

DOEA eCIRTS
Module 1
Create a Contact Record
Reference Guide

Course Description:

This module is intended to familiarize end users, primarily Information and Referral Specialists, with the process of documenting contacts, such as phone calls, emails, and face-to-face conversations, with individuals seeking information and assistance. The contact record is a documentation of the events that occurred during the contact. This module will demonstrate how to document an information contact, a referral to community resource(s) contact, and how to refer a client to the ADRC for a 701S screening.

Prerequisites:

- Layout and Navigation Video
- Searches Video
- Notes Video
- Tickler Video
- Reports Video

Suggested Resources, Materials, and Credentials

- Training Manual
- Vizio
- Cliff Notes
- Login credentials and training website link

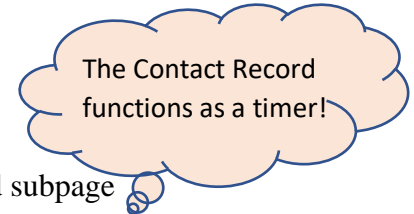
Learning Outcomes:

1. Record an information only contact for an existing client
2. Record a referral to community resources contact for an existing client
3. Record a referral to the ADRC for an existing client
4. Record an information only contact for a new client
5. Record a referral to community resources for a new client
6. Record a referral to the ADRC for a new client
7. Document an anonymous contact
8. Document and route voicemail

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Steps for Information Only **Existing** Client

- Navigate to the Client Chapter
- Execute an Advanced Search for the Client
- Verify the identify with information provided in the list view of search results
- Open the Client's Record
- Add a Contact record – File is your Friend!
 - *Contact Type Table on Pg. 26-27 in Manual*
 - Complete the required fields and save record
 - Search for and add resources from Resources Provided subpage
- Update/Verify demographics on Demographics tab
 - To update demographics, File – Edit Demographics
- Update contact record and save as complete



Steps for Referral to Community Resources **Existing** Client

- Navigate to the Client Chapter
- Execute an Advanced Search for the Client
- Verify the identify with information provided in the list view of clients
- Access the Client's Record
- Start a Contact record
 - *Status Table on pg. 63-64 in Manual*
 - Update/Verify demographics
 - On demographics tab
 - Provide appropriate resources
 - On Resources Provided subpage of Contact record
 - Add Referral to Community Resources
 - On Referrals to Providers tab
- Update contact record and save as complete



Steps for Referral to ADRC for 701S Screening for **Existing** Client

- Navigate to the Client Chapter
- Execute an Advanced Search for the Client
- Verify the identify with information provided in the list view of clients
- Access the Client's Record
- Start a Contact record
 - Update/Verify demographics – On Demographics tab
 - Provide appropriate resources – On Resources Provided Subpage of Contact record
 - Update the screening record to reflect appropriate status – On Screening Tab
 - *Screening Status table on pages 89-91 in Manual*

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- Update contact record and save as complete

**If the age is missing on the demographics page, please go to the File menu bar and select edit demographics. No changes are necessary, please Save & Close. The age field should now populate.*

Steps for Information Only New Client

- Navigate to client chapter
- Execute Advanced Search
- Client not found – Add New from File menu
- Execute Client-Search for Existing Search (This is intended to reduce duplicates)
 - Any information used to conduct the search will populate on the subsequent Demographics page
- If client still not found, click Add New button that appears below the search fields
 - Complete necessary demographics information
 - Save & Close
 - Screening Window – Status = Screening Not Required
 - Save & Close
- Navigate to the Demographics tab and start a Contact Record
 - Update or complete the demographics page
 - *Best Practice – Obtain the address information*
 - Provide appropriate resources – On Resources Provided Subpage of Contact record
- Complete Contact

Steps for Referral to Community Resources for a New Client

- Navigate to client chapter
- Execute Advanced Search
- Client not found – Add New from File menu
- Execute Client-Search for Existing Search (This is intended to reduce duplicates)
 - Any information used to conduct the search will populate on the subsequent Demographics page
- If client still not found, click Add New button in bottom right corner
 - Complete necessary demographics information
 - Screening Window – Screening Not Required
 - Navigate to the Demographics tab
- Start a Contact Record
 - Update or complete the demographics page
 - Address is required for referrals
 - Provide appropriate resources – On Contact record

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- Add Referral to Community Resources – On Referrals to Providers tab
- Complete Contact

Steps for Referral to ADRC for 701S Screening for a New Client

- Navigate to client chapter
- Execute Advanced Search
- Client not found – Add New from File menu
- Execute Client-Search for Existing Search (This is intended to reduce duplicates)
 - Any information used to conduct the search will populate on the subsequent Demographics page
- If client still not found, click Add New button in bottom right corner
 - Complete necessary demographics information
 - Screening Window – Screening Not Required
 - Navigate to the Demographics tab
- Start a Contact Record
 - Update or complete the demographics page
 - Address is required for referral
 - Provide appropriate resources – On Contact record
 - Update the screening record to reflect appropriate status
 - If screener is identified using outside scheduling tools, then record on Screening Record
 - Document appointment on Appointment tab
 - Document in Note
- Complete contact

Steps to Document Anonymous Contact

- Navigate to the Contact Chapter
- Add Contact
 - Check Anonymous Field
 - Complete 3 subsequent fields if possible
 - Provide appropriate resources
- Close Contact Record

Steps to Document and Route Voicemail

- If the client can be identified by the voicemail message, navigate to the Client Chapter
 - Execute Advanced Search
 - Verify the identify with information provided in the list view of clients – if possible
 - Access the Client's Record
 - Start a Contact record

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- The outcome is dependent on the outcome of the call
- *Contact Type Table on Pg. 26-27 in Manual*
- *Status Table on pg. 63-64 in Manual*
- Complete Contact
- If the client cannot be accurately identified, navigate to the Contact Chapter
 - Add Contact
 - Check Anonymous Field
 - Document the content of the voicemail, can document possible names and/or phone numbers
 - Complete Contact

Steps to Complete Ticklers

- Open Tickler Queue on My Work Dashboard
 - Select the appropriate Tickler
 - Click to the Notes Page
 - Use Flyout on Right side to access Client's record
 - Depending on the purpose of the Ticker view the corresponding Tab to determine if the necessary tasks have been completed. Document on the open Note, Save & Close to satisfy the Tickler.
 - Upon returning to the My Work Dashboard, that Tickler should be gone.

Corresponding Page Numbers of tasks to the Training Manual

Search for existing client...pages 15-18
Add new client record ...pages 19-23
Add Contact Record...pages 26-31
Resources Provided...pages 44-54
Demographics...pages 79-86
Add and Assign a Screening Record...pages 87-94
Tickler for 14-Day Screening Referral Follow-up...pages 108-115
Referrals to Community Resources...pages 122-125
Tickler for 14-Day Community Resource Referral...pages 125-128
Edit Contact Records...page 68

Additional I&R tasks

Add Pre-Client Record...pages 24-25

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View Past Contacts...pages 45-48

Anonymous and Incomplete Contacts...pages 31-34

Link anonymous or incomplete contacts to a client...pages 34-44

SHINE Referral and Data Form...pages 135-143

Appointments...pages 307-308

Associated People...pages 410-413