DOEA eCIRTS
Module 3
Release and Enrollments (GR & OAA)
Reference Guide

Course Description

This module is designed to demonstrate the process of releasing a client from a waitlist for General Revenue or Older Americans Act (OAA) programs. This module demonstrates tasks associated with releasing a client, updating Programs Enrollments, conducting assessments, and adding planned services. Lead Agencies and OAA Providers are encouraged to attend this module.

Prerequisites

- Layout and Navigation Video
- Searches Video
- Notes Video
- Ticklers Video
- Reports Video

Suggested Resources, Materials, and Credentials

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

Learning Outcomes

1. Update Program Record
2. Conduct Contact Attempts to Schedule an Assessment
3. Conduct Assessment
4. Update Program Record
5. Add Planned Services
6. Create Authorizations
7. Create Referral to Provider Record
8. Tickler Follow-ups

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In some PSAs, the Lead Agency will decide which clients on the list will be released. In some PSAs the ADRC or Providers decide which clients will be released. When it is decided the client will be released, the Lead Agency or the ADRC will update the status of their program record from APCL Waitlist to APPL Applicant. Not all PSAs use the APPL Applicant status for general revenue programs. APPL Applicant will be used always for MLTC programs and can also be used for General Revenue and OAA programs, but it doesn't have to be used.

<u>Update Program Record</u>

- Access the client's record through the Quick or Advance Search
- Navigate to the Programs Tab
  - Select the appropriate Program record that the client is being consider for
  - Update the Status accordingly
  - *Program status table on page 154 in the Manual*
  - Update the Program Enrollment Provider

<u>Contact attempts to Schedule an Assessment</u>

Time Documentation Required

- Utilize the Quick or Advanced search to locate the client that you have been assigned
- Click on the Client from the list view results
- Demographics Tab
- Navigate to the Start/Stop Tab
- Navigate to the Notes Tab
  - Add a Note to document your first contact attempt
    - *Each contact attempt will be documented as its own note*
  - *Note Type Table on pages 309-311 in the Manual*
- Navigate to the Start/Stop Tab
  - Record a Stop time
- **Day 2:** Start on the My Work Dashboard
- Locate the Notes Queue
  - Follow-up Queue
  - Open existing Note
  - Select the View link at the right to access the client record
- Land on Demographics page
  - Obtain contact information such as the phone number
- Navigate to the Start/Stop Tab
  - Record the Start time and reason for contact
- Use the open Note
  - Review the Note

The process for documenting contact attempts is in the manual on pages 300-306

  - Change the Status = Complete
  - *Note Status table on pages 313-315 in the Manual*
  - Save & Add Another – A New Note is created
  - Use the New Note to document the second contact attempt
- Navigate to the Start/Stop Tab
  - Record your Stop time
- **Day 3**: Start on the My Work Dashboard
- Locate the Notes Queue
  - Follow-up Queue
  - Open existing Note
  - Select the View link at the right to access the client record
- Land on Demographics page
  - Obtain contact information such as the phone number
- Navigate to the Start/Stop Tab
  - Record the Start time and reason for contact
- **Two Paths**: Unsuccessful Contact or Successful Contact
  - Unsuccessful Contact
    - Use the Open Note
      - Review the Note
      - Status = Complete
      - Save & Add Another
      - Document the third contact attempt
    - Navigate to Demographics Tab
      - Hover over Word Merge
      - Select No Contact Letter
      - Save to a Note
    - Navigate to the Start/Stop Tab
      - Record Stop Time
  - Successful Contact
    - Use the Open Note
      - Review the Note
      - Status = Complete
      - Save & Add Another Note
      - Document the outcome of the successful contact
    - Navigate to Appointments Tab
      - Document the Date and Time of the scheduled Assessment
    - Navigate to the Start/Stop Tab
      - Record Stop Time

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Conduct Contact attempts without required Time Documentation

Follow the same process as above, but skip the Start/Stop timer

Conduct the Assessment

- Access Client Record
- Navigate to the Forms Tab
  - Add New Form
  - 701B
  - Complete the Assessment
  - *Review Type explained on page 320 in the Manual*
  - Status = Complete
    - If Caregiver information is entered, then immediate Workflow Wizard to add Caregiver Info
    - Complete the information on the Workflow Wizard
- Navigate to Notes Tab
  - Add Note with required details to document the assessment

Update Program Record(s)

- Update Program Record(s)
  - Navigate to Programs Tab
  - Select Program enrollment record that is being updated
  - *Program status table on page 154 in the Manual*

Add Planned Services

- Navigate to Services Tab
  - Will create General Information
    - *Status table on page 338 in the Manual*
  - Services Subpage
    - Add Planned Services
      - *Status table for Services is on page 343 in the Manual*
    - Add another planned service as needed

Create Authorizations

- On the List view of Services Subpage, create Authorizations
- *Services that do not require authorizations are listed on page 336 in the Manual*
- Check box on the right
- File, Create Authorizations

Create a Referral to Provider

- Navigate to the Referrals to Providers Tab
  - Add Referral Details
  - *Status table is on page 124 in the Manual*

<u>Service 14 Day Follow up Tickler</u>

- Open the Tickler from the Tickler queue on My Work dashboard
- Contact the client to confirm services have started and document on the Tickler Note

Corresponding Page Numbers of tasks to the Training Manual

Other tasks that may be completed by the Lead Agency or OAA Providers