DOEA eCIRTS
Module 2
Cheat Sheet Set-up

This cheat sheet is intended to help the screeners set up clients to use as practice. Typically, I&R Specialists would be responsible for creating new clients and/or referring clients to the ADRC for 701S screenings. The training environment is not equipped for Screeners to pick-up previously created clients and practice module 2. For the screeners to adequately practice module 2, they will need to create their own new clients.

Create New Client

1. Search for existing client to ensure the client you want to create does not exist.
2. File - Add New Client
3. Complete the Demographics page
    a. Complete all required fields
    b. Complete the address according to the PSA
        i. Street address
        ii. City
        iii. State
        iv. Zip Code
        v. County
        vi. PSA
        vii. Agency Name
    c. File – Save & close
4. Complete the Screening page
    a. Primary worker = Screener (keep as self)
    b. Status = Assigned Screening Referral
    c. Screening Referral Date = Auto populates (Today)
    d. File – Save & Close
5. Find Client on My Work Dashboard under the Screening queue
6. Complete Module 2
    a. *In the beginning, when looking for Status = Screening I&R to ADRC, replace with Assigned Screening Referral. Only I&R Specialists will be able to select Screening I&R to ADRC status.*

The address is a Smart field. The answers will narrow based on locations. When you get down to the County, PSA, and Agency Name, there should only be one choice.