DOEA eCIRTS
Module 6
SHINE
Reference Guide

Course Description

This module supports activities of the Serving Health Insurance Needs of Elders (SHINE) Program that provides free, confidential, and unbiased Medicare counseling. Learning objectives of the SHINE session will include receiving the SHINE Contact and/or Referral, completing and/or reviewing the SHINE data form, assigning referrals to trained volunteers, and updating referral records.

Prerequisites

- Layout and Navigation Video
- Searches Video
- Reports Video

Suggested Resources, Materials, and Credentials

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

Learning Outcomes

1. Locating SHINE referrals
2. Assigning counselors
3. SHINE Data Form
4. Updating Referral Records

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Referrals for the SHINE program can be received by I&R or directly from an interested client. Regardless of the entry point, the process will be the same. A referral record will be created for the SHINE program and the SHINE Data form will be completed in eCIRTS.

The following steps will typically be completed by I&R Specialists, however, if the client bypasses I&R and contacts SHINE directly, the SHINE staff will

Locate an existing Client (Typically I&R, can be SHINE)

- Execute a Quick or Advanced Search
- Confirm Client identity
- Update/Verify Demographics
  - Address is required
- Navigate to Referrals to Provider tab
  - Create New Referral
  - File > Add Referral Details
    - Provider = SHINE
    - Worker = Defaults to self, need to change to SHINE Liaison or Generic SHINE worker
    - SHINE Counselor Name = Will be assigned by SHINE liaison
    - Status = Notification
    - Save & Close
- Navigate to the Forms tab
  - Add Form
  - File > Add Form
    - Select SHINE Data form from the dropdown list
    - Complete Header section
      - Division, review date, assessor worker all auto populate
      - Review = Reason for completing the Form
      - Review = Initial
      - Status = Draft, until complete
    - Complete the form with information provided by the client
      - Update Status = Complete
    - File - Save & Close

Create a New Client (Typically I&R, can be SHINE staff)

- Execute a Quick or Advanced Search
- Client not found
  - Add New Client
  - Execute the Client-Search for Existing to reduce possible duplicate records
  - Add New button on bottom right
    - Complete Demographics page

            - Address is required
            - Save & Close
        - Complete Screening page
            - Screening = Screening Not Required
            - Save & Close
        - Land on Screening tab of Client record
- Navigate to Referrals to Provider tab
    - Create New Referral
    - File > Add Referral Details
        - Provider = SHINE
        - Worker = Defaults to self, need to change to SHINE Liaison or Generic SHINE worker
        - SHINE Counselor Name = Will be assigned by SHINE liaison
        - Status = Notification
        - Save & Close
- Navigate to the Forms tab
    - Add Form
    - File > Add Form
        - Select SHINE Data form from the dropdown list
        - Complete Header section
            - Division, review date, assessor worker all auto populate
            - Review = Reason for completing the Form
            - Review = Initial
            - Status = Draft, until complete
        - Complete the form with information provided by the client
            - Update Status = Complete
        - File – Save & Close

<u>Locating SHINE Referrals (SHINE Liaison)</u>

Use this method when staff selects a specific person on the Referral record

- My Work > Client Chapter Queue > Referrals Queue > Notifications
- Click to access the Referral on the Client Record
- Assign a Counselor and document the Counselor on the Referral record
    - *You will continue to assign and notify the SHINE counselors and volunteers of their assignments using whatever means of notification that you are currently using, such as email, Time Tap, SharePoint, etc.*
- Update the Status = Referral Complete
- Save & Close
- Navigate to the Forms tab to access the completed Data Form

- May use Filters to locate the SHINE Data form from the list view of completed Forms
- Click on the SHINE data form
- Use Export option (Under Reports) or print (under File) option to obtain a copy to send to counselor via normal methods currently in use

<u>Locating SHINE Referrals (SHINE Liaison)</u>

Use this method when staff selects a generic worker on the Referral Record

- Quick Search for SHINE in Provider Chapter
- Navigate to Referrals and Notifications Tab
    - Filter the List view
    - Status = Notification
    - Worker = Generic
    - Locate the Referral, and use the View link in the right-hand column to access the client record
- Land on Client Demographics tab, click over to the Referrals to Providers tab
- Open the SHINE referral
    - Assign self as Worker
        - Click the Workers subpage on the left
        - File – Assign Workers
        - Click the ellipsis to search for your last name
        - File – Save & Close
        - Select the checkbox at the right, use Tools to Designate as Primary
        - Click back to Referral Details subpage
    - Assign Counselor and document counselor on the Referral
        - *You will continue to assign and notify the SHINE counselors and volunteers of their assignments using whatever means of notification that you are currently using, such as email, Time Tap, SharePoint, etc.*
    - Update Status = Referral Complete
    - Save & Close
- Navigate to the Forms tab
    - May use Filters to locate the SHINE Data form from the list view of completed Forms
    - Click on the SHINE data form
    - Use Export option (under Reports) or print (under File) option to obtain a copy to send to counselor via normal methods currently in use

<u>Optional Update the Referral Record</u>

Some PSAs track unsuccessful contact attempts

- Counselor will notify the SHINE liaison that three attempts to contact were unsuccessful.
- Liaison will utilize Quick or Advanced Search to locate the Client
- Click to access the client record
- Navigate to Referrals to Providers tab
  - Select the SHINE Referral record from the list
  - The Referral opens
  - Status update = Referral Incomplete
  - Comments = Document the details concerning the unsuccessful contact attempts as provided by the SHINE Counselor
  - Save & Close

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

SHINE…pages 135-149

Referrals to SHINE…pages 139-141

SHINE Data Form…pages 141-143

Locating SHINE referral records…pages 143-147

Updating the SHINE Referral…pages 148-149

<u>Additional tasks that SHINE staff may need</u>

Access existing client record…pages 15-18

Create New client record…pages 19-23