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

Tier 2 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, Tier 2 users can:

• **Receive Direct Referrals** (electronic referrals) from Tier 3 CIE partners
  - View profile information about referred clients
  - Provide outcomes for referrals
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).

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
Login Process
1. Visit: https://my211.force.com/s/login/
2. Enter your username (work email address) and your password.
3. Click “Log in”

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/Invalid Pages
- Training supports
- Insights on pending Direct Referrals
Informed Consent
The CIE has an opt-in model. In order for CIE Partner organizations to enter, view, or edit a client’s information, the client must have given their permission beforehand. This means that clients opt in before they are directly referred to other organizations, like yours. There are many different entry points and modalities to opt-in. For more background, visit https://ciesandiego.org/cie-authorization-forms/.

The embedded image is an example only and does not meet the font size requirements for actual use.
The Client Profile

This is the DETAILS view of the Client Profile (default view).

Scroll down to view Contact Information, Demographics, Household, Income and more. Notice the blue arrow points to the REFERRALS tab to the right of the DETAILS tab. Below is personal information such as their phone number, email address, birthdate and address information.

![Client Profile Screen Shot]

**Note:** Tier 2 access shows less client profile information than Tier 3 access. Tier 2 providers cannot access the same features as Tier 3 partners. For example, Tier 2 partners cannot create new client profiles or search for clients. Please refer to this guide and Tier 2 training materials for the most accurate screenshots and explanation of features.
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

![Example of Direct 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

![Example of Informational Referral]
**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.

![Diagram of Direct Referral Lifecycle](image)

**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](http://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, to view the Referral Management tab
3. Under Quick Filters, toggle between “Referral Manager” and “Care Coordinator” views
4. 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).
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.
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.

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 be assigned.
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. Select from these options:

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 Step
   a) To populate a Program Enrollment for this service, select the checkbox
   b) DO NOT attempt to add yourself as a Care Team member. Tier 2 partners are not able to add themselves to the Care Team.
5. Click “Save”

The following will occur:
- The original sender will receive an email notification, with the outcome
- Program Enrollments will populate on the profile (if selected)
- The Outcome will save and the Referral Status will change to Completed
- The Referral Lifecycle is considered complete
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
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 Step
   a) To populate a Program Enrollment for this service, select the checkbox
   b) DO NOT attempt to add yourself as a Care Team member. Tier 2 partners are not able to add themselves to the Care Team.
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

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

Additional Care Coordination
Although the Direct Referral lifecycle is complete, your team will likely continue to offer supports to the client. For example, if the client did not receive services and/or could benefit from other resources, you can encourage them to call 2-1-1 San Diego or review the Service Directory to provider informational referrals.
Providing Referrals through CIE
Background: The CIE is linked with the 2-1-1 San Diego Resource Database. Tier 2 Partners with login access can click Service Directory (top of the screen) to find other available programs and services.

Searching the Database
There are two 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 the program or organization is known.
- Category search: recommended if you prefer to browse all available resources within a category, and drill-down to subcategory.

Search tips:
- Enter the client’s zip code or location
- Sort by Relevance or Distance
- Alt-click the “Service Listing” to open it in a new tab or window
Viewing Referral Search Results

Click to view Service Listing

Hover to view more Eligibility criteria

Providing Informational Referrals

When you find resources:

- 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.
- Print a copy or email the information to the client.
Troubleshooting/ Help Tips
Common issues and potential ways to solve the issue.

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forgot Username</td>
<td>Your username is your work email address.</td>
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<tr>
<td>Forgot password</td>
<td>To reset your password:</td>
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<td></td>
<td>1. Click “Forgot Password”</td>
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<td></td>
<td>2. Enter your work email address</td>
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<td>3. Click “Send Password Reset Email”</td>
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<td>4. Check your email inbox for a link to reset your password</td>
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<td></td>
<td>If the above didn’t work, email the CIE helpdesk.</td>
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<tr>
<td>Slow page loads</td>
<td>1. Refresh the page</td>
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<tr>
<td>Error Codes</td>
<td>2. Clear your browser’s cache and cookies</td>
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<td>3. Refresh the page</td>
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<td></td>
<td>Still not working?</td>
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<td>4. Switch to another browser e.g. Chrome, Firefox, Edge</td>
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<td>If these steps didn’t work..</td>
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<td></td>
<td>5. Take a screenshot</td>
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<td>6. Write a few sentences about what you’re trying to do</td>
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<tr>
<td></td>
<td>7. Email this information to the CIE helpdesk.</td>
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</tbody>
</table>

Please submit questions to ciehelpdesk@211sandiego.org and the CIE support team will reach out to you within 48 business hours. In the meantime, please see the Troubleshooting section for tips on how to self-resolve common issues.

For more training materials, visit: https://ciesandiego.org/support