



eCIRTS Training Guide Helpline Workflows V4.1

Florida Department of Elder Affairs (DOEA)

Document Tracking

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Implementation Team





WellSky Project Team	
Name	Email
Jennifer Buck	Jennifer.Buck@wellsky.com
Monica Reed	Monica.Reed@wellsky.com

FL DOEA Project Team
Name & Email
PSA 2 - Keith Lavery-Barclay, keithlb@aaanf.org
PSA 3 - Cindy Roberts, crobertsc@agingresources.org
PSA 4 - Davette Wellmaker, davette.wellmaker@myeldersource.org
PSA 5 - Tracy Barrows, tracy.barrows@aaapp.org
PSA 6 - Francene Hazel; francene.hazel@sccmail.org
PSA 7 - Christian Steiner, christian.steiner@sraflorida.org
PSA 11 - Lisa Mele, melel@allianceforaging.org
DOEA – Gretta Jones jonesg@elderaffairs.org

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Icons used in the Guide

Icon	Description
	Tip Tips provide general recommendations on how to make it easier or more productive to use WellSky.
	Caution The Caution icon highlights areas of note or concern, where failure to use the system properly may cause or exacerbate problems.
	Note Notes provide additional information of general interest about a specific function or process of WellSky.
	Example Examples are provided to help you develop a better understanding of the subject area and how WellSky may be used in a specific scenario of relevance.

Helpline Training Guide Overview & Objectives

WellSky Human Services application/eCIRTS will maintain the helpline, intake/screening and eligibility process throughout the state of Florida, previously completed in REFER and CIRTS.

Introduction This training introduces you to the workflows completed by the Helpline staff in eCIRTS.

Importance Your confidence in using eCIRTS for adding contact records for clients, searching for and providing community resource information and creating screening referrals will increase as you develop proficiency in the software.

Overview To help develop the necessary skills and understanding to effectively use eCIRTS to perform the Helpline workflows.

Objectives

- Following the steps in the guide to:
 - Create new client records.
 - Update existing client records.
 - Add contact records for clients.
 - Add contact records for anonymous callers.
 - Search for community resource information for callers.
 - Create screening referrals.
 - Complete screening referral follow ups

Receive an Inquiry

The process begins with the helpline receiving an inquiry in one of several ways. Regardless of the method, the same processes will be completed in eCIRTS. Inquiries will be added as Contact records in eCIRTS. Although phone call is the most common, Helpline inquiries can be received in any of the following ways:

- Phone call
- Voicemail
- Mail
- Email
- Fax
- Walk In
- Website chat
- Text
- Referral from ADRC

For each inquiry, the worker will first search for an existing client record.

If one doesn't already exist, it will be created and then a contact record is added.

The only exception is anonymous and incomplete calls. Contact records will be created for those, but they will not be tied to a client record.

Workers will view past contact information for the client and record information about the current contact.

The current contact may involve searching for and providing community resources.

It may involve a screening referral.

Some contacts also require follow-up, like the 14-day screening referral follow up.

Search for Existing Client Record

Every inquiry, except for Anonymous inquiries, must be associated to a client record in eCIRTS.

The first step for almost every action in eCIRTS is to search for an existing client record. If one doesn't exist, a new client record will be added.



Role: **IR Specialist**

1. Click on the **Clients** Chapter.
2. From the **File** menu, select **Add New Client – Search for Existing**.
3. The search page opens. Update the following fields:
 - a. **Last Name:** enter the full or partial last name. This is a required search filter.
 - b. **First Name:** enter the full or partial first name. This is a required search filter.
 - c. **PSA:** enter the PSA if desired. Otherwise leave the %.
 - d. **Best Contact Phone:** enter the phone if desired. Otherwise leave the %.
 - e. **SSN:** enter the SSN if desired. Otherwise leave the %.
 - f. **DOB:** enter the DOB if desired. Otherwise, REMOVE the filter by clicking the red **X**.

Filters

Last Name *	Contains	<input type="text"/>	AND	
First Name *	Contains	<input type="text"/>	AND	
PSA	Contains	%	AND	✕
Best Contact Phone	Contains	%	AND	✕
SSN	Ends With	%	AND	✕
Date of Birth	Equal To	<input type="text"/>	AND	✕
Client ID	+			



NOTE


Each search filter contains four parts:

1. **Filter Field:** the data point to search on
2. **Operator:** the relationship between the filter field and the value described further in the table below.
3. **Value:** the filter field answer to search on. The % character is a wildcard and will return records that include anything in this field. These are the default values for most of the search filters. You do not have to enter a value if one is not known, just leave it as %.
4. **Connector:** the relationship between this filter and other filters in the search. **AND** tightens your search: only returns records that meets ALL filter criteria. **OR** broadens your search: returns records that meet ANY of the filter criteria.

Operator	Definition
Equal To	Returns records that match the entered criteria. For example, if <Last Name> is entered as “equal to” a specific person’s name, the client records assigned to that worker will be returned.
Begins With	Returns records that begin with the entered criteria. For example, if <Last Name> is entered as “begins with” ‘T’ the system will return records assigned to the worker having last names that start with ‘T’, such as Tester and Thomas.
Ends With	Returns records that end with the entered criteria. For example, if you search on <Last Name> “ends with” ‘r’, you can retrieve records where a client’s name ends in ‘r’, such as Tester.
Not Equal To	Returns records that do not match the entered criteria. For example, if a name is entered for <Last Name>, the system will return a list of records except those records for the name provided in the search criteria.
Greater Than	Returns records that are dated later than the entered criteria. For example, if <DOB> is entered as “greater than” ‘03/01/2015’, the system will return all records whose dates of birth are after March 1, 2015.
Less Than	Returns records that are dated earlier than the entered criteria. For example, if <DOB> is entered as “less than” ‘03/31/2015’, the system will return data for all records with a birth date before March 31, 2015.

Operator	Definition
Contains	Returns records that contain the entered criteria. For example, if <Last Name> is entered as “contains” specific values in the person’s name, the client record(s) assigned to that worker with those values would be returned.
Blank	A record is returned where the selected field does not have a value in the field.
Non-Blank	Returns records where the selected field does have a value in the field.

4. Click **Search**. Results are returned below.
5. If a match is NOT found, proceed to the [Add a New Client Record](#) section.
6. If a match IS found, use the flyout menu to the right of the list and select Add Contact. Proceed to [Add Contact Record](#).



ELDER AFFAIRS
STATE OF FLORIDA

Welcome, Jennifer Buck **Client - Search For Existing**
5/14/2024 9:26 AM

File

Filters

Last Name *	Contains	Apple	AND	
First Name *	Contains	Michelle	AND	
PSA	Contains	%	AND	X
Best Contact Phone	Contains	%	AND	X
SSN	Ends With	%	AND	X
eCIRTS Client ID				

Search Reset Add New

2 Clients Client - Search For Existing record(s) returned - now viewing 1 through 2

eCIRTS Client ID	Last Name	First Name	PSA	Home Phone	Best Contact Phone	SSN	Date of Birth	Pseudo SSN	Street	Street 2	City	State	Zip Code	County	Email	Gender
1760817	Apple	Michelle	2			XXX-XX-1111							32059	Madison		Female
1412768	Apple	Michelle	2B		(555)264-9103	XXX-XX-8949	04/24/1974		123 Test St		Tallahassee	FL	32304	Leon	mreed@email	Add Contacts

Add a New Client Record

If a [search for an existing client record](#) has already been completed and no matches exists, a new client record will be created in eCIRTS.



Role: **IR Specialist**

1. The search results from the previous step will already be displayed. There is not a match. Select **Add New**.

The screenshot shows the 'Client - Search For Existing' page. At the top left is the Department of Elder Affairs logo. At the top right, it says 'Welcome, Jennifer Buck' and '10/26/2023 4:22 PM'. The page title is 'Client - Search For Existing'. Below the title is a 'File' section. A 'Filters' section is expanded, showing three filter rows: 'Last Name' with a red asterisk, 'Contains' dropdown, 'Match' text input, 'AND' dropdown, and a close button; 'First Name' with a red asterisk, 'Contains' dropdown, 'No' text input, 'OR' dropdown, and a close button; and 'Client ID' with a dropdown menu and a plus sign. Below the filters are 'Search', 'Reset', and 'Add New' buttons. At the bottom of the filter section, it says '0 record(s) returned'.

2. The Demographics page opens. Proceed to the [Demographics](#) section.
3. If this is an information only call and a screening referral is not needed, a full client record doesn't need to be created. Instead, a pre-client record can be created to capture very limited information about the client, knowing additional demographic information will be captured later if the client becomes interested in pursuing services. Proceed to the [Add a Pre-Client Record](#) section.

Add a Pre-Client Record

Pre-client records will be created in eCIRTS for information only calls or instances where documentation for a client is received before the client contacts the agency. (i.e. 3008 Medical Certification forms from nursing homes) The steps to complete a pre-client record are the same as creating a new client record, it's just that less information is gathered. Later in the workflow if the client pursues the screening process, additional information will be added to the pre-client record making it a full client record.



Role: **IR Specialist**

1. Complete the [Add a New Client Record](#) section first.
2. When the **Demographics** page opens, complete the following required fields at minimum:
 - a. **First Name**
 - b. **Last Name**
 - c. **Date of Birth**



NOTE

Date of birth is a required field. When it is not known, select the DOB Unknown checkbox. The DOB field is hidden and no longer required.

Basic Demographics	
EMS Release Date	<input type="text"/>
Former CIRTS ID	<input type="text"/>
First Name *	<input type="text" value="Michele"/>
Last Name *	<input type="text" value="Keck"/>
Middle Initial	<input type="text"/>
AKA Name	<input type="text"/>
Title	<input type="text"/>
DOB Unknown	<input checked="" type="checkbox"/>
Age	<input type="text"/>
Date of Death	<input type="text"/>

- d. **Gender**
- e. **Race**
- f. **Ethnicity**
- g. **County**
- h. **PSA**
- i. **Address Type:** defaults to Physical.
- j. **Address Category:** select the type of physical address.

Basic Demographics	
EMS Release Date	<input type="text"/>
Former CIRT ID	<input type="text"/>
First Name *	Michele
Last Name *	Keck
Middle Initial	<input type="text"/>
AKA Name	<input type="text"/>
Title	<input type="text"/>
Date of Birth *	01/30/1968
DOB Unknown	<input type="checkbox"/>
Age	54.1
Date of Death	<input type="text"/>
SSN	<input type="text"/>
Pseudo SSN	<input type="text"/>
Medicaid Number	<input type="text"/>
Gender *	Female
Marital Status	<input type="text"/>
Number in Household	<input type="text"/>
Head of Home	<input type="checkbox"/>
Disabled	<input type="checkbox"/>
Are you a veteran?	<input type="text"/>
Veteran Status	<input type="text"/>

3. If any additional information is known, such as address, phone number, marital status, veteran status, complete those fields on this page at this time. For additional details on the other fields on the Demographics page, see the [Demographics](#) section. If the information is not known, leave the field blank.
4. At minimum, the required fields must be answered before the page can be saved. From the **File** menu, select **Save and Close Demographics**.
5. For new clients, the Open/Close page will open. Proceed to the [Add Open/Close Record](#) section.

Demographics

The Demographic page is the first to display when a new client record is added. From the [Add a New Client Record](#) and [Add a Pre-Client Record](#) sections you learned a user must first search for an existing record before eCIRTS will allow them to create a new record. This section details all the data elements on the Demographics page, not just the ones required to create a client record. Users may complete this information with the client on the phone or come back to it later to complete.

You can edit Demographics from this same page. For existing clients, the Demographics summary page shows first and displays the most frequently referenced Demographic fields. There are more Demographics data elements to view but the user must select **Edit Demographics** from the **File** menu to view/edit them.



Role: **IR Specialist**

Demographics			
EMS Release Date	02/01/2021	SSN	236-57-8788
eCIRTS Client ID	10005	Pseudo SSN	
Former CIRTS ID		Gender	Female
First Name	Ellen	Age	81
Last Name	White	Race	Asian, White
Middle Initial	M	Ethnicity	Non Hispanic or Latino
AKA Name		Primary Language	English
Date of Birth	1/1/1940	Other Language	
Date of Death	1/1/2021		
Contact Information			
Address Type	Mailing	PSA	2
Address Category	Assisted Living Facility	Agency - populated by places list?	2B
Street	123 Home St	Best Contact	(259) 744-8878
Street 2		Home Phone	
City	TALLAHASSEE	Work Phone	(850) 235-9774
State	FL	Mobile Phone	(850) 333-7777
Zip Code	32305	Email	
County	LEON		
Rank	5		
Priority Score	50		
Assessment Date	06/01/2021		
Interpreter Services Used	Yes		

1. To edit or add demographic information or see additional Demographic information not displayed on the Demographic Summary page, select **Edit Demographics** from the **Edit** menu. The Demographic Details page displays.

Ellen White
Last Updated by System
at 5/11/2021 10:14:19 AM

Demographics Sign Out

Role: DOEA Main GO

File Edit Tools Reports Ticklers View Contacts Word Merge

Edit Demographics

Participating

Clients Last Name GO ADVANCED SEARCH

MY WORK CONTACTS **CLIENTS** CLIENT GROUPS AGENCIES PROVIDERS RESOURCES REPORTS

SSN	236-57-8788	Priority Score	50
DOB	1/1/1940	Assessment Date	
Rank	5	EMS Release Date	02/01/2021

White, Ellen M (10005)

Caregiver/Care Recipient

Case Relations Authorizations Activities Medications

Start/Stop **Demographics** Screening Referrals/Notifications Programs Forms Services Wait List Notes Appointments

2. The Demographic Details page is also the landing page when adding a new Client record. ([Adding a New Client Record](#). Step 2.)
3. The Demographic Details page has several sections. The eCIRTS user may need to revisit this page several times to collect all the data from the client. The only required fields that must be completed before the Demographics page can be saved are First Name, Last Name, Date of Birth, Gender, Race, Ethnicity, County and PSA.

Basic Demographics:

- a. **EMS Release Date:** AHCA provides the EMS Release Date for a set number of clients.
- b. **Former CIRTS ID:** the ID number for the client in the legacy CIRTS system

- c. **First Name***: client's first name
- d. **Last Name***: client's last name
- e. **Middle Initial**: client's middle initial
- f. **AKA Name**: alias name for the client if applicable
- g. **Title**: the client's title
- h. **Date of Birth***: client's birthday
- i. **DOB Unknown**: use this field when the DOB is not known, and the DOB field will be hidden and no longer required.
- j. **Age**: client's age
- k. **Date of Death**: client's date of death, if applicable
- l. **SSN**: client's social security number. The SSN in this field will populate in other places of the application like 701S and 701B assessments.



NOTE

In March 2022, DOEA approved the change to mask SSN in eCIRTS to comply with requirements.

Only users with the eCIRTS SSN Manager role can see a full SSN. All other users can only see the last 4 digits.

Users can still search by full SSN in the Quick Search or use the Advanced Search to search by the last 4 digits.



NOTE

Several roles can add SSN but only the eCIRTS SSN Manager role can unmask and edit the SSN. Only certain users will be given the eCIRTS SSN Manager role. The SSN can also be added/updated from the 701S Assessment. The SSN saved on that assessment will also update the SSN on the Demographics page.

- m. **Pseudo SSN**: Pseudo SSN for the client when a real SSN is not known. The Pseudo SSN does not populate on the 701B assessment.
- n. **Medicaid Number**: Medicaid number of the client if applicable
- o. **Gender***: Client's gender
- p. **Marital Status**: The marital status of the client
- q. **Head of Home**: Check if Yes. Leave blank if No.
- r. **Annual Income**: leave blank
- s. **Disabled**: NAPIS/OAAPS required field that pulls from the Assessment
- t. **Are you a Veteran?:** Yes or No
- u. **Veteran Status**: If Are you a Veteran is Yes, then answer this question.
- v. **Do you have Adult Cystic Fibrosis?:** Yes or No
- w. **Primary Race***: Client's race.
- x. **Additional Race**: Multi select field to record additional race.
- y. **Ethnicity***: Client's ethnicity
- z. **Primary Language**: The primary language of the client
- aa. **Other Language**: Use this field to record other languages for the client.
- bb. **Other Communication Method**: Other communication method used by the client.
- cc. **Interpreter Service Used?:** Check this box if services were used. This will be tracked for invoicing purposes.
- dd. **Client has limited ability reading, writing, speaking or understanding English:** Yes or No

File Tools Reports

Demographics	Basic Demographics
Client Addresses	EMS Release Date 3/1/2023
Client Phones	Former CIRT'S ID 3332649103
	First Name * Michelle
	Last Name * Apple
	Middle Initial
	AKA Name
	Title
	Date of Birth * 04/24/1944
	DOB Unknown <input type="checkbox"/>
	Age 79.5
	Date of Death
	SSN XXX-XX-9103
	Pseudo SSN
	Medicaid Number 1112649103
	Gender * Female
	Marital Status Married
	Head of Home <input type="checkbox"/>
	Annual Income
	Disabled <input type="checkbox"/>
	Are you a veteran? <input type="checkbox"/>
	Veteran Status
	Do you have Adult Cystic Fibrosis? <input type="checkbox"/>
	Primary Race * White
	Additional Race <ul style="list-style-type: none"> American Indian/Alaska Native Asian Black/African American Native Hawaiian/Pacific Island Other Unknown White
	Ethnicity * Non Hispanic or Latino
	Primary Language English
	Other Language Spanish
	Other Communication Method
	Interpreter Services Used? <input type="checkbox"/>
	Client has limited ability reading, writing, speaking, or understanding English <input type="radio"/> Yes <input type="radio"/> No

Contact Information:

- a. **Homeless?:** Yes or No
- b. **Address Type:** Defaults to Physical. The physical address should be the primary address. Home and Mailing address can be added under the Client Address subpage.
- c. **Address Category*:** When Address Type is Physical, this field is visible and required.
- d. **Facility Name:** Enter the facility name when applicable.
- e. **Street:** Enter the street address
- f. **Street 2:** Enter the street address.
- g. **City:** Enter the city
- h. **State:** The places list presents a list of values based on the city selected.
- i. **Zip Code:** The places list presents a list of values based on the city, state selected.
- j. **County*:** The places list presents a list of values based on the city, state, zip selected.



Note

Several reports use the client's county to display results so be sure to enter this field.

- k. **PSA***: The places list presents a list of values based on the city, state, zip, county selected.



Note

Several reports use the client's PSA to display results so be sure to enter this field.

- l. **Agency**: This field is populated by the places list with the Agency name.



Note

Several reports and behind the scenes automations use the full Agency Name in this field. Be sure to enter this field.

- m. **Best Contact**: The best number to reach the Client. This could be the Home, Work or Mobile phone number.
- n. **Phone Note**: description of the Best Contact number (i.e. sister, caregiver)
- o. **Home Phone**: The home phone number of the Client.
- p. **Work Phone**: The work phone number of the Client.
- q. **Work Extension**: The work phone number extension of the Client.
- r. **Mobile Phone**: The mobile or cell phone number of the Client.
- s. **Email**: The email address of the Client.
- t. **Address Note**: This field is used for notes about the address. It was added so users would record real USPS address information in the street fields instead of notes.

Contact Information	
Homeless?	<input type="checkbox"/>
Address Type	Physical <input type="checkbox"/>
Address Category *	Private Residence <input type="checkbox"/>
Facility Name	<input type="text"/>
Street	123 Test St
Street 2	<input type="text"/>
City	Tallahassee <input type="button" value="Clear"/>
State	FL <input type="button" value="Clear"/>
Zip Code	32304 <input type="button" value="Clear"/>
County *	Leon <input type="button" value="Clear"/>
Client PSA *	2 <input type="button" value="Clear"/>
Agency Name	<input type="text"/> <input type="button" value="Clear"/>
Best Contact	(555)264-9103
Phone Note	this is the sister's phone number
Home Phone	x(xxx)xxx-xxxx
Work Phone	(777)264-9103
Work Extension	<input type="text"/>
Mobile Phone	(888)264-9103
Email	mreed@email.com
Address Note	<input type="text"/>

4. When finished, from the **File** menu, select **Save and Close Demographics**.
 - a. For new clients, the Open/Close page will display. Proceed to the [Add Open/Close Record](#) section.
 - b. For existing clients, the Demographics Summary page will be displayed. The updates are complete. Proceed to the [Add Contact Record](#) section.

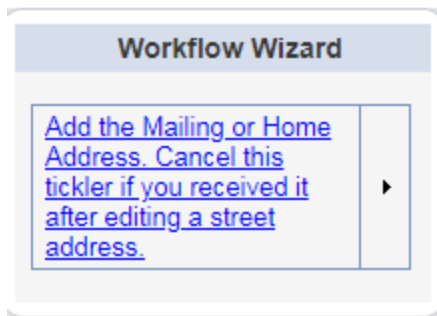


Note

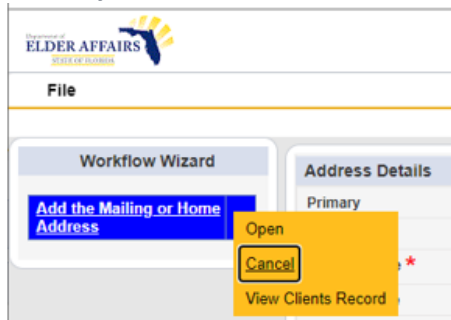
SSN, DOB, Rank, Priority Score, Assessment Date and EMS Release Date from the Demographics page are also visible in the header that remains visible on any tab of the Client record. As data for these fields changes on Demographics, it will also change in the header.

MY WORK	CONTACTS	CLIENTS	CLIENT GROUPS	AGENCIES	PROVIDERS	RESOURCES	REPORTS
SSN	236-57-8788	Priority Score	50				
DOB	1/1/1940	Assessment Date					
Rank	5	EMS Release Date	02/01/2021				
White, Ellen M (10005)							
Caregiver/Care Recipient							
Case Relations Authorizations Activities Medications							
Start/Stop Demographics Screening Referrals/Notifications Programs Forms Services Wait List Notes Appointments							

5. A workflow wizard triggers a tickler when street is added or edited on the Demographics page. The tickler is to add a second address, either Mailing or Home. The tickler lands the user on the Client Address details page. Proceed to step 6 of the [Client Address](#) section.



6. If you are editing the address and already have a second address, the tickler can be cancelled. From the tickler **flyout** menu, select **Cancel**.



Client Address

The Demographics page houses many data elements including one primary address. If a client has multiple addresses, they are recorded on the Client Address subpage. Only the primary address is visible on the Demographics page.



Role: **IR Specialist, eCIRTS Worker**

1. Navigate to the client's record and select the **Demographics** tab.
2. From the File menu, select **Edit Demographics**.
3. The Demographics detail page displays. The Client Addresses and Client Phone subpages are listed on the left.
4. Select the **Client Address subpage**. The address visible on the demographics detail page, the primary active address, will also be visible on this subpage.
5. To add an additional address, from the **File** menu, select **Add Client Address**.
6. The Address Details page displays. Update the following fields:
 - a. **Address Type:** Defaults to Physical. The physical address should be the primary address. Home and Mailing address can be added under the Client Address subpage.
 - b. **Address Category:** When Address Type is Physical, this field is visible and required.
 - c. **Facility Name:** Enter the facility name when applicable.
 - d. **Street:** Enter the street address
 - e. **Street 2:** Enter the street address.

- f. **City:** Enter the city
- g. **State:** The places list presents a list of values based on the city selected.
- h. **Zip Code:** The places list presents a list of values based on the city, state selected.
- i. **County*:** The places list presents a list of values based on the city, state, zip selected.



Note

Several reports use the client’s county to display results so be sure to enter this field.

- j. **PSA*:** The places list presents a list of values based on the city, state, zip, county selected.



Note

Several reports use the client’s PSA to display results so be sure to enter this field.

- k. **Agency:** This field is populated by the places list with the Agency name.

The screenshot shows the 'Client Addresses' interface. At the top right, the user is identified as Michelle Apple on 11/22/2023 at 3:43 PM. The page title is 'Client Addresses'. On the left, there is a navigation menu with 'Demographics', 'Client Addresses', and 'Client Phones'. The main area shows a search filter and a table of 7 records. The first record is highlighted, showing a Physical address at 12 Hawaii Blvd, Spring Grove, FL 60081, which is not active and not primary. Below the table, the 'Address Details' form is visible, with the 'Active' checkbox checked and 'Address Type' set to 'Physical'. Other fields like Facility Name, Street, and City are empty. The 'Start Date' is set to 11/22/2023. There are 'Clear' buttons next to the dropdown menus for City, State, Zip Code, County, Client PSA, and Agency Name.

7. From the **File** menu, select **Save and Close Address**.

Client Phone

The Demographics page houses many data elements including phone numbers. Phone numbers can also be added on Client Phones subpage. The phone numbers visible on the demographics detail page are also visible on this subpage.



Note

Because best contact, home and work phone numbers are captured on the Demographics page, it is not likely you will use this page to add phone numbers, but it is available.

Best Contact	(555)264-9103
Phone Note	this is the sister's phone number
Home Phone	x(xxx)xxx-xxxx
Work Phone	(777)264-9103
Work Extension	
Mobile Phone	(888)264-9103

If you want to track the effective dates of a phone number you would want to add them from the Client Phones subpage instead of Demographics.



Role: IR Specialist, eCIRTS Worker

1. Navigate to the client's record and select the **Demographics** tab.
2. From the **File** menu, select **Edit Demographics**.
3. The Demographics detail page displays. The Client Addresses and Client Phone subpages are listed on the left.
4. Select the **Client Phones**. The phone numbers that are visible on the demographics detail page and will also be visible on this subpage.
5. To add an additional phone number, from the **File** menu, select **Add Client Phone**.
6. The Phone Details page displays. Update the following fields:
 - a. **Phone Type:** Select the type of phone number.
 - b. **Phone Category:** Select Current, Previous, Unknown or Other
 - c. **Phone Number:** enter the phone number in (###)###-#### format.
 - d. **Extension:** enter if applicable
 - e. **Active:** check this box if this phone number currently in use. The phone number must be active to display on Demographics.
 - f. **Primary:** check this box if you want this phone number to display on Demographics.
 - g. **Contact Type:** Will default to Consumer and is read only.

File

Demographics

Client Addresses

Client Phones

Filters Search Reset

9 Client Phones record(s) returned - now viewing 1 through 9

Phone Type	Phone Category	Phone	Extension	Active	Primary
Current Physical Location				False	False
Home				False	False
Current Physical Location				True	False
Home				False	True
Home					
Best Contact					
Home1					
Work					
Cell					

FL eCIRTS Sandbox (Copy of PROD 10/6/22) - Personal - Microsoft Edge

https://hssflecstage.wellsky.com/stage-humanservices/Pages/Harmony.aspx?ChapterID=204...

Michelle Apple | Client Phone
11/22/2023 3:45 PM

File

Phone

Phone Type *

Phone Category

Phone Number *

Extension

Active

Primary

Contact Type

7. From the **File** menu, select **Save and Close Client Phone**.

Add Open/Close Record

An Open/Close record serves as the 'parent' record in eCIRTS, and one will be created for every client, whether they require a 701S or not. The Open/Close record is only created once... when the client record is first created. The Open/Close record will remain open until the client's record is archived.




Role: **IR Specialist, eCIRTS Worker**

- For new client and pre-client records, the Open/Close Details page will be the landing page once the Demographics page is saved for the first time.
- The Open/Close details page displays. Complete the following fields:
 - Division:** All clients will be associated with the AG division
 - Status:** Defaults to Pending. Change to Open.

Status	Use
Pending	This is the default value for all Open/Close records and should be changed. If you do not change it, the Division field on several pages in the client record like forms, programs, referrals, etc. will be blank and you will not be able to save the record.
Open	The client record is open so programs, assessments, notes, contacts, billable units, etc. can be added.

Status	Use
Closed	The Client record is closed to all programs. This is only done as part of the client archive process.

- c. **Status Date:** This field is used to record the date for the status. It will update each time the Status value is changed.
- d. **Created By:** is assigned when the client record is first created and is listed as the person who created the record. It does not need to be changed. It will be read only after saving the record the first time.



Michelle Apple | **Open/Close**
 11/22/2023 4:53 PM

File

Division *	<input type="text"/>		
Created By *	<input type="text" value="Buck, Jennifer"/>	...	Clear Details
Status *	<input type="text"/>		
Status Date	<input type="text" value="11/22/2023"/>		

3. From the **File** menu, select **Save and Close Open/Close**.

Add Contact Record

The contact record houses the details of a call. A contact record can be added directly from a shortcut on the client search, a shortcut on the client > Demographic page or it can be added directly from the Contacts chapter. Only Anonymous and incomplete contacts will be added directly from the Contacts chapter meaning they are not associated to a client record. An Incomplete call is one where the caller didn't leave enough information to accurately match with an existing client record. If this is an anonymous contact, skip to [Anonymous Contacts](#).



Role: **IR Specialist**

1. The user will first [search for an existing client record](#) or [add a new client record](#) if one doesn't already exist.
2. From the existing client search results, select the flyout menu to the right of the client's name in the search results. Select **Add Contacts**. The Contact Details page displays.

Filters

Last Name * Contains Apple AND X

First Name * Contains Michelle OR X

eCIRTS Client ID +

Search Reset Add New

1 Client - Search For Existing record(s) returned - now viewing 1 through 3

eCIRTS Client ID	Last Name	First Name	PSA	Best Contact Phone	Date of Birth	SSN	Pseudo SSN	Street	Street 2	City	State	Zip Code	County	Email	Gender
1412768	Apple	Michelle	2	(555)555-5555	04/24/1944	XXX-XX-9103		123 Test St		Tallahassee	FL	32304	Leon	mreed@email.com	Female

First Previous Records per page 15 Next Last

Add Contacts

- Or, with the client record already open, select the **Demographics** tab. From the **File** menu, select **Add Contact**. The Contact Details page displays.

Michelle Apple
Last Updated by j buck
at 8/10/2023 10:40:21 AM

Demographics

File Edit Tools Ticklers View Contacts Word Merge

Add New Client - Search For Existing 103

Print

Close Demographics

Add Contacts

Caregiver/Care Recipient


Associated People Appointments Medications

Programs Services Authorizations Activities


Demographics Open/Close Referrals To Providers Forms Notes Eligibility

Demographics

EMS Release Date	3/1/2023	SSN	XXX-XX-9103
eCIRTS Client ID	1412768	Pseudo SSN	
Former CIRTS ID	3332649103	Gender	Female

-  **NOTE**
- For I&R Specialists, the ‘clock starts’ to record the duration of the call when the Contact Record is opened. The ‘clock stops’ the last time the contact record is saved on the same day by the same user. Durations and Reason for Contact are used to I&R units.

- The Contact details page displays. Proceed to one of the following scenarios:
 - [Unsuccessful Contact](#)
 - [Leave Voice Mail](#)
 - [Contact Successful](#)

-  **NOTE**
- It is recommended to [View Past Contacts](#).

View Past Contacts

In eCIRTS, all callers, except anonymous ones, will have a client record. Contact records will then be added to the client record. This workflow allows users to view past contact information in several ways in eCIRTS.

- The View Contacts list is an easily accessible list of the client’s past contacts because knowing the details of previous contacts may assist with the current contact.

- The Contacts Queue is a full list of all contacts that can be filtered down so users can manage their workloads and supervisors can oversee work.
- In addition to the queue, there is also a report that displays all past contacts for a client. The report can be run from any open contact record and will automatically display information on all past contacts for the client record you are on, without having to add any report filters.



Role: IR Specialist

- There are several ways to view previous contacts for a client. From the **Clients** chapter, from any tab on the client's record, select **View Contacts** from the top menu bar.

- A limited summary view of the client's past contacts displays. This list does NOT display the Short Summary field from the contact record.

Contact Date ▲	Entry Point	Contact Method	Contact Type	Reason for Contact	Status
02/06/2023	I&R	Phone Call	Referral	Contact Attempt 2	Complete
02/06/2023	I&R	Phone Call	Referral	Food/Meals	Follow Up
02/06/2023	I&R	Phone Call	Referral	Food/Meals	Complete
02/07/2023	I&R	Phone Call	Screening	701S	Complete
02/16/2023	I&R	Phone Call	Referral	Food/Meals	Follow Up
02/16/2023	Intake	Phone Call	SMMC LTCP	Contact Attempt 1	Complete
02/20/2023	Intake	Phone Call	SMMC LTCP	701S Complete	Complete
02/21/2023	Eligibility	Phone Call	SMMC LTCP	Waitlist Release	Complete

- Select a record for more information. The Contact record will open. If it is in complete status, all of the fields will be read only, but the information is still visible.
- When finished, the user can close the Contact record and close the Past Contacts window.

- A more detailed list of previous contact information is available by selecting the **Contacts** chapter. A full list of previous contacts for all clients is available but too long to look through. The filters are essential to making this list manageable and useful.

The screenshot shows the CONTACTS interface with a search filter applied. The filter is 'Screener - Jennifer' with the value 'Buck, Jennifer'. The table below shows the results of this search.

Item	Client First Name - Adding Contact to Client	Client Last Name	Client DOB	Call Back Phone	Caller if Other Than Client	Contact Type	Reason for Contact	Referral Type	701S Appointment Date	Follow Up Date	Screening Referral Cr
	Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Assessment Not Needed - Client Declined				05/28/2023
	Sarah	Apple	01/01/1940			SMMC LTCP - Screening	701S Complete				05/29/2023
	Sarah	Apple			Michael Apple	SMMC LTCP - Screening	Contact Attempt 1	Initial			05/28/2023
	Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 1	Rescreening			
	Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 1	Initial			
	Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 1	APS - Intermediate			
	Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 1	Aging Out			
	Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 2	Initial			
	Sarah	Apple	01/01/1940			SMMC LTCP - Screening	30 Day NCL	Initial			
						Screening	Contact Attempt 1				
						Screening	701S Scheduled				
		Jeremy		(555)555-5555		Screening					
		Johnny		(555)555-5555		Information					
		Test			Visibility	04/24/1944	Screening				
					Ap	04/24/1944	Screening				

- Save filters that you'd like to reuse to save you time next time you use the Contact queue. Filters are specific to the user and role. If you have access to multiple roles, you will only see filters associated with your current role.
- To save a filter, you must first complete **Filter** section and execute the search by clicking Search.
- One the results are returned, select **Save As** at the top of the page.

The screenshot shows the CONTACTS interface with the filter section expanded. The 'Save As' button is highlighted with a black arrow. The filter criteria are: Screener - Jennifer, Equal To, Buck, Jennifer; PSA, Equal To, 2; Contact Status, Equal To, Assigned. The table below shows the results of this search.

Item	PSA	eCIRTS Client ID	Contact Date	Client First Name - Adding Contact to Client	Client Last Name	Client DOB	Call Back Phone	Caller if Other Than Client	Contact Type	Reason for Contact	Referral Type	701S Appointment Date	Follow Up Date	Screening Referral Created Date
2	1750746	07/06/2023	Sarah	Apple	01/01/1940				SMMC LTCP - Screening	Contact Attempt 1	Rescreening			
2	1750746	07/06/2023	Sarah	Apple	01/01/1940				SMMC LTCP - Screening	Contact Attempt 1	Initial			
2	1750746	07/06/2023	Sarah	Apple	01/01/1940				SMMC LTCP - Screening	Contact Attempt 1	APS - Intermediate			
2	1750746	07/06/2023	Sarah	Apple	01/01/1940				SMMC LTCP - Screening	Contact Attempt 1	Aging Out			

- Update the following fields:
 - Filter Name:** Enter a name for the saved filter.
 - If Filter Name Exists, Overwrite it:** If you want this filter to replace an existing one with the same name, check this box. If not, keep it unchecked and a new filter will be created.
 - Save as Default:** If this should be the filter that displays by default each time you open the Activity Roster, check this box.

Save Search Filter Option As...	
Filter Name *	Jennifer PSA2 Assigned
If Filter Name Exists, Overwrite it	<input checked="" type="checkbox"/>
Save As Default	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

10. Select **Save**.

11. The next time you use the Contact queue, you can select your saved Filter from the list and click **Search Filter**. This will populate the search filters, saving you time from looking them up again.



TIP

Saved filters are key. Be sure to take the time to create several saved filters specific to your day-to-day workload.

12. Finally, if you have a contact record open, select **Previous Contact Report** from the **Reports** menu.

13. The report displays all previous contact information for the client record you have opened.

Unsuccessful Contact

An unsuccessful contact is when a contact attempt is made, and the worker is unable to leave a message. For example, worker is returning a voice mail, and the caller doesn't have voicemail. The worker will make 2 -3 contact attempts, and they will all be documented in the same eCIRTS Contact record, NOT one contact record per contact attempt.



Role: IR Specialist

1. With the contact details page open, update the following fields:
 - a. **Division:** Required. Defaults to AG as is read only.
 - b. **Contact Date:** Required. defaults to today and is editable if needed.
 - c. **Contact Time:** Required. defaults to now and is editable if needed.
 - d. **Received By:** Required. defaults to the user adding the contact record.
 - e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
 - f. **Current Task:** Select I&R
 - g. **Contact Method:** Required. defines how the contact was received.
 - h. **Anonymous:** Leave blank
 - i. **eCIRTS ID:** populates automatically and is read only.
 - j. **Client First Name:** populates automatically.
 - k. **Client Last Name:** populates automatically.
 - l. **Call Back Phone:** populates automatically – update if needed.
 - m. **Caller if other than Client:** search field. If the Caller already exists on the client's Associated People tab, their name will be listed, and the user can pick it from the list to populate the field.

Client First Name: Randy
 Client Last Name: Slaton
 Call Back Phone: (555)572-0865
 Caller if other than Client:
 Relationship:
 Contact Type *

DialogRelationDataLookups

RECID	Name	Relationship	Phone	Date Of Birth
363759	Voncie Goldsmith	Aunt	(850) 494 7101	

Short Summary

If not, the user can close the search window by clicking the X at the top right and just type the name into the "Caller if other than client" box on the contact screen.

Client First Name: Randy
 Client Last Name: Slaton
 Call Back Phone: (555)572-0865
 Caller if other than Client: John Smith
 Relationship: Brother

- a. **REMINDER!: ADD ASSOCIATED PEOPLE RECORD FOR CALLER.** This message displays when a value is added to the Caller if Other than Client field. This is a reminder to the I&R specialist to add the caller information to the Associated People tab on the client record.

Caller if other than Client: John Smith
 Relationship:
REMINDER! ADD ASSOCIATED PEOPLE RECORD FOR CALLER

- n. **Relationship:** enter the relationship of the caller to the client
- o. **Contact Type:** select Edit Record – Not Being Billed I&R. The values differ based on the Current Task selected. This is an eCIRTS required field so the user must enter a value at the beginning of the call but can update it at the end of the call.

Contact Type	Description
Edit Record – Not Being Billed I&R	To update or correct a record, record satisfaction surveys, or note that a call was returned with no answer.
Information	One-to-one interaction with an inquirer providing appropriate information in response to a direct request for such information, resources may be provided.
Referral	One-to -one interaction with an inquirer, I&R specialist assist in determining the need of the inquirer, identifies and makes referrals to appropriate organizations capable of meeting the inquirer's needs. Follow-up is conducted.
Referral/Crisis	Assess and meet the immediate, short-term needs of inquirers who are experiencing a crisis and contact the Helpline for assistance. Follow-up is conducted unless staff directly connected the person to law enforcement or emergency services.
Referral/Advocacy	Intervene, when necessary, on behalf of individuals to help them obtain needed services. When warranted, the I&R service makes one or more calls or takes other actions on the inquirer's behalf and uses an appropriate agency mechanism to ensure inquirers get the information and/or help they need. Follow-up is conducted.
Specific Program Use I&R	Used by programs other than Helpline , i.e. SMMC LTC, EHEAP, etc.

- p. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.

- q. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
- r. **Reason for Contact:** select Contact Attempt 1, 2 or 3
- s. **Referral Type:** select if known. Otherwise leave it blank. Referral types help workers manage their caseloads easier in the Contacts queue.
- t. **701S Appointment Date:** leave blank.
- u. **Unmet Needs Reason:** leave blank.
- v. **Contact Marker:** Select Message Returned....
- w. **SNAP Submittal Date:** leave blank.
- x. **Assigned To:** search for and select your name if not already assigned.
- y. **Screener:** leave blank
- z. **Contact Status:** Incomplete. If this is the last contact attempt. Select Complete as the status.
- aa. **Duration:** will automatically populate after the record is saved.
- bb. **Client Primary Language:** Will remain blank until later in the workflow when/if a screening referral is created.
- cc. **Other Language:** Will remain blank until later in the workflow when/if a screening referral is created.
- dd. **Follow Up Date:** enter the next day you intend to follow up. If this is the last contact attempt, leave it blank.
- ee. **Screening Referral Created Date:** Will remain blank until later in the workflow when/if a screening referral is created.

Assigned To (I&R and Eligibility)	<input type="text" value="Buck, Jennifer"/>	...	Clear	Details
Screener	<input type="text"/>	...	Clear	
Contact Status *	<input type="text" value="Follow Up"/>			
Duration	<input type="text"/>			
Client Primary Language	<input type="text"/>			
Other Language	<input type="text"/>			
Follow Up Date	<input type="text" value="12/05/2023"/>			
Screening Referral Created Date	<input type="text"/>			

2. From the **File** menu, select **Save and Close Contact**.
3. If this was the final contact attempt, the process ends. If not, the next day, the worker will select the **Contacts** tab and use filters to display the contacts that need a second or third contact attempt.
4. Update the following fields to display a list of contact records assigned to the worker for a second/third contact attempt. Use this filter for the incomplete contact attempts:
 - a. Assigned To equal to = Self
 - b. Contact Status = Incomplete
 - c. Reason for Contact =
 - Contact Attempt 1 (clients who only had 1 contact attempt and need the second attempt)
 - Contact Attempt 2 (clients who had 2 contact attempts and need a third)
 - d. Follow Up Date = Greater than mm/dd/yyyy but less than mm/dd/yyyy



Note

Recommend creating a user saved filter to list all incomplete contacts that require a second/third attempt in the current week.

Filters

Save Filter Search Filter Save As Default Save As Delete

Follow Up Date	Greater Than	12/03/2023	AND	X
Follow Up Date	Greater Than	12/08/2023	AND	X
Contact Status	Equal To	Incomplete	AND	X
Reason for Contact	Equal To	Contact Attempt 1	AND	X
Assigned To	Equal To	Buck, Jennifer	AND	X
Contact ID	+			

Search Reset

- Matching results are displayed. Select the column headers to sort the results ascending vs. descending. Note the Reason for Contact. That tells you the last contact attempt that was made.

MY WORK CONTACTS CLIENTS CLIENT GROUPS RESOURCES REPORTS

Filters Contact 1 FU - Week Search Filter Save As Default Save As Delete

Follow Up Date	Greater Than	12/03/2023	AND	X
Follow Up Date	Less Than	12/08/2023	AND	X
Contact Status	Equal To	Incomplete	AND	X
Assigned To	Equal To	Buck, Jennifer	AND	X
PSA	+			

1 Advanced Search record(s) returned - now viewing 1 through 1

PSA	eCIRTS Client ID	Contact Date	Client First Name - Adding Contact to Client	Client Last Name	Client DOB	Call Back Phone	Caller if Other Than Client	Contact Type	Reason for Contact	Referral Type	701S Appointment Date	Follow Up Date
2	1750721	12/04/2023	Illian	Smith	12/01/1948			Edit Record - Not Being Billed I&R	Contact Attempt 1			12/05/2023

<< First < Previous Retrieve 15 Records at a time Next > Last >>

- Select a record to open the contact details page. Follow one of the scenarios:
 - [Unsuccessful Contact](#)
 - [Leave Voice Mail](#)
 - [Contact Successful](#)

Leave Voice Mail

This workflow should be used when a contact attempt is made, and the worker is able to leave a message. For example, the worker is making a contact attempt and is able to leave a voice mail.



Role: IR Specialist

- With the contact details page open, update the following fields:
 - Division:** Required. Defaults to AG as is read only.
 - Contact Date:** Required. defaults to today and is editable if needed.
 - Contact Time:** Required. defaults to now and is editable if needed.
 - Received By:** Required. defaults to the user adding the contact record.
 - PSA:** Required. Select your PSA from the list or populated by Stored Procedure
 - Current Task:** Select I&R
 - Contact Method:** Required. defines how the contact was received.

- h. **Anonymous:** Leave blank
- i. **eCIRTS ID:** populates automatically and is read only.
- j. **Client First Name:** populates automatically.
- k. **Client Last Name:** populates automatically.
- l. **Call Back Phone:** populates automatically – update if needed.
- m. **Caller if other than Client:** search field. If the Caller already exists on the client's Associated People tab, their name will be listed, and the user can pick it from the list to populate the field.

If not, the user can close the search window by clicking the X at the top right and just type the name into the "Caller if other than client" box on the contact screen.

- b. **REMINDER!:** ADD ASSOCIATED PEOPLE RECORD FOR CALLER. This message displays when a value is added to the Caller if Other than Client field.

- n. **Relationship:** enter the relationship of the caller to the client
- o. **Contact Type:** select Edit Record – Not Being Billed I&R. The values differ based on the Current Task selected. This is an eCIRTS required field so the user must enter a value at the beginning of the call but can update it at the end of the call.

Contact Type	Description
Edit Record – Not Being Billed I&R	To update or correct a record, record satisfaction surveys, or note that a call was returned with no answer.
Information	One-to-one interaction with an inquirer providing appropriate information in response to a direct request for such information, resources may be provided.
Referral	One-to-one interaction with an inquirer, I&R specialist assist in determining the need of the inquirer, identifies and makes referrals to appropriate organizations capable of meeting the inquirer's needs. Follow-up is conducted.
Referral/Crisis	Assess and meet the immediate, short-term needs of inquirers who are experiencing a crisis and contact the Helpline for assistance. Follow-up is conducted unless staff directly connected the person to law enforcement or emergency services.
Referral/Advocacy	Intervene, when necessary, on behalf of individuals to help them obtain needed services. When warranted, the I&R service makes one or more calls or takes other actions on the inquirer's behalf and uses an appropriate agency mechanism to ensure inquirers

Contact Type	Description
	get the information and/or help they need. Follow-up is conducted.
Specific Program Use I&R	Used by programs other than Helpline , i.e. SMMC LTC, EHEAP, etc.

- d. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
- p. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
- q. **Contact Marker:** Select Message Returned....
- r. **SNAP Submittal Date:** leave blank.
- s. **Reason for Contact:** select Contact Attempt 1, 2 or 3
- t. **Referral Type:** select if known. Otherwise leave it blank. Referral types help workers manage their caseloads easier in the Contacts queue.
- u. **701S Appointment Date:** leave blank.
- v. **UnMet Needs Reason:** leave blank.
- w. **Assigned To:** defaults to self. Can remove value or leave as is.
- x. **Screener:** leave blank
- y. **Contact Status:** Complete. If/when the caller calls back, he/she will be treated as a new contact, documented on a new contact record.
- z. **Duration:** will automatically populate after the record is saved.
- aa. **Client Primary Language:** Will remain blank until later in the workflow when/if a screening referral is created.
- bb. **Other Language:** Will remain blank until later in the workflow when/if a screening referral is created.
- cc. **Follow Up Date:** leave blank.
- dd. **Screening Referral Created Date:** Will remain blank until later in the workflow when/if a screening referral is created.

- 2. From the **File** menu, select **Save and Close Contact**. The process ends.

Contact Successful

A contact is successful when someone is reached. You could have a successful contact when returning a voice mail. You also have a successful contact each time you answer a phone call.



Role: **IR Specialist**

- 1. With the contact details page open, update the following fields:
 - a. **Division:** Required. Defaults to AG as is read only.
 - b. **Contact Date:** Required. defaults to today and is editable if needed.
 - c. **Contact Time:** Required. defaults to now and is editable if needed.
 - d. **Received By:** Required. defaults to the user adding the contact record.
 - e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
 - f. **Current Task:** Select I&R
 - g. **Contact Method:** Required. defines how the contact was received.
 - h. **Anonymous:** Leave blank
 - i. **eCIRTS ID:** populates automatically and is read only.
 - j. **Client First Name:** populates automatically.

- k. **Client Last Name:** populates automatically.
- l. **Call Back Phone:** populates automatically – update if needed.
- m. **Caller if other than Client:** search field. If the Caller already exists on the client's Associated People tab, their name will be listed, and the user can pick it from the list to populate the field.

If not, the user can close the search window by clicking the X at the top right and just type the name into the "Caller if other than client" box on the contact screen.

- n. **REMINDER!: ADD ASSOCIATED PEOPLE RECORD FOR CALLER.** This message displays when a value is added to the Caller if Other than Client field.

- o. **Relationship:** enter the relationship of the caller to the client
- p. **Contact Type:** select Information or Referral. The values differ based on the Current Task selected. This is an eCIRTS required field so the user must enter a value at the beginning of the call but can update it at the end of the call.

Contact Type	Description
Edit Record – Not Being Billed I&R	To update or correct a record, record satisfaction surveys, or note that a call was returned with no answer.
Information	One-to-one interaction with an inquirer providing appropriate information in response to a direct request for such information, resources may be provided.
Referral	One-to -one interaction with an inquirer, I&R specialist assist in determining the need of the inquirer, identifies and makes referrals to appropriate organizations capable of meeting the inquirer's needs. Follow-up is conducted.
Referral/Crisis	Assess and meet the immediate, short-term needs of inquirers who are experiencing a crisis and contact the Helpline for assistance. Follow-up is conducted unless staff directly connected the person to law enforcement or emergency services.
Referral/Advocacy	Intervene, when necessary, on behalf of individuals to help them obtain needed services. When warranted, the I&R service makes one or more calls or takes other actions on the inquirer's behalf and uses an appropriate agency mechanism to ensure inquirers get the information and/or help they need. Follow-up is conducted.

Contact Type	Description
Specific Program Use I&R	Used by programs other than Helpline , i.e. SMMC LTC, EHEAP, etc.

- q. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
- r. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
- s. **Contact Marker:** no changes needed.
- t. **SNAP Submittal Date:** leave blank.
- u. **Reason for Contact:** leave blank for now. Will be completed in the [Community Resources Needed](#) or [Screening Referral Needed](#) section.
- a. **Referral Type:** select the applicable Referral Type. Referral types help workers manage their caseloads easier in the Contacts queue.
- v. **701S Appointment Date:** if the 701S is scheduled during this contact, enter the date of the appointment.
- w. **UnMet Needs Reason:** leave blank. May be completed in the Community Resources Needed section if applicable.
- x. **Assigned To:** search for and select your name if not already selected.
- y. **Screener:** leave blank
- z. **Contact Status:** Will be completed in the [Community Resources Needed](#) or [Screening Referral Needed](#) section.
 - aa. **Duration:** will automatically populate after the record is saved.
 - bb. **Client Primary Language:** Will remain blank until later in the workflow when/if a screening referral is created.
 - cc. **Other Language:** Will remain blank until later in the workflow when/if a screening referral is created.
 - dd. **Follow Up Date:** leave blank. Will be updated in the [Screening Referral Needed](#) section if applicable.
 - ee. **Screening Referral Created Date:** Will remain blank until later in the workflow when/if a screening referral is created.

2. From the **File** menu, select **Save Contact**.



CAUTION

Select Save Contact, NOT Save and Close Contact to expose the subpages.

3. With the contact record still open, the worker should confirm the client’s Demographics and update as needed. Since this workflow started on the client record, the worker can easily view the client’s demographic information on the **Client** subpage.

File Add Participant

Contact

Resources Provided

Client

OOD Resources

Filters

First Name +

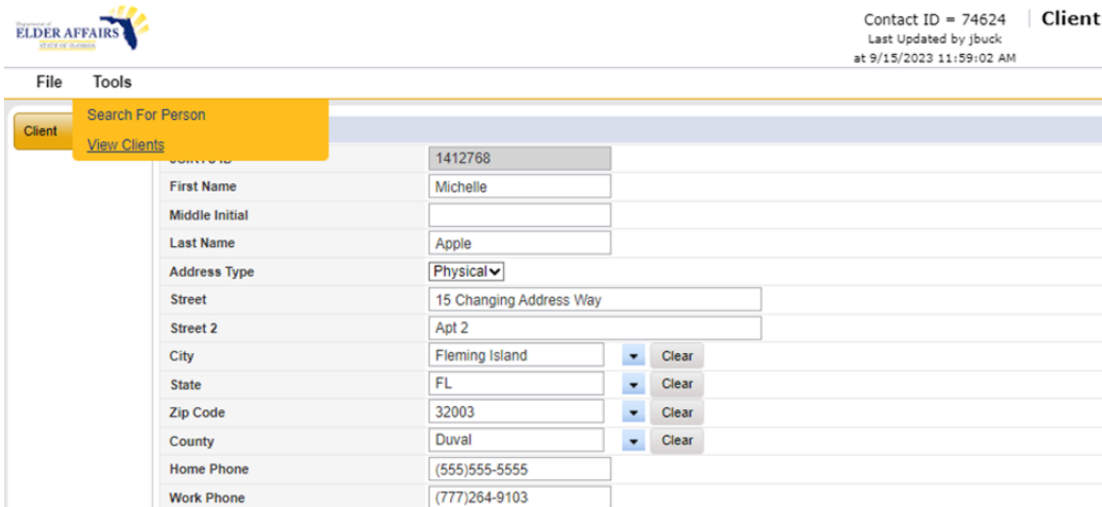
Search Reset

1 Client record(s) returned - now viewing 1 through 1

First Name	Last Name	Type	Home Phone	Work Phone	Email	Age	DOB
Michelle	Apple	Prospective Consumer	(555)555-5555	(777)264-9103	mreed@email.com	79.4	04/24/1944

First Previous Records per page 15 Next Last

- Click on the record to view additional demographic data. You can see the data; you cannot edit it from this page. To open the client record where the Demographics can be updated, from the **Tools** menu, select "**View Clients.**" See the [Demographics](#) section for details on editing this page. Once complete, return to the open Contact record.



File Tools

Client

Search For Person

View Clients

1412768

First Name Michelle

Middle Initial

Last Name Apple

Address Type Physical

Street 15 Changing Address Way

Street 2 Apt 2

City Fleming Island Clear

State FL Clear

Zip Code 32003 Clear

County Duval Clear

Home Phone (555)555-5555

Work Phone (777)264-9103

- Once there has been successful contact, the worker will determine the needs of the client. Proceed to one of the following scenarios:
 - [Community Resources Needed](#)
 - [Screening Referral Needed](#)

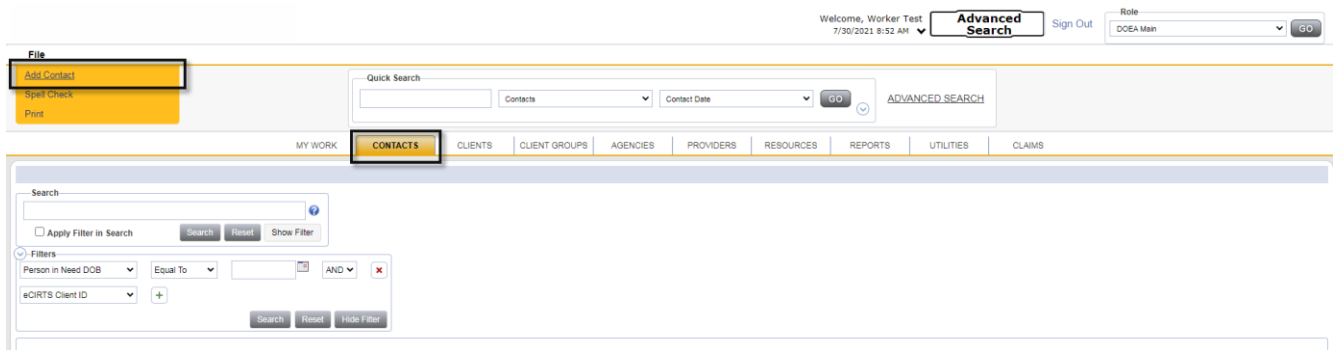
Anonymous and Incomplete Contacts

Only Anonymous and incomplete contacts will be added directly from the Contacts chapter and not linked to a client record. An Anonymous contact is one where the caller asked to remain anonymous and didn't provide any contact information. An Incomplete contact is one where the caller didn't leave enough information to accurately match with an existing client record, but some contact information was collected (i.e. number but not name.)



Role: IR Specialist

- Select the **Contacts** chapter.
- From the **File** menu, select **Add Contact**.



3. The Contact Details page displays. Update the following fields:

- a. **Division:** Required. Defaults to AG as is read only.
- b. **Contact Date:** Required. defaults to today and is editable if needed.
- c. **Contact Time:** Required. defaults to now and is editable if needed.
- d. **Received By:** Required. defaults to the user adding the contact record.
- e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
- f. **Current Task:** Select I&R
- g. **Contact Method:** Required. defines how the contact was received.
- h. **Anonymous?:** Check this box if the caller asked to remain anonymous.
- i. **Anonymous - City:** search for and select the city of the anonymous caller if known.
- j. **Anonymous - Zip:** search for and select the city of the anonymous caller if known.
- k. **Anonymous - Over 60 years old:** Answer Yes or No if known.
- l. **Call Back Phone:** enter the phone number of the caller if known.

Current Task *	I&R
Contact Method *	Phone Call
Anonymous?	<input checked="" type="checkbox"/>
Anonymous - Zip Code	<input type="text"/> Clear
Anonymous - City	<input type="text"/> Clear
Anonymous - Over 60 years old	<input type="text"/>
eCIRTS ID	<input type="text"/>
Call Back Phone	(555)264-9103
Contact Type *	Information

- m. **Contact Type:** select Information. Anonymous calls cannot be referred for a screening.
- n. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
- o. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
- p. **Contact Marker:** no changes needed.
- q. **SNAP Submittal Date:** leave blank.
- b. **Reason for Contact:** leave blank for now. Will be completed in the [Community Resources Needed](#)
- r. **Referral Type:** leave blank.
- s. **701S Appointment Date:** leave blank.
- t. **UnMet Needs Reason:** leave blank. May be completed in the [Community Resources Needed](#) section if applicable.
- u. **Assigned To:** search for and select your name if not already selected.
- v. **Screener:** leave blank
- w. **Contact Status:** Will be completed in the [Community Resources Needed](#) section.
- x. **Duration:** will automatically populate after the record is saved.
- y. **Client Primary Language:** Will remain blank until later in the workflow when/if a screening referral is created.

- z. **Other Language:** Will remain blank until later in the workflow when/if a screening referral is created.
- aa. **Follow Up Date:** leave blank.
- bb. **Screening Referral Created Date:** Will remain blank until later in the workflow when/if a screening referral is created.

4. From the **File** menu, select **Save Contact**.



CAUTION

Select Save Contact, NOT Save and Close Contact to expose the subpages.

5. The page refreshes and additional subpages are displayed. Proceed to the [Community Resources Needed](#) section.

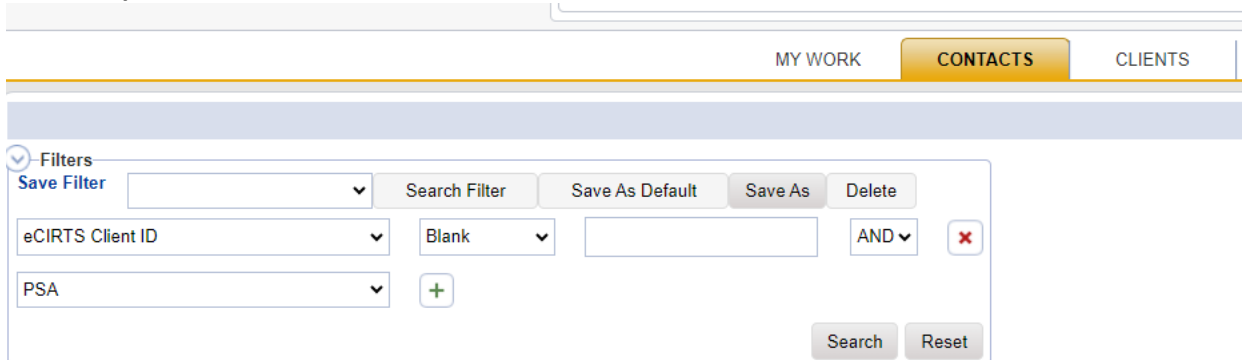
Link Incomplete Contacts to a Client

An Incomplete contact is one where the caller didn't leave enough information to confidently match with an existing client record, but some contact information was collected (i.e. number but not name.) That same caller may call back again, this time providing enough information to create a client record. PSAs periodically review incomplete calls in attempt to match them with a newly added client record. Incomplete contacts can be found by searching the Contacts chapter because the eCIRTS ID will be blank.



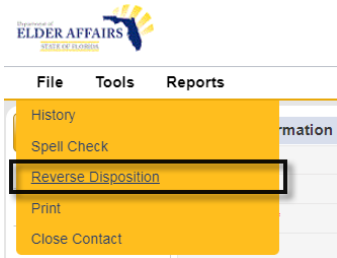
Role: IR Specialist

1. Select the **Contacts** chapter.
2. Use the filters to display all contact records that are not associated to a client. Update the following filters:
 - a. **Filter:** eCIRTS Client ID
 - b. **Operator:** Blank.



3. Click **Search**. Results are returned.
4. Add/remove additional filters to identify matches with an existing client record.
5. Once the match is located, select the contact record. The Contact Details page displays, but it is read only because the status is complete.

- To reverse the status of the Contact records so it can be updated, from the **File** menu, select **Reverse Disposition**.



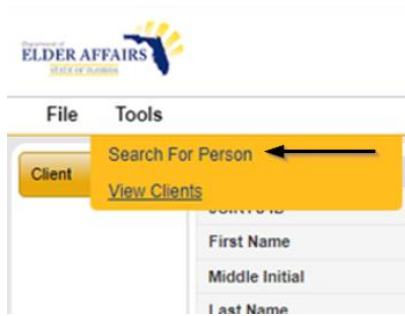
- The page refreshes and the Contact Details page displays and is in Pending status. Select the **Client** subpage.
- No records will display on this page until the contact is linked to a client. From the **Add Participant** toolbar, select **Client Participant**.



- The fields on the page are read only. The I&R Specialist must complete a "People Search" first before these fields will be editable. eCIRTS is looking for an existing client record before letting you add a new/possible duplicate one.

Contact	
Relationship	
First Name	
Last Name	
Middle Initial	
Address Type	
Street	
Street 2	
City	▼ Clear
State	▼ Clear
Zip Code	▼ Clear
Home Phone	
Work Phone	
Work Extension	
Mobile Phone	
Email	

- From the **Tools** menu, select **Search for Person**.



11. The People Search filters display.



TIP

eCIRTS has been configured with frequently used People Search filters. Because the People Search is required, these frequently used filters don't display when the page opens. Select the **Reset** button to display them.

12. The search page opens. Update the following fields:

- a. **Last Name:** enter the full or partial last name. This is a required search filter.
- b. **First Name:** enter the full or partial first name. This is a required search filter.
- c. **Best Contact Phone:** enter the phone if desired. Otherwise leave the %.
- d. **SSN:** enter the SSN if desired. Otherwise leave the %.
- e. **DOB:** enter the DOB if desired. Otherwise, REMOVE the filter by clicking the red **X**.

 A screenshot of the search filter configuration page. It shows a 'Filter' section with several rows of filter settings. Each row has a dropdown for the filter name, a dropdown for the operator, a text input for the value, a dropdown for the logical connector (AND), and a red 'X' button to remove the filter. The filters are:

- Last Name (required, marked with a red asterisk): Operator 'Contains', Value 'Apple', Connector 'AND'.
- First Name (required, marked with a red asterisk): Operator 'Contains', Value 'Michelle', Connector 'AND'.
- Best Contact Phone: Operator 'Contains', Value '%', Connector 'AND', with a red 'X' button.
- SSN: Operator 'Ends With', Value '%', Connector 'AND', with a red 'X' button.
- DOB: Operator 'Equal To', Value 'MM/DD/YYYY' (with a calendar icon), Connector 'AND', with a red 'X' button.
- eCIRTS Client ID: Operator '+', Value empty, Connector 'AND', with a red 'X' button.

 At the bottom right of the filter section are 'Search' and 'Reset' buttons.

13. Click on **Search** to display potential matches.

14. If no results for potential matches are returned, then continue by closing the Search tab/window. On the **File** menu, click **Close People Search**.

File

Filter

Last Name * Contains Apple AND

First Name * Contains Michelle AND

Best Contact Phone Contains % AND X

SSN Ends With % AND X

DOB Equal To 01/01/1940 AND X

eCIRTS Client ID +

Search Reset

Search Results for Harmony People

eCIRTS Client ID	Last Name	First Name	Middle Initial	SSN	DOB	Gender	Person Type
No records to display.							

File

Print

Close People Search


TIP

eCIRTS has been configured to require a People Search before adding new Participants. When on the People Search window, you **MUST** close using the File menu option, otherwise the system will not record that the people search was done and the fields on the Contact form will continue to be greyed out.

15. If a result is returned, then click on the '+' to expand the details about the potential match.

ELDER AFFAIRS logo

Contact ID = 74774 People Search
5/14/2024 9:58 AM

File

Filter

Last Name * Contains Apple AND

First Name * Contains Michelle AND

Best Contact Phone Contains % AND X

SSN Ends With % AND X

DOB Equal To MM/DD/YYYY AND X

eCIRTS Client ID +

Search Reset

Search Results for Harmony People

eCIRTS Client ID	Last Name	First Name	Middle Initial	SSN	DOB	Gender	Person Type
1412768	Apple	Michelle		XXX-XX-8949	4/24/1974	Female	Consumer
1760817	Apple	Michelle		XXX-XX-1111		Female	Consumer

16. Review and verify if the result returned is a match based on Last Name, First Name, DOB and/or Gender. To select, click on Participant's row.

17. Select Overwrite Participant Data because you want the demographic data already in the system for the client to overwrite anything you may have keyed in when you opened the Client details page. This is because the Client details page was read only when you opened it, so you were not able to add any data on that page, so there is no risk in overwriting it.

Overwrite Participant Data: Data on the Add New Prospective Participant Information record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Add New Prospective Participant Information record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

Overwrite Participant Data
 Link to Participant
 Cancel and Return to People Search Grid

OK

18. After a People Search is performed, the Client data is displayed on the page.

Department of ELDER AFFAIRS State of Florida

Contact ID = 74627 | Client
Last Updated by j buck
at 11/3/2023 12:29:44 PM

File Tools

Client

Client

Client ID: 1412768

First Name: Michelle

Middle Initial:

Last Name: Apple

Address Type: Physical

Street: 12 Hawaii Blvd

Street 2: Apt 2

City: Tallahassee

State: FL

Zip Code: 32304

County: Leon

Home Phone: (555)555-5555

Work Phone: (777)264-9103

Work Extension:

Mobile Phone: (888)264-9103

Email: mreed@email.com

Gender: Female

DOB: 04/24/1944

Age: 79.6

19. From the File menu, select Save and Close Client.

20. This once incomplete contact record has now been linked to a client and will be listed in the View Contacts list on the Client’s record.

Department of ELDER AFFAIRS State of Florida

Contact ID = 10471 | Client
10/1/2021 6:50 PM

File Add Participant

Contact

Resources Provided

Client

Track Status

Filters

First Name

Search Reset

1 Client record(s) returned - now viewing 1 through 1

First Name	Last Name	Type	Home Phone	Work Phone	Email	Age	DOB
Nick	Nelson	Prospective Consumer	(658)744-9845	(856)987-4897		81.7	01/01/1940

First Previous Records per page 15 Next Last

21. Don't forget to re-close the contact record. Select the **Contact** subpage. The Contact details page displays. Update the following fields:

- a. **Note:** add a note of the update you are making
- b. **Status:** Complete

Contact ID = 74625 - Michelle Apple | **Contact**
 Last Updated by j buck
 at 9/21/2023 2:40:49 PM

Reports

Division *	AG
Contact Date *	09/21/2023
Contact Time *	02:40 PM
Received By *	Buck, Jennifer ... Clear Details
PSA *	3 ... Clear
Current Task *	I&R
Contact Method *	Phone Call
Anonymous?	<input type="checkbox"/>
eCIRTS ID	
Client First Name	Apple
Client Last Name	Michelle
Call Back Phone	
Caller if other than Client	
Relationship	
Contact Type *	Information
Short Summary	discussed health care services
Notes	added client to this previous incomplete contact record
Reason for Contact	
Referral Type	
701 S Appointment Date	
UnMet Needs Reason	
Contact Marker	<div style="border: 1px solid gray; padding: 5px;"> Caregiver Related Complaint COVID19 Food Assessment Tool COVID19 Testing/Information COVID19 Vaccine Disability Related Contact Disaster Related </div>
SNAP Submittal Date	
Resolution Date "Dont" use	12/04/2023
Assigned To (I&R and Eligibility)	... Clear
Screener	... Clear
Contact Status *	Complete

22. From the **File** menu, select **Save and Close Contact**.

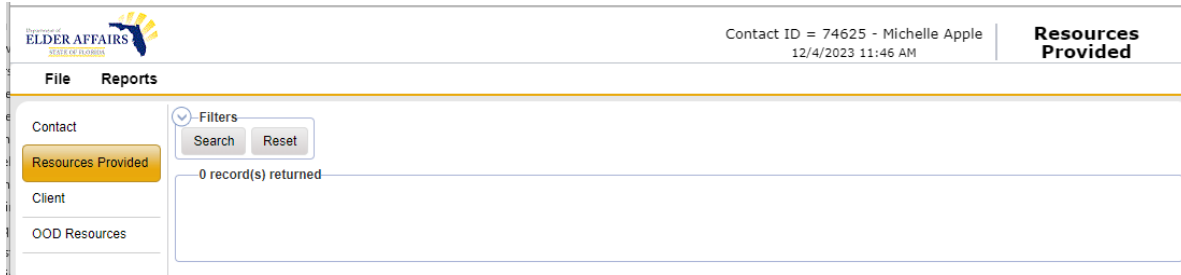
Community Resources Needed

The eCIRTS worker can search the Resource Directory to look up provider and service information for the caller on the Resources Provided tab. The information provided to the caller will be documented in the eCIRTS record as a Resource Provided record.



Role: IR Specialist

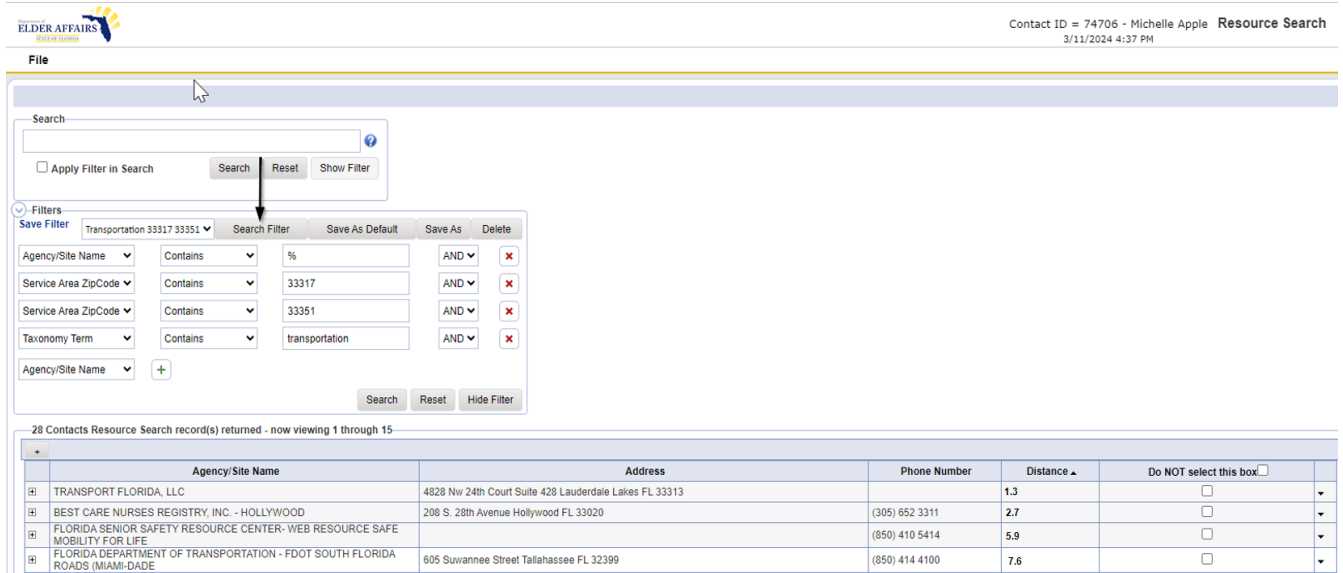
- From within the open contact record, select the **Resources Provided** subpage.



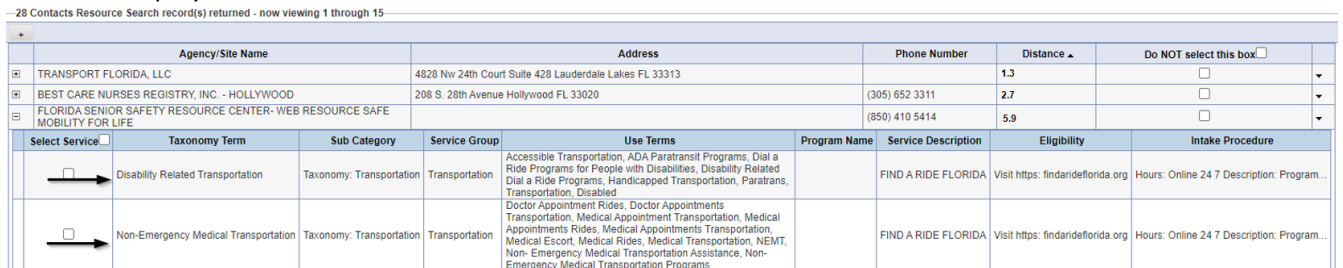
- From the File menu, select **Search Resources Provided**.



- The **Resource Search** is displayed. The Resource Search has user saved filters like the Contacts queue as reviewed in the [View Past Contacts](#) section.



- Select the filter(s) and enter the data. Click **Search**.
- The resources are displayed in the list.
- Click **+** to display the service information for the resource.





NOTE

The large + will display the service information for all resources in the list. The small + will display the service information for one resource at a time.

28 Contacts Resource Search record(s) returned - now viewing 1 through 15

Agency/Site Name		Address		Phone
<input type="checkbox"/>	TRANSPORT FLORIDA, LLC	4828 Nw 24th Court Suite 428 Lauderdale Lakes FL 33313		
<input type="checkbox"/>	BEST CARE NURSES REGISTRY, INC. - HOLLYWOOD	208 S. 28th Avenue Hollywood FL 33020		(305) 652 3...

Select Service <input type="checkbox"/>	Taxonomy Term	Sub Category	Service Group	Use Terms	Program Name
<input type="checkbox"/>	Non-Emergency Medical Transportation	Taxonomy: Transportation	Transportation	Doctor Appointment Rides, Doctor Appointments Transportation, Medical Appointment Transportation, Medical Appointments Rides, Medical Appointments Transportation, Medical Escort, Medical Rides, Medical Transportation, NEMT, Non-Emergency Medical Transportation Assistance, Non-Emergency Medical Transportation Programs	18 years and older Call for Details Call for Details

7. Review the search results and provide information to the caller.



TIP

The text search at the top of the page can be used to search letters or words that are contained in any or all of these fields:

- Program Name
- Service
- Service Group
- Sub Category

The text search does NOT search the following fields:

- Eligibility
- Intake Procedure
- Service Description,
- Use Term



TIP

It is best practice and faster to use **Saved Filters**. Be sure to take the time to create several saved filters specific to your most frequent resource directory searches.

1. To save a filter, you must first complete **Filter** section and execute the search by clicking **Search**.
2. One the results are returned, select **Save As** at the top of the page.

The screenshot shows the 'Resource Search' interface. At the top right, it displays 'Contact ID = 74625 - Michelle Apple' and '12/4/2023 11:54 AM'. Below the search bar, a 'Filters' window is open, showing a filter configuration for '32308'. The filter includes three criteria: 'Taxonomy Term' (meals), 'Service Area ZipCode' (32308), and 'Service Area ZipCode' (32309). Below the filter configuration, a table of search results is displayed:

Agency/SiteName	Address	Phone Number	Do NOT select this box
BETHEL MISSIONARY BAPTIST CHURCH	224 North Martin Luther King Boulevard Tallahassee FL 32301	(850) 224 3246	<input type="checkbox"/>
BRADFORDVILLE COMMUNITY CENTER	6006 Beech Ridge Trail Tallahassee FL 32312	(850) 891 4001	<input type="checkbox"/>
DOROTHY C. SPENCE COMMUNITY CTR	4768 Chaires Cross Road Tallahassee FL 32317	(850) 891 4001	<input type="checkbox"/>

3. Update the following fields:
 - a. **Filter Name:** Enter a name for the saved filter.
 - b. **If Filter Name Exists, Overwrite it:** If you want this filter to replace an existing one with the same name, check this box. If not, keep it unchecked and a new filter will be created.
 - c. **Save as Default:** If this should be the filter that displays by default each time you open the Activity Roster, check this box.

The screenshot shows the 'Save Search Filter Option As...' dialog box. It contains the following fields and options:

- Filter Name ***: Meals 32308-32309
- If Filter Name Exists, Overwrite it**:
- Save As Default**:

Buttons for 'Save' and 'Cancel' are located at the bottom.

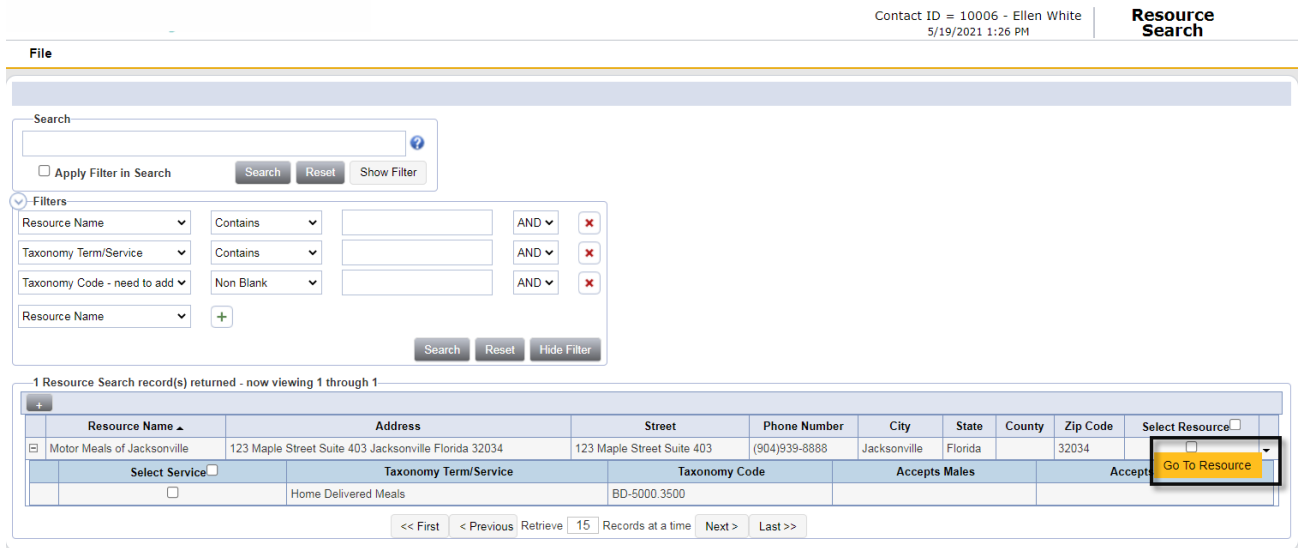
4. Select **Save**.
5. The next time you use the Resource Search, you can select your saved Filter from the list and click **Search Filter**. This will populate the search filters, saving you time from looking them up again.

The screenshot shows the 'Resource Search' interface with the 'Filters' dropdown menu open. The saved filter 'Meals 32308-32309' is selected. The 'Search Filter' button is highlighted with an arrow. The filter configuration is populated with the following criteria:

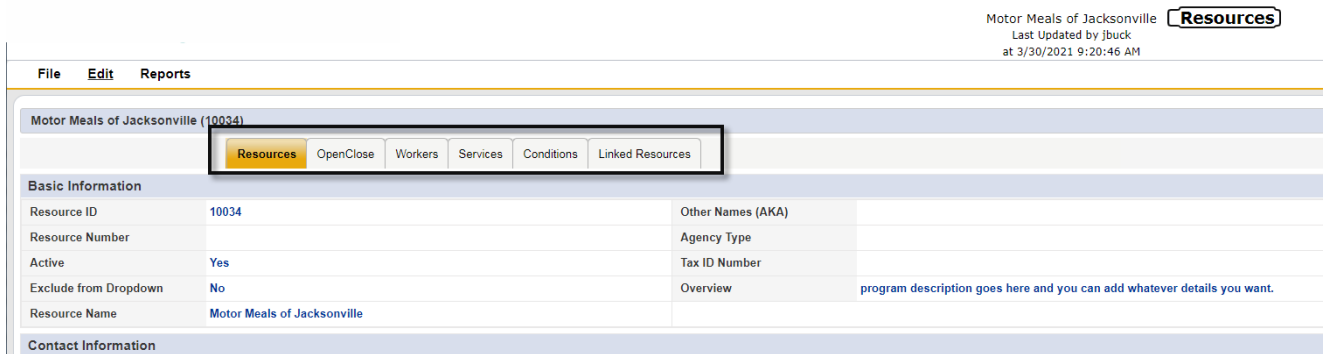
- Taxonomy Term**: meals
- Service Area ZipCode**: 32308
- Service Area ZipCode**: 32309

Buttons for 'Search', 'Reset', and 'Hide Filter' are located at the bottom.

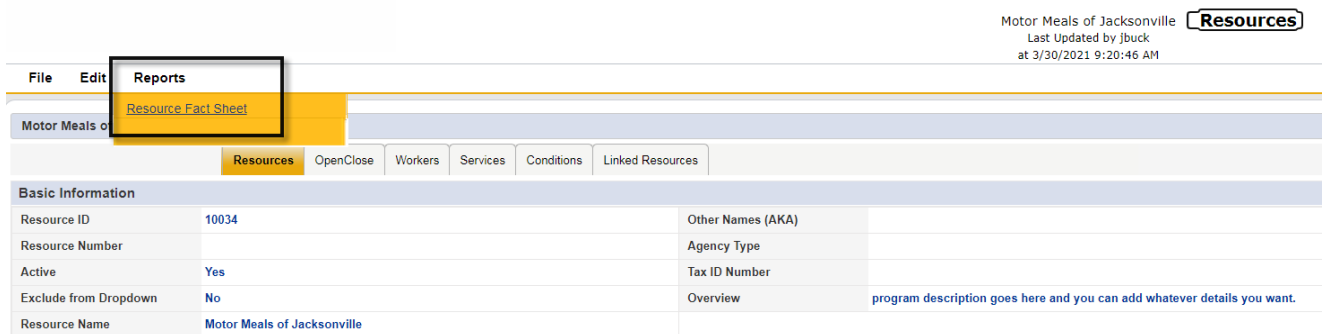
- If the information displayed on the screen is not enough, you can open the Resource record to view additional details by selecting the **flyout menu** to the right of the Resource name. If you have the information you need, skip to step 12.



- The resource record opens. The user can either click through the tabs of the record to locate the additional details or the user can run the Resource Fact Sheet report to display all data for the Resource in a PDF report that they can scroll through.



- To run the report, from the **Reports** menu, select **Resource Fact Sheet**.



- The report is displayed in a new window. Scroll through the report to find the additional information. Close the window when finished and return to the Resource Search window.

Resource Fact Sheet

As of date: 09/17/2021

Resource Name	Gotham City Senior Center
Program Name	vendors.category?
Agency Type	Private, Non-profit
Facility Type	Senior Center
Other Names (AKA)	
Overview	
Notes	
Mission	
Street Address	123 Main St.
City	JACKSONVILLE
State	Florida
Zip Code	00602
Phone 1	(555)222-4444/Work
Phone 2	
Phone 3	
Phone 4	
Phone 5	
Email	GCSP@seniorcare.net
Website	www.GCSP.com
Mailing Street	123 Main St.
Mailing City	JACKSONVILLE
Mailing State	Florida
Mailing Zip Code	00602

12. Return to the Resource Search window and record the information you shared in eCIRTS. This is done by selecting the Service record(s) under each Resource. Use the **Select Service** checkboxes.

+		Agency/Site Name	Address		Phone Number	Dist
<input type="checkbox"/>		THE CARL SHECHTER SOUTHWEST FOCAL POINT SENIOR CENTER CAMPUS (SWFP)	301 NW 103rd Avenue Pembroke Pines FL 33026		(954) 450 6888	
Select Service <input type="checkbox"/>	Taxonomy Term	Sub Category	Service Group	Use Terms	Program Name	Service Description
<input type="checkbox"/>	Congregate Meals/Nutrition Sites	Taxonomy: Food/Meals	Congregate Meals	Congregate Dining, Congregate Meals, Food, Meals, Group Meals, Hot Lunch Programs, Hot Meals for Older Adults, Hot Meals for People With Disabilities, Lunch Programs for People With Disabilities, Lunch Programs for Seniors, Meal Sites, Meals, Congregate, Nutrition Sites, Older Adult Meal Programs, Older Adult Meals, Senior Dining Sites, Senior Lunch Programs, Senior Meal Programs, Senior Meal Sites, Senior Meals	Age 60 and over and registered with MOW Donations graciously accepted. Free Service	MEALS ON WHEELS SOUTH FLORIDA (MOW)..



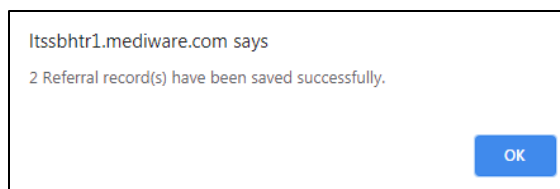
NOTE

Do not use the other check boxes on the right of the screen labeled, **Do NOT select this box**. Once the service checkbox is selected in the step above, the application will automatically check the required boxes in the Do NOT select this box field. The user should not select or unselect any of the Do NOT select this box checkboxes.

3 Resource Search record(s) returned - now viewing 1 through 3

Agency/Program Name	Address	Street	Phone Number	Do NOT select this box <input type="checkbox"/>
<input type="checkbox"/> Gotham City Senior Center	123 Main St. JACKSONVILLE Florida 00602	123 Main St.	(555)222-4444	<input type="checkbox"/>
<input type="checkbox"/> League of Seniors	123 Justice St. MIAMI Florida 33150	123 Justice St.	(888)560-6789	<input type="checkbox"/>
<input type="checkbox"/> Motor Meals of Jacksonville	123 Maple Street Suite 403 Jacksonville Florida 32034	123 Maple Street Suite 403	(904)939-8888	<input type="checkbox"/>

13. From the **File** menu, select **Save and Close Resource Search** if this is the only or last resource that is needed. Otherwise, select **Save**. The page refreshes and a notification window displays noting the referral records have been saved successfully.



TIP

The term 'referral' in this window is an eCIRTS term and is not a screening or referral to community resources. The message is telling the users the resources have been tagged to the contact record.

14. If the caller needs additional community resources, repeat steps 2-13.
15. If the caller also needs a screening referral, proceed to the [Screening Referral Needed](#) section.
16. If the caller does NOT need a screening referral, return to the Contact details page. Update the following fields:
 - a. **Contact Type:** Information
 - b. **Short Summary:** short summary of the outcome
 - c. **Note:** summarize the call and referrals made. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
 - d. **Reason for Contact:** Arts, Education, etc.
 - e. **Unmet Needs Reason:** If the caller had any unmet needs, select the reason.
 - f. **Assigned To:** defaults to self. Can remove value or leave as is.
 - g. **Contact Status:** Complete
17. From the **File** menu, select **Save and Close Contact**.
18. OPTIONAL: Follow up is not required unless there is a screening referral, but the worker can create a manual follow up whenever it's needed. Instead of updating the contact record as described above, update the following fields:
 - a. **Contact Type:** Edit Record Not Being Billed I&R
 - b. **Reason for Contact:** N/A
 - c. **Assigned To:** self or the generic worker for your PSA as applicable.
 - d. **Contact Status:** Follow Up
19. OPTIONAL: Proceed to the [Other Follow Up](#) section.

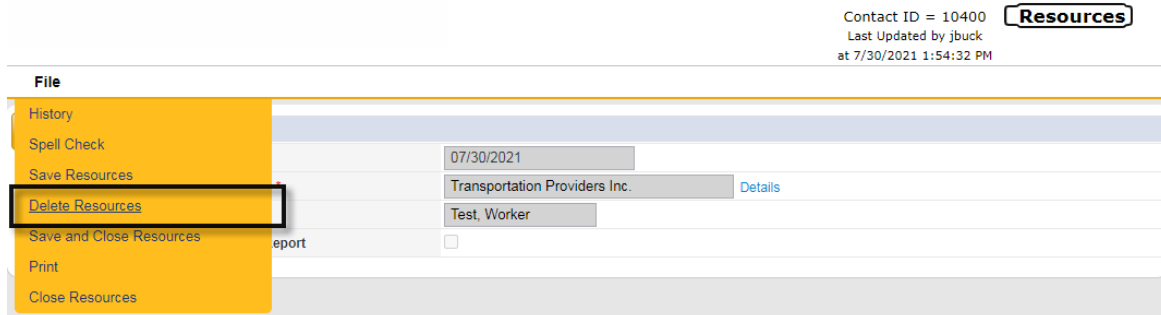
As Needed: Remove a Resource

If a mistake was made and a resource needs to be un-tagged from a contact record, the user can do that from the Resource record.

1. With the Contact record open, select the **Resources Provided** subpage. Select the Resource record that needs to be removed from the list view.



- The Resources Provided record displays and the fields are read only. From the **File** menu, select **Delete Resources**.



- Click **OK** at the confirmation message confirming you want to delete the record. Click **Cancel** if you do not.
- Clicking **OK** will display the deletion success message. The resource and all associated services have been removed from the contact record.

As Needed: Remove a Resource Service

If a service needs to be removed, but the resource should remain (i.e. Remove Home Delivered Meals but keep Congregate Meals for Meals R Us) you would not remove the Resource in the previous section. Instead, you will just delete the service associated to that resource.

- With the Contact record open, select the **Resources Provided** subpage. Select the Resource record that needs to be removed from the list view.



- The Resources Provided record displays and the fields are read only. Select the **Services** subpage.

File

Resources

Services

Resource

Date * 09/17/2021

Resource Name * Motor Meals of Jacksonville [Details](#)

Worker * Buck, Jennifer

Exclude From Report

- The Services are displays. Select the **checkbox** to the right of the service that needs to be removed. From the **Tools** menu, select **Delete Selected Items**.

Department of
ELDER AFFAIRS
STATE OF FLORIDA

Contact ID = 10430 | **Services**
9/17/2021 11:12 AM

File **Tools**

Delete Selected Items

Search Reset

Services

2 Services record(s) returned - now viewing 1 through 2

Taxonomy Code	Taxonomy Term/Service ▲	<input type="checkbox"/>
BD-5000.3500	Home Delivered Meals	<input type="checkbox"/>
BD-1800.8200-500	Meals Ready to Eat	<input checked="" type="checkbox"/>

First Previous Records per page 15 Next Last

- The service has been removed from the resource and the page can be closed.

As Needed: Resource List Report

To print or email a list of resources provided to the caller, the eCIRTS Resource List report can be used. This is a WellSky standard report. In the future, DOEA may decide to create their own custom report to replace this one.

- From the **Resources Provided** subpage, select **Reports > Resource List**.

Contact ID = 10400
7/30/2021 2:02 PM

Resources Provided

File **Reports**

Resource List

Search Reset

Resources Provided

Track Status

3 Resources Provided record(s) returned - now viewing 1 through 3

Date	Resource Name ▲	Worker	Exclude From Report
7/30/2021 2:02:20 PM	Adults Day Center	Test, Worker	No
7/30/2021 1:54:31 PM	Aging and Disability Resource Center of Broward County, Inc.	Test, Worker	No
7/30/2021 1:54:32 PM	Transportation Is Fun	Test, Worker	No

First Previous Records per page 15 Next Last

- The report is displayed in a new window and includes all the selected Resources from the previous page. Print or export the report to PDF and provide it to the caller.



Resource List

Motor Meals of Jacksonville	Website:
------------------------------------	----------

Agency Type:

Agency AKA:

Contact Address	Mailing Address	Correspondence Address
123 Maple Street, Suite 403 Jacksonville, FL 32034 Email :		

Phone	Number
Fax	(904)898-9999
Phone	(904)939-8888

Services

Service Name: Home Delivered Meals

Service Description: Must be age 60 or older, homebound, and unable to obtain food or prepare a complete meal. A spouse or disabled adult residing with an eligible person may receive an assessment to determine eligibility for a home delivered meal. An unpaid caregiver 60 or older residing with an eligible person may receive an assessment to determine eligibility for a home delivered meal. Must be a resident of Jacksonville or surrounding area.

Eligibility: 2 meals available Monday through Friday: Hot lunch and cold bag meal which can be saved for dinner.

Application Process:

Services:

Fees: Donation encouraged: \$2.75/meal. Liquid meals also available: Price varies.

Service Contact Phone Number:

Service Email:

Services Website:

- If there are resources you do not want to be included in the Resource List report, you can exclude them before running the report.
- To exclude a resource from the Resource List report, start on the **Resources Provided** subpage.
- Select **Exclude From Report** from the flyout menu for the resource you want to exclude.

Contact ID = 10400
7/30/2021 2:02 PM **Resources Provided**

File Reports

Contact

Resources Provided

Track Status

Filters
Search Reset

3 Resources Provided record(s) returned - now viewing 1 through 3

	Date	Resource Name	Worker	Exclude From Report
<input type="checkbox"/>	7/30/2021 2:02:20 PM	Adults Day Center	Test, Worker	No
<input type="checkbox"/>	7/30/2021 1:54:31 PM	Aging and Disability Resource Center of Broward County, Inc.	Test, Worker	No
<input type="checkbox"/>	7/30/2021 1:54:32 PM	Transportation Is Fun	Test, Worker	No

First Previous Records per page 15 Next Last

Go To Resource
Exclude From Report
Include In Report

- The page refreshes and Exclude From Report changes from No to Yes.

Contact ID = 10400
7/30/2021 2:08 PM

Resources Provided

File Reports

Contact

Resources Provided

Track Status

Filters
Search Reset

3 Resources Provided record(s) returned - now viewing 1 through 3

	Date	Resource Name	Worker	Exclude From Report
<input type="checkbox"/>	7/30/2021 2:02:20 PM	Adults Day Center	Test, Worker	No
<input type="checkbox"/>	7/30/2021 1:54:31 PM	Aging and Disability Resource Center of Broward County, Inc.	Test, Worker	No
<input type="checkbox"/>	7/30/2021 1:54:32 PM	Transportation Is Fun	Test, Worker	Yes

First Previous Records per page 15 Next Last

7. Run the Resource List report and this resource will not be listed.

As Needed: Out of Directory Resources

If resource information is provided to a caller that is NOT in the Resource Search, add a note to the contact record. Periodically, these notes are reviewed by management to determine if additional resources need to be added to the resource directory.

1. From the open contact record, select the **OOD Resources** subpage.
2. From the **File** menu, select Add **OOD Resource**.

Department of
ELDER AFFAIRS
STATE OF FLORIDA

Contact ID = 74534
10/26/2023 3:51 PM

OOD Resources

File Reports

Add OOD Resource
Print
Close OOD Resources

Client

OOD Resources

0 record(s) returned

3. The OOD Resource details page displays. Update the following fields:
 - a. **Added By:** Defaults to self and is required. Does not need to be changed.
 - b. **Date:** Defaults to today. Does not need to be changed.
 - c. **Type:** Defaults to OOD Resource and is read only
 - d. **Resource Name:** enter the name of the resource provided to the caller.
 - e. **Resource Address:** enter the contact address of the resource provided to the caller.
 - f. **Resource Number:** enter the phone number of the resource provided to the caller.
 - g. **Note:** enter any additional notes about the out of directory resource if applicable
 - h. **Status:** defaults to Open and is read only
 - i. **Date Completed:** is blank and read only.
 - j. **Add Attachment:** if applicable, can add attachments to this note.
 - k. **Note Recipient:** leave blank.

File Tools

Notes Details

Added By * ... Clear Details

Date *

Type * *

Resource Name

Resource Address

Resource Number

Note

Status *

Date Completed

Attachments

[Add Attachment](#)

Document	Description	Category	Action
There are no attachments to display			

Notes Recipients

Add Note Recipient: ... Clear

4. From the **File** menu, select **Save and Close OOD Resource**.
5. Select the **Contact** subpage.
6. In the **Short Summary** field, be sure to add reference that an OOD resource note was added before closing out the record. Update the Status if needed.
7. From the **File** menu, select **Save and Close Contact**.

Screening Referral Needed

If the caller is interested in receiving services a screening will need to be completed. Helpline staff will collect adequate demographic information for the client, add a "SMMC LTC" resources provided record to this contact, may schedule the screening, and will assign a screener or screening queue. eCIRTS will automatically create the screening referral contact record the intake staff will use to manage their contact attempts.



Role: **IR Specialist**

Verify/Update Demographics

1. If a screening is needed, adequate demographic details such as address, and phone need to be captured. See the [Demographics](#) section for additional details.



TIP

Shortcut to view the Demographics page from the Contact record:

1. Select the **Client** subpage.

Contact ID = 74624 | Client
9/15/2023 11:59 AM

File Add Participant

Contact

Resources Provided

Client

OOD Resources

Filters

First Name [v] +

Search Reset

1 Client record(s) returned - now viewing 1 through 1

First Name	Last Name	Type	Home Phone	Work Phone	Email	Age	DOB
Michelle	Apple	Prospective Consumer	(555)555-5555	(777)264-9103	mreed@email.com	79.4	04/24/1944

First Previous Records per page 15 Next Last

2. Click on the record to view additional demographic data.
3. If updates are needed, from the **Tools** menu, select **View Clients**. The client record opens in a new window.

ELDER AFFAIRS
STATE OF ALABAMA

File Tools

Search For Person

Client View Clients

1412768

First Name Michelle

Middle Initial

Last Name Apple

Address Type Physical [v]

Street 15 Changing Address Way

Street 2 Apt 2

City Fleming Island

State FL

Zip Code 32003

County Duval

Home Phone (555)555-5555

Work Phone (777)264-9103

SMMC LTC Resource

1. If a screening is needed, a SMMC LTC resource will be added to this contact record. Select the **Resources Provided subpage**.
2. In the search filter, add Agency/Site Name as a filter, equal to SMMC LTC. Remove any other default filters. Select **Search**.
3. The SMMC LTC resource record is displayed. Click the + to expose the Long-Term Home Health Care Service. Check the box to **Select Service**. From the **File** menu, select **Save and Close Resource Search**.

File

Search

Apply Filter in Search Search Reset Show Filter

Filters

Save Filter Search Filter Save As Default Save As Delete

Agency/SiteName Equal To SMMC LTC AND X

Agency/SiteName +

Search Reset Hide Filter

1 Resource Search record(s) returned - now viewing 1 through 1

Agency/SiteName ▲	Address	Phone Number	Do NOT select this box. <input type="checkbox"/>		
SMMC LTC					
<input type="checkbox"/> Select Service	Taxonomy Term	Service Description	Program Name	Eligibility	Intake Procedure
<input type="checkbox"/>	Long Term Home Health Care	MCO, SMMC			

<< First < Previous Retrieve 15 Records at a time Next > Last >>

- The page refreshes. The SMMC LTC referral is displayed along with any other community resources that may have also been provided to the caller.

Department of ELDER AFFAIRS

Contact ID = 74625 - Michelle Apple
12/4/2023 1:13 PM

Resources Provided

File Reports

Contact

Resources Provided

Client

OOD Resources

Filters

Search Reset

2 Resources Provided record(s) returned - now viewing 1 through 2

Date	Resource Name ▲	Worker	Exclude From Report
12/4/2023 1:06:41 PM	MEALS ON WHEELS OF CHARLOTTE COUNTY	Buck, Jennifer	No
12/4/2023 1:13:37 PM	SMMC LTC	Buck, Jennifer	No

Schedule 701S Appointment

- In some PSAs, Helpline staff schedule the screening. Helpline will continue to use Time Tap, Outlook, etc. to determine the scheduled appointment date outside of eCIRTS. Helpline will document the scheduled appointment date on the contact record in eCIRTS while on with the caller. From the open contact record, select the **Contact subpage**. Update the following fields:
 - 701S Appointment Date:** enter the date of the scheduled appointment.
 - Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
 - Note:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
 - Screener:** search for and select the name of the screener you've scheduled
- From the **File** menu, select **Save Contact**. Proceed to the [Flag for 14 Day Follow Up](#) section.
- In other PSAs, Helpline staff will send the screening referral to the ADRC for scheduling. From the open contact record, select the **Contact subpage**. Update the following fields:
 - 701S Appointment Date:** leave blank.
 - Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
 - Note:** This field is unlimited and does not display on the Contact queue

- d. **Screener:** search for and select the name of the screener if you know it. If not, select the generic worker for your PSA. The person(s) making assignments will filter the incoming referrals that need assignment by the generic worker for his/her PSA.

Search by: Last Name Search Text: psa Search Cancel

14 record(s) returned

MEMBERID	Worker	Title	User ID Active
21221	DEFAULT-WORKER-PSA-01, DEFAULT-WORKER-PSA-01		No
20139	DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02		No
25705	DEFAULT-WORKER-PSA-03, DEFAULT-WORKER-PSA-03		No
20140	DEFAULT-WORKER-PSA-04, DEFAULT-WORKER-PSA-04		No
25706	DEFAULT-WORKER-PSA-05, DEFAULT-WORKER-PSA-05		No
20141	DEFAULT-WORKER-PSA-06, DEFAULT-WORKER-PSA-06		No
22475	DEFAULT-WORKER-PSA-07, DEFAULT-WORKER-PSA-07		No
27055	DEFAULT-WORKER-PSA-08, DEFAULT-WORKER-PSA-08		No
20709	DEFAULT-WORKER-PSA-09, DEFAULT-WORKER-PSA-09		No
22476	DEFAULT-WORKER-PSA-10, DEFAULT-WORKER-PSA-10		No

- From the **File** menu, select **Save Contact**.
- When a contact record is saved with a SMMC LTC resource and a screener assigned, eCIRTS will automatically create a second contact record that includes the Primary and Other Language of the client, from the Demographics page. This contact record will serve as the screening referral to the Intake/Screening staff. The Intake/Screening staff will filter the Contacts queue to view and manage incoming screening referrals. See the Intake/Screening Workflows Training Guide.
- Proceed to the [Flag for 14 Day Follow Up](#) section.

Flag for 14 Day Follow Up

- Update the contact record so it will serve as the 14 day follow up reminder to verify the 701S is scheduled. From the **Contact** details page, update the following fields:
 - Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
 - Note:** summarizing the call and follow up need if applicable. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
 - Screener:**
 - Screener not known = Default PSA Worker
 - Screener known and screening scheduled = Screener
 - Screener known but not scheduled = Screener
 - Assigned To:** search for and select yourself or the generic Default PSA worker for your PSA (whoever is responsible for the 14 day follow up in your PSA)

Search by: Last Name Search Text: psa Search Cancel

14 record(s) returned

MEMBERID	Worker	Title	User ID Active
21221	DEFAULT-WORKER-PSA-01, DEFAULT-WORKER-PSA-01		No
20139	DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02		No
25705	DEFAULT-WORKER-PSA-03, DEFAULT-WORKER-PSA-03		No
20140	DEFAULT-WORKER-PSA-04, DEFAULT-WORKER-PSA-04		No
25706	DEFAULT-WORKER-PSA-05, DEFAULT-WORKER-PSA-05		No
20141	DEFAULT-WORKER-PSA-06, DEFAULT-WORKER-PSA-06		No
22475	DEFAULT-WORKER-PSA-07, DEFAULT-WORKER-PSA-07		No
27055	DEFAULT-WORKER-PSA-08, DEFAULT-WORKER-PSA-08		No
20709	DEFAULT-WORKER-PSA-09, DEFAULT-WORKER-PSA-09		No
22476	DEFAULT-WORKER-PSA-10, DEFAULT-WORKER-PSA-10		No

- e. Reason for Contact: Individual, Family and Community Support
- f. Contact Type: Referral
- g. Contact Marker: keep as is.
- h. Status: Follow Up. Select Complete if PSA knows will be over 14 days.

2. From the File menu, select Save and Close Contact.
3. Proceed to the Screening Referral Follow Up section.

Follow Up

I&R Specialists can manage their day-to-day workload from the My Work page. Any contact records assigned to the worker for follow up will be listed on the My Work > Contacts page. This includes screening referral 14 day follow ups and contact attempts. However, it is recommended users view their assignments from the Contact queue. There are more data elements available in the queue for quick view of the record and filtering options. Also, records are visible to all users, not just those the contact is assigned to like on My Work. (i.e. I&R Specialists covering for each other, supervisors monitoring the work of their staff.)



Role: IR Specialist, eCIRTS Worker

1. Select the Contacts tab. To view a list of screening referral follow ups assigned to you, select the following search filters:
 - a. Assigned To: search for and select your name or the generic Default PSA Worker for your PSA if follow ups are assigned to a queue in your PSA.

Search by: Last Name Search Text: psa Search Cancel

14 record(s) returned

MEMBERID	Worker	Title	User ID Active
21221	DEFAULT-WORKER-PSA-01, DEFAULT-WORKER-PSA-01		No
20139	DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02		No
25705	DEFAULT-WORKER-PSA-03, DEFAULT-WORKER-PSA-03		No
20140	DEFAULT-WORKER-PSA-04, DEFAULT-WORKER-PSA-04		No
25706	DEFAULT-WORKER-PSA-05, DEFAULT-WORKER-PSA-05		No
20141	DEFAULT-WORKER-PSA-06, DEFAULT-WORKER-PSA-06		No
22475	DEFAULT-WORKER-PSA-07, DEFAULT-WORKER-PSA-07		No
27055	DEFAULT-WORKER-PSA-08, DEFAULT-WORKER-PSA-08		No
20709	DEFAULT-WORKER-PSA-09, DEFAULT-WORKER-PSA-09		No
22476	DEFAULT-WORKER-PSA-10, DEFAULT-WORKER-PSA-10		No

- b. Contact Type: Referral

c. **Contact Status:** Follow Up

2. Select **Search**. Results are returned.



Note

Recommend creating a user saved filter to list all screening referrals that require a 14 day follow up. The next time you use the Contact queue, you can select your saved Filter from the list and click **Search Filter**. This will populate the search filters, saving you time from looking them up again.

A screenshot of a search filter configuration interface. At the top, there's a 'Filters' dropdown menu with a 'Save Filter' button and a list of saved filters, including 'Jennifer - Incomplete'. Below this are several filter rows. Each row has a field name (Assigned To, Contact Status, Contact Type, PSA), a comparison operator (Equal To), a value (Buck, Jennifer, Follow Up, Referral), and a logical connector (AND). There are also 'Details', 'Clear', and 'Search' buttons. The 'PSA' field has a plus sign to add more filters.

“Screening Referral Created Date” is visible in the search results and can be used to sort your follow ups by oldest date.

3. Select a record to open the contact details page. Skip to Step 6.
4. To view a list of other follow ups assigned to you, select the following search filters:
 - a. **Assigned To:** search for and select your name if not already selected
 - b. **Contact Type:** Edit Record – Not Being Billed I&R
 - c. **Contact Status:** Follow Up
5. Select **Search**. Results are returned. Select a record to open the contact details page.
6. Follow one of the scenarios:
 - a. [Screening Referral Follow Up](#)
 - b. [Other Follow Up](#)

Screening Referral Follow Up

eCIRTS has several tools for Helpline, and in some PSAs Intake staff, to manage required follow-ups for screening referrals.

1. Helpline must confirm contact has been made with the client within 14 days to schedule the screening. One way to do this is using the 701S Appointment Date. If an appointment date exists and it's less than 14 days from the Screening Referral Created Date, the Reason for Contact will remain "Referral." The 701S Appointment Date and Screening Referral Created Dates are visible in the **Contact queue** search results.

MY WORK CONTACTS CLIENTS CLIENT GROUPS RESOURCES REPORTS

Filters

Save Filter Jennifer - Incomplete Search Filter Save As Default Save As Delete

Assigned To	Equal To	Buck, Jennifer	AND	X
Contact Status	Equal To	Follow Up	AND	X
Contact Type	Equal To	Referral	AND	X
PSA				

Search Reset

anced Search record(s) returned - now viewing 1 through 3

PSA	eCIRTS Client ID	Contact Date	Client First Name - Adding Contact to Client	Client Last Name	Client DOB	Call Back Phone	Caller if Other Than Client	Contact Type	Reason for Contact	Referral Type	701S Appointment Date	Follow Up Date	Screening Referral Created Date	Primary
2	1750721	12/04/2023	Iillian	smith	12/01/1948			Referral	Individual, Family and Community Support			12/05/2023	12/06/2023	Englis
2	1412768	02/16/2023	Sarah	Apple	04/24/1944			Referral	Food/Meals					Englis
	1412768	02/06/2023	Michelle	Apple	04/24/1944			Referral	Food/Meals					

2. Helpline can review contact/scheduling attempt notes completed by the Intake/Screening staff. Previous contacts are visible on the clients record or the Contacts queue can be filtered by eCIRTS ID to view for just one client. See [View Past Contacts](#) section for additional details.
3. If contact was made within 14 days, from the open contact record, update the following fields:
 - a. **Contact Type:** remains Referral.
 - b. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
 - c. **Note:** summarizing the call and follow up completion
 - d. **Reason for Contact:** remains Individual, Family and Community Support
 - e. **Contact Status:** Follow Up Complete – DOEA 14 Day
 - f. **Assigned To:** defaults to self. Can remove value or leave as is.
4. If contact was NOT made within 14 days, from the open contact record, update the following fields:
 - a. **Contact Type:** change from Referral to Information
 - b. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
 - c. **Note:** summarizing the call and follow up completion. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
 - d. **Reason for Contact:** remains Individual, Family and Community Support
 - e. **Contact Status:** Follow Up Complete – DOEA 14 Day
 - f. **Assigned To:** defaults to self. Can remove value or leave as is.
5. When the updates are complete, from the **File** menu, select **Save and Close Contact**.

Other Follow Up

Sometimes additional follow-up not related to the screening referral follow up is needed for a contact before it can be completed. Helpline staff can use the My Work page or the Contact queue to manage these follow-ups.

1. To document follow up efforts, from the open contact record, update the following fields:
 - a. **Contact Type:** remains Edit Record – Not Being Billed I&R
 - b. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
 - c. **Note:** summarizing the call and follow up completion. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
 - d. **Reason for Contact:** remains NA.
 - e. **Contact Status:** Follow Up Complete – HIPPA or Client Communication
 - f. **Assigned To:** defaults to self. Can remove value or leave as is.

2. From the **File** menu, select **Save and Close Contact**.