DOEA eCIRTS
Module 1
Create a Contact Record
Cliff Notes

1. Person in need of assistance exists in the system and needs information only.
   a. I&R uses Advanced Search to locate existing client. Match Found
   b. Add Contact Record
   c. Search for and select Resources Provided
   d. Update/Close Contact Record

2. Person in need of assistance exists and needs a referral to community resources.
   a. I&R uses Advanced search to locate the client. Match found.
   b. Add Contact Record
   c. Search for and select Resources Provided
   d. Add Referral record
   e. Update/Close Contact record
   f. 14-Day follow-up Tickler, Add a Note

3. Person in need of assistance exists and needs a screening referral.
   a. I&R uses Advanced Search to locate existing client. Match Found.
   b. Add Contact Record
   c. Update Screening record
   d. Update/Close contact record
   e. 14-day follow-up Tickler, Add a Note

4. Person in need of assistance does not exist in the system and needs information only.
   a. I&R uses Advanced Search to locate existing client. Match Not Found.
   b. Create a Pre-client record/Demographics
      i. *Best Practice – Obtain Address information*
   c. Add a Screening Record
   d. Add Contact Record
   e. Search for and select Resources Provided
   f. Update/Close Contact Record

5. Person in need of assistance does not exists and needs a referral to community resources.
   a. I&R uses Advanced Search to locate existing client. Match Not Found.
   b. Create Client record/Demographics
      i. Address required
   c. Add a Screening record
   d. Add Contact Record
   e. Search for and select Resources Provided

  f. Add Referral record
  g. Update/Close Contact record
  h. 14-Day follow-up Tickler, Add a Note

6. Person in need of assistance does not exist and needs a screening referral.
  a. I&R uses Advanced Search to locate existing client. Match Not Found.
  b. Create Client record/Demographics
    i. Address required
  c. Add Screening Record
  d. Add Contact Record
  e. Update the Screening record
  f. Update/Close Contact Record
  g. 14-Day follow-up Tickler, Add a Note.

7. Anonymous Contact
  a. Contacts Chapter
  b. Add Contact
    i. Check anonymous field
    ii. Provide appropriate Resources
  c. Close Contact Record

8. Voicemails
  a. If identifiable, expectation to return call and associate with a client record
  b. If not identifiable, record as an incomplete contact record