

# CIE PARTNER NETWORK MEETING

May 26, 2022

9:00 AM – 10:00 AM

# AGENDA

## What's Happening Today

- Welcome
- Connection
  - [Compassionit.com](https://Compassionit.com)
- New CIE Partners
  - Porchlight Community Services
  - Kaiser Permanente
- Partner Highlight
  - Elder Law & Advocacy
- Partner Utilization Reports
  - Pending Direct Referrals
- CIE Updates
  - [CIE Affinity Group](#)
- CIE Partner Roundtable

# Connection

# **New CIE Partners**

# Porchlight Community Services

**WELCOME**

to the

*Community Information Exchange*



**PORCHLIGHT**  
COMMUNITY SERVICES

# Kaiser Permanente



**WELCOME**

to the

*Community Information Exchange*



**KAISER PERMANENTE®**

# Partner Utilization Reports



# CIE Utilization Reports

## Things to know

- Sent monthly
- Standard template shows activity for the current fiscal year
- Other reports are available



Community  
Information  
Exchange

2-1-1  
SAN DIEGO

## CIE PARTNER UTILIZATION REPORT

The CIE Partner Utilization Report provides summary and detail data about partner utilization within the Community Information Exchange (CIE) platform. The report displays trends by agency, department, and user and also includes metrics about logins, searching and viewing client profiles, consenting clients, creating program enrollments, care teams, screenings, and sending and receiving referrals.

Reporting Time Frame:

Start Date  
7/1/2021

End Date  
6/30/2022

Agency Name:

Data Refreshed Date/Time: 4/16/2022 6:30:08 PM

**Why this Matters:** Look for these icons to understand how data can be used to drive client outcomes.



### Adoption

Adoption is the use of the CIE platform. Monitoring this helps us increase basic participation.



### Engagement

Engagement is the interaction with client records such as viewing and adding information to a client's profile. Monitoring this helps to enhance shared information for better care coordination across the network.



### Intervention

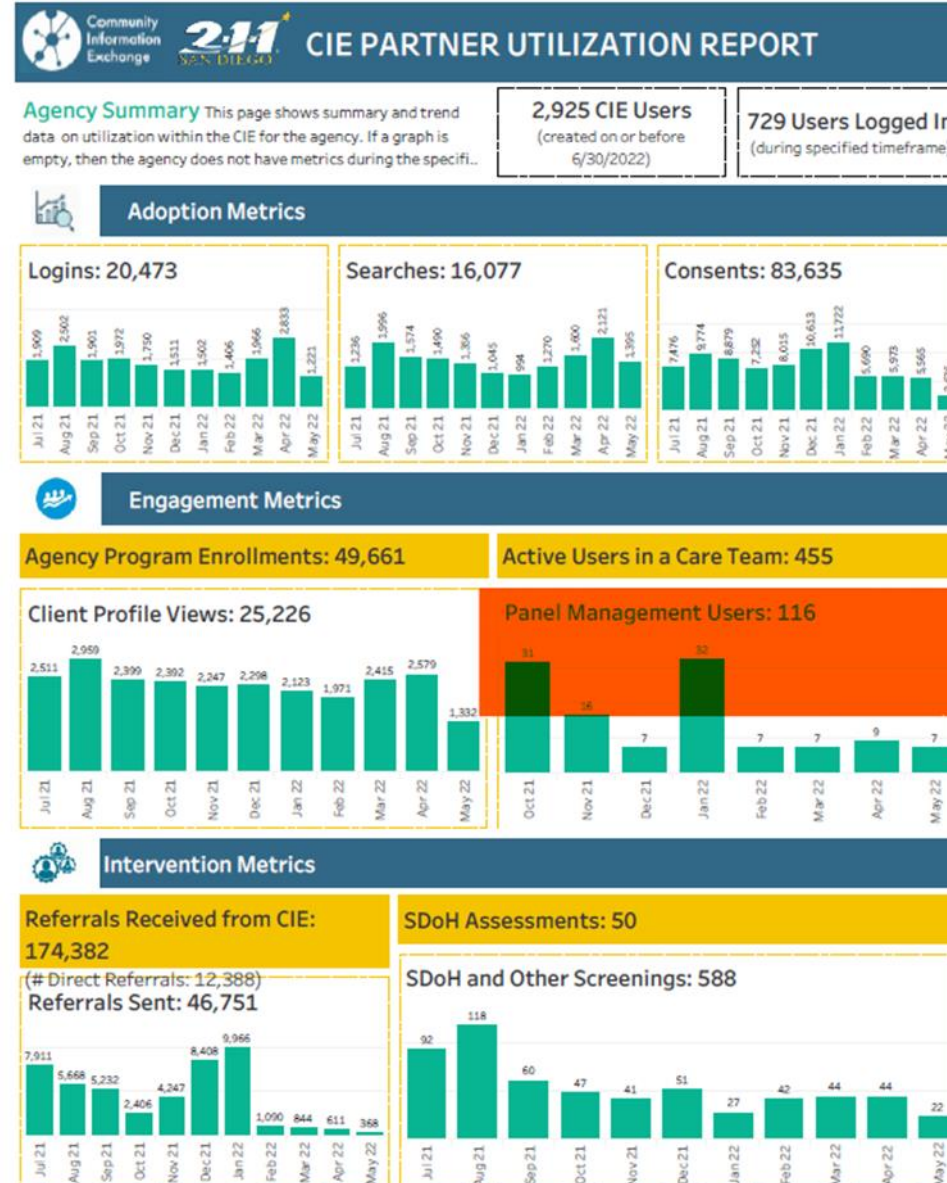
Intervention is taking action for a client's care, by sending referrals or conducting assessments and screenings. Monitoring this is essential in care coordination to improve client outcomes.



# Agency Summary Page

## At a Glance

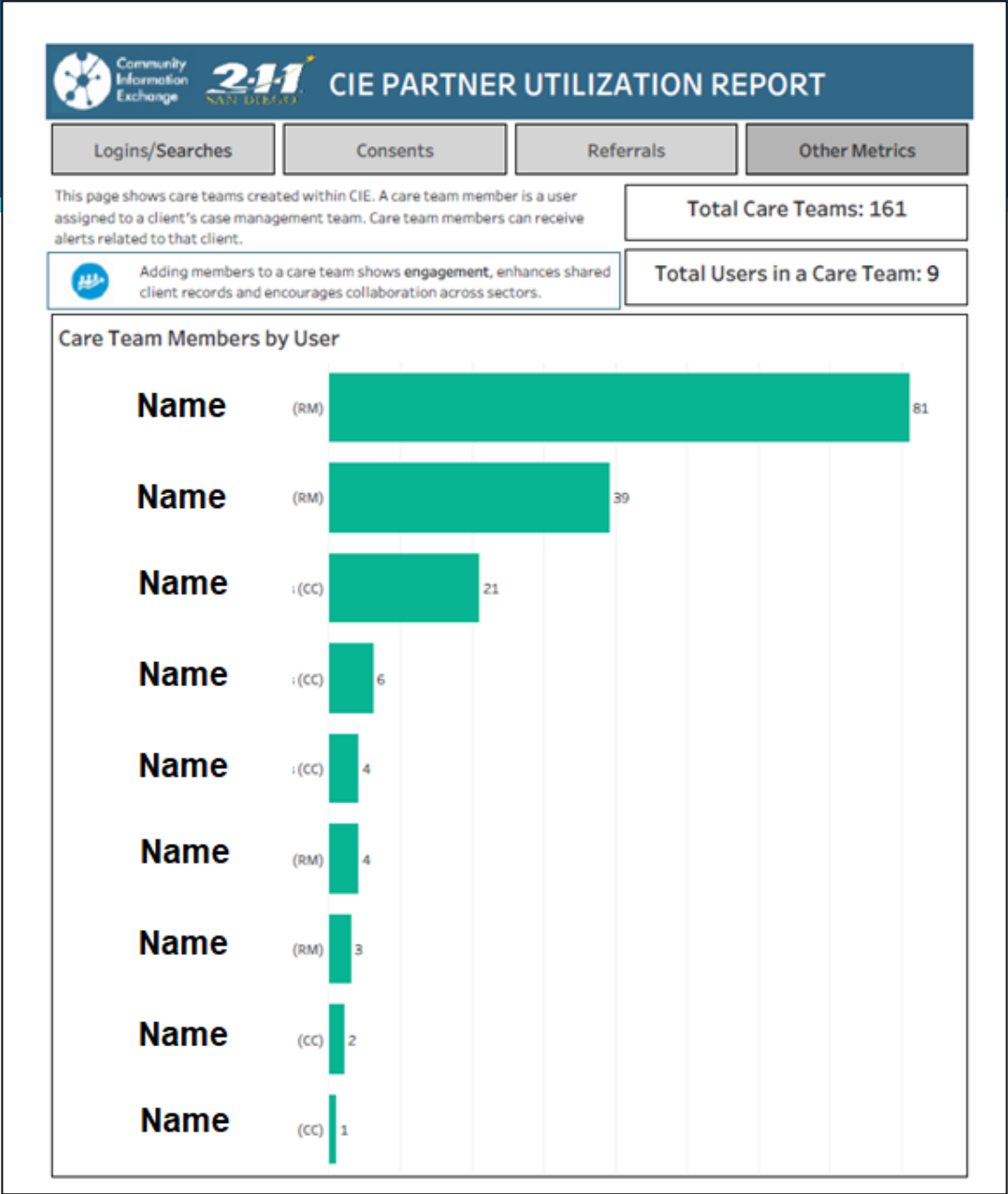
- Trends within the reporting period
- Volume of staff with CIE Access and how it's leveraged
- \*\*Starting June, Panel Management utilization will be added to the report.



# Care Team Page

## At a Glance

- Staff members on Care Teams
- Total Care Teams represents the # of clients with a Care Team
- \*Starting June, only staff with Active accounts will be shown



# Services Listings Overview

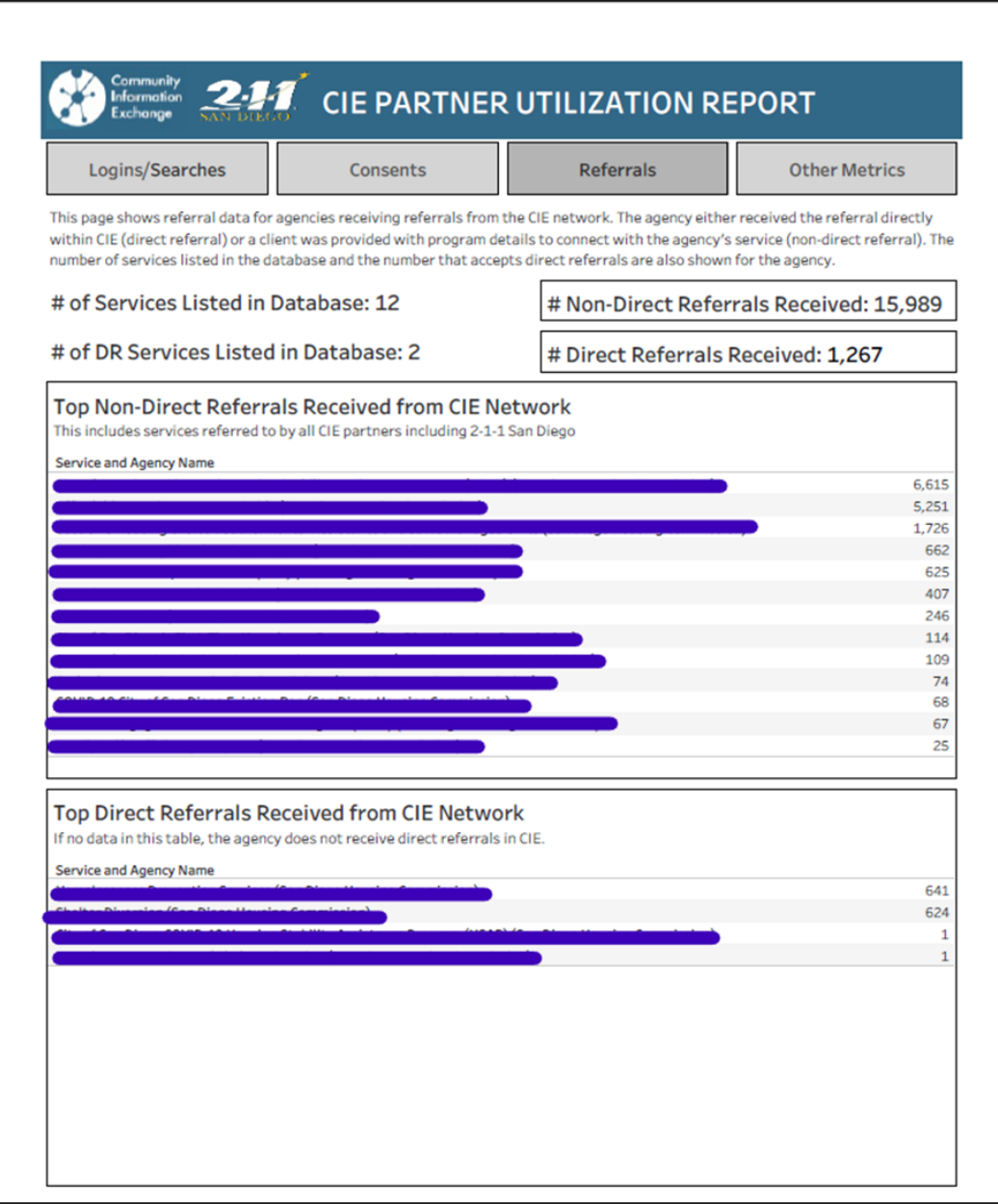
## At a Glance

- Volume of referrals to your organization

### Definitions

**Direct:** Electronic closed-loop

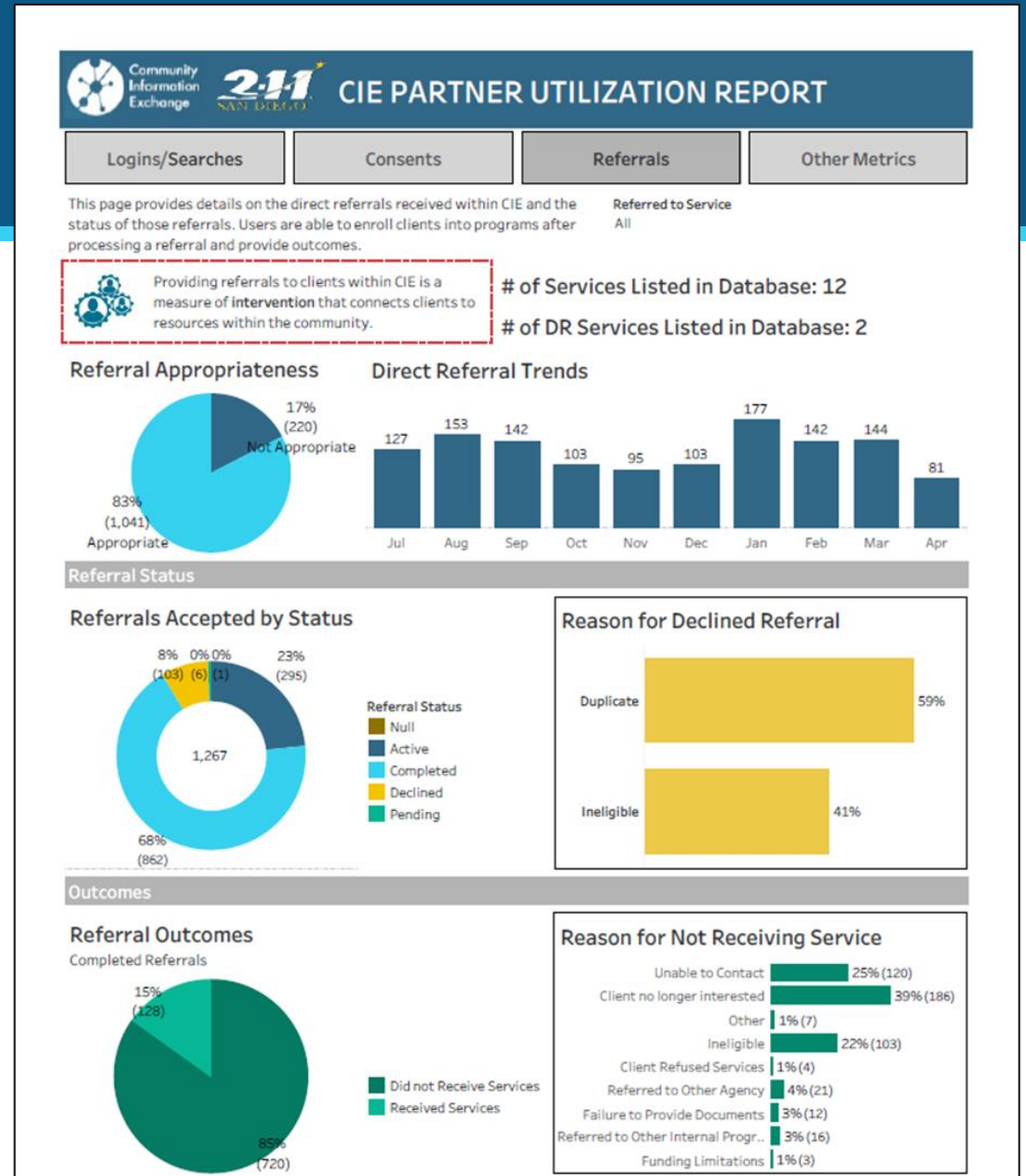
**Non-Direct:** Informational only e.g. flyer, email, printout, etc.



# Direct Referral Page

## At a Glance

- Volume of Direct Referrals received by your organization
- Status & Outcome breakdowns



# Pending Direct Referrals

## What to Expect

Emails from [aesparzabanuelos@211sandiego.org](mailto:aesparzabanuelos@211sandiego.org) to service contacts with pending direct referrals (more than 90 days overdue) - **DEADLINE 6/15**

## Option 1

Log into Partner Community >> Referral Management view

- **Suggestion:** use filters to only view "Pending" referrals dating back February 28, 2022 and older
- **Suggestion:** bulk outcome updates

Partner Community

ElderHelp of San Diego - Tier 3 Care

Case Management

Referral Management

Use this table to manage incoming Direct Referrals. Choose the default li









Note: Data will only populate for CIE p

Referral Status

Outcome

Assign To

Open referral

	Client Name		Service Name		Assigned To	Created Date	Referral Status		Outcome
<input type="checkbox"/>	Sadie Blue		Care Coordination...		Aidee Demo	 4/25/2022	Active		
<input type="checkbox"/>	Aidee Ganem		Care Coordination...		Aidee Demo	 2/9/2022	Declined - Referra...		Did not Receive S...
<input type="checkbox"/>	Sadie Blue		Care Coordination...		Aidee Demo	 1/13/2022	Completed		Receiving/Receive...
<input type="checkbox"/>	Sadie Blue		Healthcare Educat...		Aidee Demo	 1/12/2022	Completed		Receiving/Receive...

# Pending Direct Referrals

## Option 2

Update the provided excel exports & return to [aesparzabanuelos@211sandiego.org](mailto:aesparzabanuelos@211sandiego.org) via encrypted email

- Direct Referral ID
- Referral date
- Referring Agency
- Your Agency Name
- Your Service
- Client's Name
- DOB
- Phone
- Email
- Address
- Referral Status
- **Referral Outcome (YOUR SECTION TO EDIT)**
- Referral Outcome Notes (Optional)

**DEADLINE TO UPDATE: 6/15/2022**

**FOR ADDITIONAL SUPPORT:** [aesparzabanuelos@211sandiego.org](mailto:aesparzabanuelos@211sandiego.org)

# CIE Updates



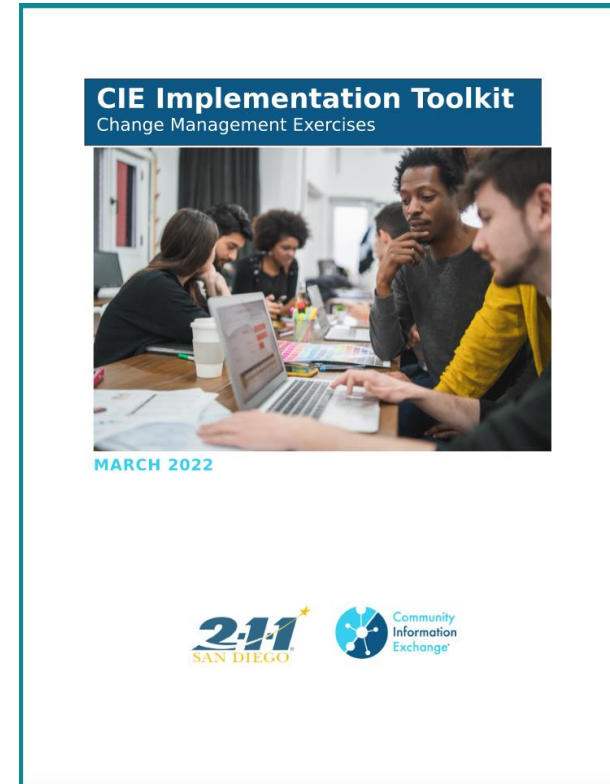
# Affinity Group- Sign up open!

## Why join?

As a group, we work through the milestones of rolling out CIE across your operations. Over 4-5 sessions, define your team's goals and outcomes for using CIE, get the buy-in needed to move your plan forward.

## Outcomes:

- Define Success
- Generate Buy-in
- Develop Team Workflows
- Change Management Plan



**Register for June:**

<https://forms.office.com/r/LdGpAp3UYs>

# **CIE Partner Roundtable**



# Community Means Strength

We are all longing to go home to some place  
we have never been—a place half-remembered and  
half-envisioned  
we can only catch glimpses of from time to time.  
Community.  
Somewhere, there are people to whom we can speak  
with passion  
without having the words catch in our throats.  
Somewhere a circle of hands  
will open to receive us, eyes will light up as we enter,  
voices will celebrate with us whenever we come into  
our own power.  
Community means strength  
that joins our strength to do the work that needs to be  
done.  
Arms to hold us when we falter.  
A circle of healing.  
A circle of friends.  
Someplace where we can be free.

- Author: [Starhawk](#)



**Thank you for your time**