DOEA eCIRTS
Module 2
Conduct a Screening
Reference Guide

Course Description:

This module is designed to familiarize end users with documenting the intake and screening process when conducting an initial 701S screening, a rescreening, or a significant change rescreening.

Prerequisite:

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

Suggested Resources, Materials, and Credentials

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

Learning Outcomes:

1. Assign Primary Worker
2. Navigate the My Work Dashboard
3. Document Contact Attempts
4. Schedule the Screening
5. Conduct the Screening
6. Add Program Record(s)

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Steps for assigning a primary worker (Only if not assigned to a Screener)

- Navigate to the Reports Chapter
  - Hover over Reports on the Menu Bar
  - Select the Screening Record Data report
    - Filter by Status = Screening Referral I&R to ADRC
    - Additional filters such as PSA and Primary Worker are available
  - Obtain the Client ID for individuals not yet assigned
- Quick Search by the Client ID to access the client's record
- Navigate to the Screening Tab and assign the Primary Worker (Screener) who will be responsible for contacting and/or conducting the screening.

Navigate the My Work Dashboard

- Locate the Screening Queue
  - Newly assigned screening records will be listed as Screening Referral I&R to ADRC
  - Other listings will also need attention, such as the Screening Scheduled, Contact Attempt 1, and Contact Attempt 2
  - Click the Screening Referral I&R to ADRC queue to see the list of clients
  - Select the Client that you want

Document Contact Attempts

- Once the client record is open, navigate to the Start/Stop tab, start timer
- Navigate to the Demographics tab to obtain the phone number
- Navigate to the Notes Tab
  - Each contact attempt will have its own Note
- Navigate to the Screening Tab
  - Update the Screening record
  - *Screening Status table on pages 89-91 in Manual*
- Navigate back to Start/Stop Tab, stop timer
- Repeat the Process for Contact Attempt 2
- At Contact Attempt 3 two paths diverge
  - Contact Unsuccessful Path
    - Once the client record is open, navigate to the Start/Stop tab, start timer
    - Navigate to the Demographics tab to obtain the phone number
    - Document the third failed contact attempt in a Note

The process for completing screening contact attempts is explained on pages 94-105 in the Manual.

        - Generate the No Contact Letter from a Word Merge
            - Document in the Note
        - Navigate to the Screening Tab
        - Navigate to Start/Stop tab
            - Stop Timer and return to My Work Dashboard

    - Contact Successful Path
        - Once the client record is open, navigate to the Start/Stop tab, start timer
        - Navigate to the Demographics tab to obtain the phone number
        - Navigate to the Notes Tab
            - *If scheduling, navigate to the Appointments Tab*
            - *If completing, navigate directly to the Forms Tab*
        - Navigate to the Screening Tab and update the Screening record
        - Navigate to Start/Stop tab, stop timer

<u>Conduct the Screening</u>

- Use the Screening queue on My Work Dashboard to identify clients in need of a screening
- Select Client
- Navigate to the Start/Stop Tab, start timer
- Navigate to Demographics Tab to obtain the Phone Number
    - *Verify age field has populated*
- Navigate to the Forms Tab
    - Complete the 701S Form
- Navigate to Notes Tab to document the outcome
- Navigate to Screening tab and update the Screening record

<u>Add Program Record(s)</u>

- Navigate to the Programs Tab
    - Add a Program record(s)
    - *Program status table on page 154 in the Manual*

<u>Attach Post 701S Letter to a Note</u>

- Navigate to Demographics
    - Hover over Word Merge on File Menu bar
    - Select the appropriate 701 Post Screening Letter
    - Save to a Note
- Navigate to the Start/Stop Tab, stop timer

*On demographics, verify age has populated

**If the age field on the demographics page is blank, please Edit Demographics. No changes are required, so please Save & Close. Saving should populate the age field.*

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<u>Corresponding Page Numbers of tasks to the Training Manual</u>

<u>Other areas of interest for Screeners or Intake specialists</u>