CIE PARTNER NETWORK MEETING

May 26, 2022
9:00 AM – 10:00 AM
AGENDA

What’s Happening Today

• Welcome
• Connection
  • 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
WELCOME

to the

Community Information Exchange

Kaiser Permanente
Partner Utilization Reports
Things to know

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

Option 2

Update the provided excel exports & return to 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
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