

# Client Choice: Collective Community (care) Plan

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211 San Diego/CIE in partnership with Interfaith Community Services, Lifeline Community Services, Neighborhood Healthcare, Multicultural Health Foundation, and Goodwill of San Diego County, offered clients (patients) the opportunity to provide feedback on how their information is viewed, managed and shared within the Partner Community, including how their information is used to support their care coordination.

## Collaborative Goals



- Gauge client's general interest in managing and viewing their 211CIE data
- Understand the what information they would like to be able to access about who they are working with and what services they accessed
- Generate best practices and lessons learned for wider community adoption of the 211CIE self-service tool

The following were completed to identify the various challenges/barriers and to help inform proposed recommendations or future opportunities for leveraging self-service tools for care coordination:

- 1 Train affinity group providers on the 211 CIE account set-up and self-service feature sets
- 2 Offer clients (patients) the option to create a self-service account
- 3 Compensated each participant with a \$25 gift card for their participation
- 4 Surveyed each participating client (patient) on perceived user friendliness, usefulness of existing self-service options
- 5 Surveyed each participating provider (staff) on value-adds, challenges, and opportunities
- 6 Convened participating providers to develop recommendations for community care planning that leverages self-service tools like the 211 CIE client portal.

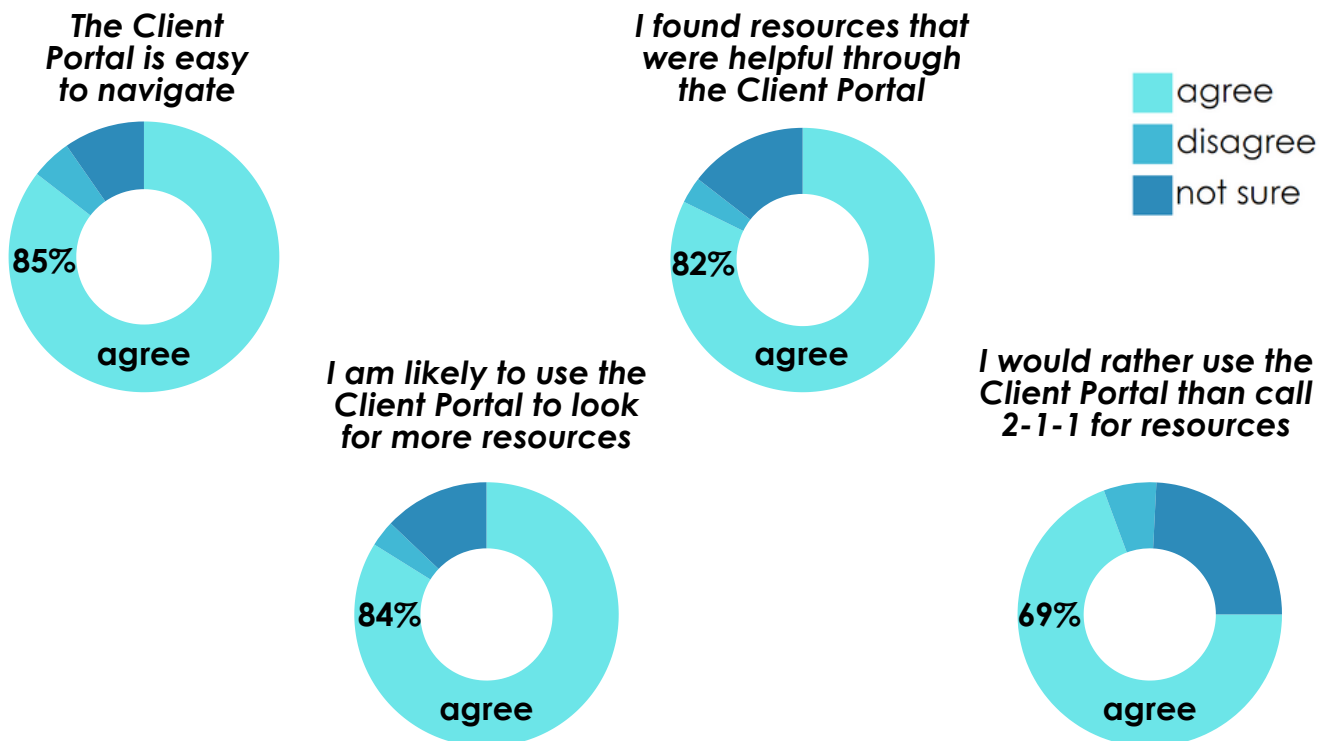
## Background on Client Choice Opportunities

Many community-based organizations and non-profit service providers rely on different customer relationship management (CRMs) tools to store personal identifying information for care coordination purposes. In some cases, service providers who support a single population or meet social specific needs will collaborate using a shared online repository of client and resource data. Although it is typical for clients to disclose personal information as part of screening and intake processes for social supports, it is not typical for someone to have direct access to their own case file.

The 211 CIE client portal is a unique avenue that allows a client to create their own profile, search for resources and save their favorite resources in a self-service platform. In addition, a client may elect to share their data with a community of service providers, participating in the Community Information Exchange (CIE), in order to support their connection to additional care coordination. Given this existing network of multi-sector supports, the *Client Choice* affinity group was convened in order to understand clients' wants and needs related to managing their own data and interest in using a self-service platform to connect with other service providers.

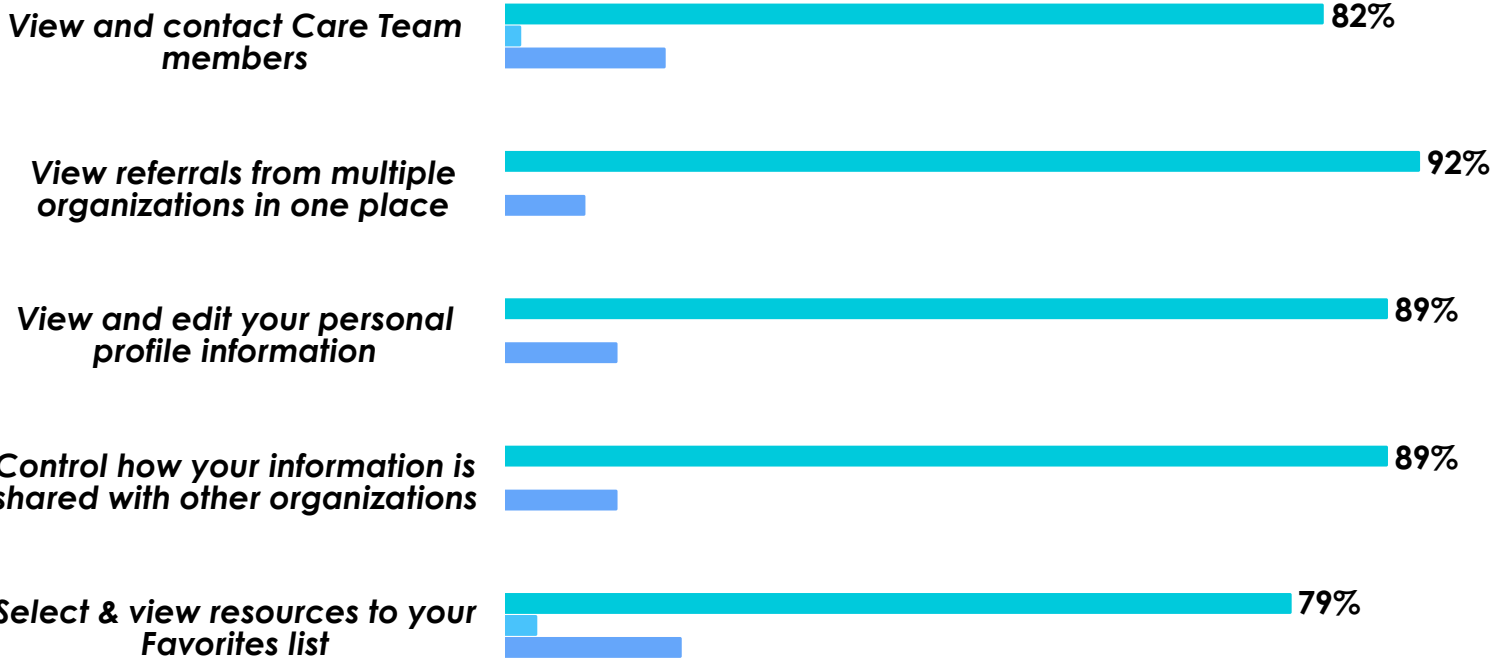
**Client Input:** Between 11/9/2023 and 1/8/2024, **62 clients** completed surveys.

*When asked how much they agreed with each statement, clients responded:*



When asked how important is it that they are able do to the following, clients responded:

● important   ● not important   ● not sure



**Partner Staff Input:**

Between 1/22/2024-2/29/2024, 17 client-facing staff completed surveys.

STATEMENT	Strongly Agree or Agree	Strongly Agree	Agree	Neutral	Disagree
<i>I plan to tell more clients about the Client Portal.</i>	77%	29% (5)	47% (8)	24% (4)	
<i>I plan to tell other community partners about the Client Portal.</i>	71%	18% (3)	53% (9)	29% (5)	
<i>The Client Portal is a more efficient way to consent clients into the CIE than through the Partner Community.</i>	59%	18% (3)	41% (7)	35% (6)	6% (1)
<i>The Client Portal is a valuable source of information for my clients.</i>	82%	29% (4)	53% (9)	12% (2)	6% (1)
<i>The Client Portal is a valuable use of my time.</i>	76%	24% (4)	53% (9)	24% (4)	
<i>The Client Portal provides another avenue to share important information with clients.</i>	77%	29% (5)	47% (8)	24% (4)	

## Identification of Challenges and Takeaways

### Client/Lived Experience

#### Challenges/Barriers

Within the context of the Client Portal, resource-seekers reported the following challenges:

- Technical Navigation/Savviness
- Resource Availability
- Resource Navigation e.g. clients reported challenges with scheduling appointments and making calls to local agencies.

#### Key Takeaway

For a client to choose to utilize self-service tools and/or to authorize into an information, sharing network, like the Community Information Exchange, these mechanisms should aim to be accessible and expansive.

When asked, **“What feature(s) would you like to see added to the Client Portal in the future?”**

- Nine clients inquired about added functionality, with responses including: adding more navigation buttons, implementing a live chat feature, accessibility tools for older clients, and learning materials for users e.g. tutorial video(s)
- Eleven clients suggested expanding the list of resources. (e.g., more pregnancy resources, dietary/exercise supports, more information for teenagers)

### Provider/Agency Experience

#### Challenges/Barriers

- For clients who chose not to participate in an account set-up, providers attributed lack of interest with mistrust and/or poor experiences with 211 or other providers in the system of care
- One provider noted that a client was resistant to set up an account and did not see the need given that they had an assigned case manager
- For clients who were interested, providers noted tech savviness as a consideration. e.g. Most respondents indicated that account set-ups took 5 to 15 minutes, whereas one respondent stated the process could take 30 to 45 minutes depending on the client’s technical savviness

### Key Takeaway

During the feedback session, partners agreed that the Client Portal was a helpful tool for clients (patients) that are tech savvy. It's especially appealing for clients who may want to navigate resources or obtain information outside of typical business hours, or for those that would like to inquire about services at their own convenience. It was proposed that by connecting clients (patients) to the self-service tools like Client Portal, it could free up providers' capacity to support clients who could benefit from more guided support.

### What's Next?

Area of Opportunity	Proposed Steps
User Experience	<ul style="list-style-type: none"> <li>• Implement updates and fixes so clients can create accounts with ease</li> <li>• Establish a Helpdesk team to support client support requests</li> <li>• Create learning resources for community members and service providers interested in using the Client Portal</li> </ul>
Outreach	<ul style="list-style-type: none"> <li>• Raise awareness about the Client Portal through social media</li> <li>• Leverage existing CIE partnerships to expose more clients to the opportunities within Client Portal</li> <li>• Create opportunities for client feedback e.g. integrated surveys, focus groups</li> </ul>

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