CommuniCare Community Information Exchange (CIE) User Guide

Drafted March 2024

Contents

Welcome to CommuniCare!

Welcome to CommuniCare, Wyoming's Community Information Exchange, or CIE, as powered by Wyoming 211. As a user of this system, you now have access to a vast network of Wyoming service providers who aim to coordinate care for clients with one another through a shared platform.

With CommuniCare, you will be able to:

- Look up current clients/patients to learn more about their history of care.
- Perform client intakes to add them to the CIE.
- Refer clients to other in-network services (those participating in the CIE).
- Utilize the full breadth of Wyoming 211's database and document referrals made to out-of-network partners (those not participating in the CIE but are in Wyoming 211's Resource Database).
- Receive direct, electronic referrals from other CIE partners.
- Update client records, access case management and screening tools, and document follow-ups

CIE Data Integration

CommuniCare is expected to integrate with multiple client management systems, databases, and Electronic Health Records. This will allow for different systems to communicate with the CIE and users to see information from other systems in real-time.

Registering Your Account

Registering for both the training site and the live system requires a 2-step registration process. Prior to training, users must register to the live site in order to access the CommuniCare Training Site. All training will be conducted on the Training Site and users will not be given full access to the live site until all required trainings have been completed.

How to Register on the Live Site

1. Visit **https://wy211.communityos.org/register**
2. Enter the required information in the fields.
3. After submitting your registration, you will be emailed a link to verify your email. Please note that during this step, you will receive an access denied error. This is because your account does not have a role assigned to it initially.
4. Once you have verified your email, please email smartin@wyoming211.org or specialist3@wyoming211.org to assign you your role to avoid access issues.

How to Reset Forgotten Password on Live Site

1. Visit **https://wy211.communityos.org/forgot-password** and input the required information.
2. An email will be sent to the registered email account with instruction on how to rest your password.
3. Once you have followed the provided link and completed the password reset process, you will be able to access your account once again.

What If I didn't receive an email?

- Double check that there were no spelling errors when requesting a password reset link.
- If you have forgotten the email associated with your account and need a system administrator to manually reset the password to your account, email smartin@wyoming211.org or specialist3@wyoming211.org. You can also contact support through our Help Desk Reference

How to Register on the Training Site

1. Visit **https://wy211-training.communityos.org/register**
2. Enter the required information in the fields.
3. After submitting your registration, you will be emailed a link to verify your email. Please note that during this step, you will receive an access denied error. This is because your account does not have a role assigned to it initially.
4. Once you have verified your email, please email smartin@wyoming211.org or specialist3@wyoming211.org to assign you your role to avoid access issues.

Important Training Site Factors

- All the information from the live site will transfer over to the training site when the training site is updated. This means if an account was created in the live site, during a training site update, that account will transfer over.
    - **HOWEVER** it is important to note that anytime the training site is **UPDATED** the user will still have their account but will need to request a new password. To request a new password on the training site, visit **https://wy211-training.communityos.org/forgot-password**
    - An email will be sent to the users registered email with the instructions on how to reset their password. Once the password is reset, the user will be able to log into the recently updated training site.
- Any information on the training site that is created including but not limited to accounts, intake records, resources, etc. **will not transfer** over when the training site is updated.

Logging In

PLEASE NOTE -
To gain access to the CIE, users must:

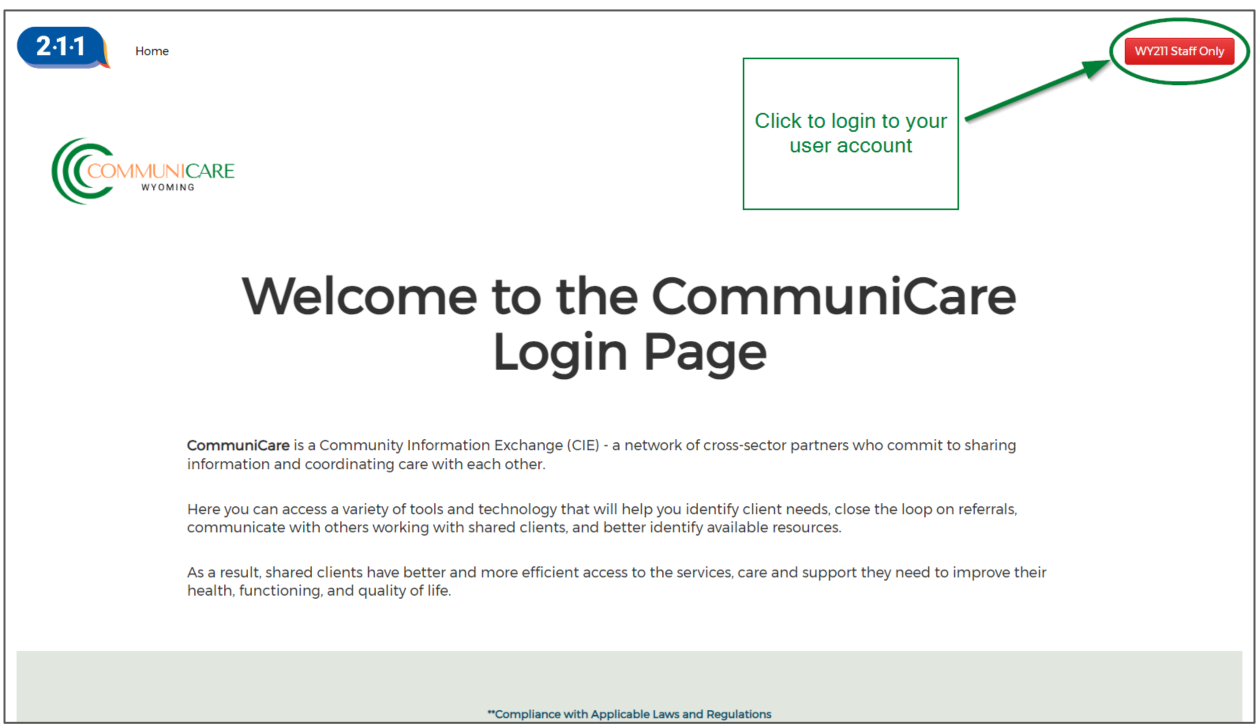
- Be an employee or contracted by a CIE Partner.
- Be assigned a role within the CIE, as decided upon by your agency and approved by CommuniCare staff.
- Complete all required CIE and HIPAA Trainings, as will be provided by CommuniCare staff.

To log into the CommuniCare system, visit:
https://wy211.communityos.org/communicare-login
Be aware: this is a live site containing sensitive personal information. Accessing this site without prior authorization is prohibited.

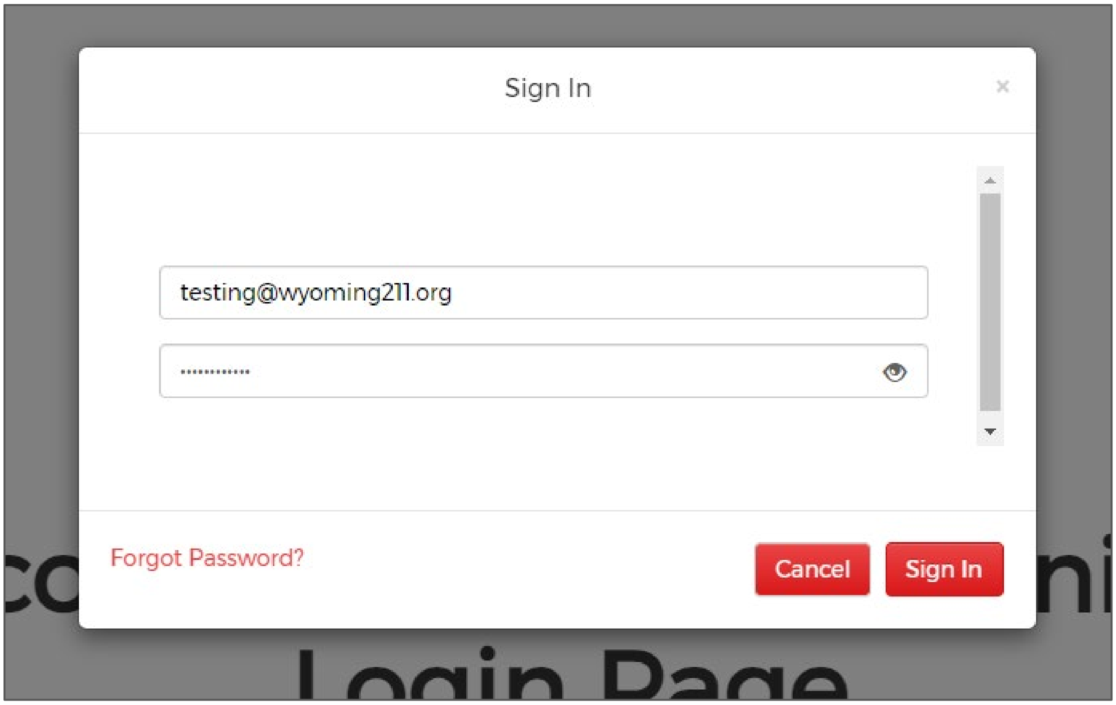
Or

To log into the Training Site, visit:
https://wy211-training.communityos.org/

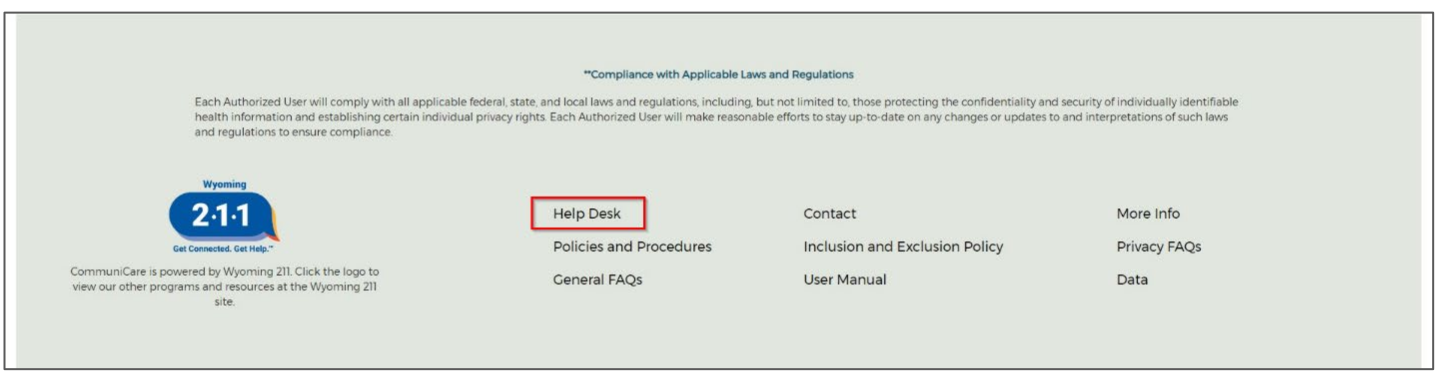
After visiting the links provided above, you will be taken to the CommuniCare Login Page. Click on the red button labeled “WY211 Staff Only” in the upper right-hand corner of the page to access the Sign In form.



Once at the Sign In form, enter the credentials you provided during registration to access to site.



If you are having difficulty logging into the site or have other questions regarding the system, please view the available resources found at the bottom of the CommuniCare login page or contact the CommuniCare Help Desk also found at the bottom of the page. You can also receive help by contacting the emails provided in the Register Your Account Section of this document. More information on the Help Desk can be found in the Help Desk section of this document.



CommuniCare User Home Page

Note: The User Home Page is still in development

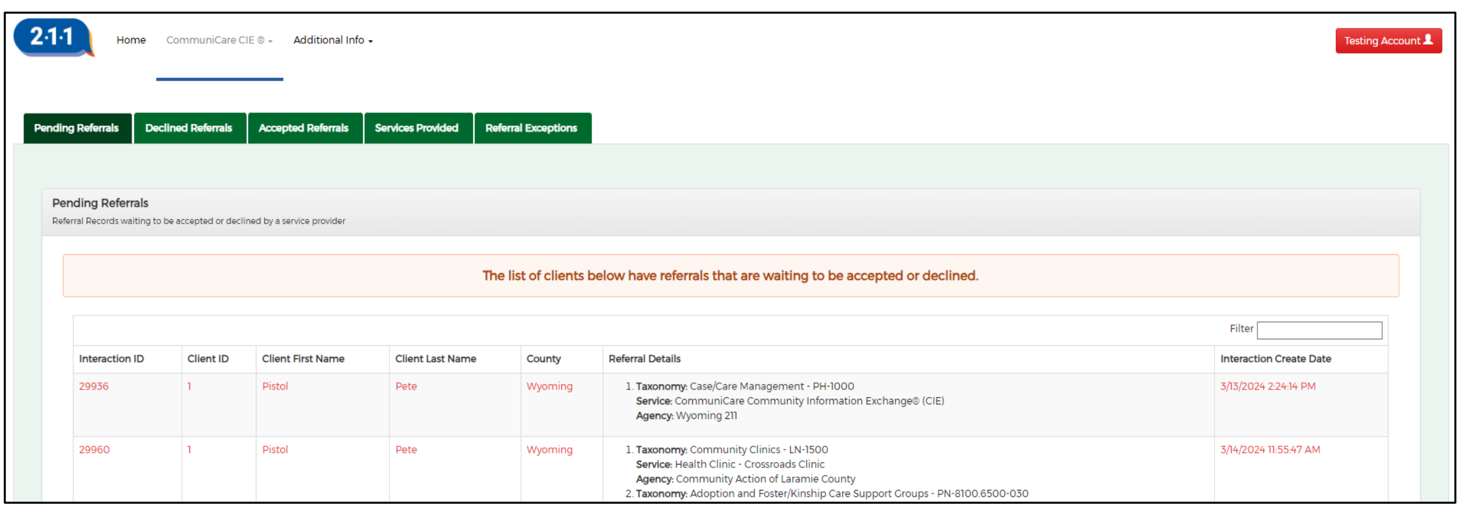
Once logged into the system, you will be directed to your CommuniCare User Home Page. This page is meant to act as a centerpiece, or hub, for accessing all of the tools you will need to conduct efficient care-coordination for your clients.

The Dashboard

Upon accessing the User Home Page, you will be given full view to your Referral Status Dashboard. The Dashboard consists of:

- Incoming and outgoing referrals.
- The status of those referrals:
  - Pending – Referrals awaiting response from your organization or a referred to partner.
  - Declined – Referrals that have been rejected by the referred to partner.
  - Accepted - Referrals that have been Accepted by the referred to partner.
  - Services Provided – Referrals that have been accepted and acted on through service delivery by referred to partners.
  - Referral Exceptions – Contradictory responses are given to a referral; you sent or received a referral and it was “Accepted” and “Declined,” or “Service Provided” and “Declined.”

Although you will be receiving tokenized emails for every referral made to your agency, it is suggested that users logon at the start of each day to view the status of their referrals. The dashboard will allow users to see all new referrals made to their agency in real time, as well as the status of outgoing referrals, which is not indicated in email.



User Menu

Located at the top of the User Home Page you will see multiple links and tabs directing you to resources and tools within the CIE, which are further detailed throughout this document with relevant links attached below:

Home
Directs users to the CommuniCare User Home Page

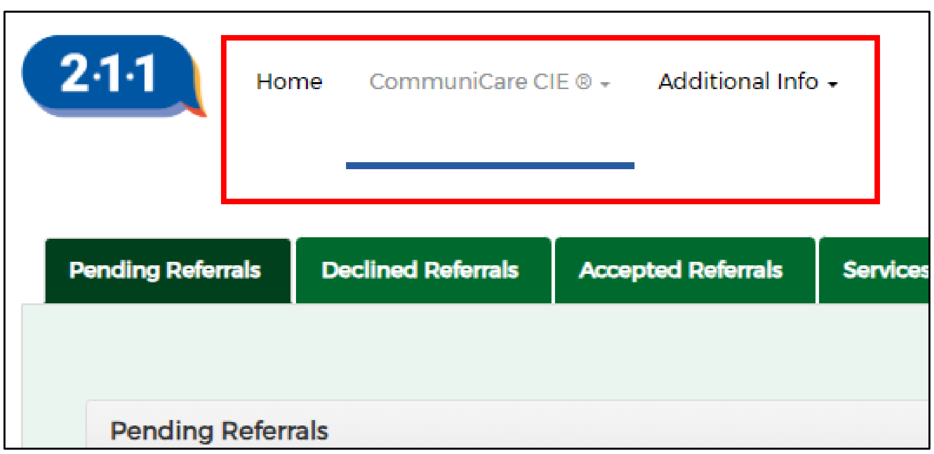
CommuniCare CIE
Tools required for Referrals and care-coordination:

- CIE Client Search
- CIE Intake
- Referral Status Dashboard

Additional Info

- Help Desk
- Policies & Procedures
- More Info
- FAQs
- Inclusion & Exclusion Policy
- User Manual
- Data

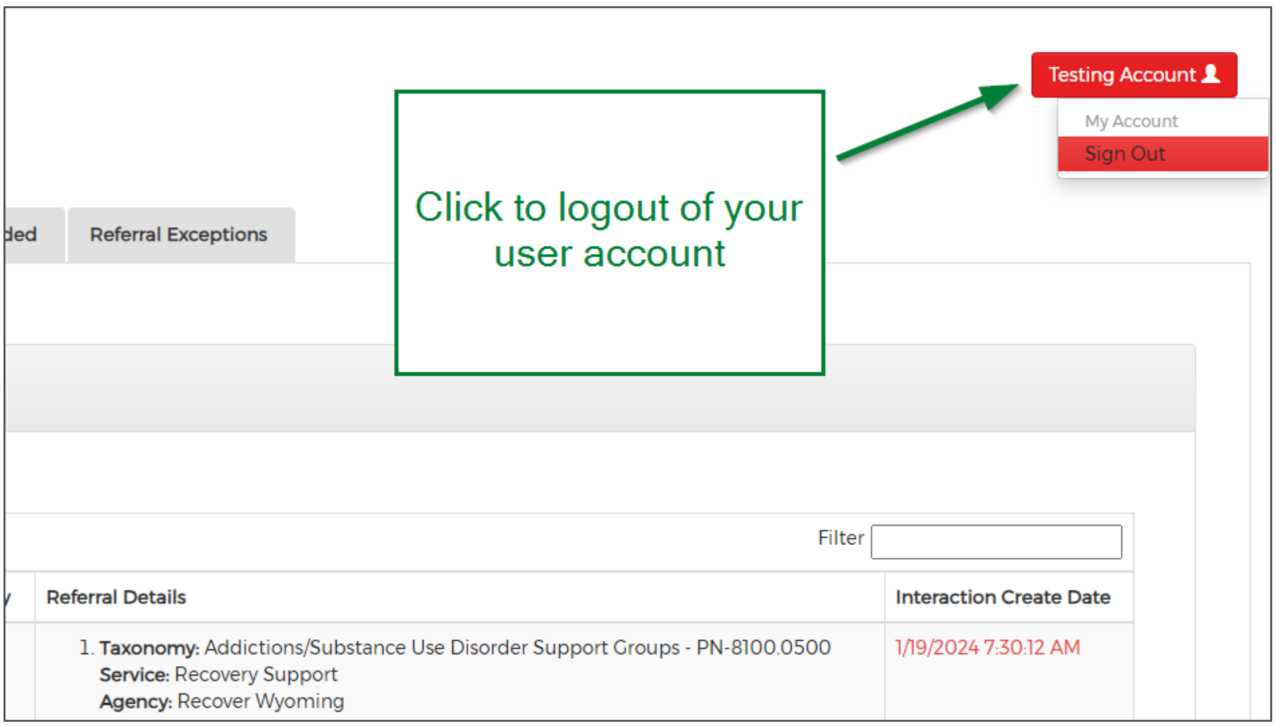
Wyoming 211 Logo
Functions the same as the "Home" User Menu item; directs users to the CommuniCare User Home Page



Logging Out

Per HIPAA guidelines, when leaving your computer, you must end your CommuniCare session to avoid prohibited individuals from potentially seeing client information. To logout, simply press the red User Account icon located at the upper right-hand corner of the page and select “Sign Out.”

The User Account icon always remains at the upper-right hand corner of the page, regardless of which tab or menu item you have opened.



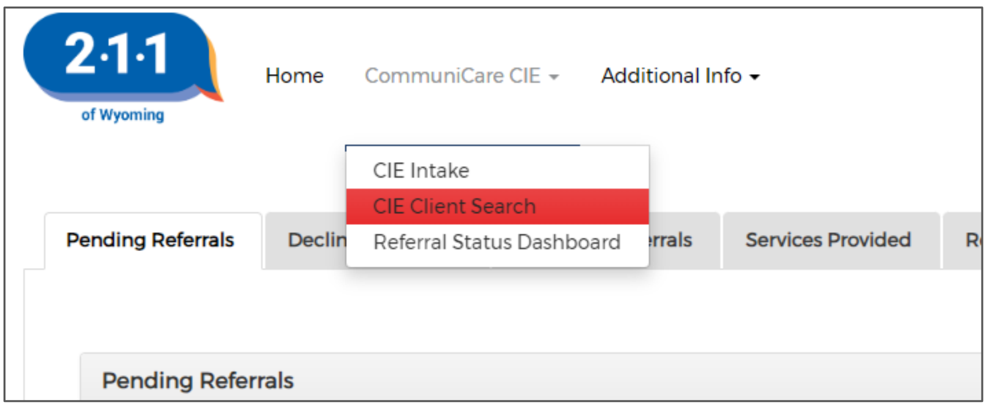
Searching for Clients

The CIE Client Search function can be used to search for individuals' that are already within the CIE system and view their Client Records. This can be a useful tool when seeing re-occurring clients or when checking in on the status of a client's care.

Prior to conducting a new client intake, users must first search through the CIE Client Search function to avoid potentially duplicating client records.

In the event you discover that a duplicate entry has occurred, you must contact CommuniCare support through the Help Desk.

The CIE Client Search can be found in the Menu at the top of the page under CommuniCare CIE.



After pressing the CIE Client Search button, you will be taken to the Client Search Form.

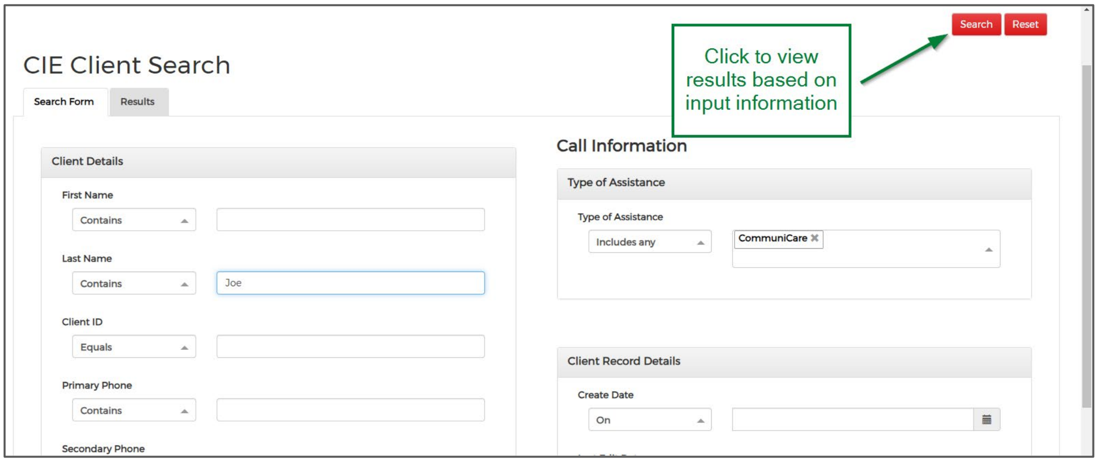
At the Search Form are multiple distinguishers of personal information you can utilize to find a potential client in the CIE.

In most cases, you will be able to easily find/not find clients based on their First and Last name.

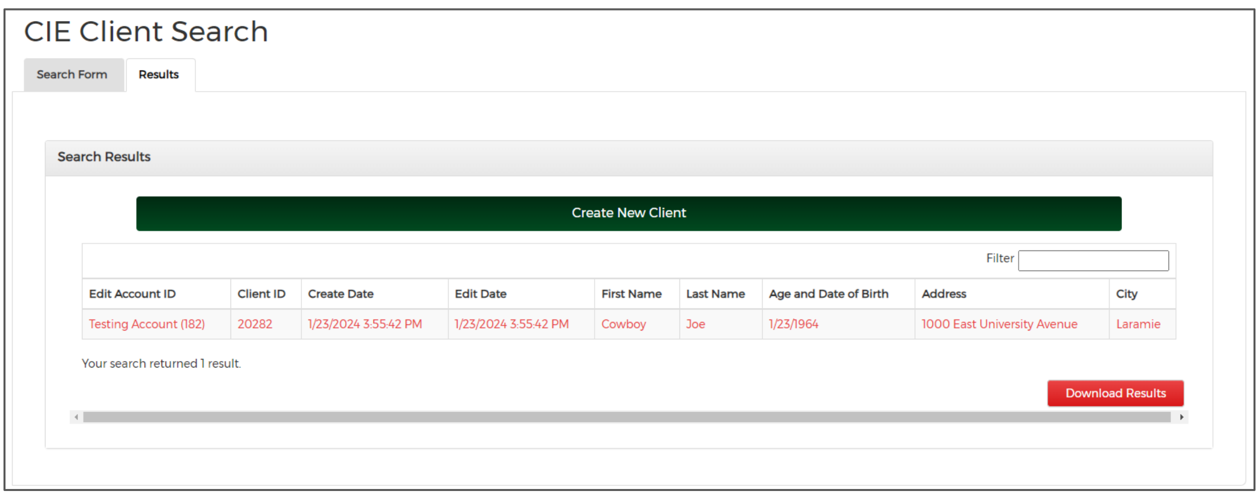
However, in certain circumstances, you might find two separate records sharing the same name. If there are multiple clients with the same name, you can differentiate in the search form based on the client's:

- Name
- Client ID
- Phone Number
- Address
- Type of Assistance (previously offered)
- The details of the client record, such as the date the record was created and by whom.

After inputting the client's information into the search form, press the red "Search" button located in the upper right corner above the Search Form.



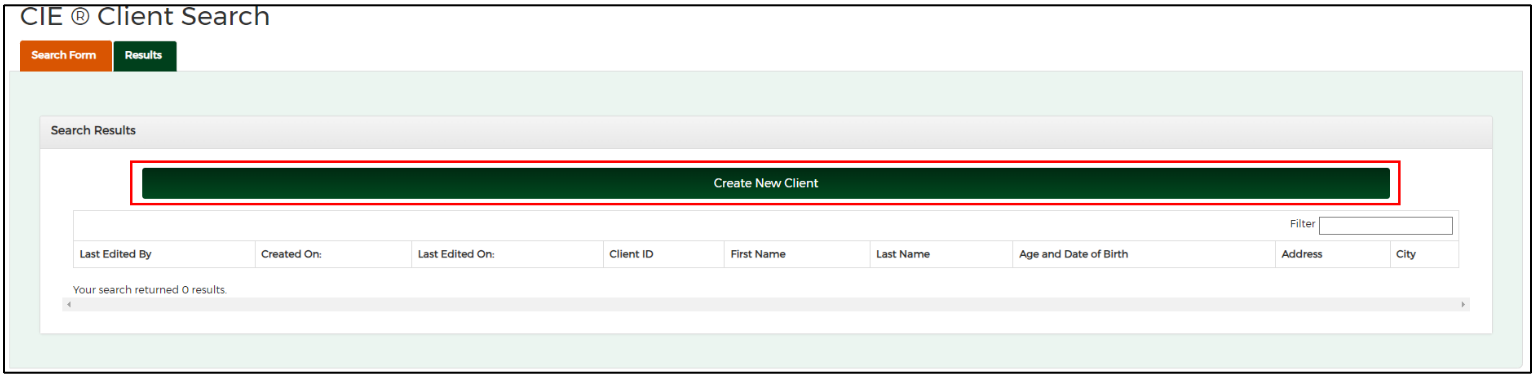
You will then be directed to the CIE Client Search Results. Here you can see any results and information associated to that client based on the information you input into the Search Form.



By pressing any red text within a resulting record under Search Results, you will be taken to the Client Record to view their information, referrals, and prior care.

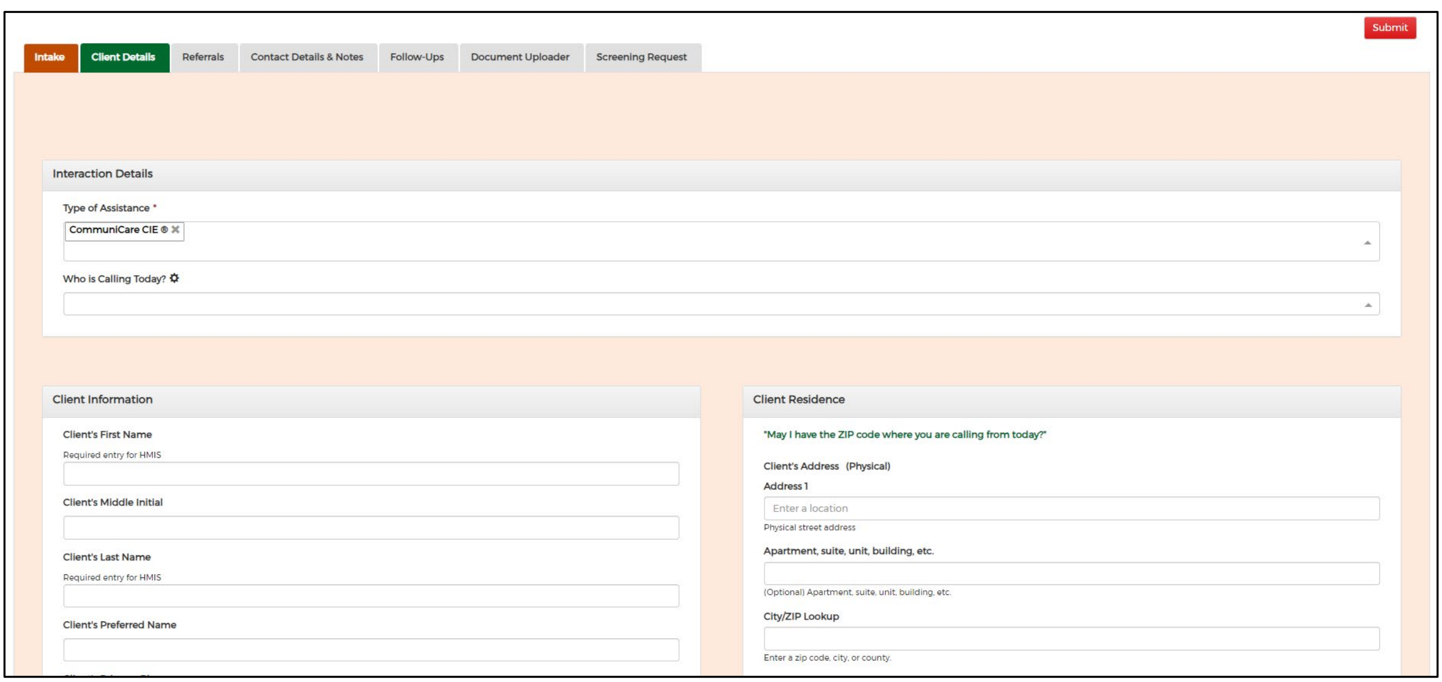
Client Intake

If a client is not found in the CIE Client Search, you can proceed to conduct a new client intake by pressing the green “Create New Client” button under Search Results or by navigating to the CommuniCare User Menu and selecting the “CIE Intake” option.



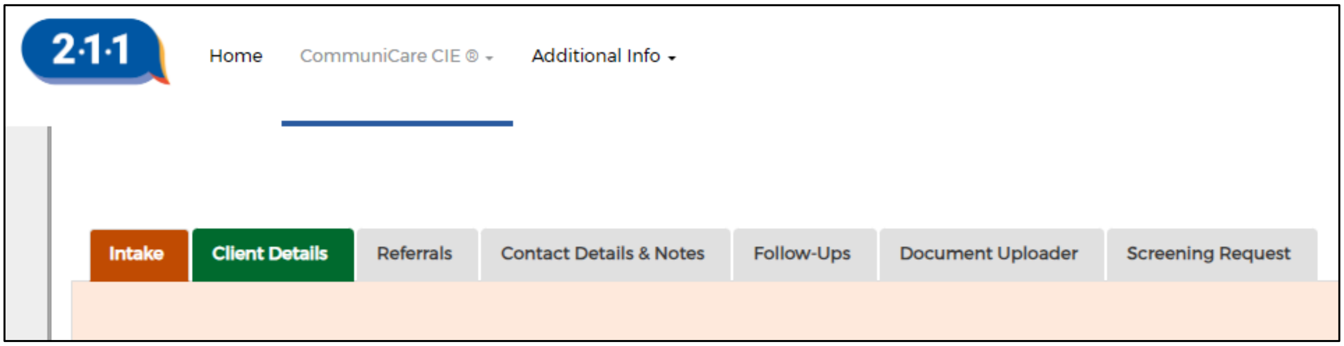
The CIE Intake not only allows for the collection of client information, but also gives access to the Referral Module that will allow users to find resources for client needs and to make the appropriate referrals.

Once an intake is completed and submitted, the CIE Intake also acts as the Client Record, showing personal information, interactions, and referrals made prior on the CIE.



CIE Intake Tools

When on the CIE Intake, you can navigate the entirety of the intake through tabs, or CIE Intake Tools, located near the top of the page.



The CIE Intake and Client Detail sections were designed to gather the minimum necessary information to make an educated decision on both the client's needs and the resources necessary to meet those needs.

CIE Intake

- Interaction Details
- Client Information
- Client Residence

Client Details

- Client Demographics
- Veteran Status
- Language/Race/Ethnicity
- Employment/Income
- Household Information
- Insurance Screening
- General Screening Questions

*** IT IS IMPERATIVE THAT ALL REQUESTED CLIENT INFORMATION WITHIN THE CIE INTAKE AND CLIENT DETAILS SECTIONS ARE TAKEN AND RECORDED.** These two sections contain the necessary information to make an informed referral, and by not collecting this information, you risk making a referral in which a client might not be eligible or further prolongs the intake process of the referred to Agency.

Referrals

The Referrals tab serves as the main functionality of the CIE, allowing partners of CommuniCare to make referrals to one another, ensuring clients receive the services that they need. More information on making and receiving referrals can be found in the Referrals section of this document.

Contact Details & Notes (Available to Care Team Members)
Additional information regarding the interaction with the client to better inform care. This tab also offers case management tools and more in-depth note taking capabilities.

- Contact Person & Date
- Method & Reason for Contact
- Assigned Case Manager
- Case Management Notes
- Case Management Log History

Follow-Ups (Available to Care Team Members)

- Follow-Up Request
- Follow-Up Attempt

Document Uploader
Allows users to upload documents that can pertain to the individuals current situation to better inform referrals and care, including Financial documents, ID's, Medical, Mental Health, SUD, Other, and notes associated to the uploads.

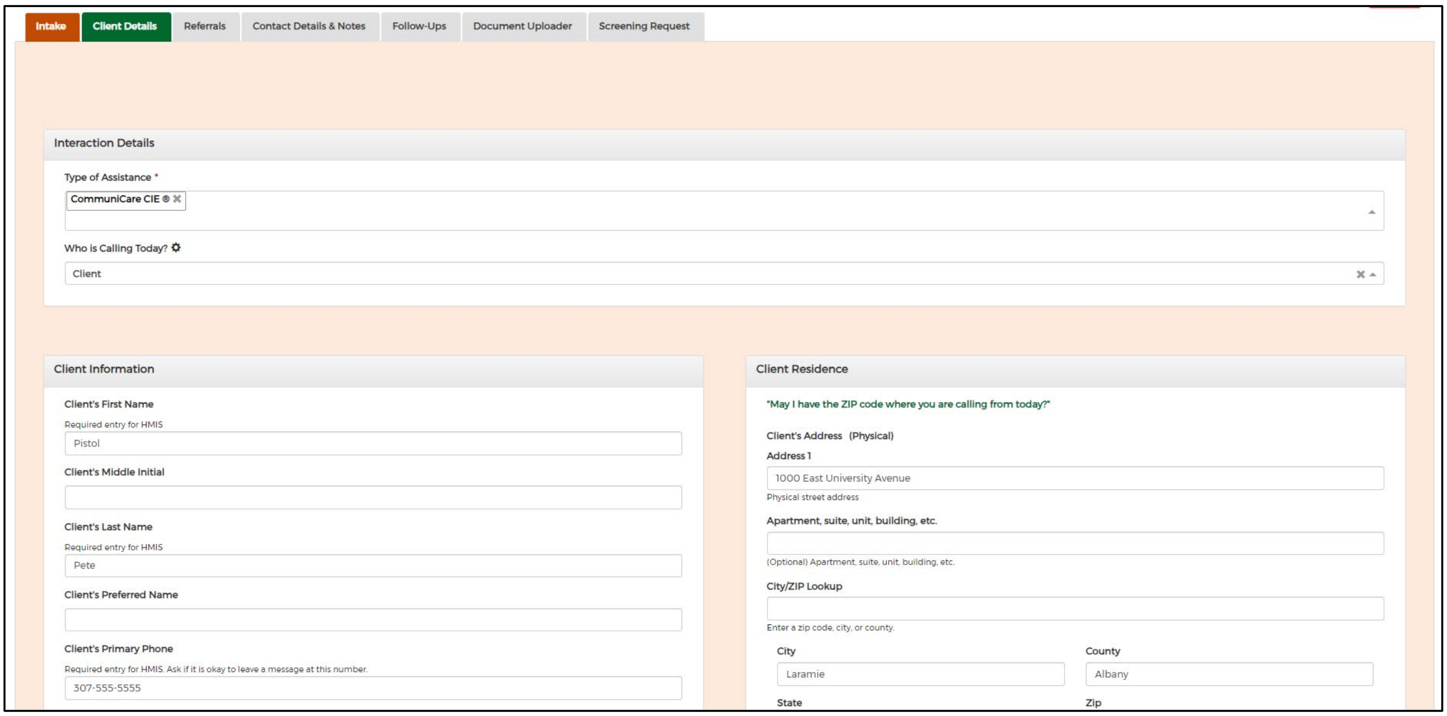
Screening Request (Available to Care Team Members)
CommuniCare offers the utilization of screening tools for Case Management services. Currently, the Accountable Health Communities (AHCM) Screening Tool is utilized by CommuniCare Case Managers and is available to all Care Team Members. However, we may be able to incorporate whatever Screening Tool your organization utilizes.

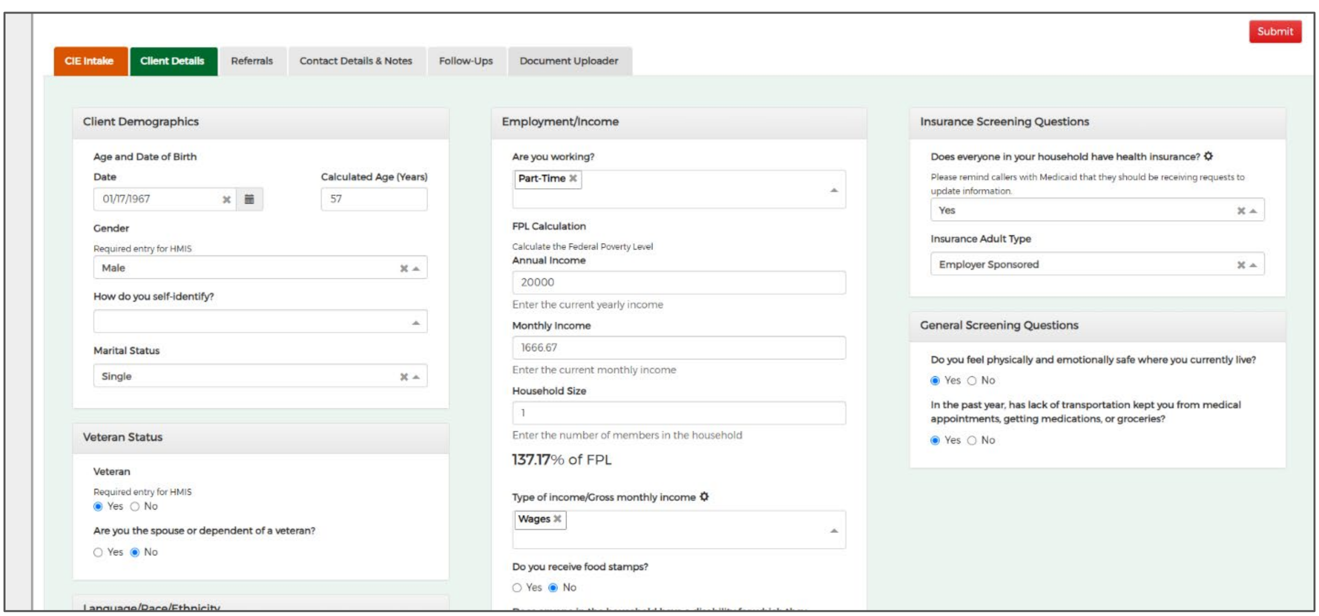
Conducting a New Client Intake

A new client comes to your agency seeking services. After you discover the individual has multiple needs that your agency does not offer services for, you ask if the client would be interested in participating in the CIE.

For clients new to the system, we encourage you formerly gather consent on the CIE Consent form under the Referrals tab prior to inputting their information in the CIE.

After agreeing to participate, you search for the client in the CIE Client Search but are unable to find him. You decide to complete a new CIE intake.





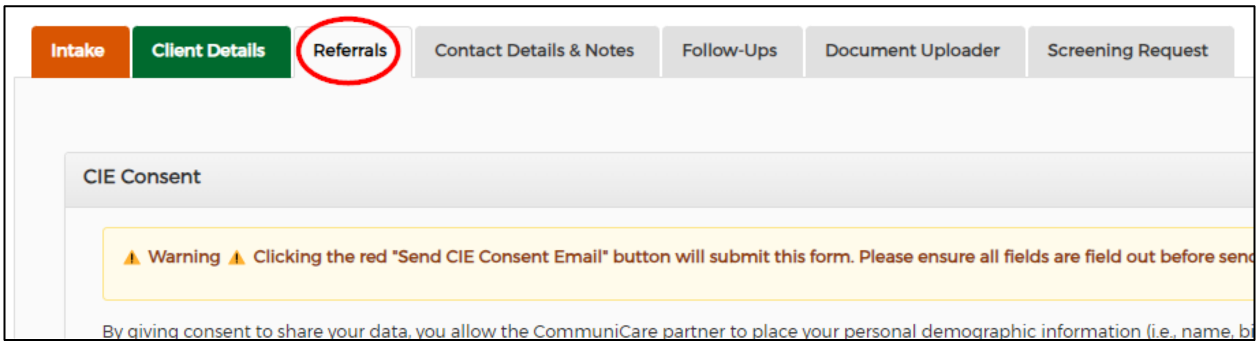
After gathering all the necessary information to complete the CIE Intake, which includes the Client Details section, you proceed with finding appropriate resources and sending a referral.

Referrals

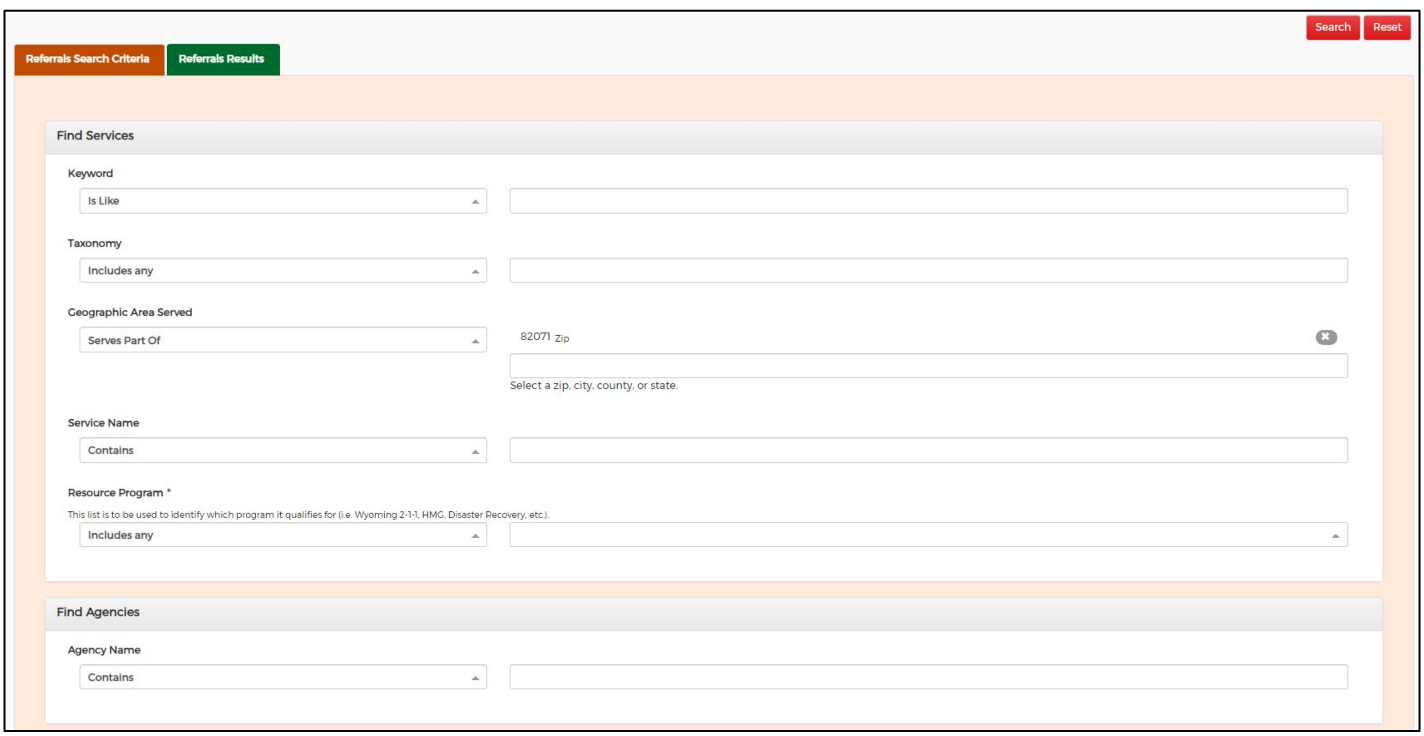
Finding Services for Referrals

After completing the intake and receiving whatever other supplementary information the client is willing to provide, you are now able to search for services to make referrals.

You can search for services by selecting the “Referrals” tab.



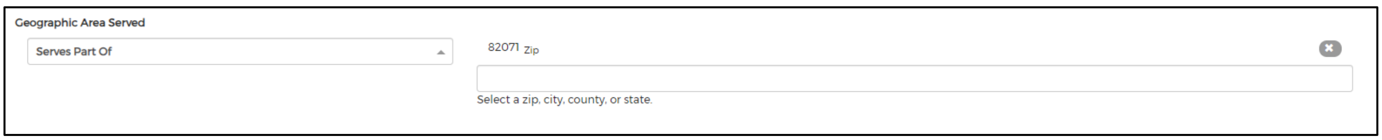
After selecting the Referrals tab, navigate down to the “Referrals Search Criteria” section to begin searching for services.



There are many ways to search for services with the Referrals Search Criteria tool. You can do so by:

- Keyword
- Taxonomy
- Geographic Area Served
- Service Name
- Resource Program
- Agency Name
- Location Relevant to Caller

If you have correctly filled out the Client Residence section of the CIE Intake, the “Geographic Area” section of Referrals Search Criteria will auto-fill with the client’s zip code. Searched for resources will be provided based on the location relative to the client.

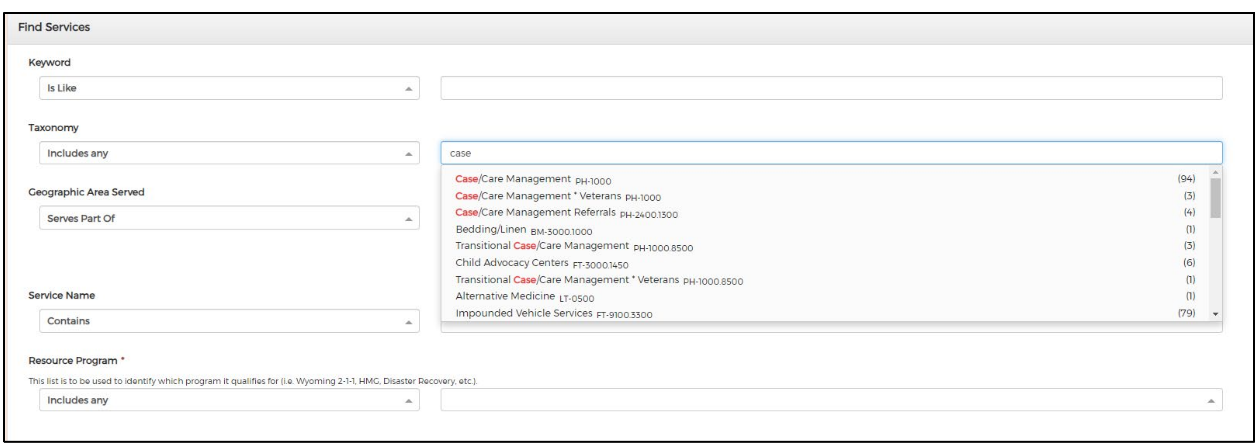


Continuing with the prior intake example, you find the client has unique needs and decide that the client would make a good candidate for CommuniCare Case Management Services.

CommuniCare, CIE is listed under “Care/Case Management” in the CIE’s Taxonomy. However, it can also be easily searched under Keyword and Service Name as “CommuniCare.” As a service provided by Wyoming 211, you can also find the service by searching for Wyoming 211 under “Find Agencies.”

In many cases, you will know what agency you plan to refer to. However, you limit relevant services by searching for a specific organization. There will also be times that you are unsure of what relevant agencies are available for you client. This is why we encourage understanding the taxonomy and its search function.

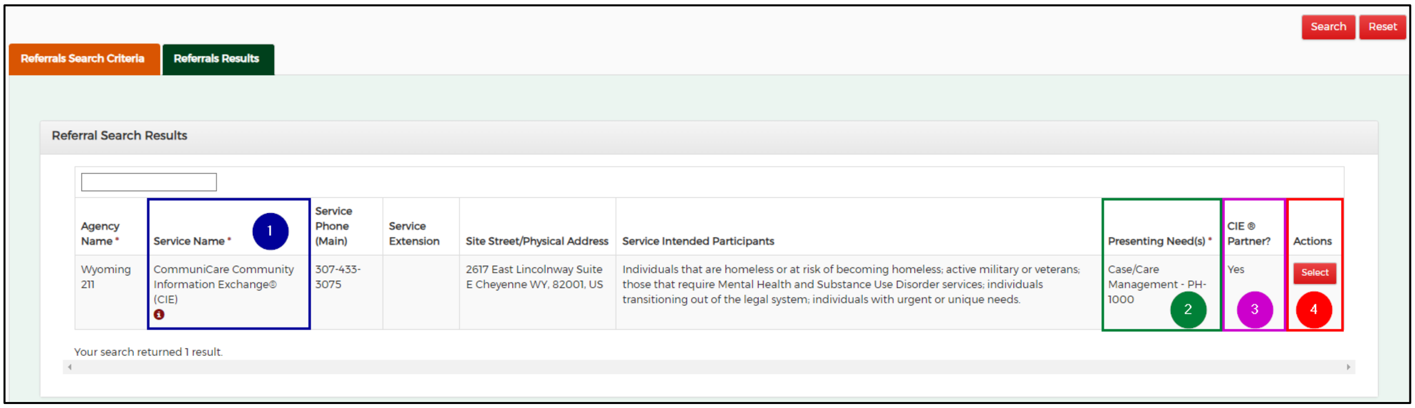
For this situation, we will be using Taxonomy to search for resources.



After selecting a suggested service, in this case "Navigator Programs," the selection will save and be placed above the Taxonomy text box.

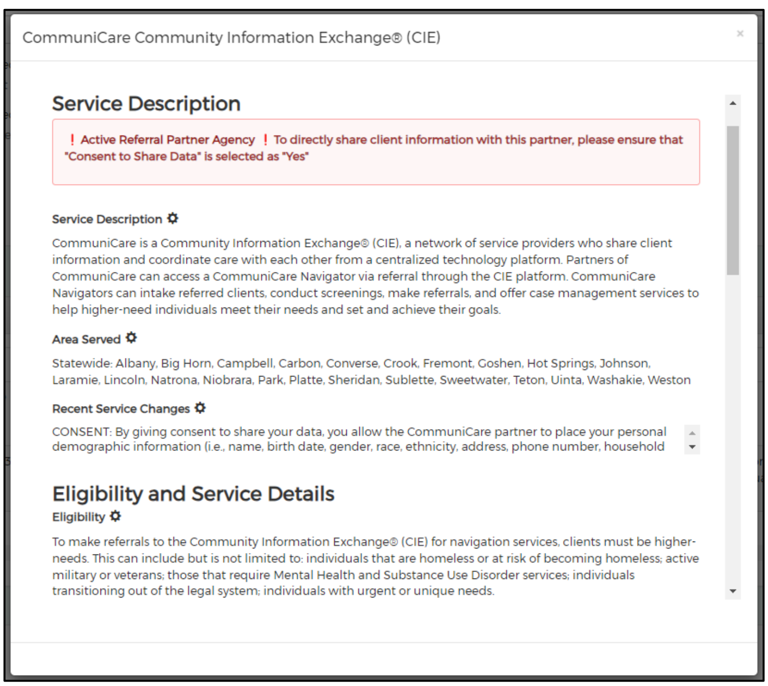
Selecting Services for Referrals

After pressing Search in the upper right-hand corner, it will take you to the adjacent tab "Referrals Results," offering results based on your search criteria and provided location of the client.



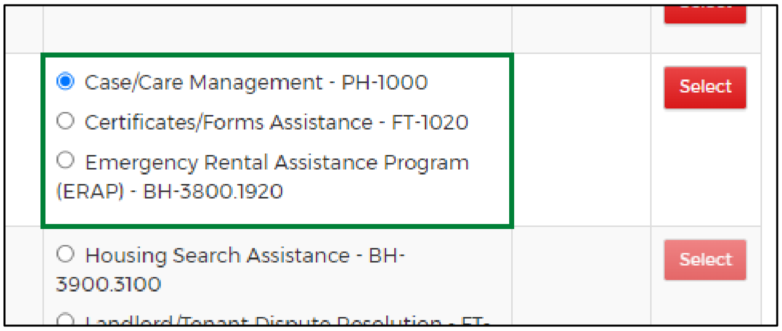
You will often receive multiple results when conducting searches via Referral Search Criteria.

1. By selecting the red icon under "Service Name," you can view information on the service and the resources they provide to make the most appropriate referral. This includes eligibility, hours of operation, fee structure, location, contact information, etc.



This can be useful when making out-of-network referrals and supplying the client with the appropriate information to access those services.

2. A single service provider can provide multiple services that may or may not pertain to the presenting needs of the client. When selecting a service to make a referral, ensure that you are selecting the correct Presenting Need so the referred to agency has accurate information regarding the client's needs. In the example below, you can see this agency offers multiple services.



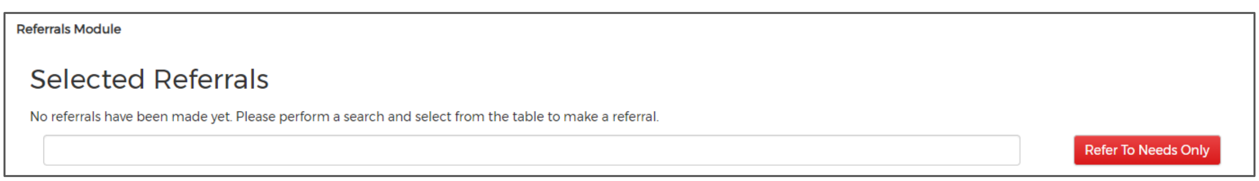
   CommuniCare Case Management services only offer one service so need to select a specific presenting need.

3. This section indicates whether or not an agency is a CIE partner and can receive direct referrals.

4. Once you have verified that the services provided will meet the client's needs and you have shared all relevant information regarding the service and agency to the client, you can press select to save the referral. The selection will then be moved to the Selected Referrals section at the top of the page to await finalization and submittal.

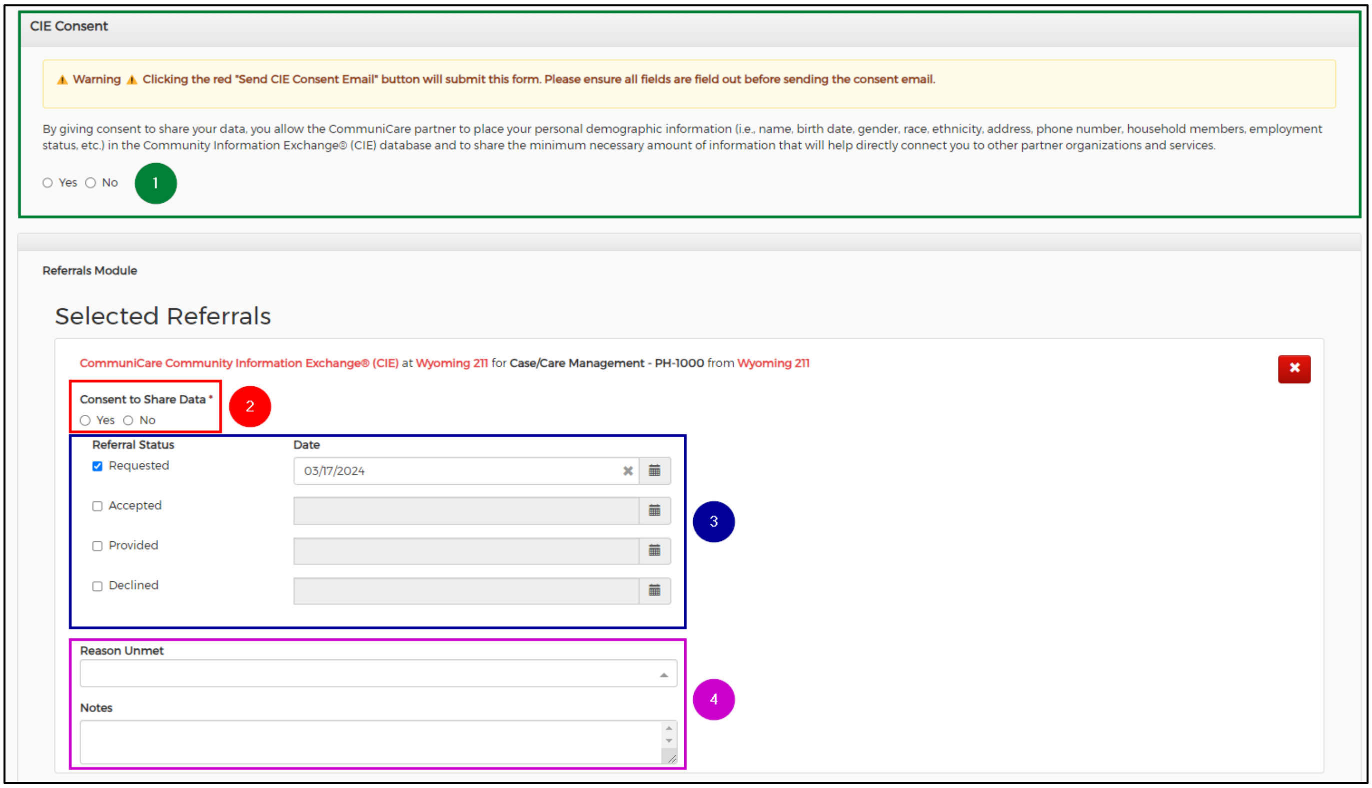
Refer to Needs Only

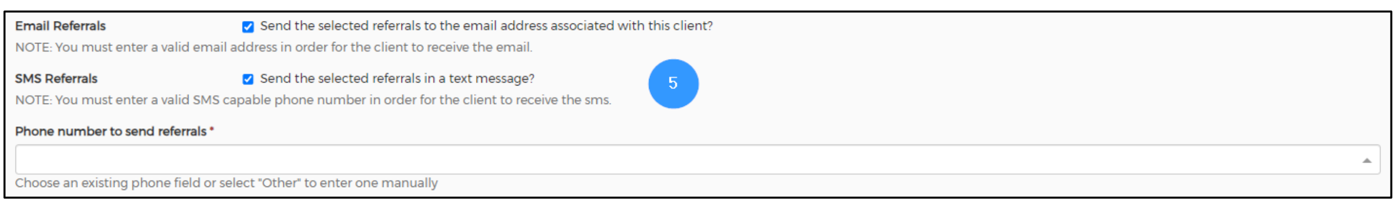
In the event you are unable to find relevant service providers to meet the needs of your client, you will "Refer to Needs Only." This indicates that a particular need has been identified but no service is available. By including this information, we can monitor this individuals unmet needs and track them as datapoints to indicate gaps in service across Wyoming.



Submitting a Referral

Now that a service has been selected and saved for referral, you can proceed with submitting the referral.





1. **CIE Referral Consent:**
   Prior to submitting a referral, it is imperative that consent has been given by the client to share their personal information to the CIE. Within this section is the language that must be recited back to the client verbatim and the option to email them the CIE consent form containing a list of agencies that can access their information.

   ***Important:** If the Client is new to the CIE, please visit the Client Opt-Out Consent section of the document. If this is a recurring client, this section will already be marked as "Yes" and you will not need to interact with this section.

2. **Consent to Share Data:**
   After verifying with the client that the organizations to receive the referrals are correct, you can select "Yes" on "Consent to Share Data."
   - If "No" is selected, a direct referral and the client's information will not be sent to the referred to agency. This is useful if the client would rather pursue the referral on their own and you can still submit a traditional, non-electronic referral for documentation, providing the client with the appropriate information to follow-up on their own.
   - If neither "Yes" or "No" are selected, you will receive a validation error and the referral will not be submitted/documented.
   - "Consent to Share Data" is not available on referrals made to organizations that are not CIE partners.

3. **Referral Status**
   Upon selecting and saving the service for referral, the Referral Status section will automatically set the status as "Requested" and autofill the date the referral was selected.
   - If the Requested status or the date of the requested referral is not selected, you will receive a validation error and the referral will not be submitted/documented.
   - The Referral Status section also plays a role in the receiving of referrals and documenting responses.

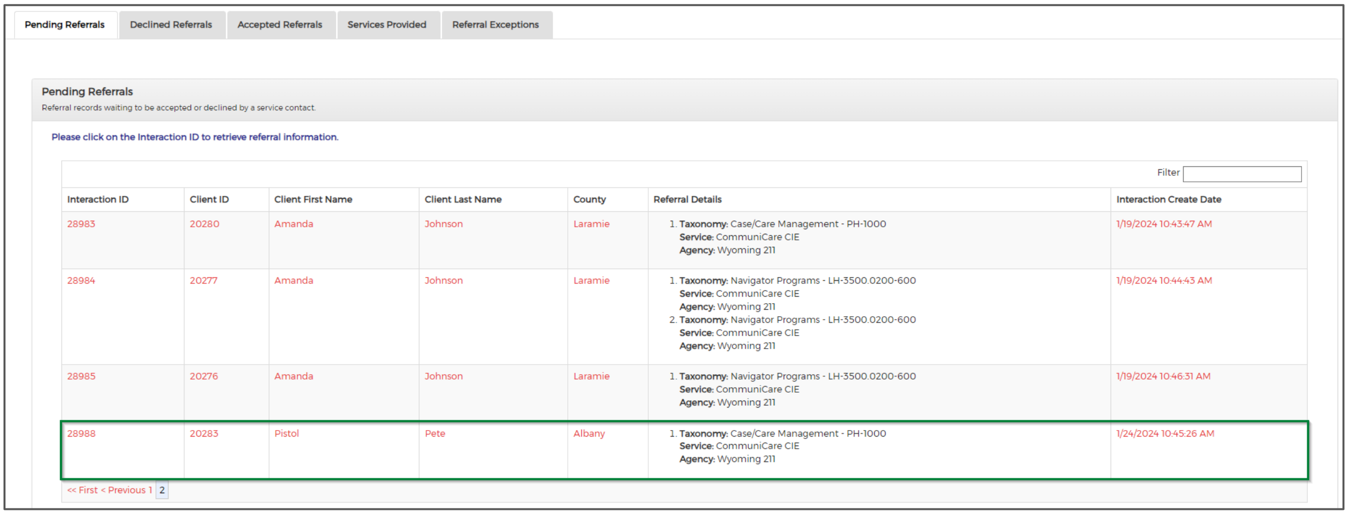
4. **Reason Unmet and Notes**
   This section of the referrals is generally for those agencies responding to a requested referral, and the reasons surrounding a Declined response. However, Additional notes can be made in this section regarding the nature of the referral by the referring agency. More on this in Declining a Referral.

5. **Send Referral Information to the Client**
   If the client has access to email or texting capabilities, you can select either "Email Referrals," "SMS Referrals," or both, and the client will receive a list of their referrals.

6. **Submit the Referral**
   After carefully reviewing and verifying all information within the Selected Referrals is complete and accurate, you can now submit the referral by clicking the red "Submit" button located in the upper right-hand corner of the page.

   - Once submitted, the referred to agency will receive notification of the referral via email and their dashboard.
   - After submitting the referral, you will be directed to the client's record.

If you visit the Dashboard, you will also see that the referral has been placed in Pending Referrals, where it will remain until Accepted or Declined by the referred to agency.


Pending Referrals | Declined Referrals | Accepted Referrals | Services Provided | Referral Exceptions

Pending Referrals

Referral records waiting to be accepted or declined by a service contact.

Please click on the Interaction ID to retrieve referral information.

Filter

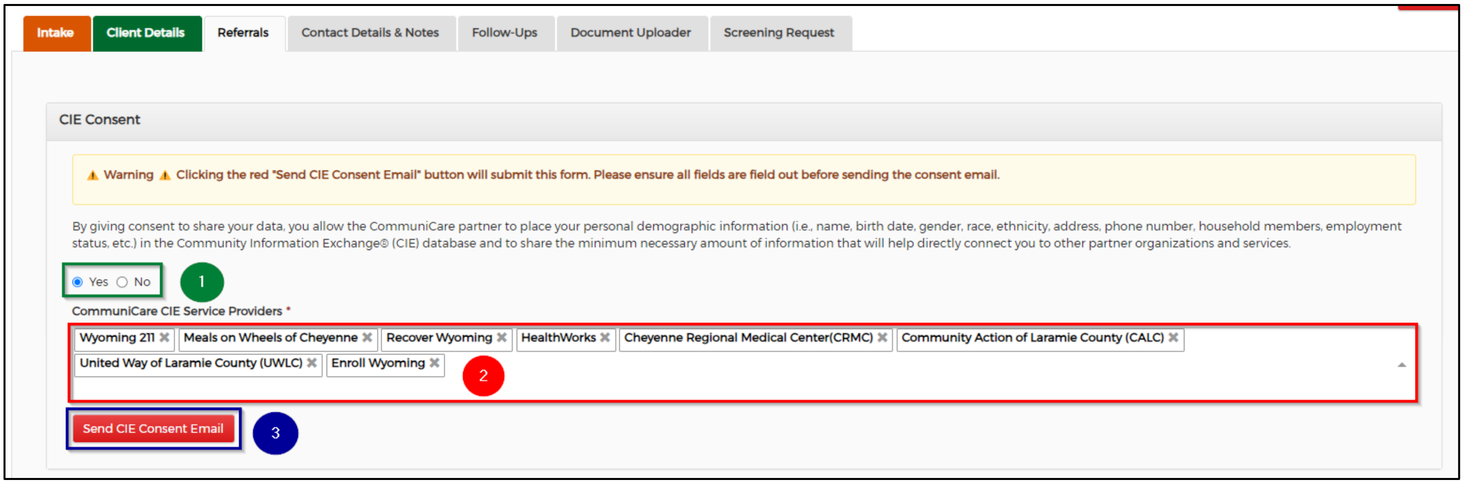
Interaction ID	Client ID	Client First Name	Client Last Name	County	Referral Details	Interaction Create Date
28983	20280	Amanda	Johnson	Laramie	1. **Taxonomy:** Case/Care Management - PH-1000 **Service:** CommuniCare CIE **Agency:** Wyoming 211	1/19/2024 10:43:47 AM
28984	20277	Amanda	Johnson	Laramie	1. **Taxonomy:** Navigator Programs - LH-3500.0200-600 **Service:** CommuniCare CIE **Agency:** Wyoming 211 2. **Taxonomy:** Navigator Programs - LH-3500.0200-600 **Service:** CommuniCare CIE **Agency:** Wyoming 211	1/19/2024 10:44:43 AM
28985	20276	Amanda	Johnson	Laramie	1. **Taxonomy:** Navigator Programs - LH-3500.0200-600 **Service:** CommuniCare CIE **Agency:** Wyoming 211	1/19/2024 10:46:31 AM
28988	20283	Pistol	Pete	Albany	1. **Taxonomy:** Case/Care Management - PH-1000 **Service:** CommuniCare CIE **Agency:** Wyoming 211	1/24/2024 10:45:26 AM

<< First < Previous 1 2

Client Opt-Out Consent

CommuniCare offers its clients the opportunity to opt-out from certain partners seeing their personal information and client profile.

When conducting a Client Intake for a new CIE client, first time consent must be given by the client to the user.



1. For a client new to the CIE, prior to submitting the clients information, you must ensure that you received consent to share their personal information to the CIE. If they consent, select “Yes” to proceed. If consent is not given, you must select “No” and cannot proceed to make direct referrals in the system.

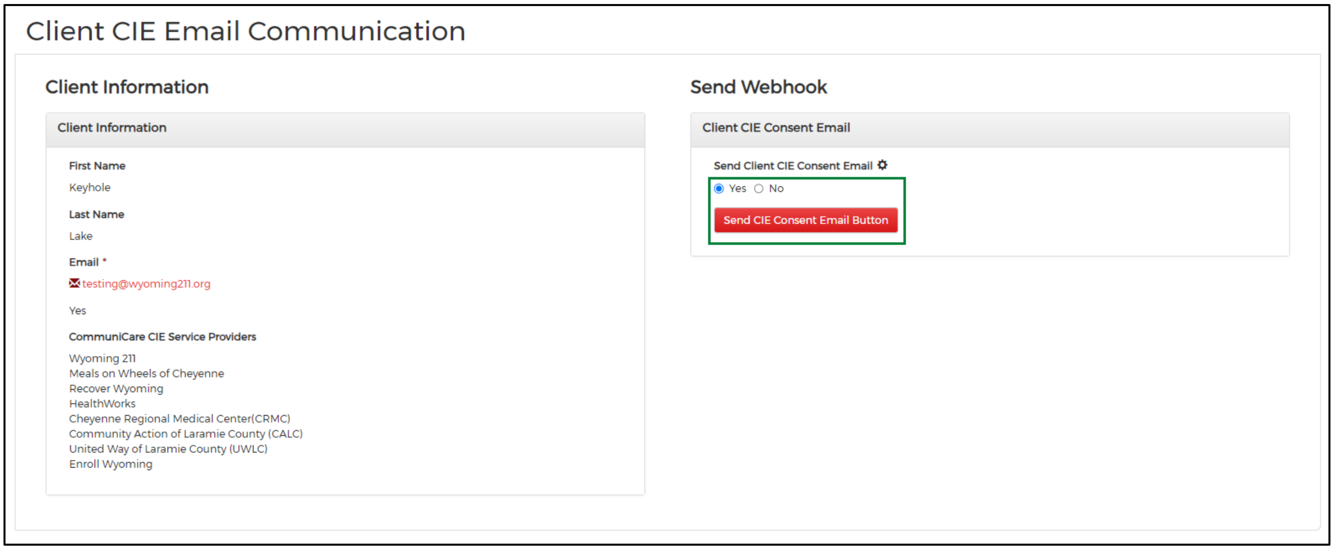
   Note: Remember to search for new clients in the Client Search function prior to beginning a new intake to prevent duplicate profiles in the system.

2. After selecting “Yes” a list of “CommuniCare Service Providers” will be revealed in a drop-down. Listed are the current organizations participating in the CIE that the client’s information will be shared. Users have the ability to remove certain organization’s from viewing a client’s information at their request. Client’s will also be able to remove organizations from viewing their organization after completing the next step.

3. Once the intake has been completed and all appropriate referrals have been selected, you can select “Send CIE Consent Email.” This function also operates similarly to the “Submit” function and will save and end the interaction. **Users must document the client’s email in the Client Intake in order to Send CIE Consent Email.**
   - If the client is already in the CIE, this process is not necessary for clients already in the CIE system. The CIE Consent will already be marked as “Yes” and you can simply “Submit” any future interaction.
   - If the client does not have an email, you must still receive consent but can

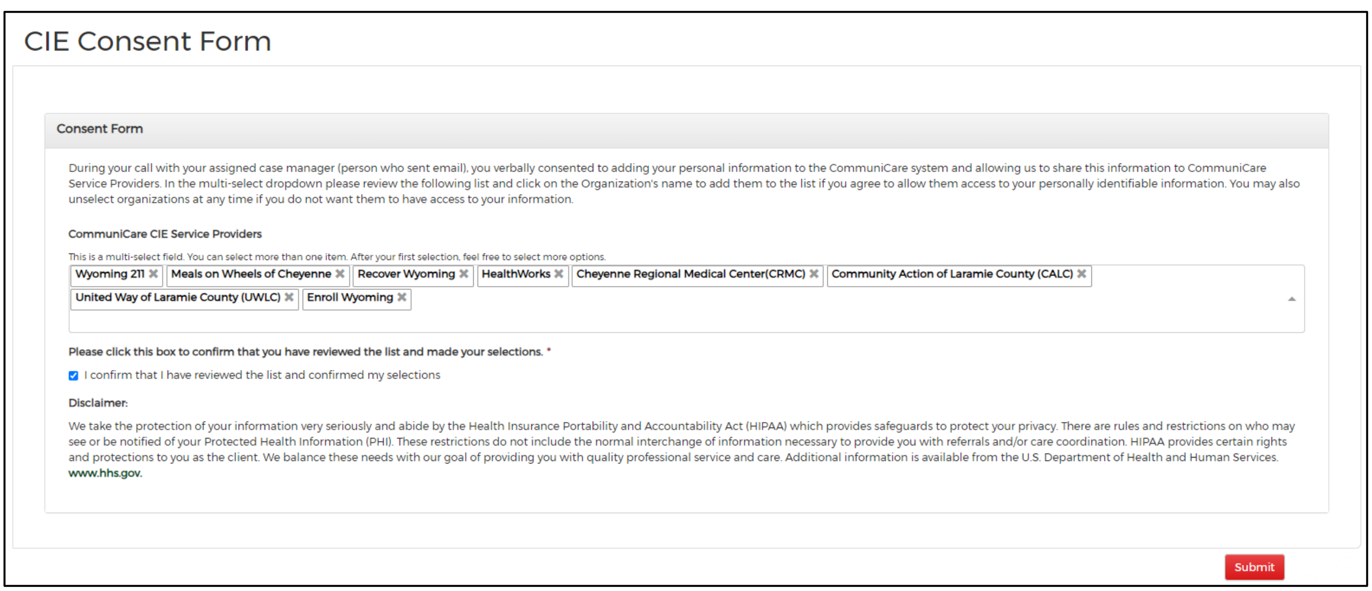
select “Submit” at the end of the interaction instead of “Send CIE Consent Email.”

After selecting “Send CIE Consent Email,” the interaction will be submitted and you will be taken to a separate page verifying that you wish to submit the Email to the client, along with the list of partnering organizations that will have access to the client’s profile.



To submit the email, select “Yes” and then “Send CIE Consent Email.” You will then be taken back to the interaction on the Client’s Profile.

Within several minutes, the client should receive an email with a link to the CIE Consent Form, viewable below. There they can review and edit what organizations are able to view their information on the CIE.



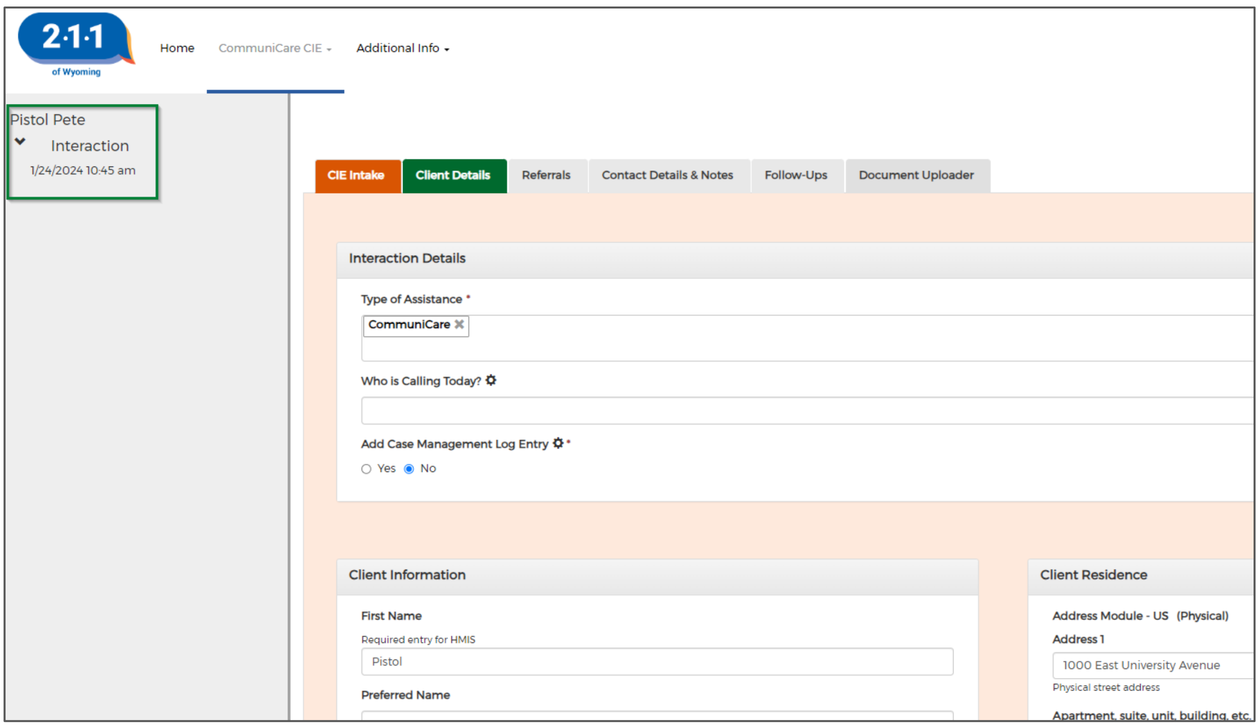
Viewing the Client Record

There are four different ways to access a client's record:

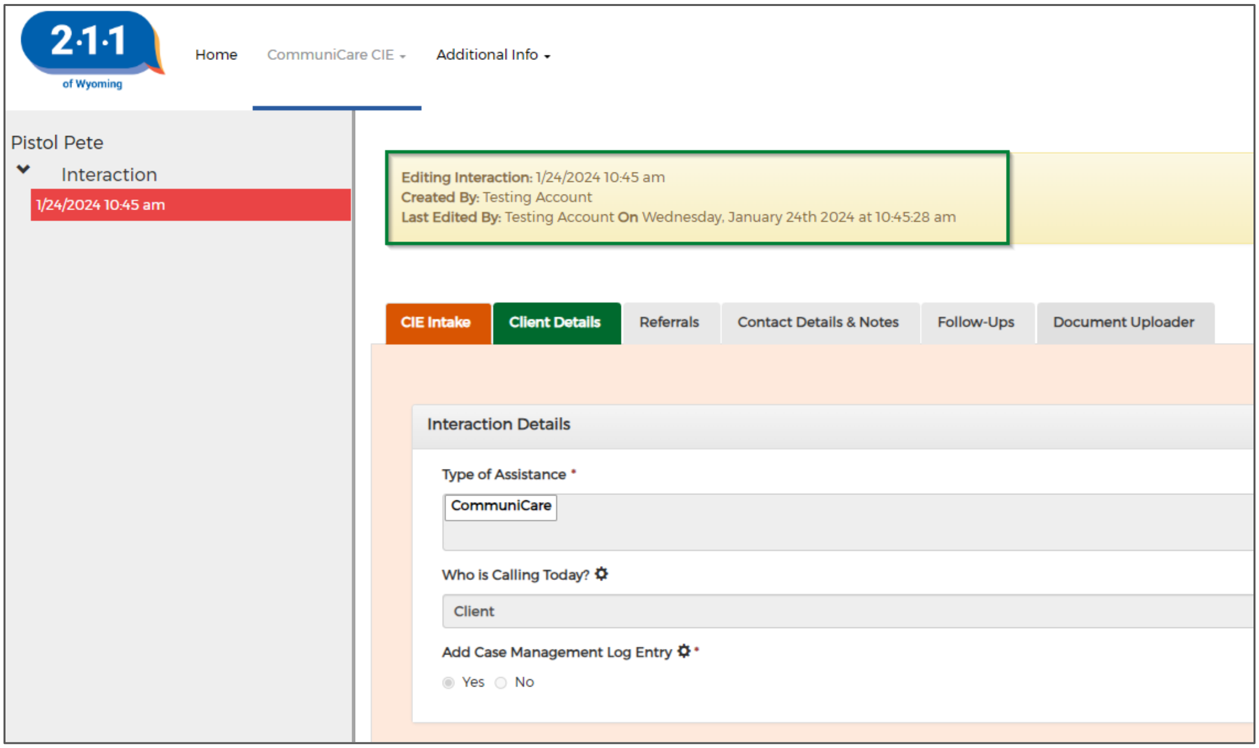
1. After the submittal of a referral, you will be taken to the client's record with the updated interaction indicated in the "Interaction" section of the page.
2. The dashboard, only after the referral has been submitted or received.
3. The link provided in the tokenized email upon receiving a referral.
4. The CIE Client Search.

Once you have accessed the Client Record, you will see tabs and fields mirror those on the CIE Intake, containing information on the client already within the fields.

On the left-hand side of the Client Record, you will see a grey "Interaction" section labeled with the client's name, indicating it as being their record.

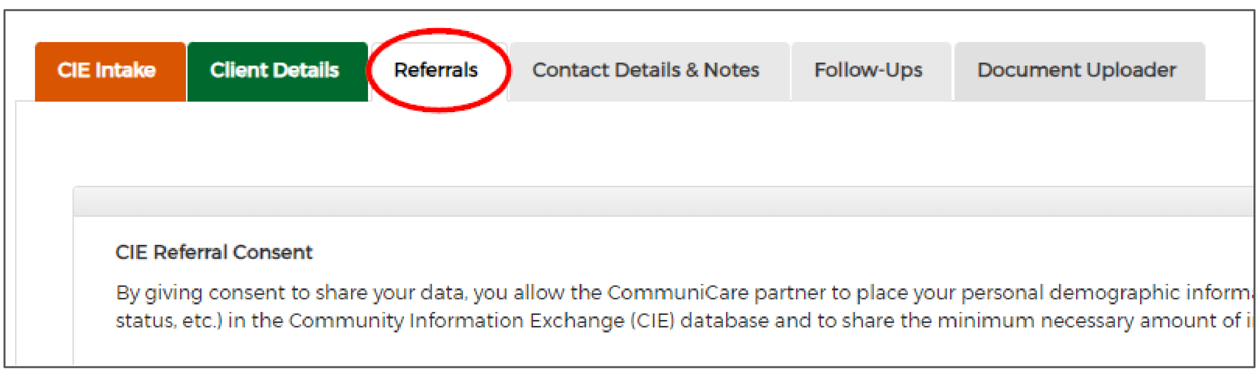


By clicking on an interaction date, you will be able to see an interaction that occurred between a client and an organization, when the interaction was edited/created, who edited the interaction, the referrals that were made during that interaction, and additions or changes to the Client Record such new client details, document uploads, follow-ups, and case management notes.



Viewing Client Referral History

The suggested way to review a client's Referral History is through the Referrals History Section at the bottom of the Referrals Tab.



The Referrals History section will show all referrals that have been made for a client and the associated:

- Client ID number
- Date of referral
- Taxonomy used
- Service provided
- Agency providing the service

You can also select “View Interaction” to be taken to the specific interaction the log was created.

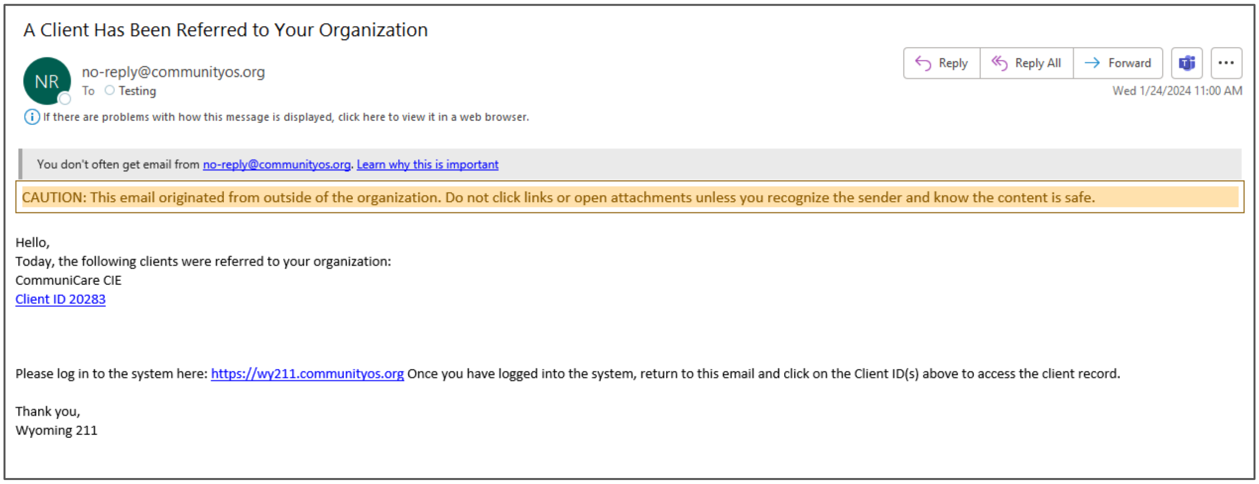
Managing Incoming Referrals

There are two ways to be notified of a received referral:

- Tokenized email
- Dashboard

Tokenized Emails

An email will be sent to the referred organization at the time the referral is submitted.


A Client Has Been Referred to Your Organization

NR no-reply@communityos.org

To Testing

Reply | Reply All | Forward

Wed 1/24/2024 11:00 AM

If there are problems with how this message is displayed, click here to view it in a web browser.

You don't often get email from no-reply@communityos.org. Learn why this is important

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Hello,
Today, the following clients were referred to your organization:
CommuniCare CIE
Client ID 20283

Please log in to the system here: https://wy211.communityos.org Once you have logged into the system, return to this email and click on the Client ID(s) above to access the client record.

Thank you,
Wyoming 211

You will be required to log into the system before being able to access to the referral. If you are not logged into the system prior to clicking on the Client ID hyperlink, you will receive an Access Denied alert.

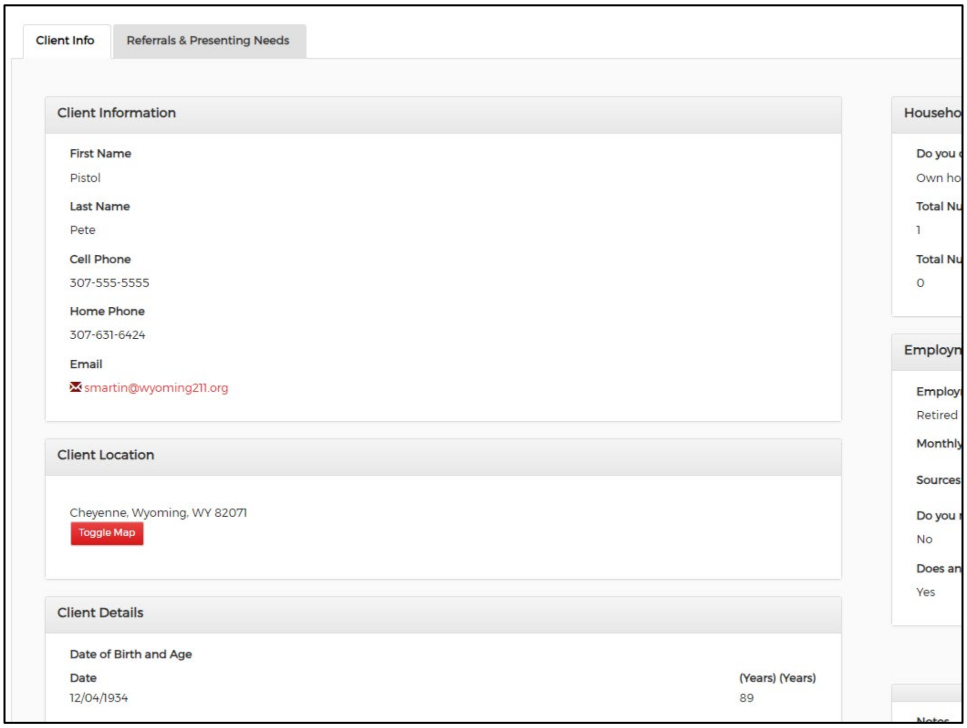
To log in, click the Client ID or follow https://wy211.communityos.org in the email. You can then visit Pending Referrals on the dashboard or return to the email to find and access the Client Record and Interaction pertaining to the referral.

If you are already signed in, you can click the Client ID hyperlink within the email to be directed to the referral.

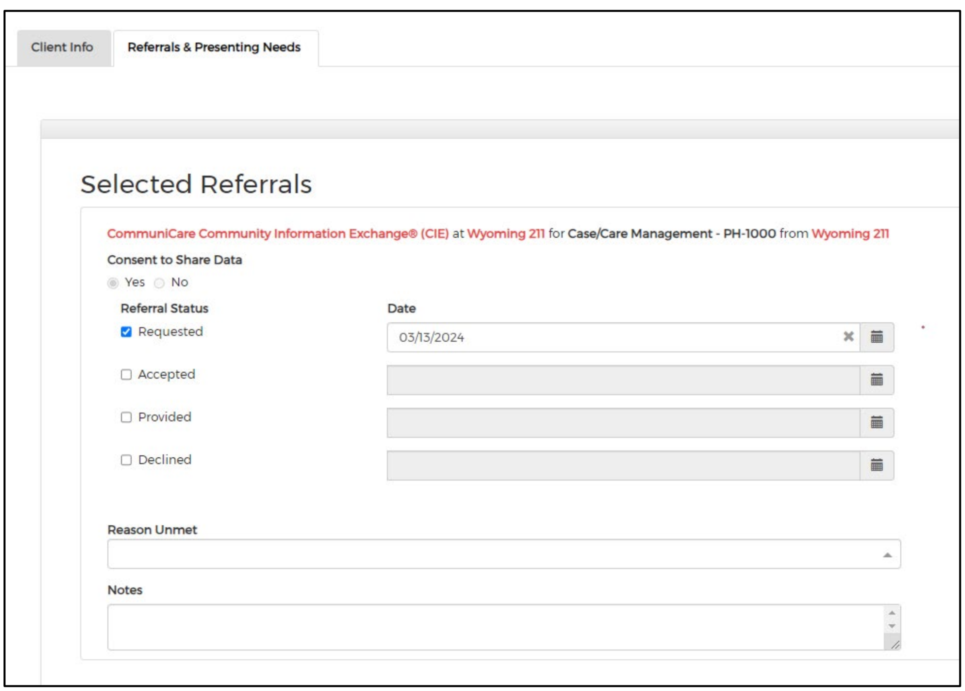
Note: Referral notifications via email will be sent from no-reply@communityos.org. Like the email received to register a new account, this email is often flagged as spam and can appear in your junk folder or may not arrive at all depending on the level of security set by your organization.

Ensure that your organization’s internal security mark these emails as safe. It is also suggested that you create a separate folder for these emails to better manage incoming referrals.

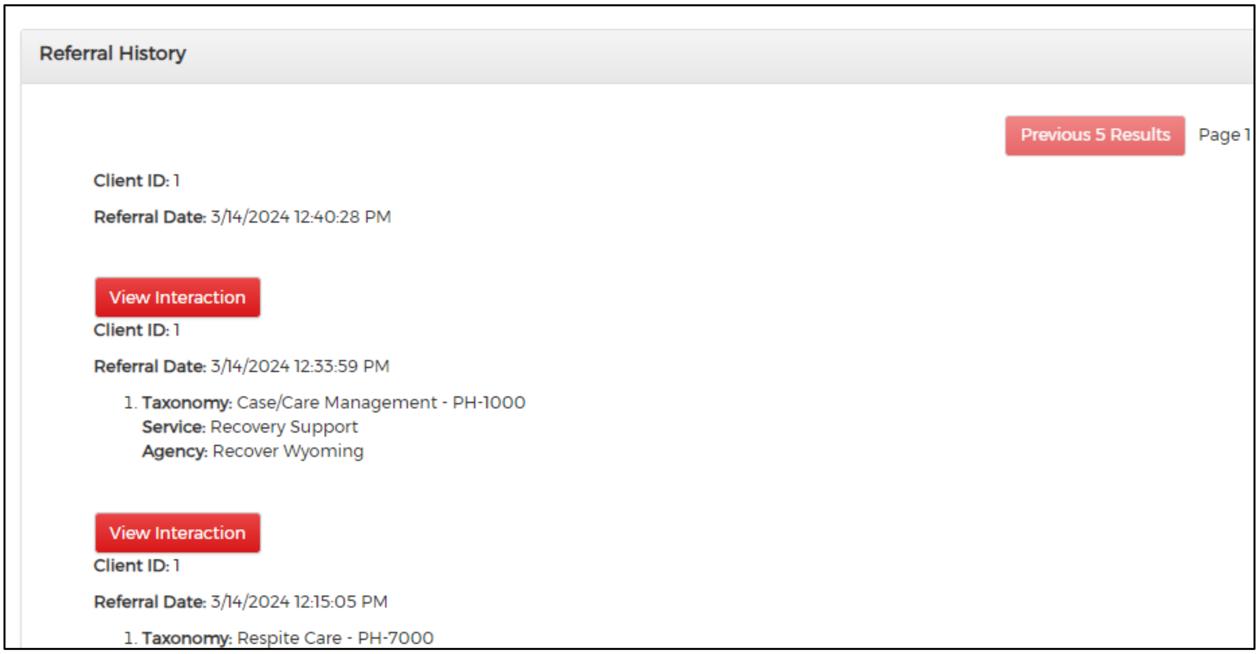
After selecting the Client ID in the Tokenized Email, you will be directed to a form containing the client's information and the referral that was made to your organization.



In the "Referrals & Presenting Needs" tab you can view the referral made to your organization and respond with Accepted, Provided, and Declined, and include any other supplemental information relevant to the referral. For more information on how to appropriately respond to a referral, visit Responding to a Referral in this User Manual.



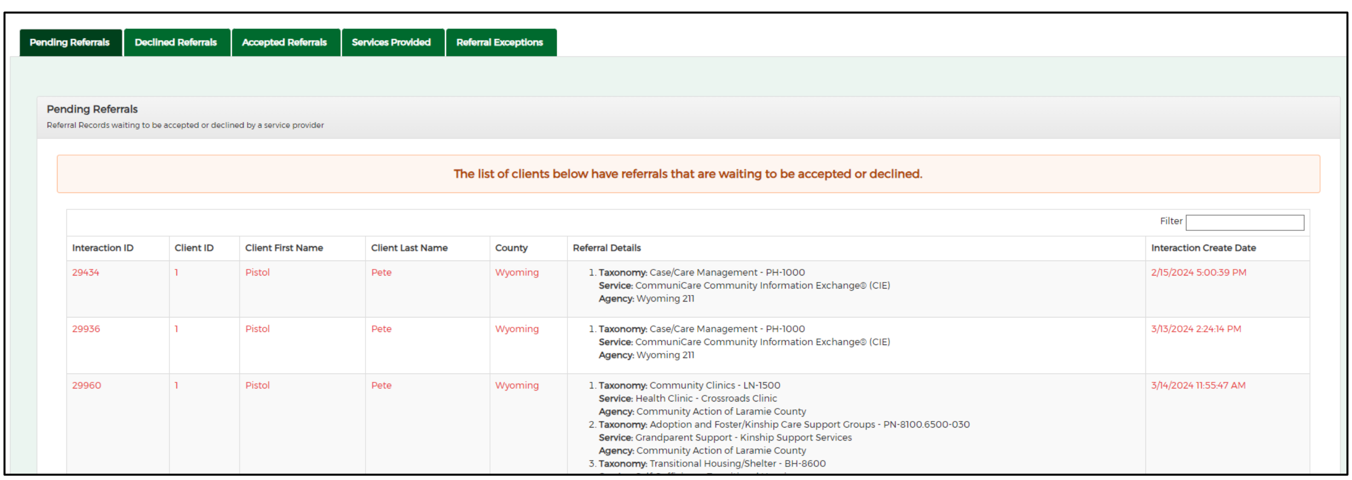
If you would like more information on the client before responding to the referral, you can scroll to the bottom the Referrals and Presenting Needs tab to find the client's referral history. By selecting "View Interaction" to the corresponding referral, you will be taken to that specific interaction on the Client's Profile where you can view additional information on the client and view the referral under the Referrals tab.



Dashboard

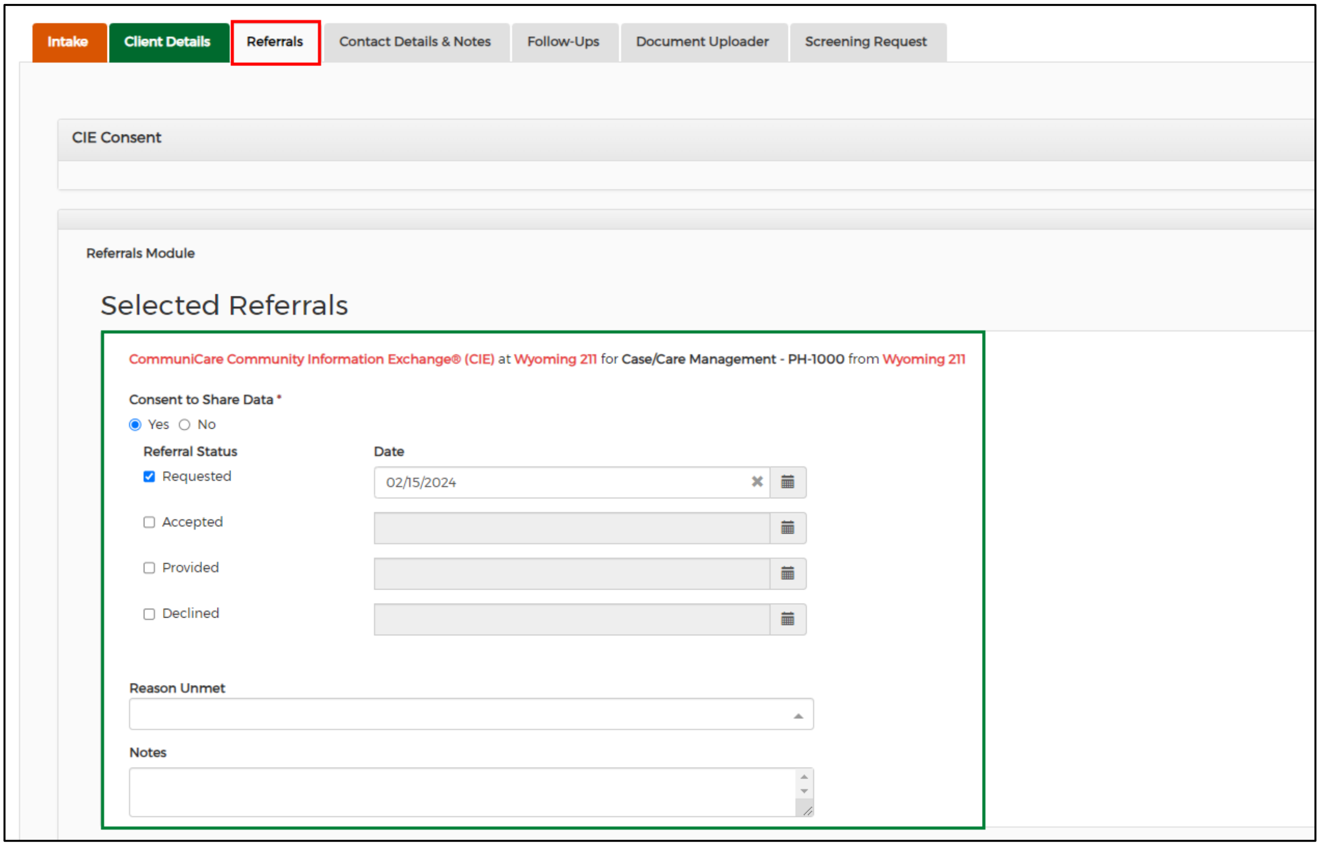
The Dashboard can also be used to view and respond to referrals. More information regarding its location and utilization can be found here.

Once a referral to your organization is made, unlike the email, it will appear almost instantaneously in the Pending section of the Dashboard. Pending referrals are listed from oldest to newest to better help identify clients that have not been responded to.



After selecting the Client ID, or by clicking any field within the Pending Referral section of the Dashboard, you will be taken to the specific Interaction within the Clients Record containing the referral.

To view the referral, visit the Referrals tab on the Client Record.



Responding to a Referral

Timeliness for Responding to Referrals

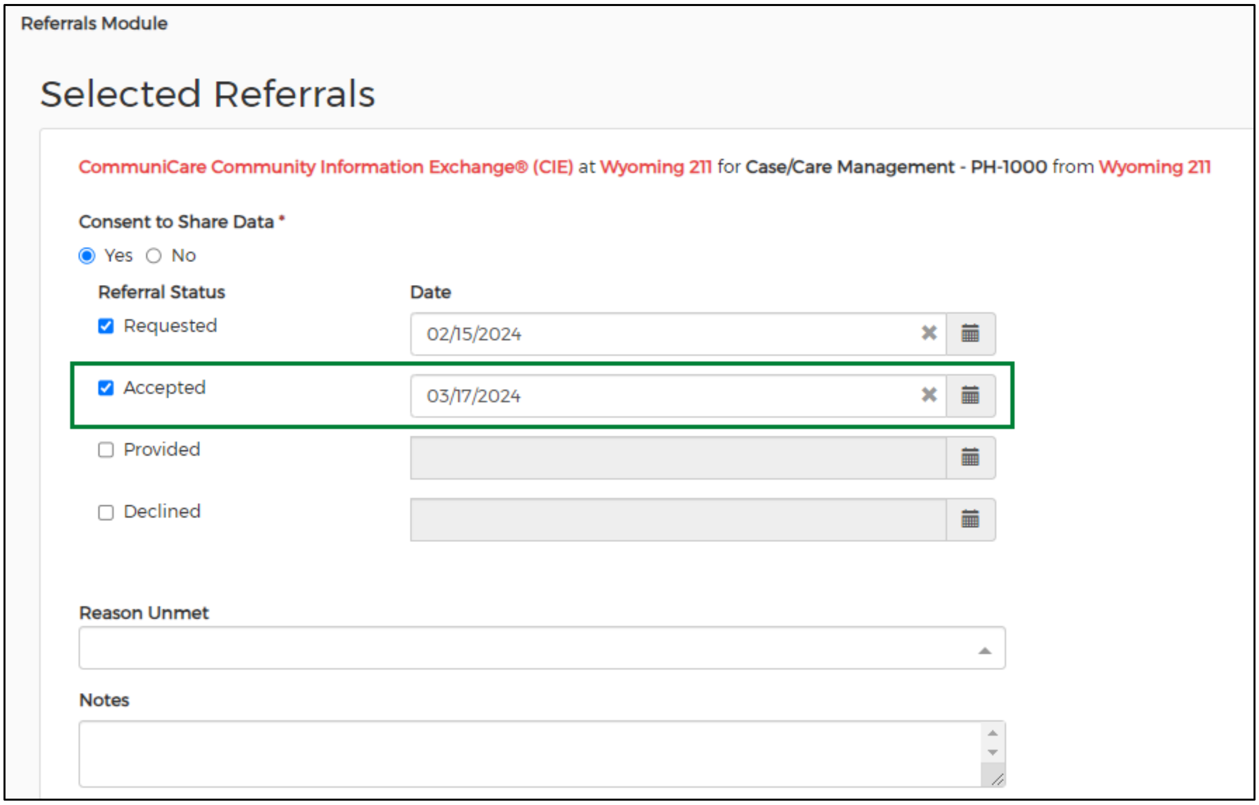
By participating in the CIE, your organization has signed an agreement that includes standards for all partnering organizations to follow.

Among those standards there is an expectation that all CIE partners will respond to incoming referrals within 48 hours from the time the referral was received.

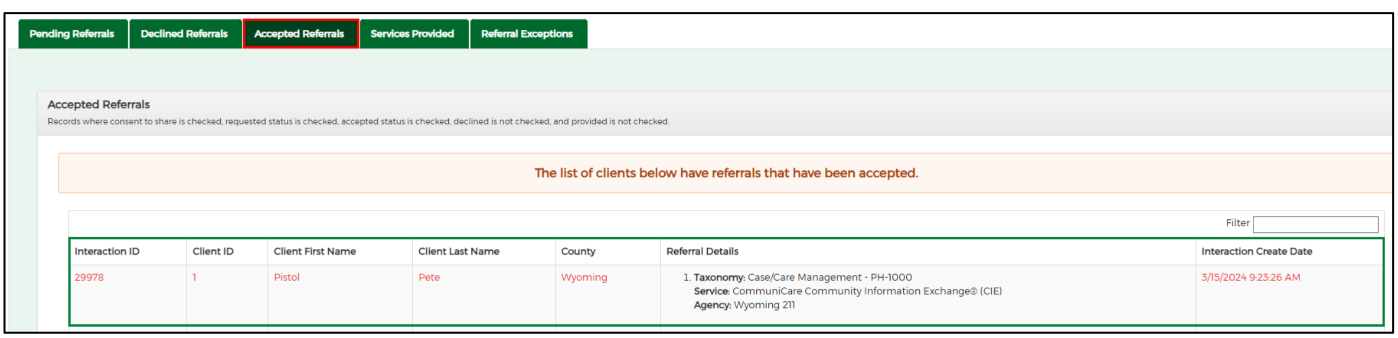
This standard does not apply to organizations that have given good cause prior to onboarding to the CIE as to why response within 48 hours is unfeasible for their organization. CommuniCare also understands certain circumstances, like employee absences, turnover, facility and technology issues, and increased client intake can impact response times.

Accepting a Referral

After viewing the clients information and performing whatever follow-up is deemed necessary by your agency to make a decision on a referral, you decide to Accept the referral. Simply select "Accepted" and mark the appropriate date on the referral.



After accepting the client, the referral and client information initially found under "Pending Referrals" on the Dashboard will be moved to the "Accepted Referrals" tab, viewable by both you and the organization that made the referral.



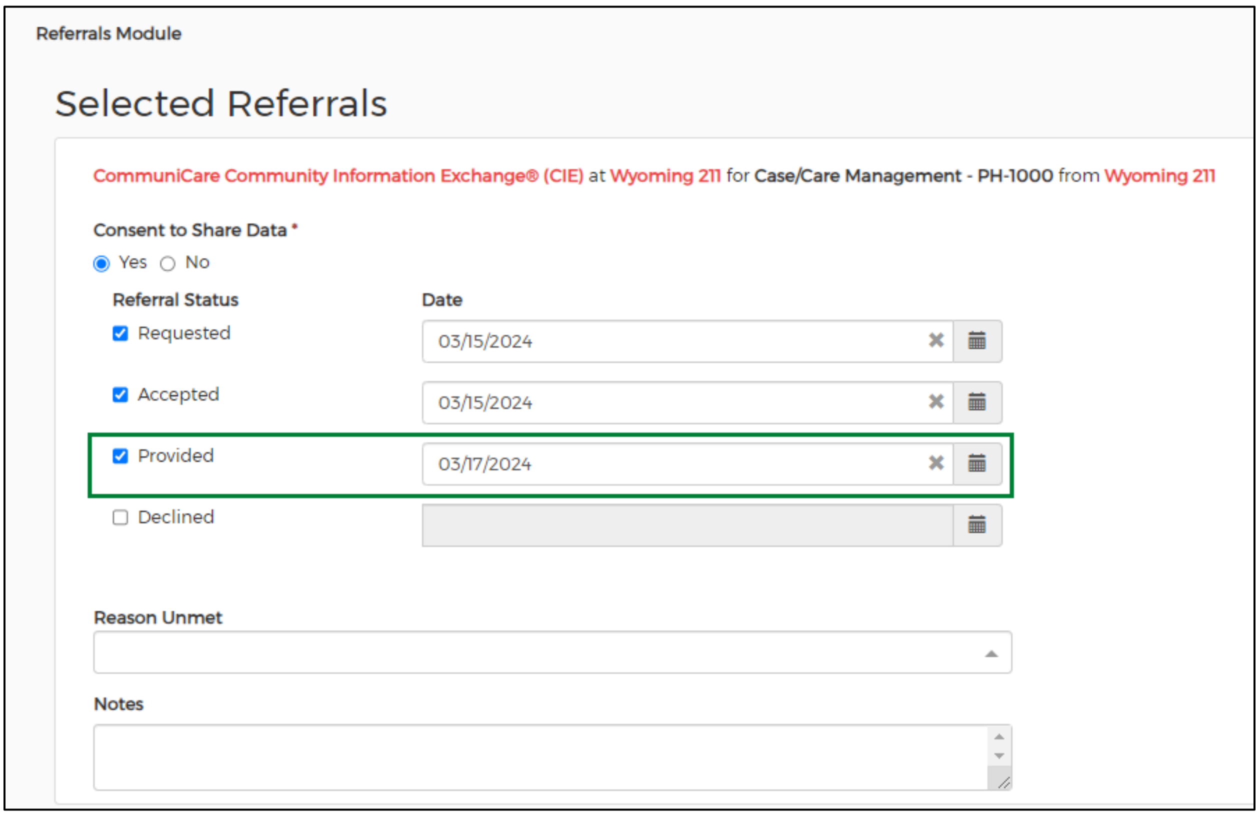
Providing Service for a Referral

After Accepting a referral, an appointment to offer services or follow-up to the client will likely be made. What is most important for other organizations to understand is that the Client eventually did receive services.

Once you have met with the client and provided services, you must go back to the particular interaction containing the relevant referral and select “Provided” on the referral with the associated date.

To easily find the specific referral that you accepted, select the relevant client which now exists under the “Accepted Referrals” tab.

If there is information regarding the services you provided that would be useful to other CIE organizations to know, you can document this within the notes section of the referral, or, if a Care Team Member, document further in the Contact Details & Notes.



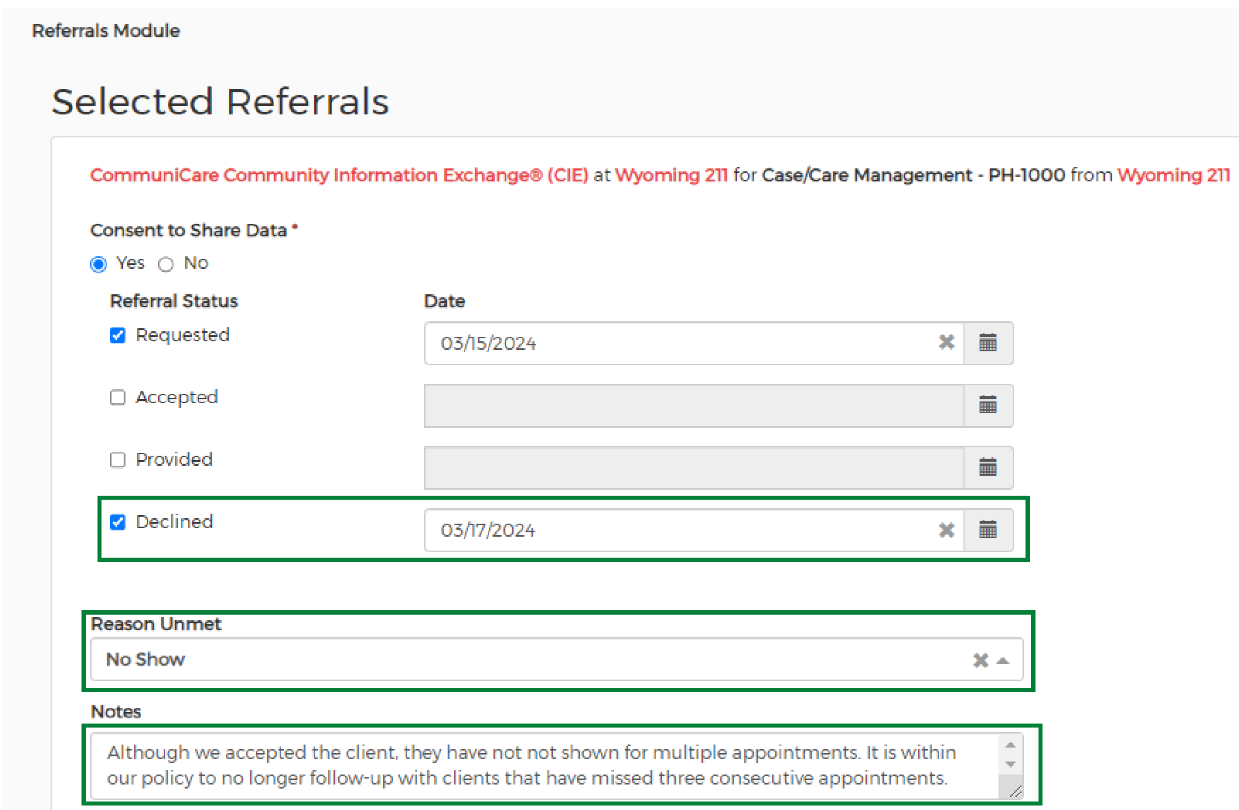
After submitting the interaction, the referral and client information found under “Accepted Referrals” on the Dashboard will now be moved to the “Services Provided” tab.

Declining a Referral

There are a number of reasons that an organization will decline a referral. Perhaps the client is not eligible for services, it was an incorrect referral and the organization doesn't offer necessary services, or perhaps the referral was initially accepted but the Client didn't show up to receive services.

If you are declining a referral, go to the particular interaction containing the relevant referral and select "Declined" with the associated date. Select an option under "Reason Unmet" as to why the referral was declined. Further information regarding the reason for declining can be further outlined in the referral Notes. This can help the referring agency understand why you declined the referral and how to better help the client.

If you initially accepted the referral, be sure to uncheck the "Accepted" box, otherwise the referral will be placed in the "Referral Exception" tab of the Dashboard for having the contradictory response of "Accepted" "and Declined."



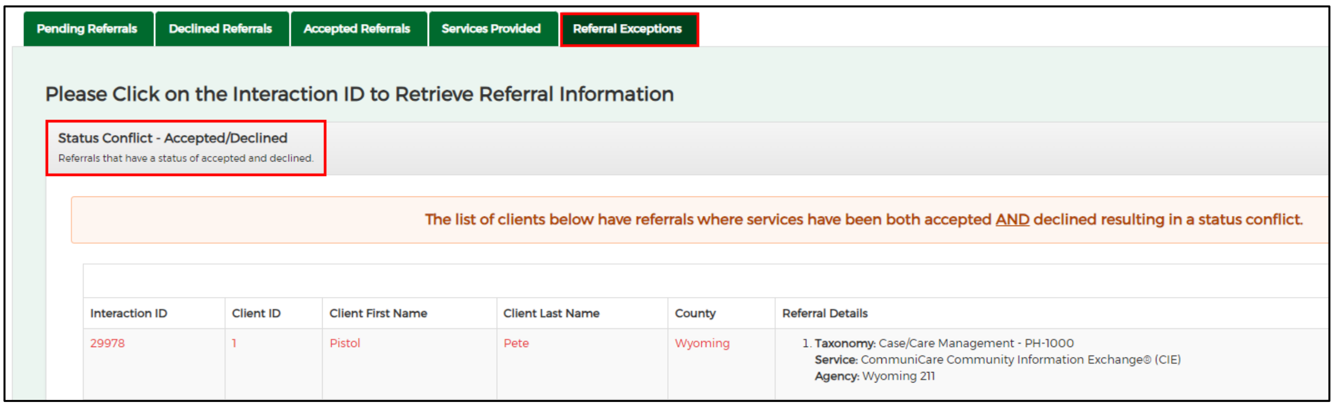
After declining a referral, you as a CIE partner can refer the individual to an appropriate resource or leave it to the referring organization to do so. If you are currently in contact with the client, we encourage that you make that referral to limit barriers to service. Be sure to indicate within the notes why you declined the referral and whether or not you deferred the client to a different organization.

Response Error - Referral Exceptions

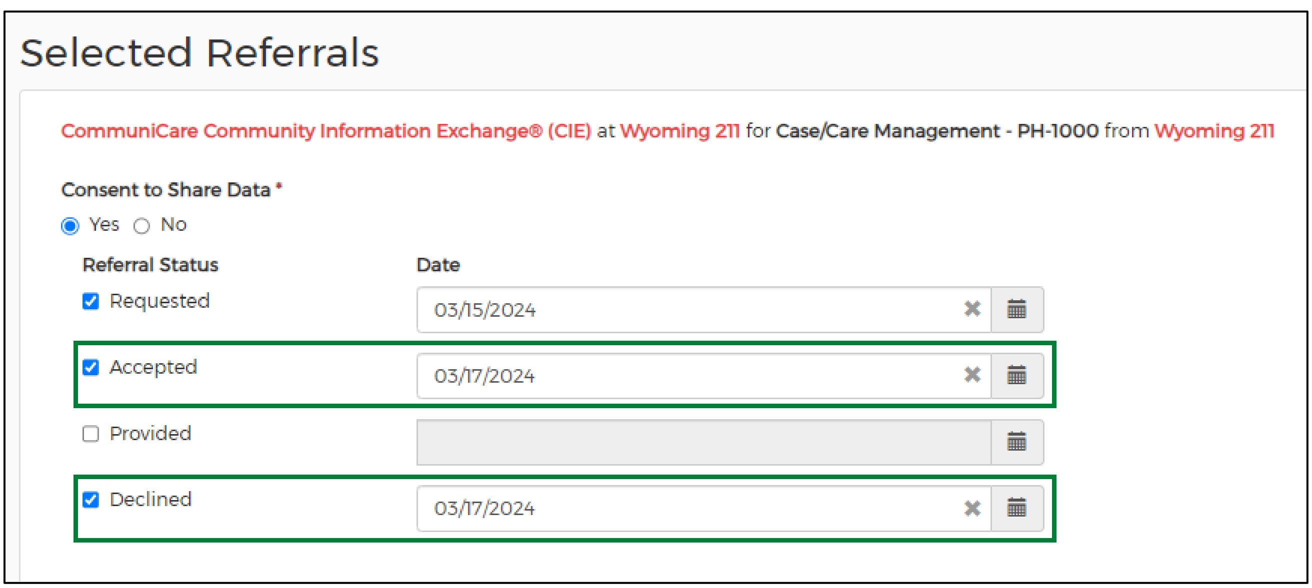
A Referral Exception will occur when contradictory responses are applied to a referral. For example, you sent or received a referral and responded to the referral by selecting “Accepted” and “Declined,” or “Service Provided” and “Declined.” Only one can be true.

In the event a client is Accepted but you are ultimately unable to provide services, go back to the referral and uncheck the “Accepted” box and select “Declined,” being sure to add notes as to why the referral was Declined.

In this example, the Dashboard indicates the user selected both “Accepted” and “Declined” the referral.



By selecting the interaction in the dashboard, we can see this is what occurred when the referred to organization responded to the referral. Follow-up with the organization may be necessary to remedy the error.

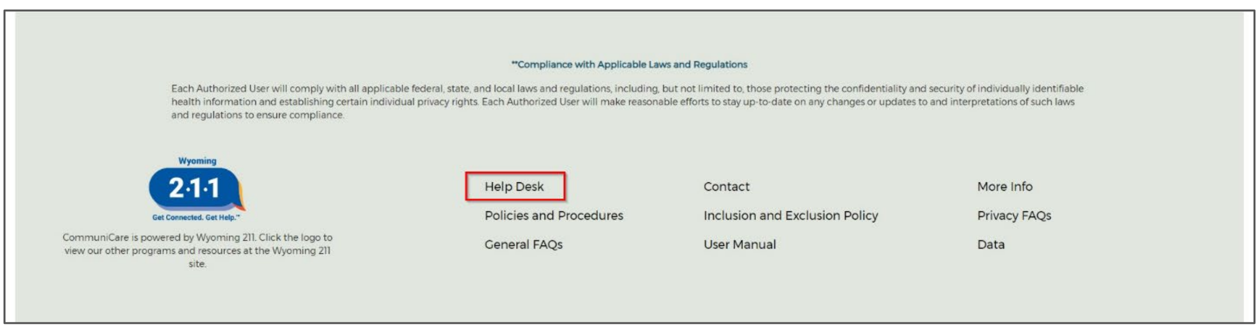


Help Desk

The primary purpose of the CommuniCare Help Desk is to provide technical assistance, troubleshooting, and guidance to users encountering issues with the CommuniCare system. The Help Desk also operates as a point of contact in the event of a suspected security breach. Our trained support staff is dedicated to resolving your inquiries promptly to minimize downtime and maximize productivity across departments.

Users can access the Help Desk by pressing the “Additional Info” drop down in the User Menu and selecting “Help Desk,” or finding it at the bottom of the CommuniCare login page.

You can also find a link to the Help Desk at the bottom of the CommuniCare Login page, amongst other resources, at https://wy211.communityos.org/communicare-login.

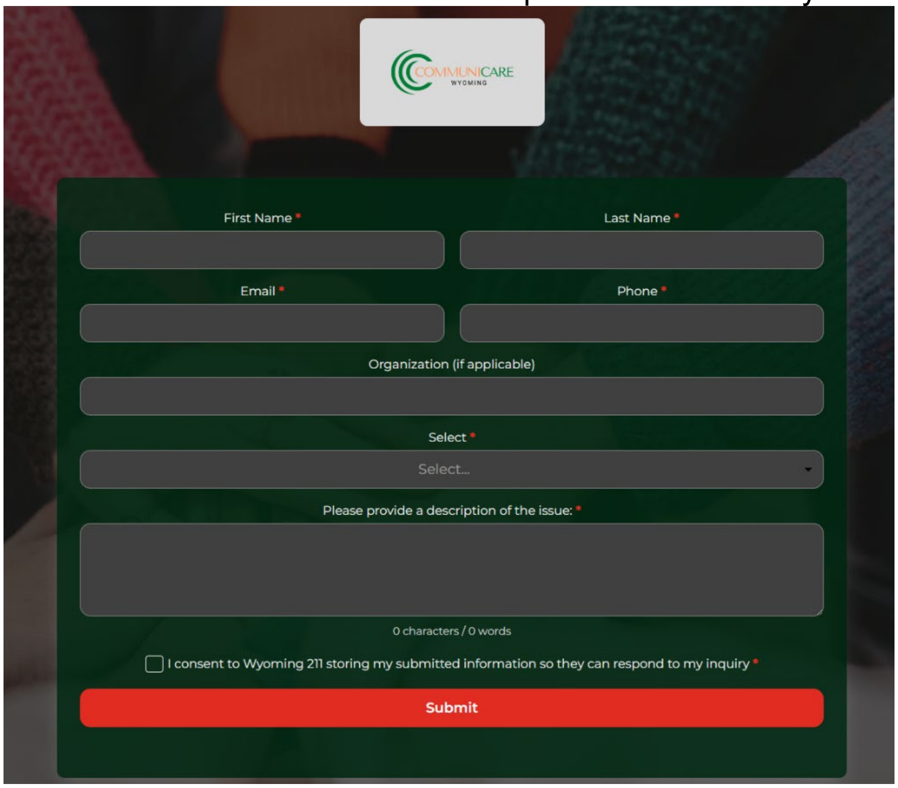


After selecting Help Desk, you will be taken to a Help Desk form. We request that you fill in all sections of the form indicating who is requesting assistance and why.

You must also select an option under “Select” containing a list of reasons for the inquiry:

- General Help – Assistance using the system, looking for particular services and understanding taxonomy, and logging in.
- Privacy Violation – Suspected data breach or violation of client information.
- I’d Like to Report a Bug – Suspected technical issue not related to the user requiring changes to the system.
- Other

Please be thorough when describing the issue under “Please Provide a Description of the Issue” so our team can best understand the problem and assist you.



Once the form has been filled in its entirety, select “Submit,” and an email with the corresponding information will be sent directly to system Admins.

The support team will reach out to you directly for additional information within 12 hours from the time that the request is submitted.

Security Breaches

Maintaining client privacy and confidentiality is of the utmost importance to Wyoming 211 and CommuniCare. In the event that a suspected breach of privacy has occurred, you can submit an inquiry through the Help Desk. However, given the serious nature of a suspected data breach, we also ask that you submit this information via email to our Security Officer at admin@wyoming211.org.

Breach: Any situation where PII is accessed by someone other than an authorized user, for anything other than an authorized purpose. PII includes, but is not limited to, any of the following:

- Personal Identifying Information (PII): information that can be used to distinguish or trace an individual’s identity. PII includes, but is not limited to, any of the following:
- Social Security numbers
- Credit card information (credit card numbers, whole or part; credit card expiration

dates; cardholder names; cardholder addresses)

- Tax identification information numbers (Social Security numbers; business identification numbers; employer identification numbers)
- Biometric records (fingerprints; DNA; or retinal patterns and other measurements of physical characteristics for use in verifying the identity of individuals)
- Payroll information (paychecks; paystubs)
- Medical information for any employee or customer (doctor names and claims; insurance claims; prescriptions; any related personal medical information)
- Other personal information of a customer, employee or contractor (dates of birth; addresses; phone numbers; maiden names; names; customer numbers)

Additional information on how breaches and how Wyoming 211 handles them can be found in the CommuniCare Policies and Procedures – Data Breach Policy, located in the Additional Info section of the User Menu.

CIE Navigation Services for Partners and Clients

Partnering organizations may receive a higher-needs client that requires more assistance and attention than the organization is able to offer. Often times, these clients would benefit greatly from Case Management services.

If your organization does not have the capacity to offer Case Management services to higher-needs clients, CommuniCare provides our partners and their clients access to in-house Case Management services.

A client is eligible for Communicare Case Management Services if they are:

- Homeless or at risk of becoming homeless.
- Transitioning out of the correctional system
- Requiring Mental Health and Substance Abuse (MHSA) services.
- Client has three or more presenting needs in a single call.
- A frequent client with the same, persisting needs, indicating further assistance.
    - This can include a client not receiving services, either due to the client's lack of follow-thru or service provider not providing services.

If during intake you find the client's information meets CommuniCare Case Management criteria, we encourage you utilize CommuniCare Case Management services by making a referral to "CommuniCare Community Information Exchange (CIE)."

This can be found in the Referrals Search Criteria by simply typing "CommuniCare" or "CIE" into Keyword or Service Name.

To search by taxonomy, CommuniCare is listed under "Case/Care Management.

You can also search for "Wyoming 211" under Agency Name and CommuniCare will be under available services.

Referral Search Results

Agency Name *	Service Name *	Service Phone (Main)	Service Extension	Site Street/Physical Address	Service Intended Participants	Presenting Need(s) *	CIE ® Partner?	Actions
Wyoming 211	CommuniCare Community Information Exchange® (CIE)	307-433-3075		2617 East Lincolnway Suite E Cheyenne WY, 82001, US	Individuals that are homeless or at risk of becoming homeless; active military or veterans; those that require Mental Health and Substance Use Disorder services; individuals transitioning out of the legal system; individuals with urgent or unique needs.	Case/Care Management - PH-1000	Yes	Select

Your search returned 1 result.

You can present this option to the client by using this guiding language:
“Are you interested in receiving CIE Navigation Services? You will meet with a qualified navigator that will conduct a screening to make an assessment of your situation and identify some of the hurdles you are facing. You and the navigator will then work together to create an individualized plan and the steps needed to help you reach your goal. The CIE works closely with a group of agencies with multiple resources to help you overcome your situation and move towards the life you want to have.”

Note: A client can be rejected or differed by the CIE navigator if:

- Client needs are met by a different 211 program (WY211’s ADRC or Kinship)
- Client already has an active case manager within the community
- Client is institutionalized.
- Client requested to be removed from CIE program.
- CIE program elects to circumstantially remove the client.
- Client needs to have SOAR application completed (will be referred to ADRC).
- Other reasons at the discretion of the CommuniCare Case Manager

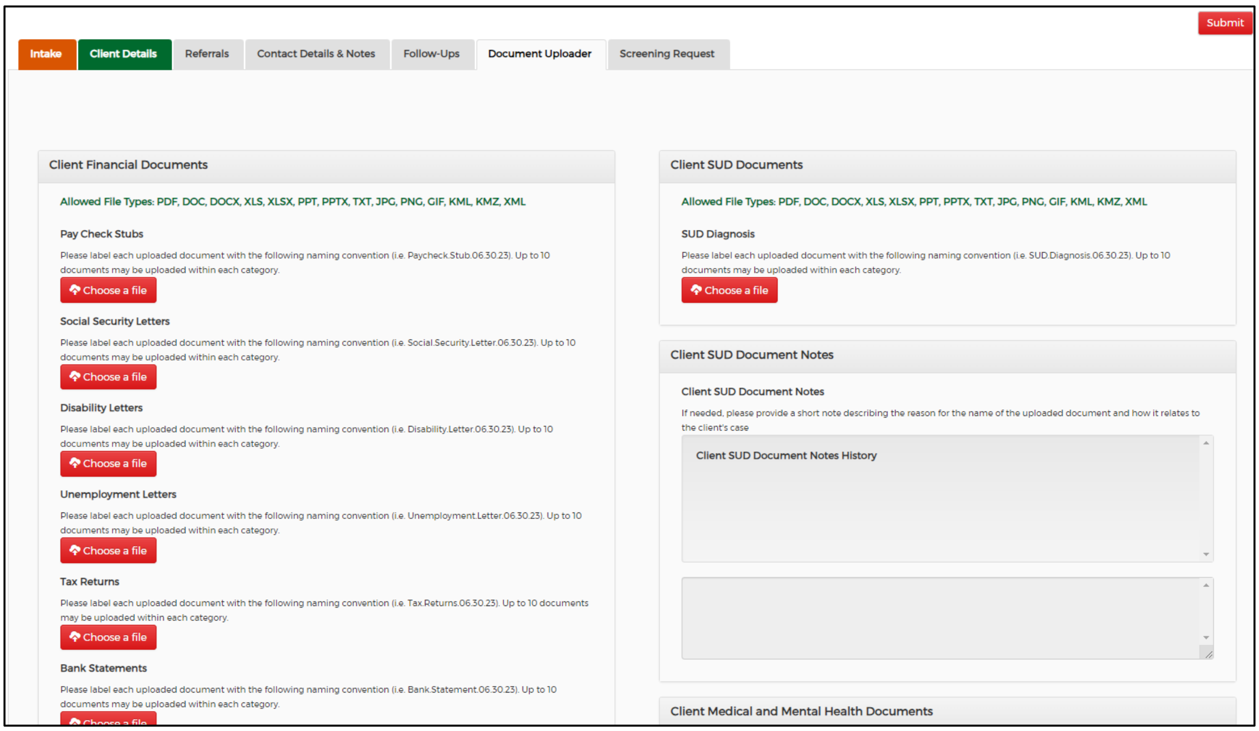
More on the CIE Intake/Client Record

Document Uploader

All Referral Agents and Care Team Members will have access to the Document Uploader tab in the Client Intake/Client Profile.

The Document Uploader tab is a centralized hub to hold all of an individuals documents ranging from paychecks, tax returns, and lease agreements to identification, licenses, and other items. Here, partnering organizations can access an individual's documents that they and other organizations have uploaded.

The "Client SUD Documents" section will only be available to partnering organizations that have signed a QSOA agreement with Wyoming 211. Here you can upload written consent to share SUD information.

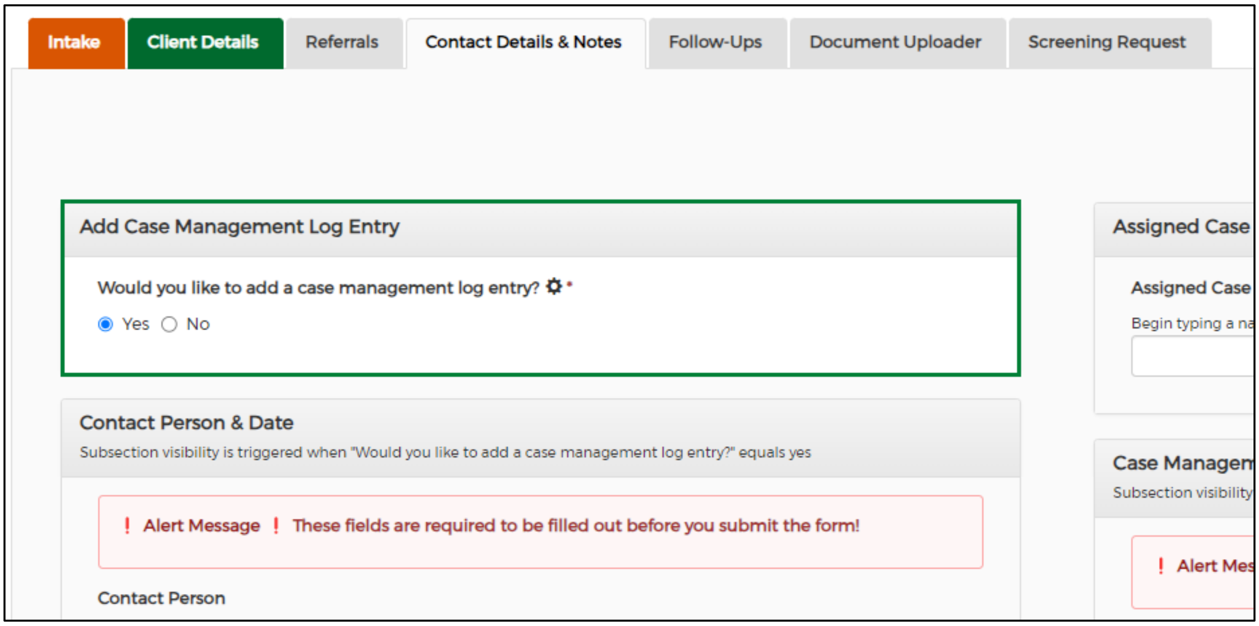


Case Management Tools

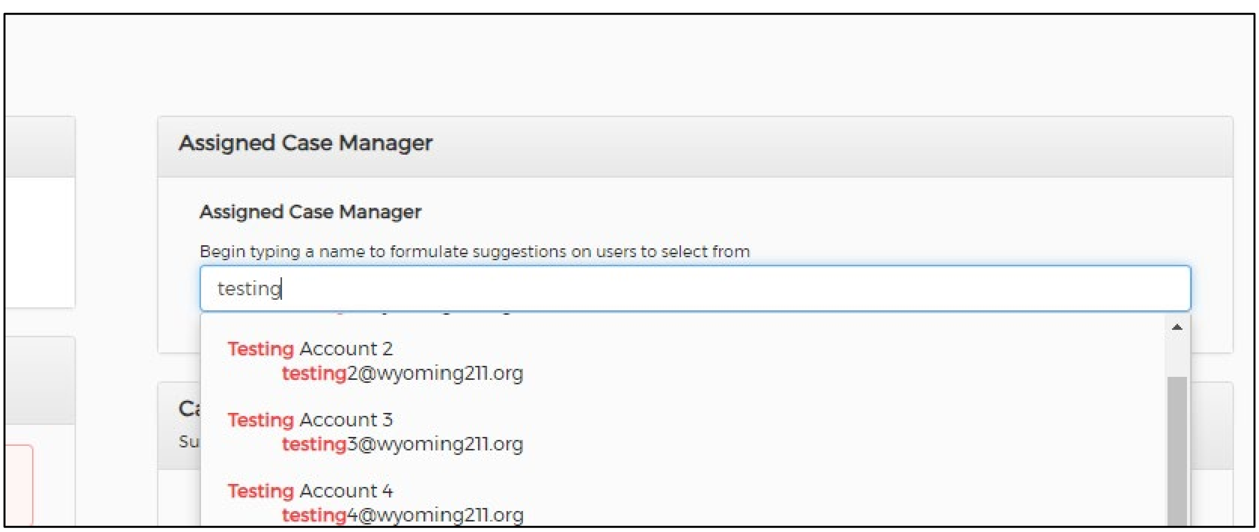
Care Team Members have access to a myriad of Case Management Tools to help them serve and track the progress of their client's.

Contact Details & Notes

To begin using Contact Details and Notes, users must first select "Yes" on the "Add Case Management Log Entry." By doing so, you can then interact with the various forms and tools available on the tab.



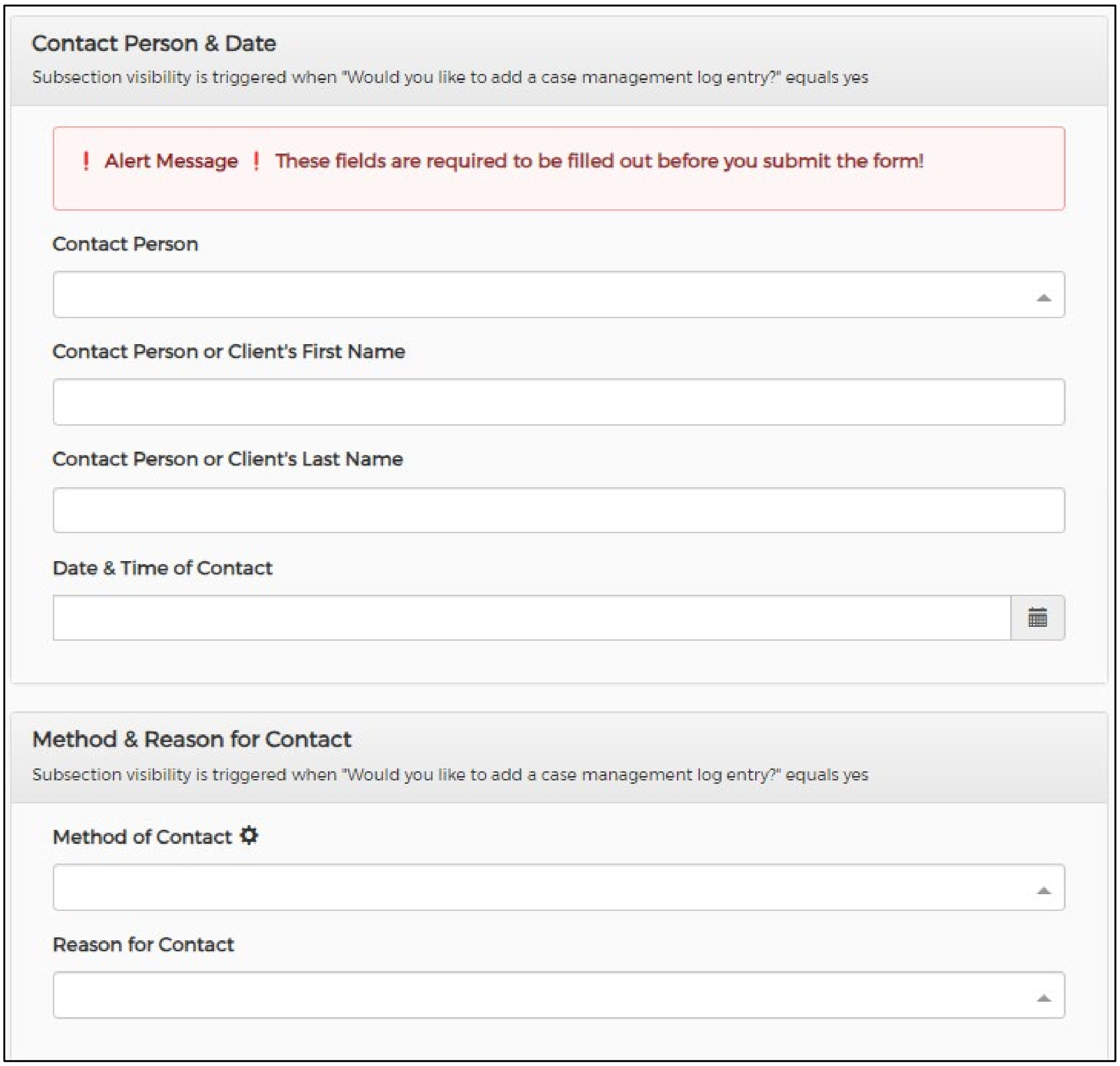
In the Contact Details and Notes, users can Assign a Case Manager, which will remain documented on the Client's Record unless changed. This will indicate who the client's main Case Manager in the system to prevent duplicate case management services.



To document more in-depth details regarding the client interaction, you can utilize the “Contact Person & Date” and “Method & Reason for Contact” sections of the Contact Details and Notes tab.

Here you can indicate who the interaction was with, for instance, if it were the client’s caretaker or another agency who advocated on behalf of a client.

In the Method & Reason for Contact section, you can select the method of contact and whether you interacted with the client in person, over email, text, or phone.


Contact Person & Date

Subsection visibility is triggered when "Would you like to add a case management log entry?" equals yes

! Alert Message ! These fields are required to be filled out before you submit the form!

Contact Person

Contact Person or Client's First Name

Contact Person or Client's Last Name

Date & Time of Contact

Method & Reason for Contact

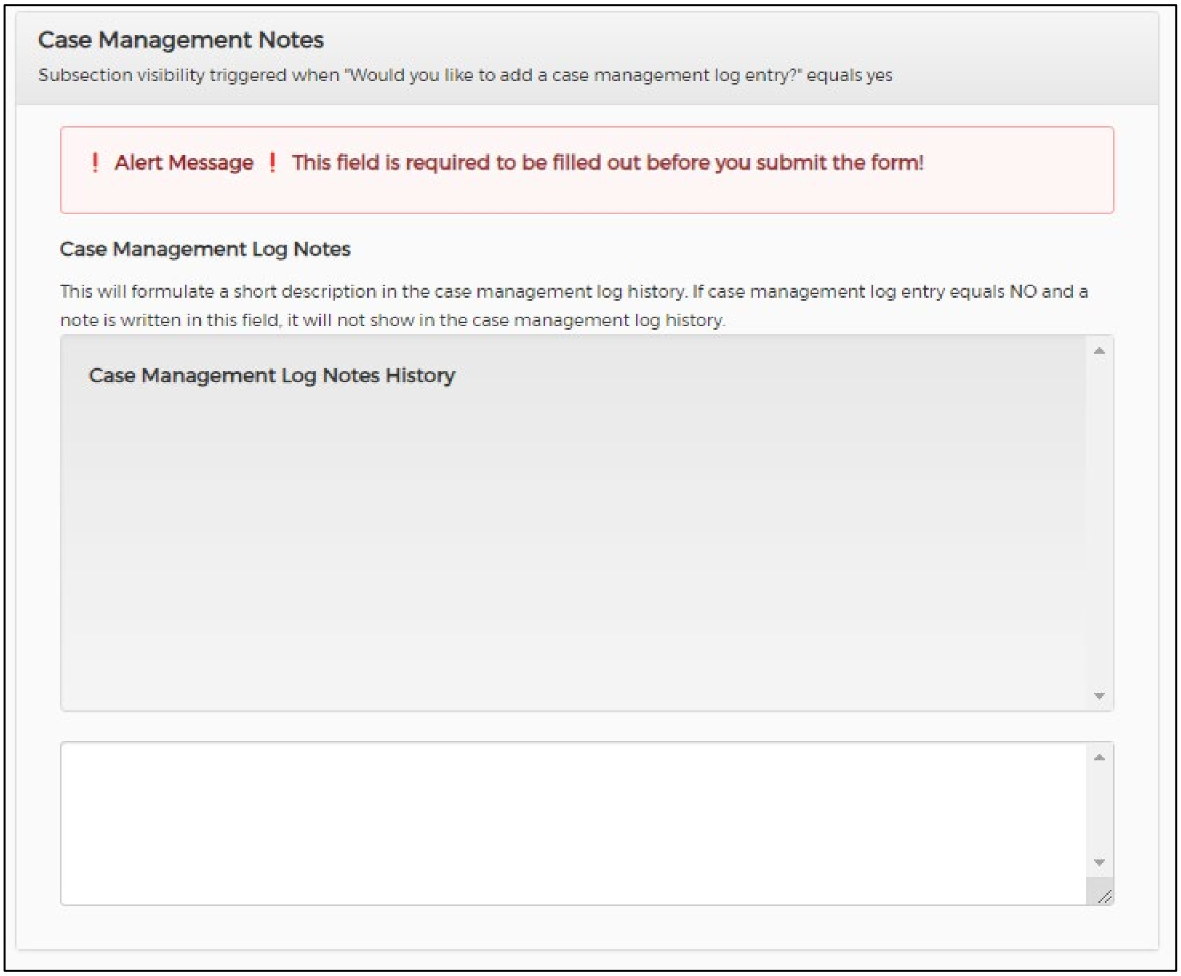
Subsection visibility is triggered when "Would you like to add a case management log entry?" equals yes

Method of Contact

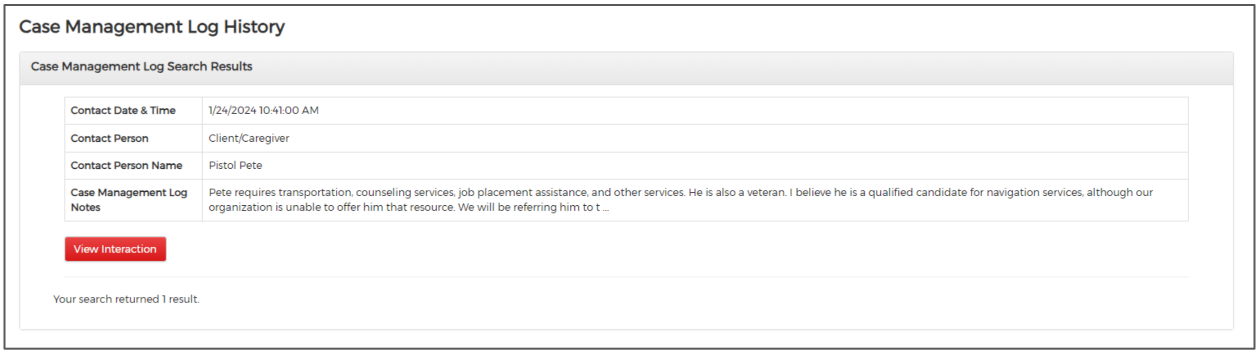
Reason for Contact

Within the Contact Details and Notes Tab, you can utilize the Case Management Notes section. Case Management Notes track and document interactions, interventions, progress, and outcomes related to a specific client. These notes serve as a record of the case's history and are crucial for maintaining continuity of care, ensuring accountability, and facilitating communication among multidisciplinary teams.

As a Care Team Member, you will be able to log your own notes when interacting with a client and view the logged notes of other Care Team Members.



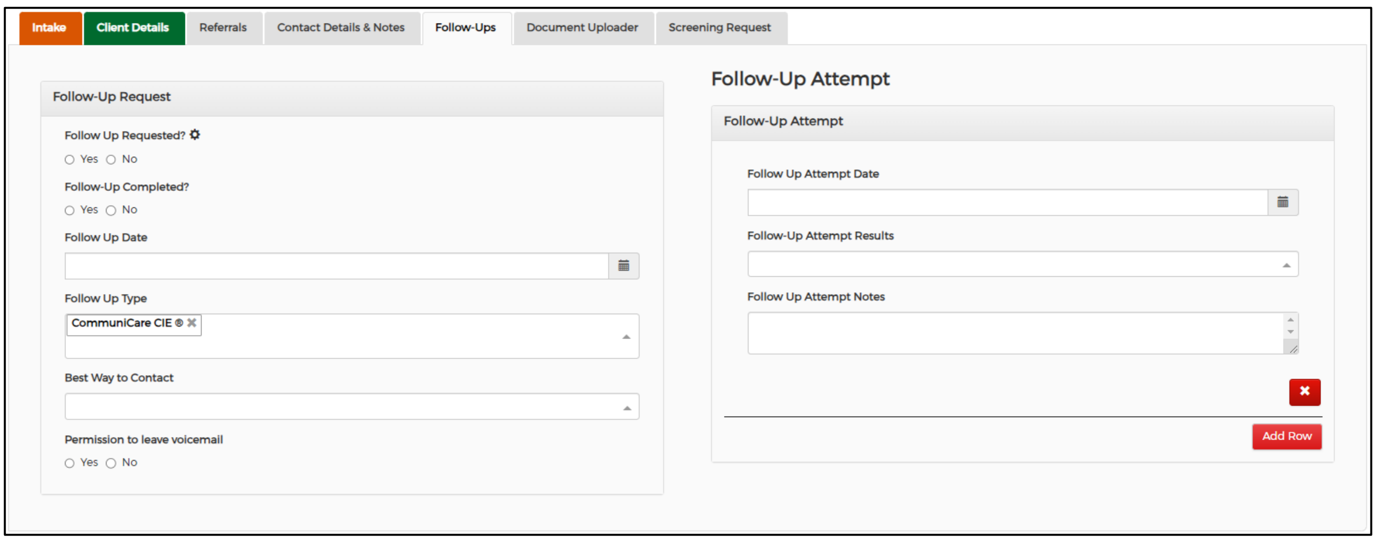
Beneath the Case Management Notes, you can also find the Case Management Log History, which offer a summary of past Case Management logs. These logs are created after you finalize the interaction and select “Submit” in the upper and lower right-hand corners of the page. To view more information on a prior Case Management Log Entry, select “View Interaction” to be taken to the specific interaction the log was created.



Follow-Ups

Depending on your organization's protocol, you may be required to do follow-ups with clients. If offering Case Management, this will likely be the case.

If a Follow-up is requested by the client, caregiver, or agency, you can use the "Follow-up Request" tool to input the proposed follow-up date and how best to contact the client.



Anytime a follow-up is attempted, you can document each attempt and the results of the attempt in the "Follow-up Attempt" section.

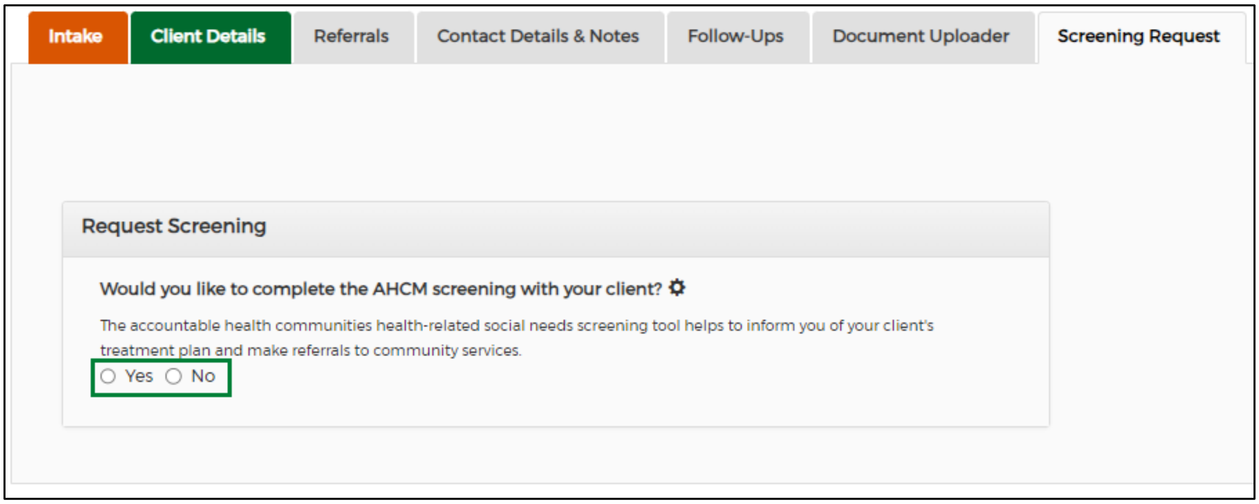
For additional follow-up attempts, you can select "Add Row" at the bottom right-hand corner of the Follow-up Attempt section, which will be saved for future viewing.

If specifically requested by an organization, the Follow-up tool can be made accessible to Referral Agents.

Screening Tools

CommuniCare offers the utilization of screening tools for Case Management services. Currently, the Accountable Health Communities (AHCM) Screening Tool is utilized by CommuniCare Case Managers and is available to all Care Team Members. However, we may be able to incorporate whatever Screening Tool your organization utilizes.

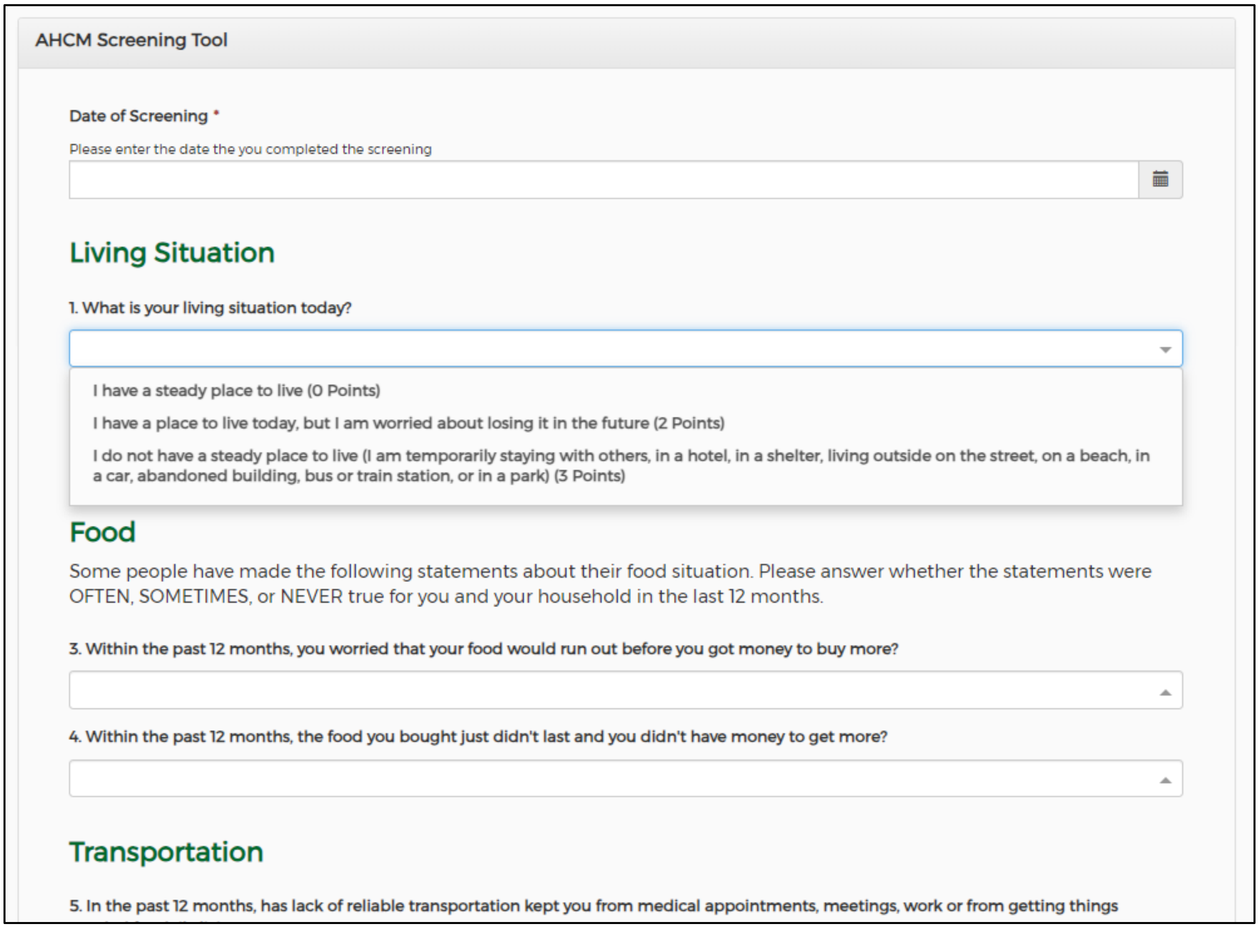
To view the screening tool, you must select "Yes" under "Request Screening."



After selecting "Yes," you will be taken to a new tab containing the screening tool.

You will see a box with the title of the Screening Tool. Select "Add Row" to expand the tool.

Depending on the screening tool available to you, the form will contain various questions for you to fill out with associated scores that indicate client's overall health risk.



AHCM Screening Tool

Date of Screening *

Please enter the date the you completed the screening

Living Situation

1. What is your living situation today?

I have a steady place to live (0 Points)

I have a place to live today, but I am worried about losing it in the future (2 Points)

I do not have a steady place to live (I am temporarily staying with others, in a hotel, in a shelter, living outside on the street, on a beach, in a car, abandoned building, bus or train station, or in a park) (3 Points)

Food

Some people have made the following statements about their food situation. Please answer whether the statements were OFTEN, SOMETIMES, or NEVER true for you and your household in the last 12 months.

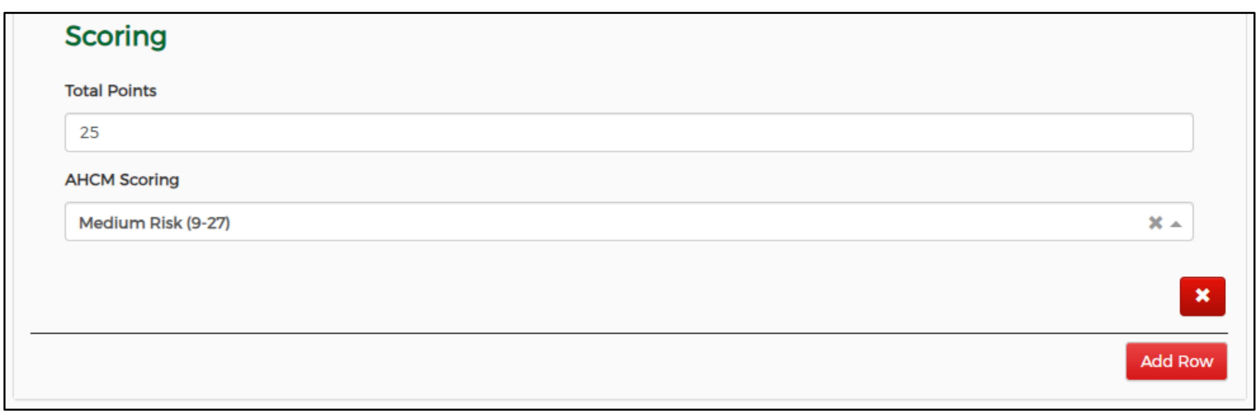
3. Within the past 12 months, you worried that your food would run out before you got money to buy more?

4. Within the past 12 months, the food you bought just didn't last and you didn't have money to get more?

Transportation

5. In the past 12 months, has lack of reliable transportation kept you from medical appointments, meetings, work or from getting things

For the AHCM, you can calculate the final score under "Total Points" and select the level of Risk based on that score under "AHCM Scoring."



Scoring

Total Points

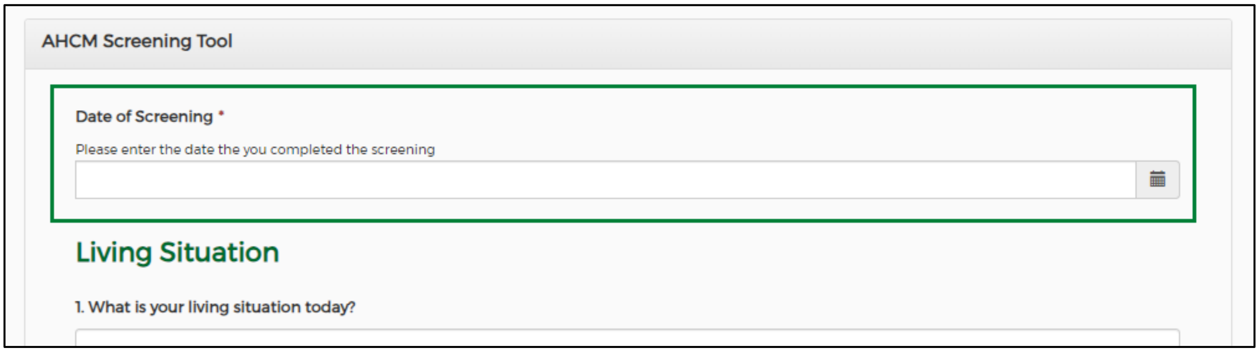
25

AHCM Scoring

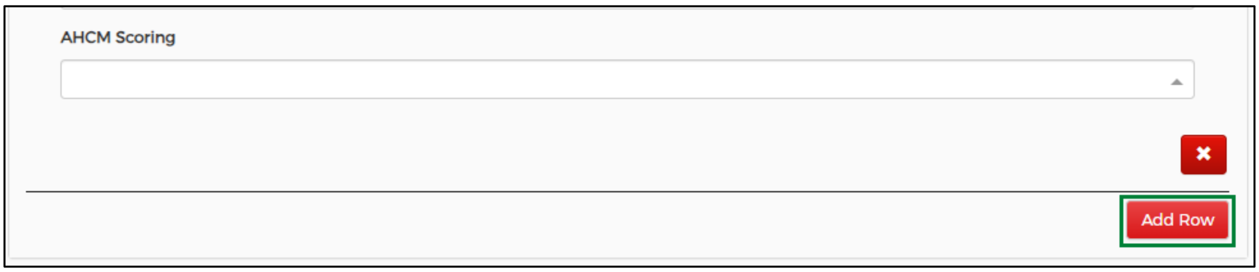
Medium Risk (9-27)

Add Row

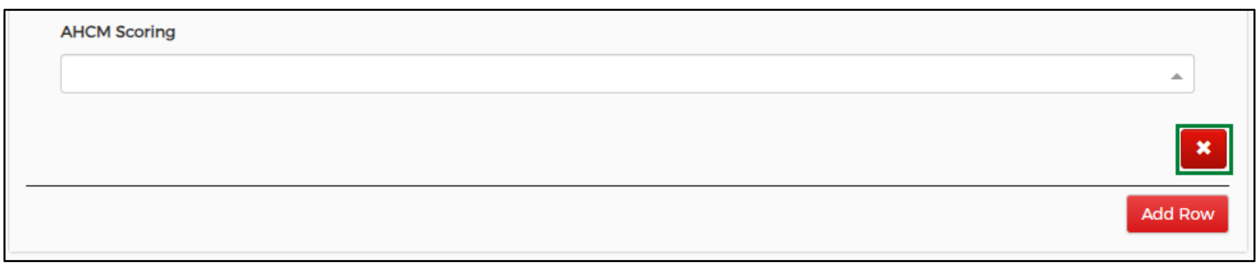
In order to submit the interaction, the “Date of Screening” must be selected at the top of the form.



If you would like to conduct another screening for the same client, you can select “Add Row” at the bottom of the form.



If you wish to remove the screening, select the “X” at the bottom of the form.



If you are viewing a client and accidently select “X,” do not submit the interaction and select “Undo” to prevent saving the interaction and permanently deleting the screening.