

Partner Community

General User Guide



Community
Information
Exchange

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An Overview of CIE

Welcome to the Community Information Exchange (CIE). You are now part of a network of partners who have agreed to share client/patient information through the CIE platform as part of a regional movement for service providers to coordinate care across agencies.

This cross-sector collaboration has statistically shown to improve client outcomes and to reduce the hospital readmissions.

To view a current list of CIE Partners: please visit ciesandiego.org/partners

Core Features

CIE Partners are granted access to the CIE platform, called the Partner Community or sometimes referred to as the Partner Portal. When logged into the CIE, users can:

- **Look up** current clients/patients to learn more about their history of care
- Add a client/patient to the CIE with their **consent**
- **Refer** client/patients to other services
- **Receive Direct Referrals** (electronic referrals) from other CIE partners

Care Coordination Features

- Users that place themselves on Care Teams can receive notifications for important occurrences such as EMS alerts and Arrests
- Users can complete screenings and assessments to track changes over time
- Users can see real-time updates such as outcomes and situational changes

CIE Data Integration:

The CIE platform integrates with multiple Customer Relationship Management (CRM) systems and Electronic Medical Record systems. This allows for CIE users to see updated information from system such as:

- HMIS Systems e.g. Clarity
- Arrest notifications from Public Records
- Emergency Medical Service (EMS) alerts
- Oasis, Jacobs and Cushman, San Diego Food Bank

CIE Login Credentials

To gain access to CIE, users must:

- Be an employee (or permitted contractor) of a CIE Partner
- Be authorized by their employer or contractor to get access to CIE for care coordination
- Complete an [online training](#). For course completion credit, each person will enter their personal credentials and accept the terms of use (see image).

The screenshot shows a registration form titled "CIE New User E-Learning". On the left, there is a "Resources" section with the following text: "Please share the following details needed for account creation." followed by a "Note:" section stating "We only accept email addresses with a unique organization domain." and "We do not create accounts with personal emails e.g. gmail or yahoo." and "We cannot create accounts for generic email distributions e.g. info@company.org". The main form area contains several input fields: "Name*", "Email*", "Agency/Organization*", "Department", "Job Title*", and "Phone". Below these are two dropdown menus: "Do you need access to view health related information in CIE?*" and "Are you interested in receiving Direct Referrals?". At the bottom of the form are two buttons: "< PREV" and "START >". On the right side, there is an "OUTLINE" section with a search bar and a list of six items: "1. CIE New User E-Learning", "2. What is the Community Information Exchan...", "3. Privacy & Security", "4. Basic CIE Navigation", "5. FAQs & Training Suggestions", and "6. End User Agreement".

Upon completion, the below message will appear and the CIE team is automatically notified. Login credentials are created within the next 48 business hours.

Thank you for agreeing to our terms. We appreciate your partnership.



Within 48 business hours, you will receive a **Welcome Email** containing a link to create your password.
After 48 hours, we encourage you to check all inbox folders before reaching out.

For support, please reach out to CIEhelpdesk@211sandiego.org

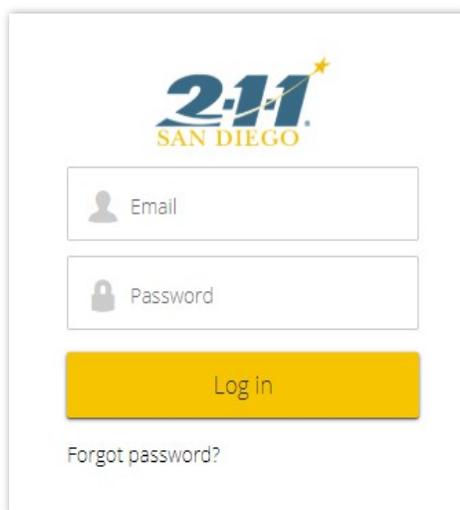
[DETAILED REPORT](#)

Login Process

Steps:

1. Visit: <https://my211.force.com/s/login/>
2. Enter your username and your password.
3. Click “Log in”

Note: Your username should match your work e-mail address



The image shows a login form for 211 San Diego. At the top is the logo with '211' in blue and 'SAN DIEGO' in yellow. Below the logo are two input fields: the first is labeled 'Email' with a person icon, and the second is labeled 'Password' with a lock icon. A yellow button labeled 'Log in' is positioned below the fields. At the bottom of the form is a link that says 'Forgot password?'.

Forgot Password

If you have forgotten your password, clear out your browser’s cache and cookies prior to clicking “Forgot password?” If you would like more support, please email the CIE Helpdesk.

CIE Helpdesk

For support, email ciehelpdesk@211sandiego.org. The Helpdesk is monitored 8:00am - 5:00pm, Monday through Friday. You can expect a reply within the same business day. Examples of support:

- Account lockouts
- Account activation/deactivation
- System errors
- Training supports
- Insights on pending Direct Referrals

Finding clients in CIE

Background: In order to locate a client in CIE, they must have an Active consent record on file. To check to see if a client has consented to share their information with CIE, follow these steps to search for an existing client profile.



1. Click “Search Client” in the top right corner.
2. On the next screen, enter the client’s first name, last name, date of birth, and click “Search.”

Search Client

First Name Sam	Last Name Wise
Social Security Number	Last 4 of SSN or PIN ####
Phone Number	Email



3. Scroll down to the Results.
 - a) Verify that a Results match on name and date of birth
 - a. Click on their Name to enter the client’s profile.
 - b) If a matching client does not appear under the results, continue to the section on the consent process.

Results

NAME	PHONE	BIRTH MONTH/YEAR	LAST 4 OF SSN OR PIN	EMAIL
Samual Wisely		01/1950	1111	SWisely@demo.com

Authorization Form

Visit <https://ciesandiego.org/cie-authorization-forms/> to download updated copies of the CIE Authorization form. This document is available in other formats and languages.

Available Languages: English, Spanish, Arabic, Russian, Tagalog, Vietnamese, Dari, and Swahili.

This embedded image is an example only and does not meet the font size requirements for actual use. Do not use to this example to collect a client's signature.

		AUTHORIZATION FOR THE USE AND DISCLOSURE OF INFORMATION COMMUNITY INFORMATION EXCHANGE	
Full Name:		Today's Date:	
Gender:	Birthdate:	Full or last 4 SS#/4 Digit Pin:	
Phone Number:		Email:	
Agency Name:		Care Coordinator:	

You are authorizing Infoline of San Diego County, dba Community Information Exchange (CIE) and its Partner Agencies to use, store and share your personal, financial and health information with each other in order to assess your needs, coordinate your care and provide services to you. Partner Agencies participating in the CIE are listed at www.ciesandiego.org/partners.

This Authorization covers, without restriction, all information disclosed and re-disclosed to CIE by you, your family, Partner Agencies including your care team, or any other person involved in your care while this Authorization is in effect. CIE and its Partner Agencies may share your personal, financial and health information. By providing your consent, you specifically authorize CIE to use and disclose information relating to Drug/Alcohol/Substance Abuse, Mental Health, HIV/AIDS. You agree to notify CIE if your information changes or is incorrect. Information disclosed pursuant to this Authorization may be re-disclosed and no longer be protected under applicable privacy laws. However, your information will still be protected under our Participation Agreement with our Partner Agencies. Your refusal to sign this Authorization will not adversely affect your ability to receive health care or services from Partner Agencies.

Notice of Privacy Practices posted at www.ciesandiego.org/privacy explains how CIE uses and protects information, how to get a copy of this Authorization and your record. You can revoke this authorization at any time by sending notice to CIE at revoke@211sandiego.org, allowing a minimum of **five business days** to process. Revocation will not affect any information previously disclosed in reliance on this Authorization. Unless revoked earlier, this Authorization will expire in **Ten (10) Years, or on the following Date:** _____.

If you agree, sign your name below:

Client's Signature:

Revised: 02.24.2020

Informed Consent

The CIE has an opt-in model. In order for CIE Partner organizations to enter a client's information, the client must have given their permission beforehand. This permission is denoted by signing or agreeing to share their information through any of the consent methods described below.

Consent Methods

Background: There are 4 methods of documenting a client's consent within the CIE Platform: Wet Signature, Verbal Attestation, Telephonic Signature, and Digital Signature via Email. If unsure of which mode of consent is appropriate for you and your team to use, reach out to your supervisor or email ciehelpdesk@211sandiego.org.

Wet Signature

Under Privacy Method, select **Paper**, if the client signed a physical copy of the Authorization form. A copy of the signed document must be uploaded at the time of profile creation.

Verbal Attestation

Under Privacy Method, select **Verbal**, if the client has read (or been read aloud) and agrees by verbal attestation. A copy of the Verbal-Authorization form must be uploaded at the time of profile creation.

Telephonic Signature

Under Privacy Method, select **Telephonic**, if capturing an audio recording of the client listening to the Authorization script and agreeing to provide their consent in this format. A copy of the audio file, must be uploaded at the time of profile

Digital Signature

Under Privacy Method, select **Email**, to trigger an Authorization to be sent out for signature to the client's email address. In order for their profile to finish creating, the client will need to access the email and sign the form digitally. A copy of the client's signature is automatically uploaded when the client completes the signature from their device.

The steps to document consent by signing a document, verbal attestation or telephonic signature are very similar. Digital signature via Email is unique. Review the next pages for details on each process.

Note: In order for the Authorization to be valid, the written language must be in the client's first language. Written consents must be printed with a 14-point font size. The copies, as found at ciesandiego.org, meet the font requirements. Do not attempt to alter, edit or resize the Authorization forms. Doing so, could make the forms invalid.

Creating a client profile

1. Search the client in CIE (see page 6)
Note: After the search, the system will populate additional fields to create a new client profile.
2. Enter the client's profile information
 - First Name*
 - Last Name *
 - Last 4 of Social Security Number/Pin*
 - Birthdate*
 - Language*
 - Phone Number
 - Email Address
3. Select the Privacy Method (see page 7)
 - a. Click "Choose File" and upload a copy of the appropriate file.
 - i. Paper- copy of the signed document
 - ii. Verbal- copy of the [verbal template](#)
 - iii. Telephonic- copy of the audio recording
4. Enroll in Care Team?
 - a. Select "Yes" to receive ongoing alert notifications about a client's situation.
 - b. Select "No" if not interested in receiving future alerts.See page for more details on the Care Team.
5. Active Date
 - a. Default: Today's date
 - b. Alter this field if the client signed the consent form on an earlier date. The Active Date cannot be a future date.
6. Expiration Date
 - a. Default: 10 years from today's date
 - b. Alter this field if the client opted for an expiration date sooner than 10 years from the point of signature. The Expiration Date must be a future date.
7. Click "Create Client"
8. The CIE system will load the newly created Profile (see example on page).

Digital Signature via Email

1. Search the Client
2. Enter the client's profile information, including email address (required).

3. Under Privacy Method, select Email.
4. Choose whether to Enroll in the Care Team.
5. Select "Create Client."

Signature Via Email- What happens next?

- The CIE system sends the CIE Authorization to the email address as entered.
- The page loads the client’s name only. The full profile is on hold.
- When the client signs the Authorization, the CIE system will generate the full profile.
 1. A digital copy of the signed form is automatically stored in the client’s profile.
 2. Once the client signs the document via email, their profile will be searchable in CIE.

Best Practices:

- Ensure all fields with the red asterisk* are completed when creating a new client profile.
- Confirm the spelling of their name, DOB and other information to ensure their identity and to ensure their profile information is accurate.
- Although the Phone Number and Email fields aren’t required, this information should be entered when available. This is critical for Direct Referral follow-ups.
- If sending the Authorization through the email method, make sure the client is aware to check their email inbox.

Example of Adding a Client using the "Verbal" privacy method.

Search Client

<p>* First Name <input type="text" value="Demo"/></p>	<p>* Last Name <input type="text" value="Client"/></p>
<p>Social Security Number <input type="text"/></p>	<p>* Last 4 of SSN or PIN <input type="text" value="1212"/></p>
<p>* Birthdate <input type="text" value="3/27/1980"/></p>	<p>Phone Number <input type="text" value="8583805491"/></p>
<p>Email <input type="text" value="democlient@211sandiego.org"/></p>	<p>* Privacy Method <input type="text" value="Verbal"/></p>

Please confirm that you have attached the correct file. After clicking "Create Client", the individual will be shared with the CIE network. Max file size is 3 MB.

CIE-Telepho...ion-Verbal.pdf
CIE-Telephonic-Authorization-Verbal.pdf

<p>* Language <input type="text" value="English"/></p>	<p>* Add yourself as a Care Team member? <input type="text" value="Yes"/></p>
<p>* Active Date <input type="text" value="7/20/2022"/></p>	<p>* Expiration Date <input type="text" value="7/20/2036"/></p>

The Client Profile

This is the DETAILS view of the Client Profile.

On the left side, scroll down to view Contact Information, Demographics, Household, Income and more.

On the top right side, scroll down to view Care Team members, Alerts, Program Enrollments, Past Referrals, and more.

Sadie Blue

Select the "Edit" button to open the fields on the left and make updates.
 Select "Find Referral" to search and provide referrals.

Edit

Find Referral

Age
25

Phone
(619) 858 3000

Email
sblue@ciemosd.org

Gender Identity
Transgender Woman

DETAILS
PRIVACY
SDOH
REFERRALS
FEED

Individual Information

* Select a domain:

Activities of Daily Living

Domain Shortcut-
 Select one of the 14 domains from the dropdown and click "Next."

Next

Privacy Status Icon

A

Client Name

Sadie Blue

Email

sblue@ciemosd.org

Last 4 of SSN or PIN

1234

Client Phone

(619) 858 3000

Mobile

(619) 858 3000

Birthdate

01/01/1994

Birth Month/Year

01/1994

Address Information

Home Street

12345 Pineapple

Home City

San Diego

Home State/Province

Agency/User	Date	Value
211 San Diego	10/16/2019 05:13 PM	12345 Pineapple
211 San Diego	10/16/2019 05:13 PM	3860 CALLE FORTUNADA
211 San Diego	09/18/2019 02:19 PM	
211 San Diego	09/18/2019 02:19 PM	4600 LAMONT ST
211 San Diego	09/18/2019 01:46 PM	

Demographics

Primary Language

English

Age

25

Race

White/ Caucasian

Ethnicity

Non-Hispanic/Non-Latino

Domains (6+)

DOMAIN ...	RISK INDIC...	REFERRALS	LAST ASSES...
Utility	● Stable	4	10/30/2019 3:...
Transporta...	● Critical	0	9/13/2018 11:...
Social/Com...	● Critical	6	8/17/2018 12:...
Safety & Di...	● Vulnerable	1	9/28/2018 1:2...
Primary Care	● Stable	2	5/10/2019 9:2...
Personal H...	● Critical	0	7/31/2017 2:4...

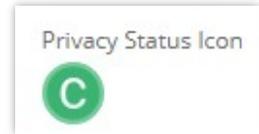
Privacy Records (6+)

PRIVACY ...	PRIVACY TY...	STATUS	EXPIRATIO...
P-133757	Authorization	Complete	10/15/2029
P-132264	Authorization	Renewed	10/3/2029
P-132063	Authorization	Pending	
P-132062	Authorization	Renewed	10/2/2029
P-131876	Authorization	Renewed	10/1/2029
P-131547	Authorization	Pending	

Hover over the floating "i" to view previous data entry, source, and date of entry.

Privacy Status & the “Warning” notification

A notice will appear on any record that has a green “C” Privacy Status Icon. The “C” status allows for CIE Partners to view the client’s record.



However, for partners with Covered Entity status to be able to edit the record, an updated consent form should be added to the client’s profile.

If you see this notice when viewing a client’s record, please obtain a newly signed Authorization form (if possible) and follow the steps on the next page to update the client’s consent status.



Covered Entities are advised to ensure that there is an “A” before making edits to the profile.

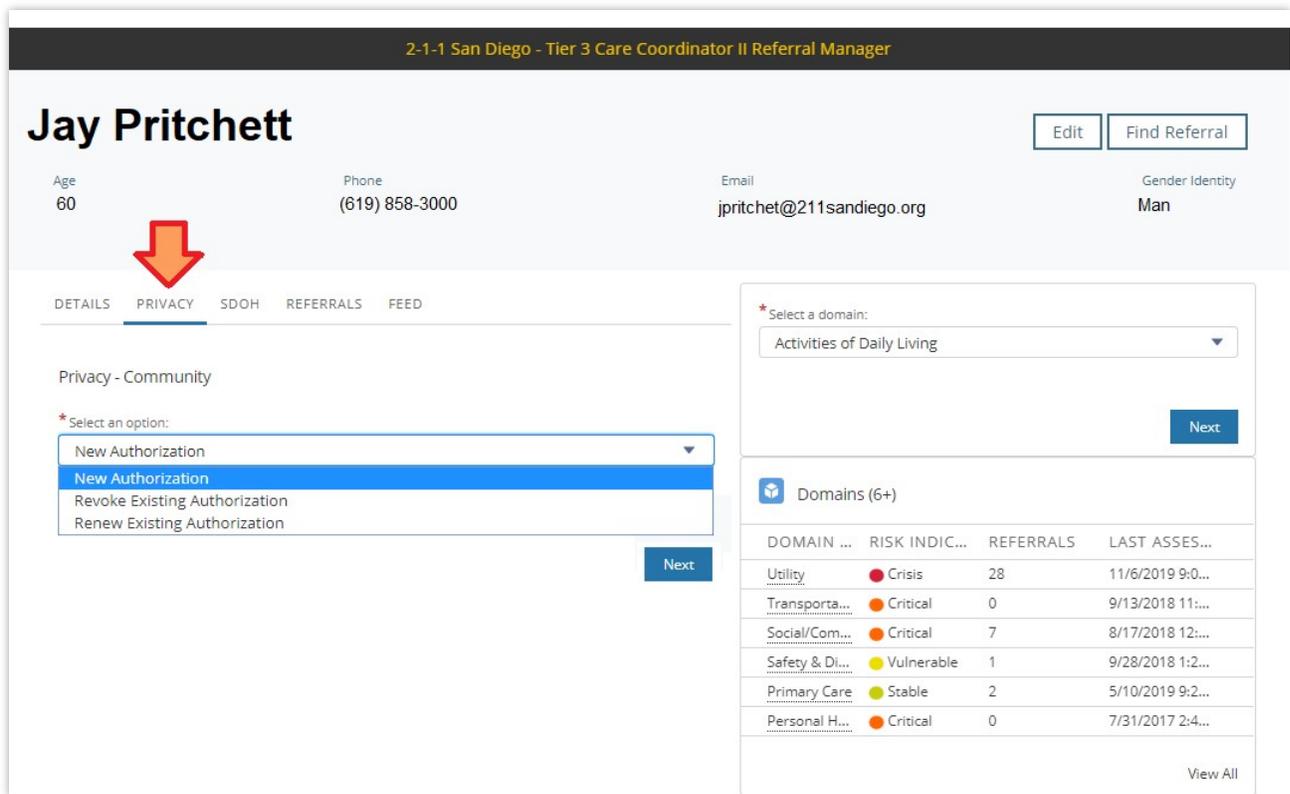
A screenshot of a web application interface showing a client profile for "Jay Pritchett". At the top, there is a navigation bar with links: DASHBOARD, AGENCY PROFILE, REQUEST LOG, SERVICE DIRECTORY, SUPPORT. Below this is a header for "2-1-1 San Diego - Tier 3 Care Coordinator II Referral Manager". The main content area features a prominent orange warning banner that reads: "Warning: This individual needs an updated Authorization. Please add a new Authorization by going to the Privacy tab." Below the banner, the client's name "Jay Pritchett" is displayed, along with fields for Age (74), Phone ((858) 300-1211), and Gender Identity. A red arrow points to the name, another to the warning banner, and a third to the "Find Referral" button. Below the client information, there are tabs for DETAILS, PRIVACY, SDOH, REFERRALS, and FEED. The "DETAILS" tab is active, showing "Individual Information" with a "Privacy Status Icon" (a green circle with a 'C') and "Client Name" (.Jay Pritchett). To the right, there is a form section with a dropdown menu labeled "Select a domain:" currently set to "Activities of Daily Living", and a "Next" button. Below the form, it says "Domains (6+)".

Sample language for clients:

“It looks like you previously consented to share your information with the Community Information Exchange, a group of health and community-based service providers. We have an updated consent form. Would it be okay to have you sign the new form? This helps ensure that all service providers are allowed to coordinate care for you.”

Updating Privacy Status

To update a client's consent or if a client requests to opt out of CIE, go to the "Privacy" tab on the client's profile.



2-1-1 San Diego - Tier 3 Care Coordinator II Referral Manager

Jay Pritchett

Age 60 Phone (619) 858-3000 Email jpritchet@211sandiego.org Gender Identity Man

DETAILS **PRIVACY** SDOH REFERRALS FEED

Privacy - Community

*Select an option:

- New Authorization
- New Authorization**
- Revoke Existing Authorization
- Renew Existing Authorization

Next

*Select a domain:

Activities of Daily Living

Next

Domains (6+)

DOMAIN ...	RISK INDIC...	REFERRALS	LAST ASSES...
Utility	● Crisis	28	11/6/2019 9:0...
Transporta...	● Critical	0	9/13/2018 11:...
Social/Com...	● Critical	7	8/17/2018 12:...
Safety & Di...	● Vulnerable	1	9/28/2018 1:2...
Primary Care	● Stable	2	5/10/2019 9:2...
Personal H...	● Critical	0	7/31/2017 2:4...

View All

To update the client's profile with a new Authorization:

1. Click on the PRIVACY tab
2. Select New Authorization and click Next
3. Select the Method
4. Select the Language and click Next
5. Upload the appropriate file (Unless email was selected)

See screenshots on next page

Steps 4 through 6

DETAILS PRIVACY SDOH REFERRALS FEED

Privacy - Community

Select from the following options:

* Method ⓘ
Paper

* Language
English

Previous Next

DETAILS PRIVACY SDOH REFERRALS FEED

Privacy - Community

You have successfully added an authorization. This authorization will not be complete until you upload the signed document.

Link to Pending Authorization

Upload signed authorization document

Upload Files Or drop files

Include 42 CFR in authorization ⓘ

Upload Files

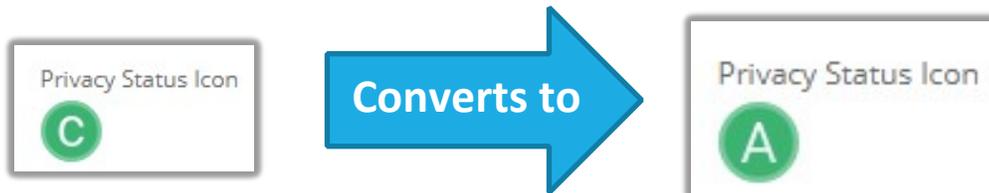
Example Signed Authorization.docx
31 KB

1 of 1 file uploaded

Done

Previous Next

If you completed these steps, you should see the green “A” replace the “C” on the client’s profile. Also, the “Warning” notification should go away shortly after.



To Revoke a Consent

1. Go to the “Privacy” tab
2. Select “Revoke Existing Authorization”
3. Select “Yes” to “Revoke all Privacy Records”
4. Select the primary reason the client has revoked
5. Write a quick note for context
6. Click “Next” on subsequent screens

Privacy - Community

* Select an option:

Revoke Existing Authorization

Next

Privacy - Community

Select a privacy record to revoke. Records are displayed in descending order of most recent. If no records appear below, then there are no records to revoke.

Revoke all privacy records?

Yes
 No

* Select

P-137285 - Authorization - Paper - Complete - 2019-11-11

* Reason

Privacy Concerns

Other Reason

Previous Next

Note: Once you complete the steps to revoke, the client’s page will become invalid. When you attempt to search this client, they will no longer appear under results.

Referrals Methods

There are two types of referral methods in CIE: Direct Referral and an Informational Referral.

Direct Referral

Also known as Electronic Referral, Closed-Loop referral, warm handoff

An electronic referral, sent from one CIE provider to another, on behalf of the client. The receiving organization tracks their incoming Direct Referrals through their CIE Dashboard. Typically, the client is called within 2 to 3 business days of the Direct Referral being sent. Direct Referrals are a type of warm handoff.

Example

Legal Services, Central Office
Legal Aid Society of San Diego, Inc.
Provides FREE help including counseling, advice, and representation in court to low-income people in such...
Eligibility

Direct Referral:
(877) 534-2524
110 EUCLID AVE
SAN DIEGO,
CA 92114

[Add Referral](#)

Informational Referral

Also known as Indirect Referrals, Non-direct

This describes when a client is offered information about a service. Through CIE, service providers have access to a resource database, and can print out information about Informational Referrals or email the client a link to the service listing. In this case, the client is responsible for reaching out to the organization.

Example

Feeding San Diego Services
Feeding San Diego
Provides food referrals and resources to a network of distribution partners serving children, families and seniors each week. Focused on healthy food, educatio...
Eligibility

(858) 452-3663
9455 WAPLES ST
Suite 135
SAN DIEGO,
CA 92121

[Add Referral](#)

Providing Referrals through CIE

Background: The CIE is linked with the 2-1-1 San Diego Resource Database. CIE Partners with login access can use CIE to provide referrals to clients and save the referral history to the client's CIE profile.

To get started:

1. Visit the client's profile in CIE
2. Click "Find Referral" as found on the upper right corner of the profile page

This takes you to the resource database page. Notice in the screenshot, the client's name, Jay Pritchett, is displayed on the left side of the page. This means that any referrals that are sent, will be documented Jay's profile.



Searching the Database

There are two main ways to search for resources: using a keyword or by categories.

Keyword search: recommended when looking for specific types of resource or when the name of program or organization is known.

Category search: recommended if you would prefer to browse all available resources within a category, and drill-down to subcategory.

Best Practices:

- Enter the client's zip code or location
- Sort by **Relevance** or **Distance**
- Select the **Direct Referral** checkbox to filter for available Direct Referrals

- Expand “Refine my results” to view other sorting options

- Alt-click the “Service Listing” to open it in a new tab or window.

Viewing Referral Search Results

Click to view Service Listing

Tenant Help
 Legal Aid Society of San Diego, Inc.
 Provides FREE help including counseling, advice and/or representation in court to eligible people in helping with evictions, security deposit, habit...
 Eligibility

Direct Referral:
(877) 534-2524
 110 EUCLID AVE
 SAN DIEGO, CA 92114

Add Referral

Hover to view more Eligibility criteria

Click to Send/Save

Providing Direct Referrals

Remember key steps:

- Visit the client's profile
- Click Find Referral
- Locate resources

When you find a resource with a Direct Referral icon, do the following:

1. Click **Add Referral**
2. Read the "Internal Notes" within the pop-up page. This has key information about what makes the client eligible and when the client can expect a follow-up call.
3. Leave the **Referral Method** as "Direct Referral" (default)
4. Under **Domain**, choose the category of support e.g. Legal, Housing, etc.
5. Under **Additional Notes**, enter the best time to reach the client and any specific circumstances that support a successful connection, e.g. if a translator is needed.
6. Select checkboxes that describe the kinds of support or need related to this case (not pictured)
7. Click **Next**

Add Referral

-Must reside in San Diego County -Services are for individuals determined eligible by federal regulations. -Once direct referral is made, Legal Aid will connect with client within 48 (business hours). Due to legal privilege, all outcomes to this direct referral will be determined as 'Legal Privilege'. Must meet eligibility requirements set by agency. -Once client speaks to intake specialist about their situation, Legal Aid's intake specialist will notify client about next steps.

* Referral Method

Direct Referral

* Choose domain(required) ?

-- None --

Additional Notes: ?

Type here...

Max 2000 characters

Protected Health Information/Notes: ?

Type here...

On the next screen:

8. Update the client's email address (if available)
 - The client will receive a copy of the Service Listing link with a recap of the Next Steps. For example, the email will include how many days it may take for a follow-up call.
9. Select any checkboxes that describe that describe specialized services
10. Click **Save** to submit the Direct Referral

Add Referral

Email Address (the email address as entered will automatically update the client's profile):

Referral details will be emailed to the individual.

Choose Target Populations:

- Immigrants
- Divorce/Custody/Support Issues
- Housing Issues
- Legal Issues
- Public Assistance Issues
- Low Income

Best Practices:

- Ensure the client meets the eligibility criteria
- Make sure the client understands when to expect a follow up call from a representative from that organization.
- Only send a Direct Referral, if the client agrees to their information being sent to that organization.
- Ensure the client's profile contains contact information (phone and/or email)
- Ensure their profile contains key eligibility information (related to the referral)
- Encourage the client to reach out to the organization, if they miss their call or they have not seen a call in the expected timeframe.
- If you receive a notification that the Direct Referral was declined, or had an outcome "Did Not Receive Services," reach out to the client to discuss other supports.

Providing Informational Referrals

Remember key steps:

- Visit the client's profile
- Click Find Referral
- Locate resources

When you find a resource with without the Direct Referral icon, do the following:

1. Click **Add Referral**
2. Under **Domain**, choose the category of support e.g. Legal, Housing, etc.
3. Under **Additional Notes**, enter any notes for yourself or your team to reference during follow-ups (if applicable)
4. Select checkboxes that describe the kinds of support or need related to this case (not pictured)
5. Click **Next**

Add Referral

No Internal Staff Notes for this service

* Referral Method

Provide Program Details

* Choose domain(required) ?

Criminal Justice/Legal

Additional Notes: ?

Type here...

Max 2000 characters

Protected Health Information/Notes: ?

Type here...

Max 2000 characters

Choose Taxonomy/Taxonomies:

Crime Issues

Disabilities Issues

...

Cancel

Next

On the next screen:

6. Update the client's email address (if available)
 - The client will receive a copy of the Service Listing link.
7. Select any checkboxes that describe that specialized services needs.
8. Click **Save** to submit the Informational Referral to the client's profile.

Add Referral

Email Address (the email address as entered will automatically update the client's profile):

Referral details will be emailed to the individual.

Choose Target Populations:

- Immigrants
- Divorce/Custody/Support Issues
- Housing Issues
- Legal Issues
- Public Assistance Issues
- Low Income

Cancel

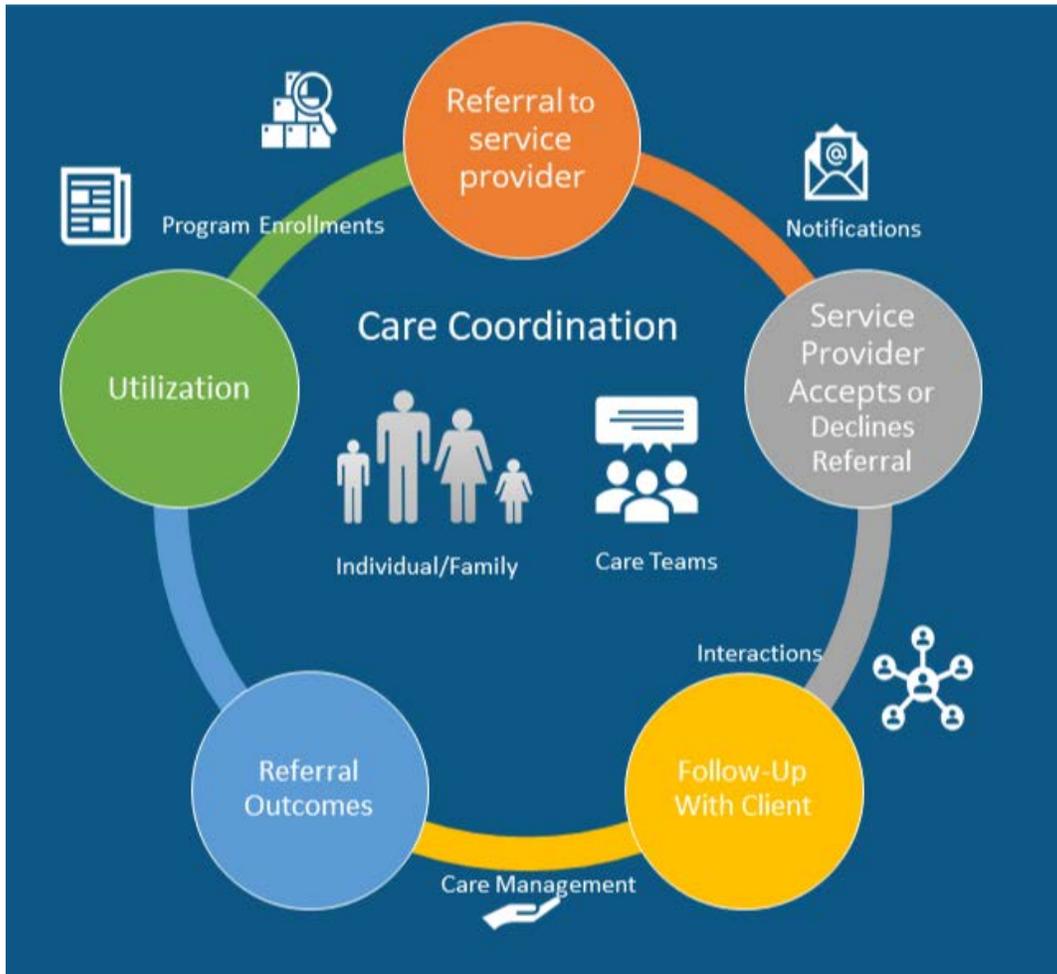
Save

Best Practices:

- Ensure the client meets the eligibility criteria
- Make sure the client understands the intake process e.g. calling the agency, completing an application, visiting the organization during specified hours, etc.
- Encourage the client to complete the intake process and reach back to your team or 2-1-1 San Diego, if they find they need a different support.

Direct Referral Lifecycle

The direct referral lifecycle begins with a new Direct Referral. The referral will be reviewed, and either accepted or declined. Declined referrals return to the original sender. Accepted referrals indicate the provider is determining eligibility and is attempting to connect the client to services. The referral lifecycle ends with outcome information. In most cases, this is just one component within a larger set of care coordination activities.



The Value

- All coordinating partners have access to the latest case information within CIE
- Clients benefit from follow-up and tailored interventions
- Direct Referrals can lead to ongoing program enrollments
- Clients benefit from outreach and extra support, rather than having to self-navigate the screening and intake processes
- Providers can track outcomes for program evaluation

Direct Referral Set-up

1. Ensure your service listing(s) are up to date

You can update your services electronically by logging into the [partner community](#) and clicking on “Agency Profile”. More information on how to update your services [here](#). Please note that direct referrals have a public listing on the 2-1-1 website. Here is an [example](#) service listing.

2. Identify your Direct Referral Management Team(s)

Direct Referrals are associated to a single service listing. Organizations that have various programs may have more than one Referral Management team.

Referral Manager(s)

- Receives initial notifications
- Can view all cases
- Can assign cases to Care Coordinators person receiving direct referral alerts and assigning to Care Coordinators

Care Coordinators – team processing referrals and following up with clients

- Can view assigned cases
- Evaluate eligibility
- Coordinate outreach & enrollment
- Updates outcomes in CIE

3. Ensure your staff completes training and has access to CIE

<https://ispri.ng/23VKz>

4. Referral Appropriateness Response and Follow-up Time

- Identify the time-frame the referral manager will respond and accept or decline a referral (e.g. 48 business hours, 3 business days)
- Identify the likely time-frame that your team will follow-up with the client (e.g. 72 business hours)

5. Identify a Start/launch date

Or Submit a [Direct Referral Set-up Request](#) on the ciesandiego.org/partner-with-cie for a CIE team member to guide you through the process.

Once your Direct Referral has been set-up, see the following pages on how to manage and process the referrals from the CIE Dashboard.

Navigating the Dashboard

Background: Referral Managers and Care Coordinators have a slightly different view. This page describes the key ways to navigate the queue of incoming referrals.

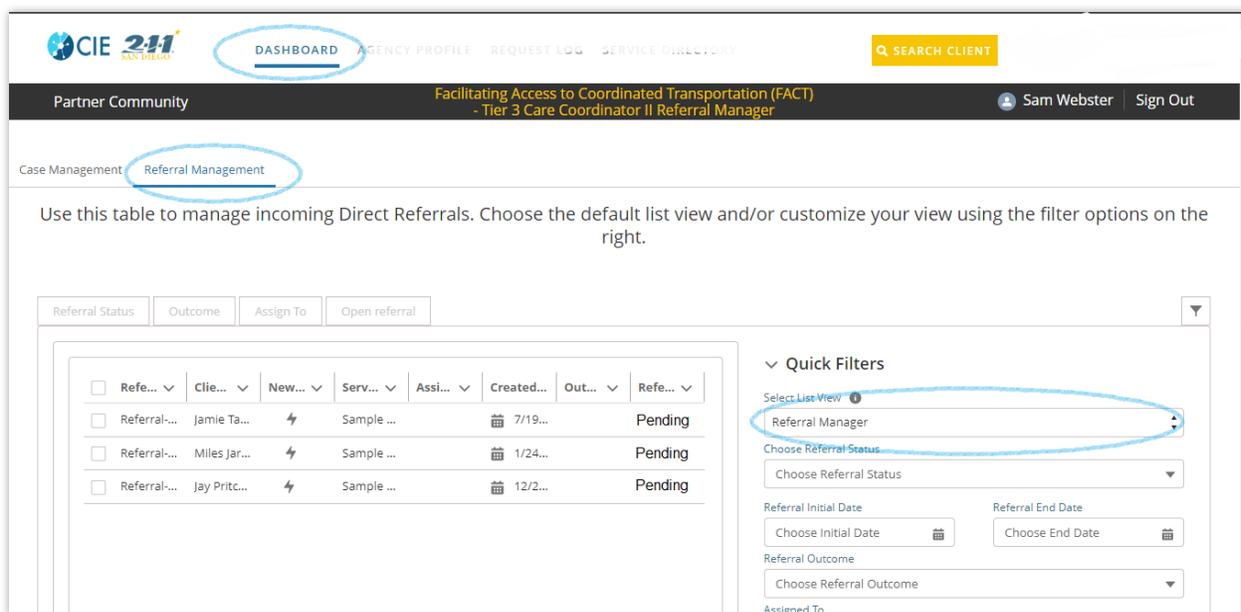
Steps:

1. Login to CIE
2. Click **Dashboard** on the top of the page
3. Click the **Referral Management** tab
4. Under Quick Filters, toggle between “Referral Manager” and “Care Coordinator” views
5. Click the client’s name to view their profile

Key differences:

Referral Managers may toggle between the “Referral Manager” and “Care Coordinator” views. When using the filters or selecting new columns, a custom version of each view is created. This means Referral Managers can have up to 4 views (2 default views, and 1 custom of each).

Care Coordinators may only access the “Care Coordinator” view. When using the filters or selecting new columns, a custom version is created. This means Care Coordinators can have up to 2 views (1 default view and 1 custom version).



The screenshot displays the CIE 211 San Diego dashboard. At the top, the 'DASHBOARD' tab is circled in blue. Below the navigation bar, the 'Referral Management' tab is also circled in blue. The main content area features a table of referrals and a 'Quick Filters' panel on the right. The 'Quick Filters' panel is circled in blue, showing the 'Referral Manager' view selected. The table below has columns for Referral Status, Client Name, New referral status, Service, Assigned To, Created Date, Outcome, and Referral Status. The table contains three rows of data, all with a 'Pending' status.

Referral Status	Client Name	New...	Serv...	Assi...	Created...	Out...	Refe...
<input type="checkbox"/>	Referral-...	Jamie Ta...	⚡	Sample ...	📅 7/19...		Pending
<input type="checkbox"/>	Referral-...	Miles Jar...	⚡	Sample ...	📅 1/24...		Pending
<input type="checkbox"/>	Referral-...	Jay Pritc...	⚡	Sample ...	📅 12/2...		Pending

Customizing your Referral Management view

Background: as more cases add to your queue, use the Quick Filters to manage the list. You can also choose to add, remove or reorder available columns. Anytime you update a filter and click “Save Filters” or “Select Columns,” these changes will save to the custom copy of your view. Clicking “Remove Filters” will reset settings to the default view.

The screenshot shows the 'Quick Filters' panel. At the top, there is a dropdown menu for 'Select List View' currently set to 'Custom Referral Manager'. Below it is a dropdown for 'Choose Referral Status' set to 'Pending'. There are two date pickers: 'Referral Initial Date' set to 'Choose Initial Date' and 'Referral End Date' set to 'Choose End Date'. Below these is a dropdown for 'Referral Outcome' set to 'Choose Referral Outcome'. At the bottom, there is a search box labeled 'Assigned To' with the placeholder text 'search...'. At the very bottom of the panel are two buttons: 'Save Filters' and 'Remove Filters'.

The screenshot shows the 'Select Columns' panel. It is divided into two columns: 'Available' and 'Selected'. The 'Available' column contains a list of column names: 'Agent Note', 'Appropriateness of Re...', 'Completed Date', 'Declined Date', 'Did not receive reason', and 'Last Modified Date'. The 'Selected' column contains a list of column names: 'Referral #', 'Client Name', 'New Referral', 'Service Name', 'Assigned To', and 'Created Date'. Arrows between the columns indicate the ability to move items between them. At the bottom of the panel is a button labeled 'Select Columns'.

Managing Direct Referral Process- Referral Manager

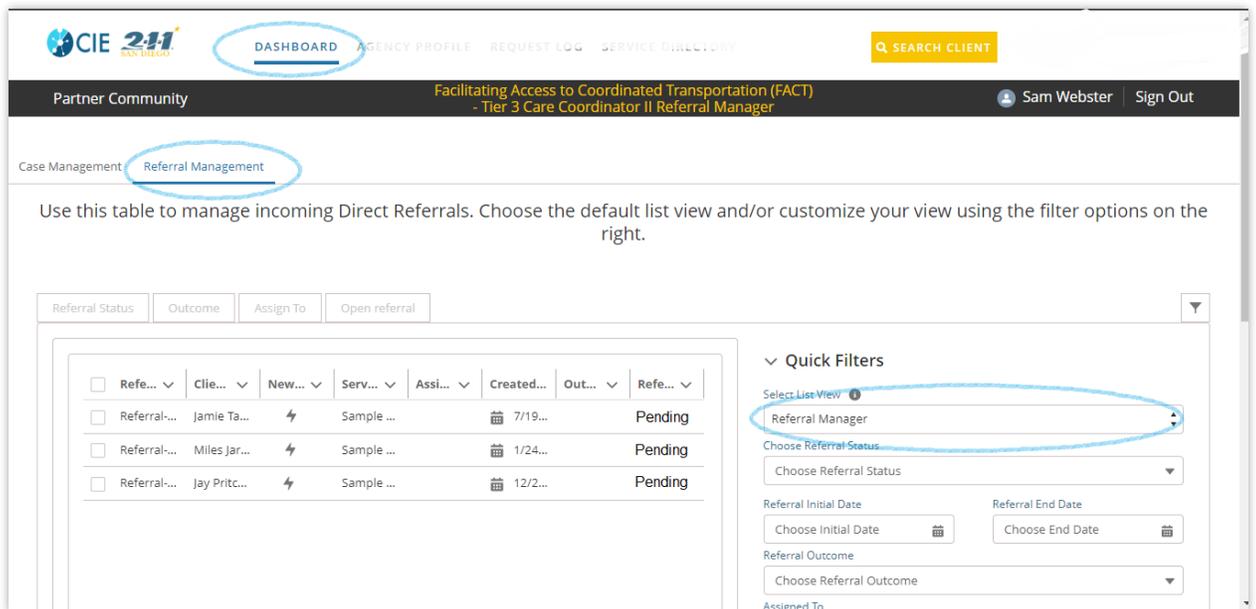
Referral Manager Role

The primary role of the Referral Manager is to:

- Review new referrals within the committed timeframe
- Accept or Decline the referral
- Assign referrals to other care coordinators
- Ensure clients are followed up with appropriately
- Ensure outcomes are completed

Reviewing New Referrals

1. The Referral Manager(s) will get an email notification each time a new Direct Referral has been added to your queue
2. Login to CIE to review the new referral on your dashboard (filter to “Pending” if needed)
3. Click on the client’s name from your dashboard to view their profile
4. After viewing the client’s information, determine if you will:
 - a. Accept the case and assign it to someone or
 - b. Decline the case



Based on the client’s profile, review whether the client meets initial eligibility criteria e.g. HH size, income, etc.



Accept or Decline

There are two places you can process referrals. The first is from the REFERRALS tab on the client's profile. The other is from the Dashboard.

Individual Profile Process

1. Go to the **REFERRALS** tab
2. To accept the referral, select "Yes" to indicate that the referral is appropriate.
3. You have two choices:
 - a) Select "Evaluating" if more follow up is needed to determine an outcome. This is the most common status for an open case.
 - b) Select "Pending Client Action", if the client is responsible for next steps. For example, if they need to go to a food bank to access services.
4. Under **Case Manager**, assign the team member that will follow-up and complete the outcome.
5. Click "Save." That team member will receive an email notification about the assignment.

The screenshot shows the 'REFERRALS' tab in a client profile. The main heading is 'NEED: HEALTH MANAGEMENT' and 'SERVICE NAME: **WHOLE PERSON WELLNESS PROGRAM**'. Below this, it lists 'TAXONOMIES: LONG TERM CASE/CARE MANAGEMENT, HOMELESS MEN' and 'AGENT NOTE: Direct referral to WPW from 2017 county supplied list'. The 'Was this an appropriate referral?' section has 'Yes' selected. The 'Referral Status' dropdown is set to 'Evaluating'. The 'Case Manager' dropdown is open, showing a list of names: 'Select Owner', 'Sandra Wieder', 'Noelani Dizon', 'Chris Lopez', 'Joanna Quezada', and 'Madeline Lewis'. There are 'Add a Case Note...' fields and a 'Save' button at the bottom.

Decline Process

- If the client is ineligible, select "No" for appropriateness and select "Declined-Ineligible" under the Referral Status. Please include a note explaining what made this person ineligible.
- If the client was referred to the same program more than once, select "No" and select "Declined- Duplicate."

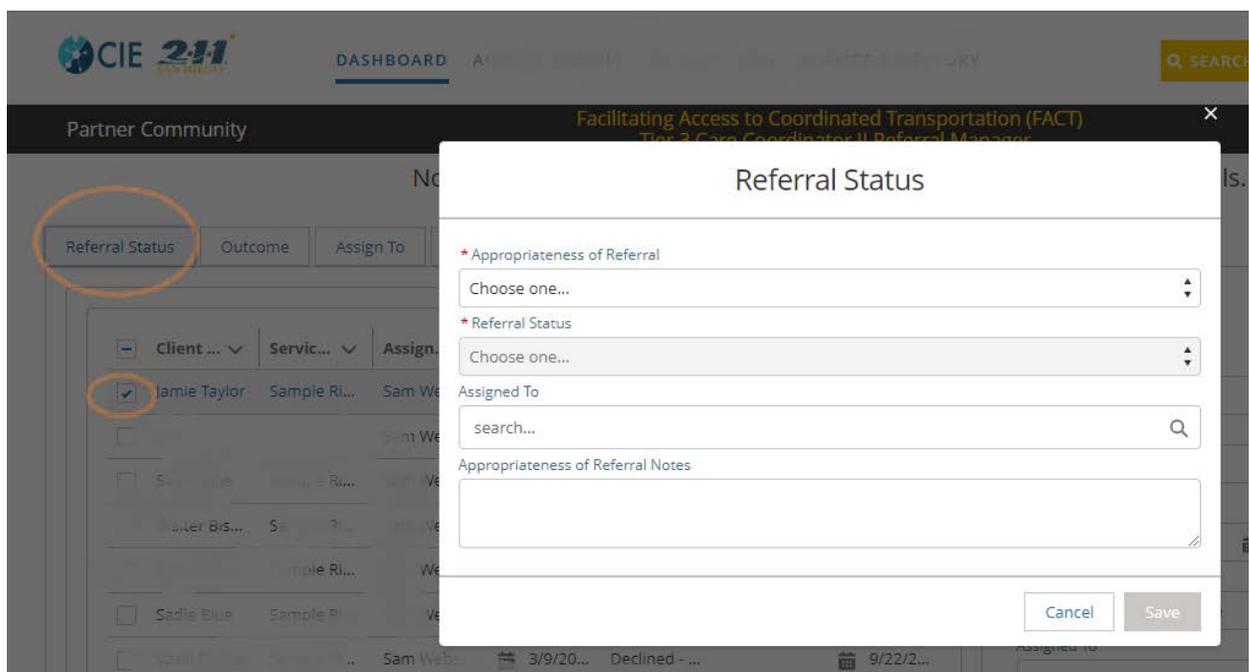
- If your program is no longer accepting new clients, and the client would otherwise be a good fit for your program, select “Yes” for appropriateness and select “Declined-No Capacity.”

Dashboard Bulk Updates

To accept the referral(s)

1. Go to **Dashboard**
2. Click **Referral Management** tab
3. Locate the referral record
4. Select the record(s)
5. Click the “Status” button
6. Select “Yes” to indicate that the referral is appropriate.
7. You have two choices:
 - c) Select Evaluating if more follow up is needed to determine an outcome. This is the most common status for an open case.
 - d) Select Pending Client Action if client is responsible for the next steps in their intake process. For example if they need to go to a food bank to access services.
8. Under Assigned to, type the name of the team member that will assign.
9. Click “Save.”

That team member will receive an email notification about the assignment.



To decline the referral(s)

1. Go to **Dashboard**
2. Click **Referral Management** tab
3. Locate the referral record
4. Select the record(s)
5. Click the “Status” button
 - a) If the client is ineligible, select “No” for appropriateness and select “Declined-Ineligible.” Please include a note explaining what made this person ineligible.
 - b) If the client was referred to the same program more than once, select “No” and select “Declined- Duplicate.”
 - c) If your program is no longer accepting new clients, and the client would otherwise be a good fit for your program, select “Yes” for appropriateness and select “Declined-No Capacity.”
6. Click **Save**
7. Click **Continue**

The original sender will receive an email notifying them that the referral was declined.

Monitoring

In addition to updating the initial status, Referral Managers should actively monitor their team's ability to respond to Direct Referrals in a timely manner. Referral Managers are able to access all Direct Referrals throughout their life cycle and can reassign Direct Referrals to other team members when needed.

- Filter for Pending, Evaluating, and Pending Client Action to view open cases
- Check the Last Modified Date column to see when referrals were last updated

To Reassign Cases

1. Go to **Dashboard**
2. Click **Referral Management** tab
3. Locate the referral record
4. Select the record(s)
5. Click the “Assign to” button
6. Type the name of the team member
7. Click **Save**
8. Click **Continue**

Self-Assignment

Referral Managers may choose to assign the case to themselves. If doing so, they should refer to the instructions in the Care Coordinator section, to learn the remaining steps to provide outcomes.

Managing Direct Referral Process- Care Coordinator

Care Coordinator's primary role is to:

- Follow up with client
- Attempt intake and enrollment
- Update the outcome

Reviewing Assigned Referrals

1. The Care Coordinator will get an email notification each time a Direct Referral is assigned to them.
2. Login to CIE to review the referral on the dashboard
3. Filter to “Evaluating” or “Pending Client Action” (if needed).
4. Click on the client’s name to view their profile.
5. Review the details in the Referral and the profile
 - a. Contact Information
 - b. Demographics
 - c. Notes about when to contact
 - d. Notes about specialized services or needs

Outreach

At this stage, it is unknown whether the active referral will result in receiving services, a program enrollment, or another outcome. The assigned Care Coordinator should follow their organizational protocols to engage the client and conduct activities necessary for intake and enrollment. Typically, the Care coordinator will:

- Conduct 2-3 follow-up attempts
- Complete additional screening
- Attempt Enrollment for eligible clients
- Redirect clients to other appropriate services

Outcome

Once the Outreach stage is completed, or the Care Coordinator has made their final attempt to reach the client or complete their intake, the Care Coordinator will close out the referral by saving an Outcome. These are options to select from:

- a) Receiving/Received Services
- b) Did not Receive Services
- c) On Wait List
- d) Legal Privilege* Only applicable for legal service providers. This should be selected for all Direct Referrals made to legal services e.g Legal Aid Society of San Diego, Elder Law & Advocacy, etc.

Receiving Services

There are two places you can process referrals. The first is from the REFERRALS tab on the client's profile. The other is from the Dashboard.

Individual Profile Process

1. Go to the **REFERRALS** tab
2. Go to the **OPEN REFERRALS** subtab
3. Under **Outcome**, select "Receive/receiving services"
 - a) Select whether the service will be "Ongoing" or "One-time" assistance
4. Optional Steps (see Care Team and Program Enrollment pages for more detail).
 - a) To add yourself as a Care Team member, select the checkbox
 - b) To populate a Program Enrollment for this service, select the checkbox
5. Click "Save."

The following will occur:

- The original sender will receive an email notification, with the outcome
- Care Teams and Program Enrollments will populate on the profile (if selected)
- Existing Care Team members receive an email notification about new Care Team member
- The Outcome will save and the Referral Status will change to Completed
- The Referral Lifecycle is considered complete

DETAILS REFERRALS FEED

PENDING REFERRALS OPEN REFERRALS PROGRAM ENROLLMENTS CLOSED REFERRALS DECLINED REFERRALS

NEED: HEALTH MANAGEMENT
SERVICE NAME
WHOLE PERSON WELLNESS PROGRAM
TAXONOMIES
LONG TERM CASE/CARE MANAGEMENT, HOMELESS MEN
AGENT NOTE
Direct referral to WPW from 2017 county supplied list

Case Manager: CIE DemoUser3

Outcome: did the individual receive the service?
Receiving/Received Services

Type of Service Received Ongoing

Include in Care Team

Create Program Enrollment

Outcome Note

Save

Did Not Receive Services

Individual Profile Process

1. Go to the **REFERRALS** tab
2. Go to the **OPEN REFERRALS** subtab
3. Under **Outcome**, select “Did not Receive Services”
4. Select the reason the client did not get services
 - a) Funding Limitations
 - b) Ineligible
 - c) No Show
 - d) Unable to Contact
 - e) Client Refused Services
 - f) Referred to other Agency
 - g) Referred to other Internal Program
 - h) Other
5. Provide additional context in the **Outcome Note** e.g. If ineligible, briefly explain why.
6. Click “Save.”

The following will occur:

- The original sender will receive an email notification, with the outcome
- The Outcome will save and the Referral Status will change to Completed
- The Referral Lifecycle is considered complete

DETAILS REFERRALS FEED

PENDING REFERRALS OPEN REFERRALS PROGRAM ENROLLMENTS CLOSED REFERRALS DECLINED REFERRALS

NEED: HEALTH MANAGEMENT
SERVICE NAME
WHOLE PERSON WELLNESS PROGRAM

TAXONOMIES
LONG TERM CASE/CARE MANAGEMENT, HOMELESS MEN

AGENT NOTE
Direct referral to WPW from 2017 county supplied list

Case Manager: CIE DemoUser3

Outcome: did the individual receive the service? Did not Receive Services

Reason Client was not Connected

Outcome Note

Select Reason

- Select Reason
- Client no longer interested
- Funding Limitations
- Ineligible
- No Show
- Failure to Provide Documents
- Referred to Other Agency
- Referred to Other Internal Program
- Unable to Contact**
- Other

Save

On Wait List

Individual Profile Process

1. Go to the **REFERRALS** tab
2. Go to the **OPEN REFERRALS** subtab
3. Under **Outcome**, select “On Wait List”
 - a) Select whether the service will be “Ongoing” or “One-time” assistance
4. Optional Steps (see Care Team and Program Enrollment pages for more detail).
 - a) To add yourself as a Care Team member, select the checkbox
 - b) To populate a Program Enrollment for this service, select the checkbox
5. Click “Save.”

The following will occur:

- The original sender will receive an email notification, with the Outcome
- The Outcome will save and the Referral Status will change to Completed
- The Referral Lifecycle is considered complete

Legal Privilege

Individual Profile Process

1. Go to the **REFERRALS** tab
2. Go to the **OPEN REFERRALS** subtab
3. Under **Outcome**, select “Legal Privilege”
4. Click “Save.”

The following will occur:

- The original sender will receive an email notification, with the Outcome
- The Outcome will save and the Referral Status will change to Completed
- The Referral Lifecycle is considered complete

Dashboard Bulk Updates

1. Go to **Dashboard**
2. Click **Referral Management** tab
3. Locate the referral record
4. Select the record(s)
5. Click the “Outcome” button
6. Choose the appropriate Outcome.
7. Click Save

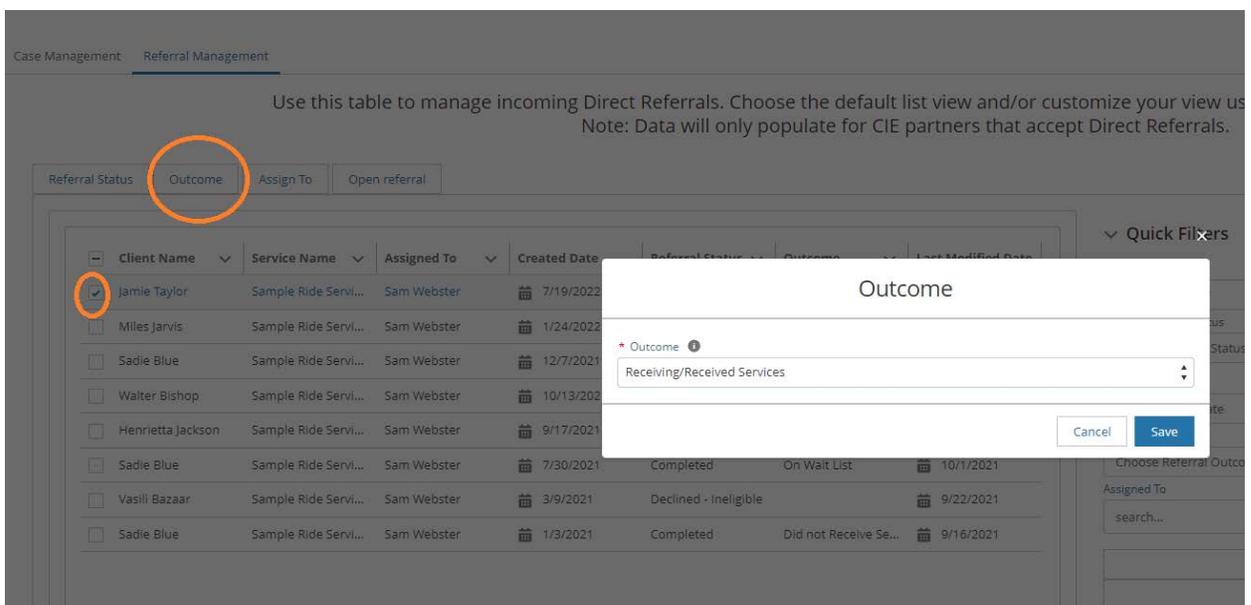
8. Click Continue

The following will occur:

- The original sender will receive an email notification, with the outcome
- The Outcome will save and the Referral Status will change to Completed
- The Referral Lifecycle is considered complete

The following cannot be done through the Dashboard:

- Adding Care Team members
- Adding Program Enrollments



Additional Care Coordination

Although the Direct Referral lifecycle is complete, your team will likely continue to offer supports to the client. It is recommended you review the other features available in CIE, to learn about other tools that can help you further support the client. For example, if the client did not receive services and/or could benefit from other resources, you can send Direct Referrals to other providers.

Care Team

For more information on Care Team Alerts, see: <https://ispri.ng/9x72W>

Care Team members can receive the following alerts:

- Changes to their Care Team
- Emergency Medical Services transports
- Food insecurity
- Housing vulnerability
- Recent arrests

To add a Care Team member:

1. Visit the client's profile
2. Go to the Care Team section (middle right side)
3. Click **New** to open a pop-up (pictured).
 1. Enter the name of your organization in the **Agency** field.
 2. Enter your name
 3. Enter "End Date" (if known)
 4. Select Save

The image shows two screenshots from a software interface. The top screenshot displays a table titled 'Care Teams (6+)'. The table has columns for 'Care Team No.', 'Case Manager N...', 'Agency', and 'Date Assigned'. Three rows of data are visible, each with a 'New' button to its right. A blue box highlights the 'New' button in the top right corner of the table, with a line pointing to the 'New Care Team' pop-up form below.

Care Team No.	Case Manager N...	Agency	Date Assigned
CT-00600753	Karis Demo	North County He...	10/21/2020
CT-00600862	Jazmin Demo	North County He...	4/20/2021
CT-00600864	Max Ricco	North County He...	7/2/2021

The bottom screenshot shows the 'New Care Team' pop-up form. It contains several fields: 'Agency' (with a search box), 'Case Manager Name' (with a search box), 'Date Assigned' (pre-filled with 6/29/2022), 'End Date' (with a calendar icon), 'Active' (checked checkbox), 'MORNA' (unchecked checkbox), and 'Service' (with a search box). At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'. A blue box highlights the 'Save' button.

To de-activate a Care Team member:

1. Visit the client's profile
2. Go to the Care Team section (middle right side)
3. Click on the CT# next to your name to open a pop-up (pictured).
 1. Uncheck the "Active" checkbox

2. Enter the "End Date"
3. Select Save

The screenshot shows a 'Care Teams (6+)' section with a 'New' button. Below is a table of care teams:

Care Team Nu...	Case Manager N...	Agency	Date Assigned
CT-0000793	Karis Demo	North County He...	10/21/2020
CT-0000802	Jazmin Demo	North County He...	4/20/2021
CT-0000804	Max Rizzo	North County He...	7/2/2021

A blue box highlights the row for CT-0000804. Below the table is a 'View All' link. A larger blue box shows the detailed view for 'Care Team CT-0000804':

- Date Assigned: 7/2/2021
- End Date: (empty)
- Agency: North County Health Services
- Case Manager Name: Max Rizzo
- Client: Jay Pritchett
- Case Manager Title: Operations Coordinator
- Care Team Number: CT-0000804
- Case Manager Contact Phone #: 8583805491
- Agency: North County Health Services
- Case Manager Email Address: mrizzo@ncounty.org

The following will occur when changes are saved to the Care Team:

- ❑ Active Care Team members receive email notification about any new or deactivated Care Team member
- ❑ New Care Team members receive a notification

Review your own Care Team

1. Go to **Dashboard**
2. Click **Case Management** tab
3. Under **Quick Filters**, select "Care Team Assignments"

The screenshot shows the CIE 211 San Diego dashboard. The 'DASHBOARD' tab is selected. The user is logged in as Max Rizzo, a Referral Manager at North County Health Services. The 'Case Management' tab is selected, showing a table of client referrals and a 'Quick Filters' section. The 'Quick Filters' section has a dropdown menu set to 'Care Team Assignments'.

Use this table to review your CIE client base. Choose from the default list views and/or customize your view using the filter options on the right.

Client ...	Gende...	Prima...	DOB	Phone...	Email	Last Modi...
<input type="checkbox"/> Sadie Blue	Man	English	6/7/19...	(408) ...	nblum...	7/29/2...
<input type="checkbox"/> Jay Pritchett	Man	English	4/10/1...	(858) ...	jbear...	7/13/2...
<input type="checkbox"/> John Doe			7/14/1...	(858) ...	john.d...	7/14/2...
<input type="checkbox"/> Jackie Demo	Woman	English	1/3/19...	(619) ...	jackie...	7/18/2...

Quick Filters

- Select List View: Care Team Assignments
- Minimum Age: Enter Min Age
- Maximum Age: Enter Max Age
- Zip Code: Enter Zip Codes
- Food Insecurity Level: Choose...

Program Enrollments

To demonstrate that you are working with clients to other providers using CIE, add your Service Name as a Program Enrollment.

1. Visit the client's profile
2. Go to the **Program Enrollments** section (located on the right side of the profile)
3. Click **New** to open a pop-up (pictured)
4. Enter the name of your program in the **Service** look up field
5. Click **Save**

The screenshot shows the 'Program Enrollments (6)' section of a client profile. A 'New' button is highlighted with a blue box. Below it is a table of existing enrollments:

Enrollment #	Service Name	Status	Program Entr...
PE-00041873	Care Coordina...	Active	5/16/2022
PE-00041870	Dental Care, O...	Active	3/31/2022

A 'View All' link is located below the table. A blue box highlights the 'New' button, with a line pointing to a 'New Program Enrollment' form. A note box states: 'Note: Email a list of your programs to ciehelpdesk@211sandiego.org in order for your program to populate in the Service field.'

The 'New Program Enrollment' form contains the following fields:

- Account: Jay Pritchett
- *Service: Search Services... (highlighted with a blue box)
- Enrollment #: [Empty]
- Status: Active
- Program Entry Date: 6/29/2022
- Program Exit Date: [Empty]
- Reason for Exit: [Empty]
- Volume of Service: [Empty]
- Assistance Count: [Empty]
- Renewal Date: [Empty]
- Last Assistance Date: [Empty]
- Eligible to Return: --None--
- Food Bank Card Number: [Empty]
- Eligible Return Date: [Empty]
- Expense Type: Available (Rent/mortgage ..., Security deposit, Move-in costs, Car related exp...) and Chosen (empty)
- Destination: [Empty]
- Other Expense Type: [Empty]

Buttons at the bottom: Cancel, Save & New, and Save (highlighted with a blue box).

Return to the Program Enrollment at any time to make it Inactive (if applicable).

