Community Information Exchange (CIE) Advisory Board Meeting

February 15, 2022
CIE Advisory Board Meeting  
AGENDA  
February 15, 2022 • 8:30 AM – 9:30 AM

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 – 8:35 AM</td>
<td>Welcome &amp; Agenda Overview</td>
<td>Mathew Packard</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Chair 2-1-1 Advisory Board</td>
</tr>
<tr>
<td>8:40– 8:50 am</td>
<td>CIE Trends &amp; Utilization Updates</td>
<td>Karis Grounds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>VP of Health and Community Impact</td>
</tr>
<tr>
<td>8:50-9:25 am</td>
<td>Workgroup Updates</td>
<td>Mathew Packard</td>
</tr>
<tr>
<td></td>
<td>• Membership Meeting</td>
<td>Chair 2-1-1 Advisory Board</td>
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<tr>
<td></td>
<td>• CalAIM Meeting</td>
<td>Karis Grounds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>VP of Health and Community Impact</td>
</tr>
<tr>
<td>9:00-9:25</td>
<td>CIE Onboarding/Refresher</td>
<td>Karis Grounds</td>
</tr>
<tr>
<td></td>
<td>• Overview of Content</td>
<td>VP of Health and Community Impact</td>
</tr>
<tr>
<td></td>
<td>• Technology/Customization &amp; Use of CIE</td>
<td></td>
</tr>
<tr>
<td>9:25-9:30 am</td>
<td>Action Items &amp; Meeting Adjournment</td>
<td>Mathew Packard</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Chair 2-1-1 Advisory Board</td>
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</tbody>
</table>
CIE Trends and Utilization
### CIE Dashboard

<table>
<thead>
<tr>
<th>FY Goal</th>
<th>Current</th>
<th>% of Goal</th>
<th>Monthly Trends</th>
<th>All-Time Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partners</td>
<td>20</td>
<td>7</td>
<td>35%</td>
<td><strong>1</strong></td>
</tr>
</tbody>
</table>

#### Adoption Metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>FY Goal</th>
<th>Current</th>
<th>% of Goal</th>
<th>Monthly Trends</th>
<th>All-Time Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logins</td>
<td>45,000</td>
<td>18,519</td>
<td>41%</td>
<td><strong>2,696</strong></td>
<td><strong>3,268</strong></td>
</tr>
<tr>
<td>Consents</td>
<td>90,000</td>
<td>63,069</td>
<td>70%</td>
<td><strong>7,311</strong></td>
<td><strong>9,204</strong></td>
</tr>
<tr>
<td>Searches</td>
<td>35,000</td>
<td>10,101</td>
<td>29%</td>
<td><strong>1,296</strong></td>
<td><strong>1,990</strong></td>
</tr>
</tbody>
</table>

#### Engagement Metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>FY Goal</th>
<th>Current</th>
<th>% of Goal</th>
<th>Monthly Trends</th>
<th>All-Time Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records with Shared Data</td>
<td>80,000</td>
<td>85,449</td>
<td>107%</td>
<td><strong>18,664</strong></td>
<td><strong>21,156</strong></td>
</tr>
<tr>
<td>Profile Views</td>
<td>35,000</td>
<td>17,408</td>
<td>50%</td>
<td><strong>2,532</strong></td>
<td><strong>2,976</strong></td>
</tr>
<tr>
<td>Panel Management Users</td>
<td>N/A</td>
<td>77</td>
<td>N/A</td>
<td><strong>1</strong></td>
<td><strong>16</strong></td>
</tr>
</tbody>
</table>

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**Highlights:**

- Increase in Consents and panel management use
- 25% drop in searches, slight drop in profile views (due to dashboard)
Other Initiative Updates

• **Thrive Local-Kaiser Permanente**
  - Joining as CIE Network Partner
  - Aligning on CIE Network Partners & referrals
  - Developing data integration between UU & CIE

• **Last of 7 Health Plans--Pending**
  - Aetna as last health plan (contract finalized)
CIE Membership Workgroup
Current Priorities:
- Update on search for new nominees
  - Vote to move forward on suggested nominees
- Review of draft charter
- Nomination process for Chair
- Community-At Large Quarterly Meetings
CalAIM Workgroup
Updates on CalAIM

Presentations/Training:

• HSD CalAIM Workgroup 1/28
• HSD Joint Consumer and Professional Meeting 2/10
• How You Can Leverage CIE for your Organization 2/10
• Presentations, Tools and Demos

*Next Meeting at end of February
Membership: Refresher/Onboarding
# Refresher/Onboarding CIE

<table>
<thead>
<tr>
<th>Date</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2021</td>
<td>Governance/Data Ownership</td>
</tr>
<tr>
<td>January 2022</td>
<td>Security/Privacy/Use of Data</td>
</tr>
<tr>
<td>February 2022</td>
<td>Technology/Customization &amp; Use of CIE</td>
</tr>
<tr>
<td>March 2022</td>
<td>Bi-laws for CIE Advisory Board/ Financial Report</td>
</tr>
</tbody>
</table>

**Onboarding/Refresher Toolkit**
Demo of CIE

Jackie Demo

Age
60

Phone
(619) 858-7443

Email
jackiedemo@gmail.com

Gender Identity
Woman

Individual Information

Privacy Status Icon
A

Client Name
Jackie Demo

Email
jackiedemo@gmail.com

Client Phone
(619) 858-7443

Mobile

Birthdate
01/03/1962

Domains (6+)

<table>
<thead>
<tr>
<th>Domain Name</th>
<th>Risk Indicator</th>
<th>Referrals</th>
<th>Last Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing</td>
<td>Crisis</td>
<td>9</td>
<td>2/7/2022 12:56 PM</td>
</tr>
<tr>
<td>Social/Communi...</td>
<td>Stable</td>
<td>5</td>
<td>1/26/2022 12:22 PM</td>
</tr>
<tr>
<td>Nutrition</td>
<td>Critical</td>
<td>5</td>
<td>1/26/2022 12:29 PM</td>
</tr>
<tr>
<td>Criminal Justice/...</td>
<td>Crisis</td>
<td>1</td>
<td>1/26/2022 2:45 PM</td>
</tr>
</tbody>
</table>
Primary CIE Uses

• Searching patients/members to see historical use of social services
  • Tailor services accordingly
  • Reach out to existing care team member or agency for support
• Make referrals to external community and healthcare organizations
  • Ability to track referrals to partners
  • Send client profile directly to agency (outcomes of referral)
• Shared screening or prioritization of resources
  • Example--Homeless Prevention resources
  • Prioritize access to services (history or acuity)
• Receive alerts to be proactive or response
  • Join as care team member and receive alerts
Initiatives with CIE

- HEAP
- Partners in Prevention
- Building Resiliency
- CAFA
- CalAIM
- DoorDash
- Homeless/Housing Instability
- Master Plan on Aging
- ACES
- CDC
- Blue Shield Vax Project
- AHRQ/UCSF
Challenges/Opportunities

- Development needs and costs
- Data Integration costs on our end and for partners
- Multiple systems, burden on CBOs
- Increase adoption and utilization based on use cases
- Developing cohorts and supporting person-centered care
OTHER UPDATES & NEXT MEETING

March 15, 2022, 8:30-9:30 AM