

DOEA eCIRTS
Module 3
Release and Enrollments (GR & OAA)
Cliff Notes

Priority Ranking Report to identify those who will come off the wait list.

- Update Program Record
 - Status = APPL Applicant (It is known that this status is not universally used, but for demonstration purposes, it is easier to track and show changes)
- Update Enrollment Provider
 - Must update to reflect self in order to populate on My Work dashboard

Conducting Contact Attempts to Scheduling the Assessment

- **Day 1:** First contact attempt to schedule the assessment
- Start/Stop Tab, record start time
- Notes Tab
 - Add a Note to document Contact Attempt 1
 - *Each contact attempt will have its own Note*
 - Start/Stop Tab, stop time
- **Day 2:** My Work > Notes > Follow-up Queue
 - Start/Stop Tab, start time
- Update Contact Attempt 1 Note to remove it from the queue
 - Document Contact attempt 2
- Start/Stop Tab, stop time
- **Day 3:** My Work > Note > Follow up Queue
 - Start/Stop Tab, start timer
- Update Contact attempt 2 Note to remove it from the queue
 - Document the outcome of the third contact attempt
 - Successful contact
 - Appointments Tab
 - Document the Date and Time of scheduled appointment
 - Unsuccessful Contact
 - Demographics tab to pull the Word Merge
 - Save No Contact Letter to a Note
- Start/Stop Tab
 - Record Stop time

Conduct the Assessment

- Forms Tab
 - Complete the 701 A, B, or C Assessment
- Caregiver Workflow Wizard if Caregiver was documented

Update Program record and add services

- Programs Tab
 - Update appropriate Program Records

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- Services Tab
 - Create the General Information Page
 - Add services
 - Create Authorizations for the added services
- Referrals to Providers Tab
 - Add referral to Service Provider(s)
- Notes Tab
 - Create a Note to document the outcome of the assessment

Address the Follow up task

- Locate and open Service 14 Day Follow up Tickler
- Confirm with client services have started and document on Tickler Note