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

The Contact Record functions as a timer!

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

*On Demographics, **verify** that age has populated

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*

- 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.*

<u>Steps for Information Only **New** Client</u>

- 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

<u>Steps for Referral to Community Resources for a **New** Client</u>

- 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

    - 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

        - 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

Additional I&R tasks

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