:
• Membership Workgroup
  • Vision and Recommendations
    • Reviewed current charter for revision into AB Bylaws
    • Reviewed current membership, bios and sector representation
    • Reviewed best practices for board membership
    • Recommend a membership of 15 to 18 with 10 seats representing 10 community sectors
    • August AB meeting slate of six new members will be presented representing six of ten sectors. Next several months will be used to orient and build trust among new members.
    • End of year is the target whereby the remaining sector as well as the 5-8 at large seats will be filled, new bylaws will be adopted and the first meeting of the reconstituted board will occur.
Opportunities for Community Input

CIE Advisory Board
Working Group will continue to explore other opportunities for membership and input

CIE Network Partner Meeting

CIE Network Partner Working Groups
- Ethics Policy (inclusion, data ownership, data governance)
- User Experience
- Community Voice
- Affinity Groups (Initiative, Catalyst, Collaborative)

211 San Diego Board of Directors

Quarterly Community Updates
Working Group will continue to explore other opportunities for membership and input

CIE Advisory Board Working Groups
- Clinical Healthcare Working Group
- Outcomes/Measurement
- CalAim Working Group
CIE Advisory Board Membership Workgroup Update

• Very pleased to have four new members join us here today or will be joining us in future meetings:
  • Marilyn Cornell
  • Bishop Dr. William Benson, Stepping Higher
  • Brenda Schmitthenner, West PACE
  • Nancy Maldonado, Chicano Federation

• Next steps for the working group over the next 3-4 months:
  • Draft and present draft charter for approval
  • Structure agenda to facilitate orientation and trust building among current new members
  • Pursue potential candidates to fill remaining sector and at large seats and ensure representation from appropriate sectors/seats
  • Create an input structure that allows for inclusive feedback

• Next Membership Meeting October 11, 2021 at 9:00 AM
INTRODUCTIONS

• What motivated you to be on the CIE Advisory Board?
• One or two things you would like to see the CIE accomplish in the next five years?
CIE UTILIZATION UPDATE
CIE Summit

560 + attendees from across the Country

Keynotes included:
- Highlighted lived and living experience: Re-humanizing the Data
- Driving Systems Change from an Antiracist Framework
- Policy Impact on Current and Future Systems of Care
- Innovative Approaches to Funding and Sustainability
## CIE Utilization Trends

### CIE Trends and Metrics Dashboard - Fiscal Year: July 1, 2020 - June 30, 2021

The trends dashboard highlights the established fiscal year goals for the CIE. These goals are specific to utilization, including how many partners and clients are in the network and how partners use the network to view clients, refer them to appropriate resources, and share data to enhance records. This utilization allows us to better assess and understand the overall impact the CIE has on client outcomes.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Current Numbers</th>
<th>% of Goal</th>
<th>Monthly Trends</th>
</tr>
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<tbody>
<tr>
<td>105 Partners</td>
<td>104 Partners</td>
<td>99% of Goal</td>
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#### Adoption Metrics
- **30,000 Logins**
  - 37,250 Logins
  - 124% of Goal
- **205,000 Consents**
  - 214,953 Consents
  - 105% of Goal
- **40,000 Searches**
  - 22,824 Searches
  - 57% of Goal

#### Engagement Metrics
- **100,000 Records with Shared Data**
  - 124,274 Records with Shared Data
  - 124% of Goal
- **30,000 Profile Views**
  - 24,983 Profile Views
  - 83% of Goal

#### Intervention Metrics
- **25,000 Direct Referrals**
  - 31,731 Direct Referrals
  - 127% of Goal

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* 30 days of profile view data were lost in January and February 2021 and are not retrievable; number for March months appear lower than actual utilization.
* On 2/22/2020, CIE adjusted policy to ensure time-outs (i.e., the number of idle minutes before the system signs a user out), which led to an increase in number of logins.

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Data Source: 211/CIE Information System | Reporting Period: 7/1/2020 - 6/30/2021

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**Community Health Group**
CalAIM: Updates

- In conversations with all health plans in joining CIE
- Support health plans in administrative coordination/infrastructure for additional
- Opportunity to support providers for Enhanced Care Management and In Leui of Services (ILOS)
  - Starting CIE CalAim workgroup in October 2021—interest e-mail Karis

Enhanced Case Management

- Outreach for Contracted Provider
  - Member Matching: Find the member, who they are working with
  - Potential to flag or create auto-alerts to FOHICs/CB-CME
- Identification of eligible ECM Members
  - Flag eligibility for health homes/ECM
  - Program Enrollment for with ECM provider & Care Team Member
- Referrals to Health Plan for ECM services
  - Health Plans can accept direct referrals from providers for eligible ECM members
- Coordination of Services
  - Support Comprehensive Case Management
  - Referrals to community and social supports
  - Administrative tracking and documentation

Workflow: ILOS

- Health Plan receives referral
- CBO/ALS Provider sends eligibility memos to ECM or ILOS
- CBO/ALS Provider accepts/declines
- CBO/ALS Provider creates referral (Existing OR consent for new OR consent)
- Notification back to referee
- CBO/ALS Provider program creates referral
- Health Plan/Supervisor has access to referral for internal workflow status
- CBO/ALS Provider can request extension by sending a direct referral back to health plan, with justification
- Health Plan creates custom monthly report to access information to create invoicing or billing
- Real-time feedback: Dashboard of metrics or updates to shows current status of availability
Opportunities and Challenges with CalAIM

_population Health - Capturing Social Needs and Care Management Documentation_
- CIE captures individual and aggregate needs and service utilization data
- Allows for exchange of SDOH and behavioral data and visibility of key aspects of a person’s changing circumstances to plans and providers.
- CIE integrates with source systems (EHRs)

_no streamlined tracking/reporting processes_
- Interoperability between platforms
- Investment in CBO data integrations with CIE

DHCS Priority SDOH Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
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<tbody>
<tr>
<td>Z55.0</td>
<td>Illiteracy and low-level literacy</td>
</tr>
<tr>
<td>Z56.0</td>
<td>Homelessness</td>
</tr>
<tr>
<td>Z59.1</td>
<td>Inadequate housing (lack of heating/space, unsatisfactory surroundings)</td>
</tr>
<tr>
<td>Z59.2</td>
<td>Problems related to living in residential institution</td>
</tr>
<tr>
<td>Z59.4</td>
<td>Lack of adequate food and safe drinking water</td>
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<tr>
<td>Z59.7</td>
<td>Insufficient social insurance and welfare support</td>
</tr>
<tr>
<td>Z59.8</td>
<td>Other problems related to housing and economic circumstances (forclosure, isolated dwelling, problems with creditors)</td>
</tr>
<tr>
<td>Z60.2</td>
<td>Problems related to living alone</td>
</tr>
<tr>
<td>Z60.3</td>
<td>Acculturation difficulty (migration, social transplantation)</td>
</tr>
<tr>
<td>Z60.4</td>
<td>Social exclusion and rejection (physical appearance, illness or behavior)</td>
</tr>
<tr>
<td>Z60.21</td>
<td>Child in welfare custody (non-parental family member, foster care)</td>
</tr>
<tr>
<td>Z62.610</td>
<td>Personal history of physical and sexual abuse in childhood</td>
</tr>
<tr>
<td>Z62.611</td>
<td>Personal history of psychological abuse in childhood</td>
</tr>
<tr>
<td>Z62.812</td>
<td>Personal history of neglect in childhood</td>
</tr>
<tr>
<td>Z62.619</td>
<td>Personal history of unspecified abuse in childhood</td>
</tr>
<tr>
<td>Z62.620</td>
<td>Parent-biological child conflict</td>
</tr>
<tr>
<td>Z63.0</td>
<td>Problems in relationship with spouse or partner</td>
</tr>
<tr>
<td>Z63.4</td>
<td>Disappearance &amp; death of family member (assumed death, bereavement)</td>
</tr>
<tr>
<td>Z63.5</td>
<td>Disruption of family by separation and divorce (marital estrangement)</td>
</tr>
<tr>
<td>Z63.6</td>
<td>Dependent relative needing care at home</td>
</tr>
<tr>
<td>Z63.72</td>
<td>Alcoholism and drug addiction in family</td>
</tr>
<tr>
<td>Z65.1</td>
<td>Imprisonment and other incarceration</td>
</tr>
<tr>
<td>Z65.2</td>
<td>Problems related to release from prison</td>
</tr>
<tr>
<td>Z65.8</td>
<td>Other specified problems related to psychosocial circumstances (religious or spiritual problem)</td>
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Opportunities and Challenges with CalAIM

- **With WPW/Health Homes lack of coordination for CB-CMEs challenges with outreach, tracking, and reporting**
  - Tracking within CIE for identification, locating, alerts, eligibility, referrals, care coordination, and outcomes

- **Volume of individuals who will benefit from CalAIM**
  - Supporting provider capacity for community-based organizations
  - CIE facilitates cross-sector communication (ECM, ILOS, PATH)
  - Key integrations applicable for Populations of Focus (HMIS, Jail alerts, etc.)
  - CIE provides information on likely-eligibility

- **Services not required to be offered countywide**
  - CIE is local to San Diego and critically connects service providers across all areas of the county
Enhanced Case Management

- **Outreach for Contracted Provider**
  - Member Matching-find the member, who they are working with
  - Potential to flag or create auto-alerts to FQHCs/CB-CME

- **Identification of eligible ECM Members**
  - Flag eligibility for health homes/ECM
  - Program Enrollment for with ECM provider & Care Team Member

- **Referrals to Health Plan for ECM services**
  - Health Plans can accept direct referrals from providers for eligible ECM members

- **Coordination of Services**
  - Support Comprehensive Case Management
  - Referrals to community and social supports
  - Administrative tracking and documentation
The San Diego Foundation is supporting a pilot program to learn more about ways we can leverage collective coordination and the CIE technology to improve access to financial services resources for community members, community-based organizations and providers.

**Goals:**
- Pilot a workgroup comprised of organizations providing direct financial assistance (i.e. pays for expenses or provides money to pay for expenses) along with the CIE Partner Network to identify co-occurring needs and develop a framework to understand and facilitate peoples’ access to financial and other supportive services in tandem;
- Identify opportunities to make this work more structured and institutionalize the coordination of efforts;
- Establish a shared framework to facilitate coordinated financial assistance that leverages the technological and legal infrastructure of CIE.

**Approach:**
- Kick-Off Meeting and Listening Session in October, followed by monthly affinity group
- Final Report on findings
Items to Review/Feedback:

• Membership Governance Structure, input or insights
  • Join the next meeting Membership Meeting October 12th at 9:00 AM

• Interest in CalAIM workgroup? Email Karis

• Any other topics identified through this meeting?

Next Meeting:

• 2020/2021 Strategic CIE Goals
• Champion CIE Network Partner
OTHER UPDATES & NEXT MEETING

October 19, 2021 8:30-9:30 AM