

Partner Agency Service Update Process

211 San Diego has implemented a new way to ensure that Clients have access to the most up-to-date list of services available to them here in San Diego and Imperial Counties. We are proud to share our new semi-automated Annual Update Process. Based on the date that each service was last updated, our system will now generate an email to the service update contact when that service is between 30 to 60 days away from its annual review date. Additionally, the system will generate two reminder emails that will be sent weekly, following the initial email, and will contain those services requiring an update. Services that are updated between emails will be removed from the list, to reduce confusion.

This document is meant to serve as a guide for Partner Agencies to use in understanding the new changes.

If your agency **does not** currently have access to our Partner Community, you will receive an email that provides instructions on how to request an account.

If your agency **HAS** access to our Partner Community, you will receive an email that directs you to log into your account, with a link to the log in page.

The email will also contain a list of services that need to be reviewed, their current status, and the last updated date. If a service is active, clicking on the Service name will take you to the online service details page in a web browser.

Service Name	Service Status	Last Updated Date
Home Finder	Active	8/13/2021
HEAP Hotel Motel Vouchers, City of Chula Vista	Inactive	8/28/2021
COVID-19 Paclnn NCS	On Hold	9/27/2021

AGENCY/SERVICE UPDATE PROCESS

1. Sign in to the CIE Partner Community:

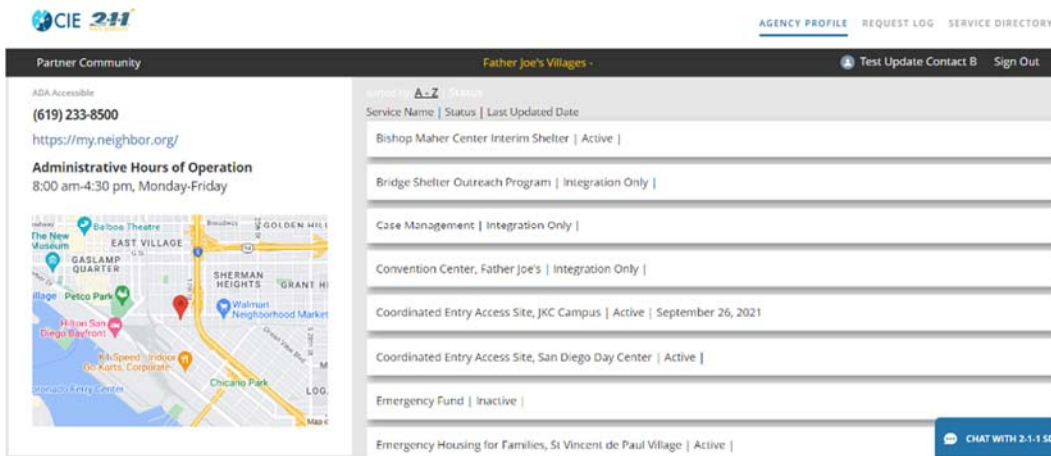
<https://my211.force.com/s/login/?startURL=https%3A%2F%2Fmy211.force.com%2Fs%2Fservice-directory>

You will then be prompted to enter your login credentials.

- a. If you forget your login credentials, select '**Forgot password?**' and enter your **EMAIL** address **ONLY**.

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*If you are a current user of our Partner Community, you may be familiar with 211SD's agency profile page. However, we have made a few improvements to this page to support our new update process.



IMPROVEMENTS:

The service list page can now be sorted alphabetically or by status by clicking on the desired option:

sorted by: **A - Z** | Status

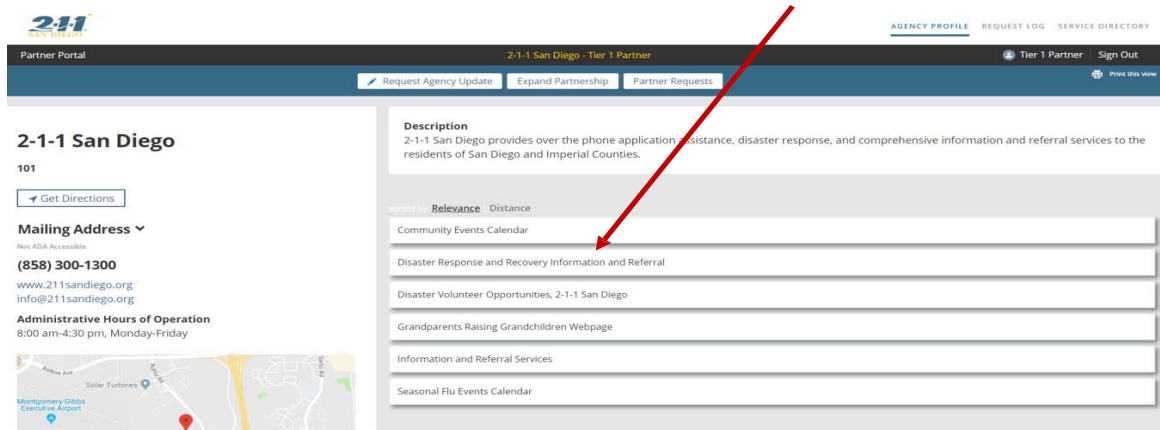
Please note that Alpha sorting is ALWAYS A-Z and Status sorting is ALWAYS Active services first. There is currently no way to change the sort order.

Additionally, services also show the current Status and the Last Updated Date (if captured).

Service Name | Status | Last Updated Date

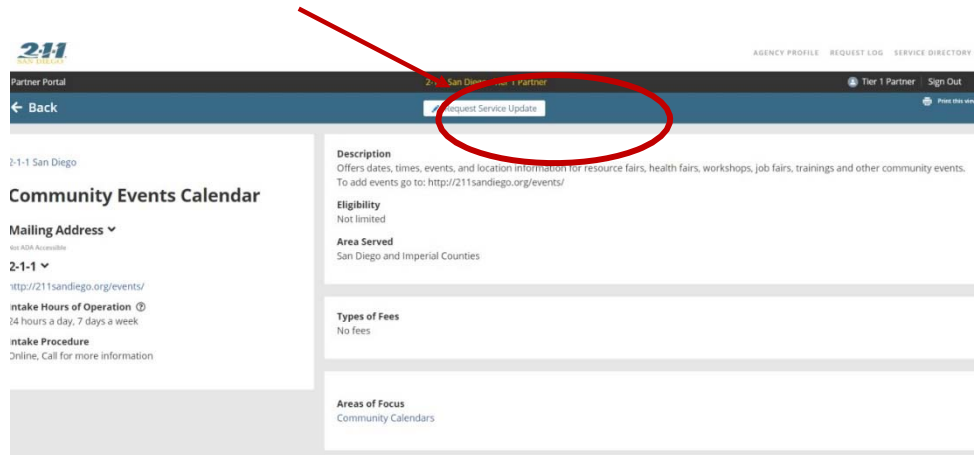
Coordinated Entry Access Site, JKC Campus | Active | September 26, 2021

- Updating an existing service remains similar to the existing update process. To update a service, simply click on the desired service name in the list of services.



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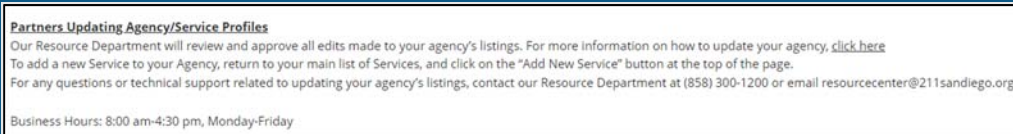
- From the service profile, you will see all the information listed for that service. Click on 'Request Service Update'



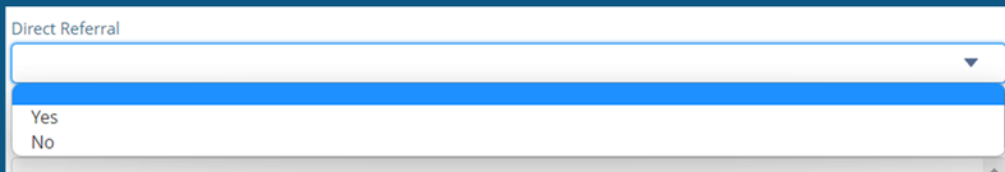
NEW CHANGES:

The following changes have been made to the Service Update Process:

- There is new language regarding the update process



- FOR CIE PARTNERS ONLY:** You may now set the Direct Referral status of the service



- You may now change the service contact information as needed

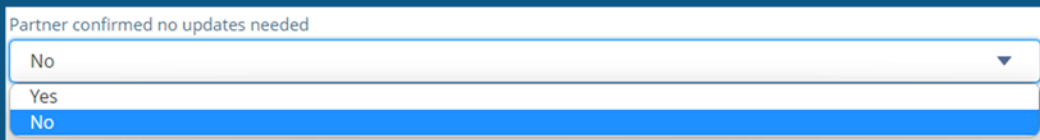
Indicate here if the person responsible for updating this resource has changed. Please include full name, email, and phone number for the new Update Contact.

Update Contact Name

Update Contact Email

Update Contact Phone

- If no changes are necessary, you may indicate that the service information is still accurate by selecting "Yes" in this field.



Adding a New Service

New services can now be added directly from the Partner Community! On the Agency Profile screen there is now an option to Add New Service.



Adding a new service is similar to updating an existing one, the screens are virtually the same.

Partner Community Father Joe's Villages - Test Update Contact B Sign Out

Request Agency Update + Add New Service Expand Partnership Partner Requests Print this view

CIE 2-1-1

Partner Community Father Joe's Villages -

Welcome to our Partner Community Update Portal!

Acknowledgements

Upon entering the Partner Community portal, you agree that the information you edit/update has been verified and is true and accurate to the best of your knowledge.

Partners Updating Agency/Service Profiles
Our Resource Department will review and approve all edits made to your agency's listings. For more information on how to update your agency, [click here](#).
For any questions or technical support related to updating your agency's listings, contact our Resource Department at (858) 300-1200 or email resourcecenter@211sandiego.org.

Business Hours: 8:00 am-4:30 pm, Monday-Friday

PUBLIC INFORMATION

*Service Name

Service Status
New

Direct Referral

Simply fill out the form, providing as much detail as possible and then submit your request. It will be reviewed by the 211SD resource team and will be made available once the service has been approved. Also, please note that the **Last Updated By** and **Last Update Date** fields cannot be filled out. They will be updated automatically. Additionally, the **Partner confirmed no updates needed** field does not need to be completed, as this a new service.

Last Updated By

Last Update Date

Partner confirmed no updates needed
No

If you have any questions about the new updates, please feel free to email the 211SD Resource Center at resourcecenter@211sandiego.org