

**DOEA eCIRTS**  
**Module 4**  
**Cliff Notes**

Add a Billable Service for One Client

- Use quick or Advance search to access Client Record
- Navigate to Referrals to Providers Tab
  - Ensure the Provider is listed
- Navigate to the Activities Tab
  - Add Activities
  - Complete each section of the Activity Record
  - Update Status = Complete
  - Save & Close

Add Activity for Multiple Clients

- Locate the Activity Roster under the My Management section of the Tasks Queue
- Complete each section of the Activity Roster record
- Update status = Complete
- Save & close to finish

Add aggregate Services

- Navigate to the Client Groups Chapter
- Search for and select the appropriate Client Group
  - Navigate to the Activities Tab
  - Use the File menu to Add Activities
  - Complete the Activities page
  - Update Status = Complete
  - Save & Close to finish

Import Activities for Multiple Clients

- Locate the upload option under the My Files section of the Tasks Queue
- Upload the file
  - Successful = Popup will indicate successful upload
  - Unsuccessful = Popup will indicate a failed upload attempt
    - Check error log to identify and address errors
    - Retry upload