**DOEA eCIRTS**
**Module 2**
**Conduct a Screening**
**Cliff Notes**
*The record data report can be used to identify clients assigned to the generic worker*

Contact Attempts by ADRC to Schedule Screening – Contact Successful

- **Day 1**: Locate Client on My Work Dashboard
    - Screening Queue
- Start/Stop Tab, Record Start Time
- Notes Tab, 701S Screening Contact Attempt 1
    - Status = Complete
- Screening Tab
    - Status = Contact Attempt 1
- Start/Stop Tab, Record Stop time
- **Day 2**: Locate Client on My Work Dashboard
    - Screening Queue – Contact Attempt 1
- Start/Stop Tab, Record Start Time
- Notes Tab, 701S Screening Contact Attempt 2
    - Status = Complete
- Screening Tab
    - Status = Contact Attempt 2
- Start/Stop Tab, Record Stop time
- **Day 3**: Locate Client on My Work Dashboard
    - Screening Queue – Contact Attempt 2
- Start/Stop Tab, Record Start Time
- Notes Tab, 701S Screening scheduled
    - Status = Complete
- Appointments Tab
    - Record Date and Time of the scheduled appointment
- Screening Tab
    - Status = Screening Scheduled
- Start/Stop Tab, Record Stop time

Scheduling Attempts by ADRC to Schedule Screening – Contact Unsuccessful

- **Day 1 and 2 are the same**
- **Day 3**: Locate Client on My Work Dashboard
    - Screening Queue – Contact Attempt 2
- Start/Stop Tab, Record Start Time
- Notes Tab, 701S Screening Contact Attempt 3
    - Status = Complete
- Screening Tab
    - Status = Contact Attempt 3
- Demographics Tab

- o Word Merge, No Contact Letter, Save to a Note
  - ▪ Note status = Follow up
- Start/Stop Tab, Record Stop time

*If after a specified amount of time has passed*

- *Client does not call back, Complete Follow-up Note*
- *Screening Tab*
  - o *Status = Screening Not Complete*

Complete 701S and add Client Program record(s)

- Start/Stop Tab, Record start time
- Forms Tab
  - o Complete the 701S Screening
- Confirm the Rank, Score, and Assessment date populate on Demographics page and in the header section of the client's record
- Program Tab
  - o Add appropriate Program records
  - o *Program status table on page 154 in the Manual*
- Associated People Tab
  - o Add Associated people if appropriate
- Screening Tab
  - o Status = Screening Complete
- Demographics Tab
  - o Word Merge, Post 701S letter, Save to a Note
- Notes Tab, 701S screening, Complete
  - o Status = Complete
- Start/Stop Tab, record Stop time