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## Services

Once the Assessment is completed, the service needs for the client will be known and will be added to the Services tab in eCIRTS. The Services tab will house Service Plans and Care Plans. Case managed clients will have a Care Plan. Non-case managed clients will have a Service Plan. In CIRTS, services were only added for clients who required a care plan. In eCIRTS, one-on-one services planned out in advance (even if reported in the aggregate) will be added as services. For example, Companionship (COMP), Homemaker (HMK, HMKV), TRANSPORTATION (TRS, TRSG, TRSI, TRSV, DPTRS), Personal Care (PECA, PECV.)

This will allow a better overview of a client's needs, help with monitoring providers to ensure service delivery, and assist with monitoring spending plans by provider. For each service, a provider will be selected to deliver the service. Non-Department (NDP) funds can also be entered as eCIRTS Services, but it is up to the AAA and/or provider if they choose to enter them. Once the services are entered and accepted by the provider, they are turned into authorizations in eCIRTS. Authorizations will be used to control the number of units a provider can bill by client. This will assist providers with their spending plans, ensuring they do not go over their contracted funds, and aid the AAAs and providers in monthly Surplus/Deficit discussions. With this being a new function, the Department recommends setting the service/authorization limits high for the first year so that constant re-authorizations would be unnecessary. However, in future years the limits should be reduced to align with contracted funds to ensure providers stay within their budgets. A provider is also able to deliver and bill services outside of the authorized limits when needed to care for the client.

Services/authorizations are not required for the following services:

- APS Crisis Revolving Services
- NDP services (optional)
- Information
- Referral
- Intake
- Screening and Assessment
- Congregate Meals Screening
- All OA3D services.
- Medication Management – Group (MMG) – CCE and LSP
- Powerful Tools for Caregivers (PTCG) – OA3E
- Caregiver Training/Support (CTSG)
- Caregiver Support Groups (CSG)
- Gerontological Counseling (GECO)
- Counseling (Mental Health/Screening) (MHSG)
- Health Support (HSUG)
- Education/Training (EDUCG),
- Legal Assistance (LEG),
- Medication Management Group and OA3D Medication Management Individual (MMG, MEMAG, MEMAI),
- Recreation (RECR), and
- Telephone Reassurance (TERA, TERACV)
- Legal Assistance (LEG)



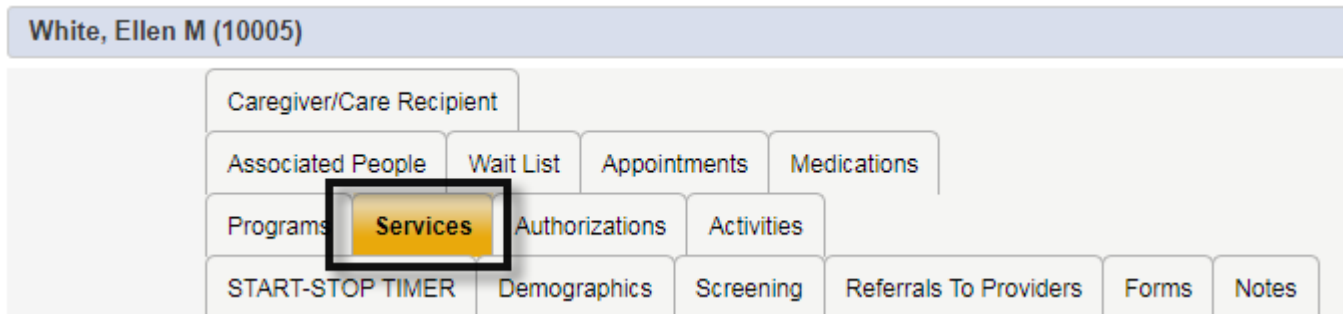
### Note

The Department recognizes that this will be additional work for providers during the transition to eCIRTS who will be entering services for non-case managed clients for the first time. The providers are encouraged to enter the information as soon as they can. However, services must be entered into eCIRTS no later than the client's next reassessment or care plan review, whichever comes first. Setting up the services in eCIRTS at the time of assessment can be billed to Screening and Assessment, Congregate Meals Screening, or Intake (whichever service the provider typically uses to report completing an assessment).

## General Information

Before the services can be added, some general information must be added first. This general information record serves as the parent record and the services are the child records in eCIRTS. The general information record is referred to as a Plan record in eCIRTS. One Plan record will be created per year.

1. The Assessor or Case Manager will click on the **Services** tab.



2. From the **File** menu, select **Add Plan**.
3. The General Information page will display. Update the following fields:
  - a. **Division:** This field will display the Division that has an open status on the Screening page.
  - b. **Program:** select DOEA Services



### Note

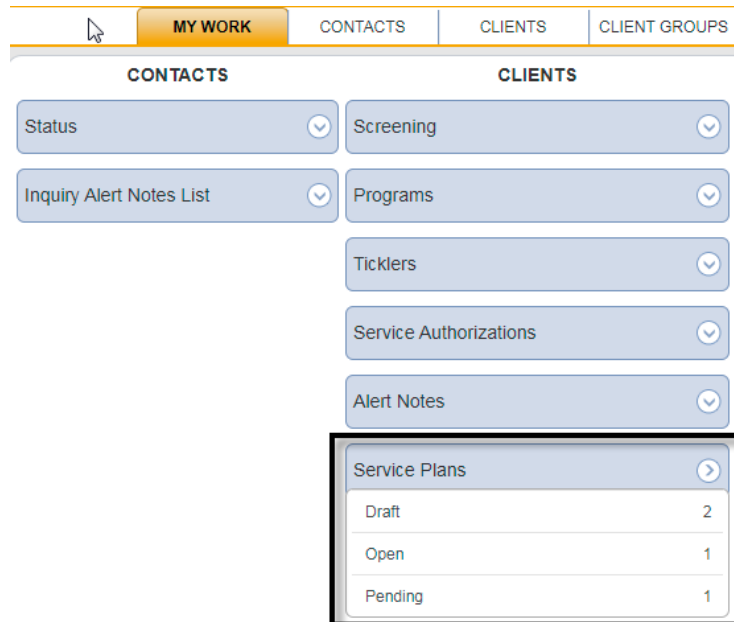
The DOEA Services program record was added automatically when the client record was created. It is a required field for eCIRTS authorization functionality to work correctly, and DOEA will always select 'DOEA Services.'

- c. **Agency:** This field will display the Agency associated with the selected Screening value.
- d. **Worker:** This field will default to the worker creating the record and most of the time also be the one who completed the assessment. Update it if it is not correct.



**Note**

If you are the worker, this Plan will also appear on your My Work page in the Service Plan queue. This makes it easy for Case Managers and Providers to keep up with their case loads.



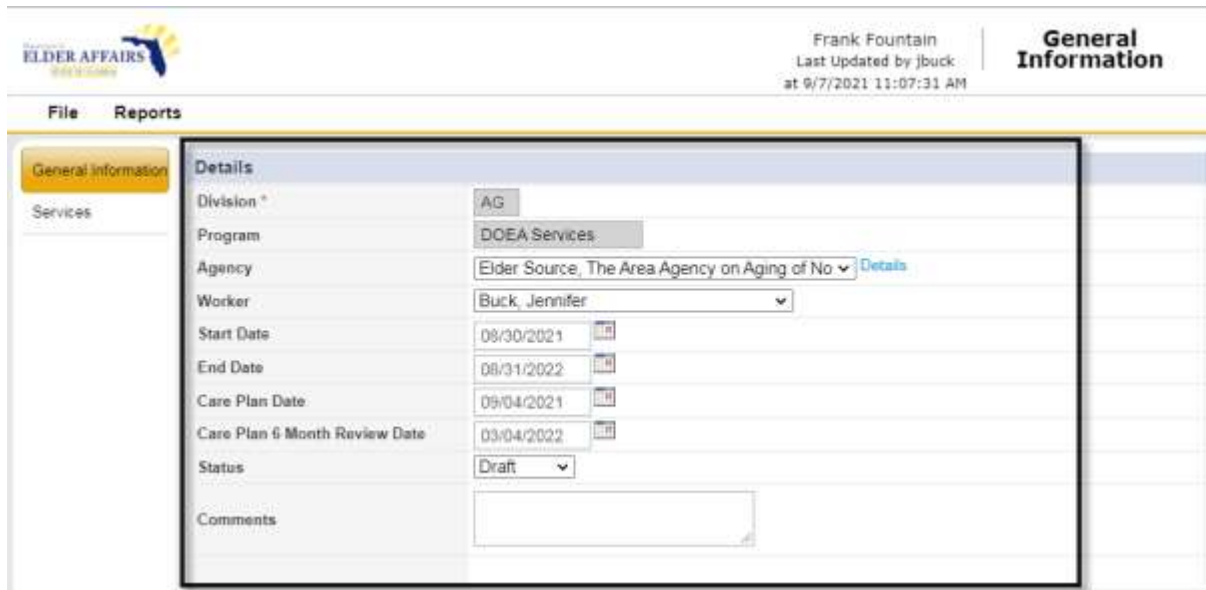
The screenshot shows a navigation bar with 'MY WORK', 'CONTACTS', 'CLIENTS', and 'CLIENT GROUPS'. Below are two columns of filters: 'CONTACTS' and 'CLIENTS'. The 'CONTACTS' column includes 'Status' and 'Inquiry Alert Notes List'. The 'CLIENTS' column includes 'Screening', 'Programs', 'Ticklers', 'Service Authorizations', 'Alert Notes', and 'Service Plans'. The 'Service Plans' filter is expanded, showing a table with the following data:

Status	Count
Draft	2
Open	1
Pending	1

- e. **Start Date:** This is the start date of the client’s care plan or reassessment cycle.
- f. **End Date:** This is the last day of the month one year later.
- g. **Care Plan Date:** When applicable, this is the date the Care Plan is reviewed with the client.
- h. **Care Plan 6 Month Review Date:** When applicable, this is the date the Case Manager completes the six-month care plan review with the client.
- i. **Status:** This field will display the status of the plan.

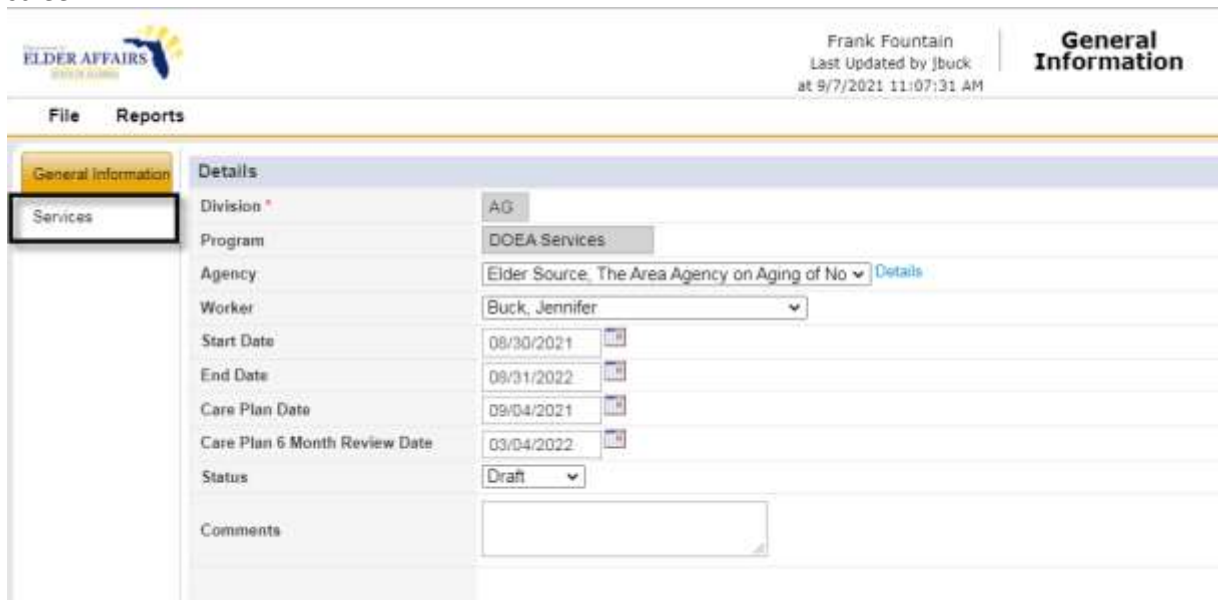
Status	Use
Draft	Indicates that the record is active, and services are still being added to the record.
Open	indicates that the record is active, and services have been added to the record. Modifications can be made to the record throughout the year.
Complete	indicates that the record is complete, and no modifications can be made to the record. This status is used at the end of the year to ‘close out’ one year and open the next.

- j. **Comments:** notes about the plan record.



Details	
Division *	AG
Program	DOEA Services
Agency	Elder Source, The Area Agency on Aging of No <a href="#">Details</a>
Worker	Buck, Jennifer
Start Date	09/30/2021
End Date	09/31/2022
Care Plan Date	09/04/2021
Care Plan 6 Month Review Date	03/04/2022
Status	Draft
Comments	

- From the **File** menu, select **Save Plan**. Select the Services subpage which is now visible on the left side of the screen.



## Provider Services

It is important to understand the link between provider services and client services in eCIRTS. A provider must be contracted to provide a service before you can add a service for that provider on a client's record. A service record for the provider must exist for the service, program and client county you are adding the client service for. This provider service will have a start and end date within the start and end date of the client service. Sometimes there is not a single provider service record that covers the date span on the client service record.

## Entering Services and Billable Units in eCIRTS

3/25/22

Usually this happens because there are 2 provider service records and together, they cover the data span on your service record.

Or you do not have any provider services that cover the full date span on the service record, usually because the client service start date is before the provider service start date.

eCIRTS will warn you when one of these issues exist and even offers to make the corrections for you.

One or more unit cost changes exist for this service and provider between the specified start and end dates.

You can return to the screen and manually narrow your date range or you can allow the system to create a separate planned service for each unit cost change between the specified start and end dates.

Manually adjust dates

Save and automatically create one planned service for each unit cost

**OK**

The result will be one or more client service records, each with a start/end date that aligns with the associated provider service record, collectively covering the full client service date span.



### Example

Provider has 2 CSG OA3E services. First with a date range of 10/1/21 – 12/31/21. The second with a date range of 1/1/22 – 12/31/22.

CSG	CSG CAREGIVER SUPPORT GROUPS	OA3E	10/01/2021	12/31/2021
CSG	CSG CAREGIVER SUPPORT GROUPS	OA3E	01/01/2022	12/31/2022

The client service has start date of 10/1/21 and end date of 2/24/22.

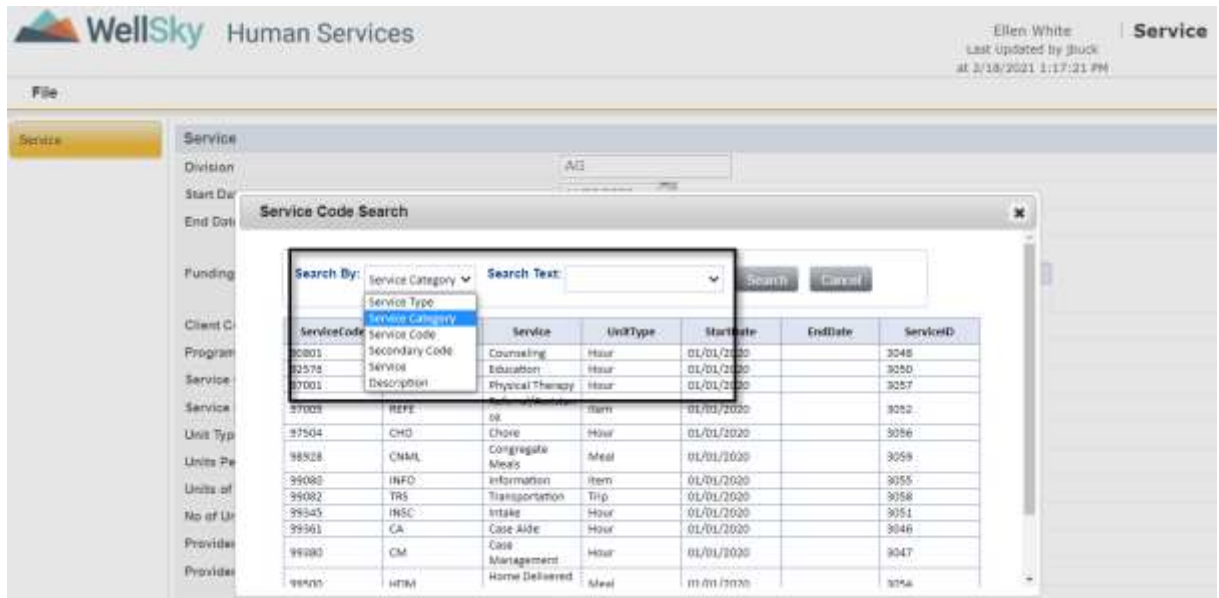
There is not a single provider service that covers this date range, there are two. Two client services need to be added. The first will have a date range of 10/1/21 – 12/31/21. The second with a date range of 1/1/22 – 2/24/22.

### Add a Service

Each provider will have their own service record for the client. For example, a client needs 40 hours/week of Chore services, delivered by two providers. There will be two service records in eCIRTS. One for 30 hours and second for 10 hours. Each service record will have a provider who will deliver the services.

1. With the **Services** subpage selected, from the **File** menu, select **Add Planned Service**.





- h. **Service Description:** Description representing the delivery of a specific service. This will auto populate after the service code is selected from the service code search.
- i. **Unit Type:** This field displays the unit type associated with the service code. (e.g. hour, mile, session) This will auto populate after the service code is selected from the service code search.
- j. **Units Per:** This field is used in conjunction with the Units of Measure field to specify the frequency, or how often a service can be delivered.
- k. **Units of Measure:** This field is used in conjunction with the Units Per field to specify the frequency, or how often a service can be delivered.



**Note**

Units Per and Units of Measure are used to indicate the frequency of service delivery. The data entered is left to the user's discretion and often, there are several combinations of data that will result in the same number of units.



**Example**

A service that runs for an entire year, 1 unit per calendar day and 365 units per year will both result in the same number of units (365).



**Example**

A service that runs for an entire year for SCAS or CMV. 1 hour per month or 12 hours/year will both results in the same number of units (12).

- l. **No of Units:** This is a calculated field based on the Units Per and Units of Measure.



- m. **Number of Periods:** This is an eCIRTS required, read-only field that is calculated using the date range and the units of measure.



**Example**

If a service runs for an entire year, then when the unit of measure is year, the number of periods is 1. If the unit of measure is quarter, the number of periods is 4, and for a unit of measure of week, the number of periods is 52.

- n. **Provider ID:** This field displays the system generated ID for the Provider after the user has searched for and selected a value. Provider ID field is not required until Service Status: Accepted or Requested.
- o. **Provider:** This field displays the name of the Provider that will deliver the service.
- p. **Unit Cost:** This field will auto populate when the provider is selected and displays the unit cost associated with the service for the selected provider.
- q. **Max Amount:** This is an auto calculated field based on the unit cost and units per.
- r. **Comments:** add any comments that need to be visible on the authorization
- s. **Service Status:** This field will display the Service Status according to the table below:

Status	Use
Needed	Determined when doing assessment. Services are needed but a subcontracted provider or agency has not been identified to provide the services yet.
Requested	Services needed and a subcontracted provider or agency has been identified, but not accepted yet.
Accepted	The subcontracted provider or agency has agreed to provide services to the client.
Declined	The subcontracted provider or agency has declined providing services to the client.



**Note**

Service status: Accepted will trigger a reminder to the user to follow up with the client within 14 days from the start of the service to verify services have been started and needs have been met. See [Service 14 Day Follow Up](#) section for more details.

- t. **See Narrative:** Each funding source will have its own service record. When services are split between 2 funding sources, it will be noted in the Narrative. On the services page, the See Narrative field should equal YES as a trigger to check the Narrative record.
- u. **Corresponding Auth No:** This field will display the corresponding authorization number, when applicable. This is an eCIRTS generated identification number for the authorization.

File

Service

**Service**

Division: AG

Start Date: 06/04/2021

End Date: 12/31/2021

Funding Source:

IndexCode	Index Description	SubObject	SubObject Description
GR	General Revenue	ADI	ALZHEIMER'S DISEASE I...

Program: ADI

Client County: Charlotte

Service Code: CA

Service Description: CA CASE AIDE

Unit Type: Hour

Units Per: 30.00

Units of Measure: Year

No of Units: 17

Number Of Periods: 0.58

Provider ID: 27211

Provider: CHARLOTTE COUNTY SENIOR SERVICES

Unit Cost: \$36.00

Max Amount: \$612.00

Comments:

Service Status:

See Narrative:

- When complete, from the **File** menu, select **Save and Close Planned Service**. The Provider/Case Manager is returned to the Services list view page.
- Proceed to the [Create Authorizations](#) section and be sure to [Add a Referral to Service Provider](#) record for each provider added to the Services list.

### Add a Referral to Service Provider record

Every provider who will deliver services for the client must have an active Referral to Providers record in eCIRTS. Do not add the Referral to Provider record until you want to allow the Provider to bill for this client. When you close this Referral to Provider record, the provider will no longer be able to bill services for the client. Navigate to the **Referrals to Providers** tab. See the [Add a Referral to Service Provider record](#) section for more details.

### Edit a Service

- If the service records need to be updated at any time, click on the **Services** tab and select this year's record.



# Entering Services and Billable Units in eCIRTS 3/25/22

White, Ellen M (10005)

Caregiver/Care Recipient

Associated People    Wait List    Appointments    Medications

Programs    **Services**    Authorizations    Activities

START-STOP TIMER    Demographics    Screening    Referrals To Providers    Forms    Notes

Filters  
Division: [v] +  
[Search] [Reset]

5 Services record(s) returned - now viewing 1 through 5

Division	Start Date	End Date	Care Plan Review Date	Care Plan 6 Month Review Date	Status	Worker
AG	11/20/2021	11/30/2022	11/21/2021		Craft	Test, Stacy

2. The **General Information** page will display.
3. Click on **Services** subpage.

WellSky Human Services

Ellen White | **Services**  
11/30/2020 5:36 PM

File Tools

General Information

**Services**

Filters  
Client County: [v] +  
[Search] [Reset]

2 Services record(s) returned - now viewing 1 through 2

Provider	Client County	Start Date	End Date	Service Code	Service	Unit Type	Unit Cost	Units	Max Amount	Planned Service Status
Meals R Us	LEON	10/01/2020	06/30/2021	99500	Home Delivered Meals	Meal	\$6.00	273.0000	\$1,638.00	Needed
Meals R Us	LEON	11/20/2020	11/30/2021	99500	Home Delivered Meals	Meal	\$6.00	752.0000	\$4,512.00	Needed
								1025.0000	\$6,150.00	

<< First < Previous Retrieve 15 Records at a time Next > Last >>

4. Click on the Service record in the list view grid.

2 Services record(s) returned - now viewing 1 through 2

Provider	Client County	Start Date	End Date	Service Code	Service	Unit Type	Unit Cost	Units	Max Amount	Planned Service Status
Meals R Us	LEON	10/01/2020	06/30/2021	99500	Home Delivered Meals	Meal	\$6.00	273.0000	\$1,638.00	Needed
Meals R Us	LEON	11/20/2020	11/30/2021	99500	Home Delivered Meals	Meal	\$6.00	752.0000	\$4,512.00	Needed
								1025.0000	\$6,150.00	

5. Make any edits as needed. In eCIRTS, the old service will be discontinued, and a new service is added.



### Example

In Oct 2020 we thought the client would get 10 meals/day 11/01/2020 – 11/30/2021. Service #1 was added for 10 meals/day 11/01/2020 – 11/30/2021.

Later, in June, we reduce her to 5 meals/day. Service #1: 10 meals/day was changed to 11/1/2020 – 5/31/2021. Service #2: 5 meals/day 6/1/-21 – 11/30/21 is added.

6. From the **File** menu, select **Save and Close Service**.
7. When Services are edited, their associated authorizations must also be updated. See the [Update Authorizations](#) section.

## Service 14 Day Follow Up

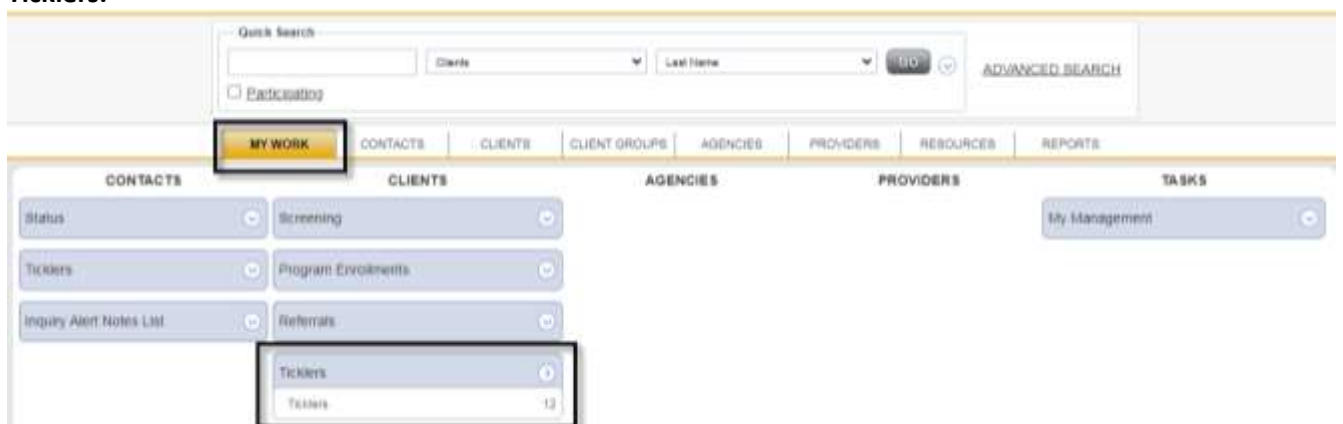
When the Assessor/CM saved the service record with a status of Accepted, a Workflow Wizard triggered a tickler for a service 14 day follow up. The Assessor/CM will be reminded to follow up with the client within 14 days of the service start date to make sure services have been received. All services with status of Accepted will trigger its own tickler.



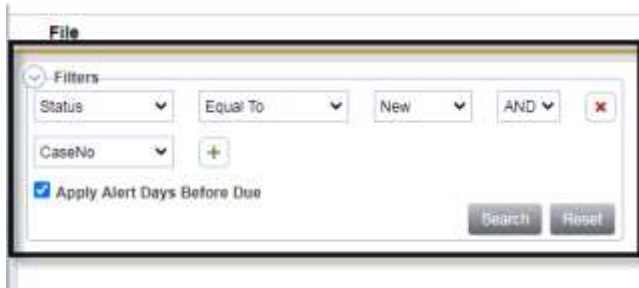
### Note

The System Change Task Force (SCTF) is looking into ways to make this reminder process more efficient. Right now each tickler requires a note to resolve the tickler but usually the worker adds one note that addresses all services. This can be changed so the reminder is just a message not requiring the creation of a Note. This must be approved by the SCTF before it will be updated in eCIRTS.

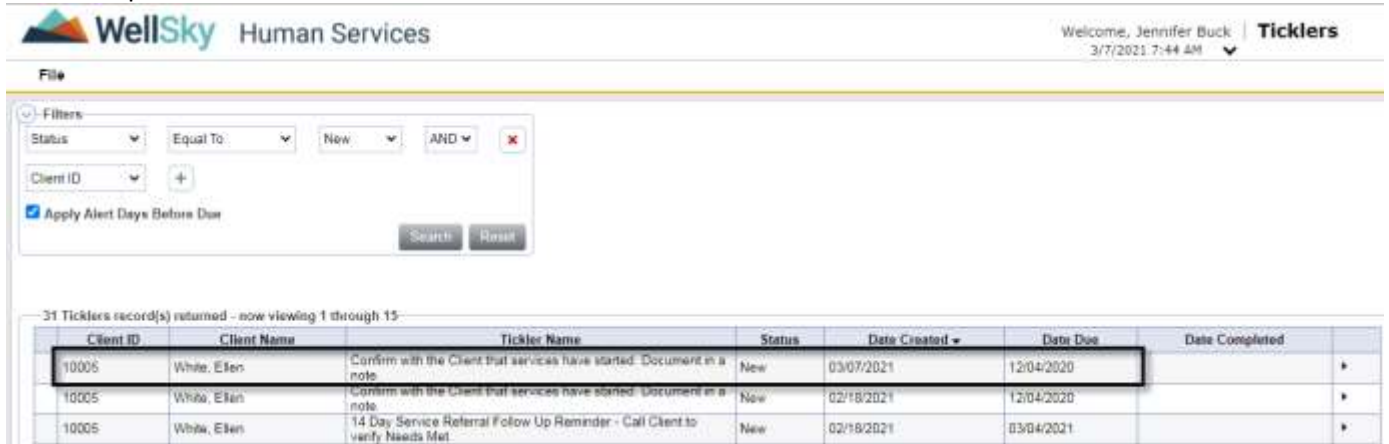
1. Daily, the Assessor, Case Manager or OAA Provider will monitor My Work for new ticklers. Service referral follow up ticklers will be due 14 days from the date the service started and are visible from **My Work > Clients > Ticklers**.



2. Select **Ticklers** to display a list of ticklers currently due.
3. Use the **Search** filters at the top of the page to narrow down your results if needed.



4. Locate the **Confirm with the Client that services have started. Document in a Note** tickler. Click on the tickler name to open it.



5. The Note Detail page displays. Contact the client to follow up on the service. Use the tickler flyout menu as a shortcut to **View Client Record** and lookup information to complete the follow up.



6. The Assessor, Case Manager or OAA Provider will complete the follow up and in a note in eCIRTS.
7. Return to the open **Workflow Wizard** window and complete the Notes detail page. Update the following fields:
  - a. **Note Type:** Select Services, APS-High or Case Management Narrative according to the scenarios below.



## Entering Services and Billable Units in eCIRTS

3/25/22

Note Type	Use
Services	Lead Agency and OAA Providers who completed the assessment and added services will select Services as the Note Type.
Case Management Narrative	Case Managers who completed the assessment and added services will select Case Management Narrative as the Note Type instead of Services.
APS-High	Lead Agency, OAA Providers and Case Managers who completed the assessment and added services for an APS-High risk case will select APS-High as the Note Type instead of Services. This will make the monitoring of APD-High risk case requirements easier.

- b. **Note Sub-Type:** The Assessor, Case Manager or OAA Provider will select a Note Sub-Type according to the table below.

Sub-Type	Use
14-Day Follow Up Completed	Used when Note Type is Services or APS-High and the referral follow up has been completed within 14 business days.
14-Day Follow Up Not Completed	Used when Note Type is Services or APS-High and the referral follow up has not been completed within 14 business days.
14-Day Follow Up	Used when Note Type is Case Management Narrative

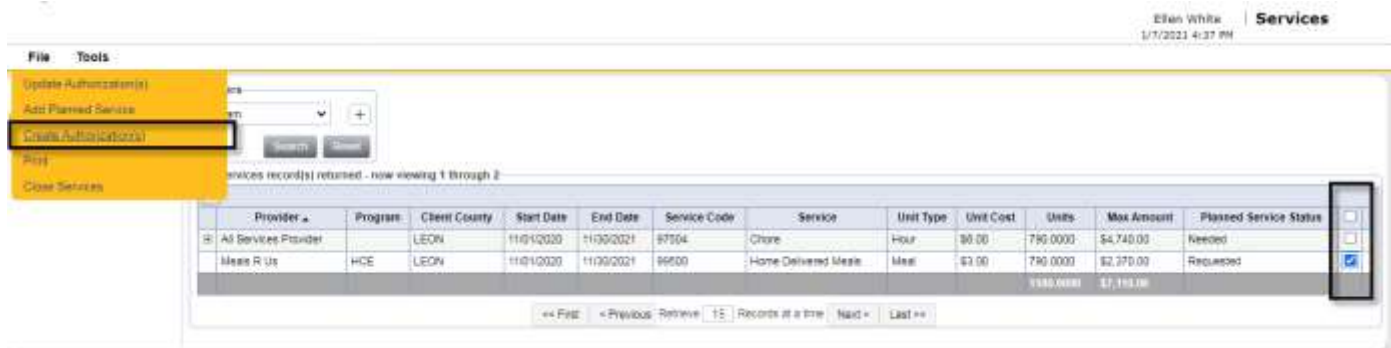
- c. **Description:** leave blank  
d. **Status:** Complete  
e. **Note Recipient:** Leave blank
8. When finished, from the **File** menu, select **Save and Close Notes**.
9. The tickler is marked as complete when the note is saved. The Workflow Wizard window can be closed.
10. The Note is visible on the client Notes tab.

## Authorizations

Authorizations are created from Services in eCIRTS. Each authorization is associated with a specific provider, but a client can have multiple authorizations with different providers. Authorizations will be used to control the number of units a provider can bill by client, by service and by program. This will assist providers with their spending plans, ensuring they do not go over their contracted funds, and aid the AAAs and providers in monthly Surplus/Deficit discussions. With this being a new function, the authorization limits will be set high for the first year so that constant re-authorizations will not be needed. However, in future years the limits should be reduced to align with contracted funds to ensure providers stay within their budgets. A provider is also able to deliver and bill services outside of the authorized limits when needed to care for the client. Authorizations are not be required for several services. Please see the [Services](#) section for a complete list.

## Create Authorizations

1. From the **Services** tab, select the applicable **General Information** record.
2. The General Information page displays with the Services subpage visible on the left.
3. Select the **Services** subpage. The Services list view displays.
4. Click the **checkbox** next to each Service record that is ready to be turned into an authorization.
5. From the **File** menu, select **Create Authorizations**.



The screenshot shows the 'Services' tab in the eCIRTS system. The 'File' menu is open, and 'Create Authorizations' is highlighted. Below the menu, a table of services is displayed. The table has columns for Provider, Program, Client County, Start Date, End Date, Service Code, Service, Unit Type, Unit Cost, Units, Max Amount, and Planned Service Status. A checkbox is visible next to the 'Home Delivered Meals' service record.

Provider	Program	Client County	Start Date	End Date	Service Code	Service	Unit Type	Unit Cost	Units	Max Amount	Planned Service Status
AD Service Provider	HCE	LEON	11/01/2020	11/30/2021	87504	Chore	Hour	\$0.00	795.0000	\$4,740.00	Needed
Meals R Ut	HCE	LEON	11/01/2020	11/30/2021	86500	Home Delivered Meals	Meal	\$3.00	790.0000	\$2,370.00	Requested
									1585.0000	\$7,110.00	

6. A notification displays that the authorization was created and an eCIRTS assigned authorization number will be added to each service.



### Note

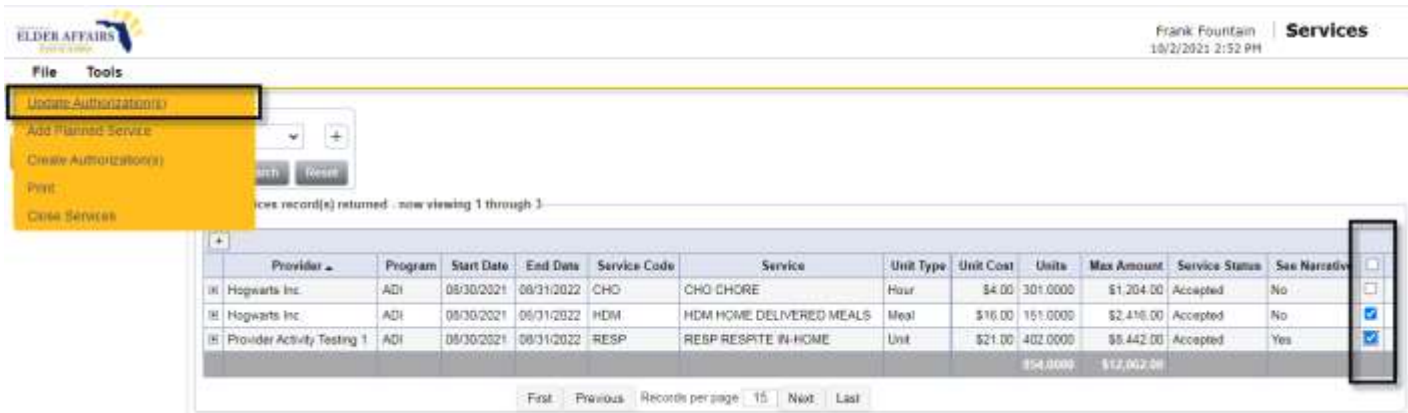
The Program on the General Information page must equal DOEA Services for the Create Authorization functionality to work correctly.

## Update Authorizations

Authorizations are created from services. When Services are updated, their associated authorization needs to be updated. This is done on the Services list view page.

## Entering Services and Billable Units in eCIRTS 3/25/22

1. From the **Services** tab, select the applicable **General Information** record.
2. The General Information page displays with the Services subpage visible on the left.
3. Select the **Services** subpage. The Services list view displays.
4. Select the Service that needs to be updated and make your changes. See the [Services](#) section for additional information.
5. Click the **checkbox** next to each Service record that is ready to have its linked authorization updated.
6. From the **File** menu, select **Update Authorizations**.



The screenshot shows the 'Services' page in the eCIRTS system. The 'File' menu is open, and 'Update Authorization(s)' is highlighted. Below the menu, there is a table of service records. The table has columns for Provider, Program, Start Date, End Date, Service Code, Service, Unit Type, Unit Cost, Units, Max Amount, Service Status, and See Narrative. The last column contains checkboxes for each record.

Provider	Program	Start Date	End Date	Service Code	Service	Unit Type	Unit Cost	Units	Max Amount	Service Status	See Narrative	
Hogwarts Inc.	ADI	08/30/2021	08/31/2022	CHO	CHO CHORE	Hour	\$4.00	301.0000	\$1,204.00	Accepted	No	<input type="checkbox"/>
Hogwarts Inc.	ADI	08/30/2021	08/31/2022	HDM	HDM HOME DELIVERED MEALS	Meal	\$16.00	151.0000	\$2,416.00	Accepted	No	<input checked="" type="checkbox"/>
Provider Activity Testing 1	ADI	08/30/2021	08/31/2022	RESP	RESP RESPITE IN-HOME	Unit	\$21.00	402.0000	\$8,442.00	Accepted	Yes	<input checked="" type="checkbox"/>
								\$54,000.00	\$12,062.00			

7. A notification displays that the authorization was updated.

### View Authorizations – Client record

1. The authorization information is visible on the Service record and on the Authorizations tab of the Client record.
2. On the Service details page, the Authorization number is visible.



File

Service

**Service**

Division: AG

Start Date: 11/20/2020

End Date: 11/30/2021

Funding Source: Test

Program: CCE

Service Code: 99361

Service Description: Case Aide

Unit Type: Hour

Units Per: 4.00

Units of Measure: Business Day

No of Units: 1068

Number Of Periods: 267.00

Provider ID: 10037

Provider: Case Aide For You

Unit Cost: \$15.00

Max Amount: \$16,020.00

Comments: Task 1/Task 3

Service Status: Accepted

See Narrative: [v]

Corresponding Auth No.: 9

- On the Services List view page, the Authorization number and statuses are visible by selecting the + expansion icon.

Ellen White | Services  
1/7/2021 4:41 PM

File Tools

General Information

Services

Filters: Program [v] +

Search Reset

3 Services record(s) returned - now viewing 1 through 2

Provider	Program	Client County	Start Date	End Date	Service Code	Service	Unit Type	Unit Cost	Units	Max Amount	Planned Service Status
Services Provider		LEON	11/01/2020	11/30/2021	97504	Chore	Hour	\$6.00	790.0000	\$4,740.00	Requested
Auth Svc ID			Auth Svc Status			Auth Svc EDI Status					
			Requested								
Home R Us	HCE	LEON	11/01/2020	11/30/2021	99500	Home Delivered Meals	Meal	\$3.00	790.0000	\$2,370.00	Requested
Auth Svc ID			Auth Svc Status			Auth Svc EDI Status					
			Requested								
										1580.0000	\$7,110.00

<< First < Previous Refresh 15 Records at a time Next > Last >>

- The Authorization information is also visible on the **Authorizations** tab of the Client record.

White, Ellen M (10005)

Caregiver/Care Recipient

Associated People Wait List Appointments Medications

Programs Services **Authorizations** Activities

START-STOP TIMER Demographics Screening Referrals To Providers Forms Notes

Filters

Provider

Search Reset

14 Authorizations record(s) returned - now viewing 1 through 14

Auth Service ID	Start Date	End Date	Service Code	Service	Unit Type	Units Per	Units of Measure	Unit Cost	Units	Max Amount	Status	Auth Service EDI Status
17	11/00/2021	11/00/2022	99082	Transportation Trip		2.00	Business Day	\$11.00	536	\$5,896.00	Requested	
				Transportation Providers Inc.							Approved	
				Provider Activity Testing 1							Approved	
72	05/01/2021	05/00/2022	92587	RESP RESPITE IN-HOME	Units	15.00	Week	\$3.00	846	\$2,538.00	Approved	Approved

### Print Authorizations

For Phase 1 go live of eCIRTS, PSAs will continue their current processes of supplying printed Service Authorization forms to providers. A copy of the form will be scanned and attached to a note in eCIRTS. Additional options to print and distribute the authorizations within eCIRTS are being explored for Phase 2.

- Once the Service Authorization form is completed and given to the provider, a copy will be saved as an attachment to a note in eCIRTS.
- Open the Client record and select the **Notes** tab.

White, Ellen M (10005)

Caregiver/Care Recipient

Associated People Wait List Appointments Medications

Programs Services Authorizations Activities

START-STOP TIMER Demographics Screening Referrals To Providers Forms **Notes**

- From the **File** menu, select **Add Notes**.
- The Note Details page displays. Update the following fields:
  - Division:** Defaults to AG
  - Note By:** Defaults to self
  - Note Date:** Defaults to today
  - Note List:** Select Provider or ADRC
  - Note Type:** select Uploaded Forms
  - Note Sub-Type:** Service Authorization form
  - Description:** lookup values that change depending on the Note Type selected.
  - Description:** Select from the lookup. The values in this field are dependent on the Note Type selected.

- i. **Note:** Enter details.
- j. **Status:** select Complete
- k. **Date Completed:** This field will auto populate with the date when the status is changed to Closed.
- l. **Add Attachment:** Search for and select the electronic Service Authorization Form on your workstation.
- m. **Add Note Recipient:** None needed

File **Tools** Reports

**Notes**

**Notes Details**

Division \* AG ▾

Note By \* Buck, Jennifer

Note Date \* 06/09/2021

Note List \* All ▾

Note Type \* Service Authorization Form ▾

Note Sub-Type Sent ▾

Agency Aging and Disability Resource Center of Brow ▾ [Details](#)

Program ▾

Description ▾

Note

5. From the **File** menu, select **Save and Close Notes**.

### View Authorizations – Provider Record

1. For Providers, the Authorization information is visible on the Provider record on the Authorization tab.

MY WORK | CONTACTS | CLIENTS | CLIENT GROUPS | AGENCIES | **PROVIDERS** | RESOURCES | REPORTS

---

All Services Provider (10094)

Provider ID Numbers | Linked Providers | Directory Info | **Authorizations** | Forms | Contacts | Notes | Credentials | Experience | Agencies

Filters: Case No:

3 Authorizations recently returned. now viewing 1 through 3

Case No	Client																														
10008	White, Ellen																														
<table border="1"> <thead> <tr> <th>Auth Service ID</th> <th>Start Date</th> <th>End Date</th> <th>Service Code</th> <th>Service</th> <th>Units Per</th> <th>Units of Measure</th> <th>Auth Svc Status</th> <th>Auth Service EDI Status</th> <th>Last Updated</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>11/01/2020</td> <td>11/09/2021</td> <td>67504</td> <td>Chore</td> <td>2.00</td> <td>Calendar Day</td> <td>Resubmit</td> <td></td> <td>11/04/2020 2:38:44 PM</td> </tr> </tbody> </table>	Auth Service ID	Start Date	End Date	Service Code	Service	Units Per	Units of Measure	Auth Svc Status	Auth Service EDI Status	Last Updated	2	11/01/2020	11/09/2021	67504	Chore	2.00	Calendar Day	Resubmit		11/04/2020 2:38:44 PM											
Auth Service ID	Start Date	End Date	Service Code	Service	Units Per	Units of Measure	Auth Svc Status	Auth Service EDI Status	Last Updated																						
2	11/01/2020	11/09/2021	67504	Chore	2.00	Calendar Day	Resubmit		11/04/2020 2:38:44 PM																						
10009	Brz, Dg																														
<table border="1"> <thead> <tr> <th>Auth Service ID</th> <th>Start Date</th> <th>End Date</th> <th>Service Code</th> <th>Service</th> <th>Units Per</th> <th>Units of Measure</th> <th>Auth Svc Status</th> <th>Auth Service EDI Status</th> <th>Last Updated</th> </tr> </thead> <tbody> <tr> <td>4</td> <td>09/01/2020</td> <td>09/30/2021</td> <td>82576</td> <td>Education</td> <td>2.00</td> <td>Month</td> <td>Approved</td> <td></td> <td>12/3/2020 8:11:57 AM</td> </tr> <tr> <td>3</td> <td>09/01/2020</td> <td>09/30/2021</td> <td>88926</td> <td>Congregate Meals</td> <td>6.00</td> <td>Week</td> <td>Approved</td> <td></td> <td>12/03/2020 8:11:57 AM</td> </tr> </tbody> </table>	Auth Service ID	Start Date	End Date	Service Code	Service	Units Per	Units of Measure	Auth Svc Status	Auth Service EDI Status	Last Updated	4	09/01/2020	09/30/2021	82576	Education	2.00	Month	Approved		12/3/2020 8:11:57 AM	3	09/01/2020	09/30/2021	88926	Congregate Meals	6.00	Week	Approved		12/03/2020 8:11:57 AM	
Auth Service ID	Start Date	End Date	Service Code	Service	Units Per	Units of Measure	Auth Svc Status	Auth Service EDI Status	Last Updated																						
4	09/01/2020	09/30/2021	82576	Education	2.00	Month	Approved		12/3/2020 8:11:57 AM																						
3	09/01/2020	09/30/2021	88926	Congregate Meals	6.00	Week	Approved		12/03/2020 8:11:57 AM																						
10006	Client, Jia																														
<table border="1"> <thead> <tr> <th>Auth Service ID</th> <th>Start Date</th> <th>End Date</th> <th>Service Code</th> <th>Service</th> <th>Units Per</th> <th>Units of Measure</th> <th>Auth Svc Status</th> <th>Auth Service EDI Status</th> <th>Last Updated</th> </tr> </thead> <tbody> <tr> <td>8</td> <td>01/01/2021</td> <td>12/31/2021</td> <td>88100</td> <td>Home Delivered Meals</td> <td>6.00</td> <td>Week</td> <td>Approved</td> <td></td> <td>1/7/2021 9:55:25 AM</td> </tr> </tbody> </table>	Auth Service ID	Start Date	End Date	Service Code	Service	Units Per	Units of Measure	Auth Svc Status	Auth Service EDI Status	Last Updated	8	01/01/2021	12/31/2021	88100	Home Delivered Meals	6.00	Week	Approved		1/7/2021 9:55:25 AM											
Auth Service ID	Start Date	End Date	Service Code	Service	Units Per	Units of Measure	Auth Svc Status	Auth Service EDI Status	Last Updated																						
8	01/01/2021	12/31/2021	88100	Home Delivered Meals	6.00	Week	Approved		1/7/2021 9:55:25 AM																						

## Care Plans

A Care Plan is the tool used by the case manager to document a client’s assessed needs, services to be provided, and costs associated with the provision of services. The care plan is a plan of action, developed in conjunction with the client, caregiver, and the client’s family or representative. It is designed to assist the case manager in the overall management of the client’s care. The Care Plan is a document that can be printed from eCIRTS, pulling data from the Services page. As stated earlier, the Services page will be completed for all clients, whether they require a Care Plan or not. When a care plan is required, periodic follow ups must also be completed. the Case Manager will be reminded of these by Workflow Wizards.

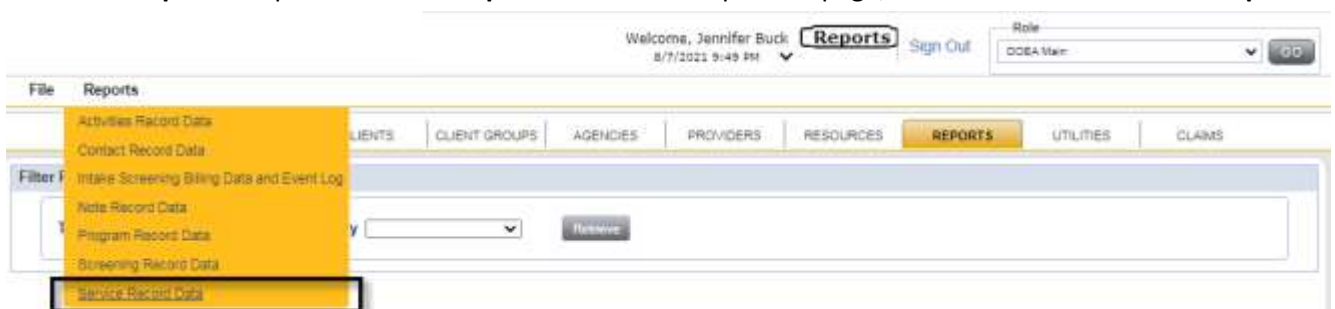
1. All services the client is to receive will be entered on the **Services** tab of the client’s record. See the [Services](#) section for more information.
2. After the 701B is completed and it is determined the client will receive Case Management services, the Case Manager will complete the Care Plan and attach a signed version to a note in eCIRTS. The Case Manager can use the 203 Care Plan Form outside of eCIRTS or can print a version of the 203 Care Plan form out of eCIRTS.
3. If the Case Manager will use the 2032 Care Plan form, skip to step 9.
4. If the Care Plan will be printed from eCIRTS, use the **Service Record Data Report**. The report will be run for one client at a time.



### Note

Services must exist before printing this report. See the [Services](#) section for additional details.

5. Select the **Reports** chapter. From the **Report** menu at the top of the page, select **Service Record Data report**.



6. Select the start and end dates in the report filters. Enter the client’s name.



Entering Services and Billable Units in eCIRTS  
3/25/22

Production Report - Google Chrome

Start Date:   NULL End Date:   NULL

Agency ID:  Client:   NULL

Case Manager:  Program:

Provider:  Service:

---

Department of ELDER AFFAIRS  
STATE OF FLORIDA

**Services Record Data/Care Plan** Generated on: 09/15/2021

Start Date:  
End Date:  
Agency: All  
Client: White, Ellen  
Case Manager: All  
Program: All  
Provider: All  
Service: All

Client ID	Client Name	Client DOB	Case Manager	Agency	Care Plan Date	Care Plan 6 Month Review Date	Status	Program
10005	Ellen White	01/01/1940	Monica Reed	Northwest Florida Area Agency on Aging, Inc.			Pending	
10005	Ellen White	01/01/1940	Monica Reed	Northwest Florida Area Agency on Aging, Inc.			Pending	HCE
10005	Ellen White	01/01/1940	Stacy Test	Aging and Disability Resource Center of Broward County, Inc.			Draft	ADI
10005	Ellen White	01/01/1940	Stacy Test	Aging and Disability Resource Center of Broward County, Inc.	11/21/2021		Draft	ADI
10005	Ellen White	01/01/1940	Stacy Test	Aging and Disability Resource Center of Broward County, Inc.	11/21/2021		Draft	ADI
10005	Ellen White	01/01/1940	Stacy Test	Aging and Disability Resource Center of Broward County, Inc.	11/21/2021		Draft	ADI

I have participated in developing this care plan through discussion regarding my assessed needs and the services and service providers available to help meet those needs. I understand that the amount of assistance I receive is dependent upon my ability and preference. I understand I am entitled to a grievance review if my services are reduced, changed, or terminated. I authorized the provider to release information concerning the services I receive under all programs to the Florida Department of Elder Affairs.

Client: \_\_\_\_\_

Caregiver and/or Designee: \_\_\_\_\_

Date: \_\_\_\_\_

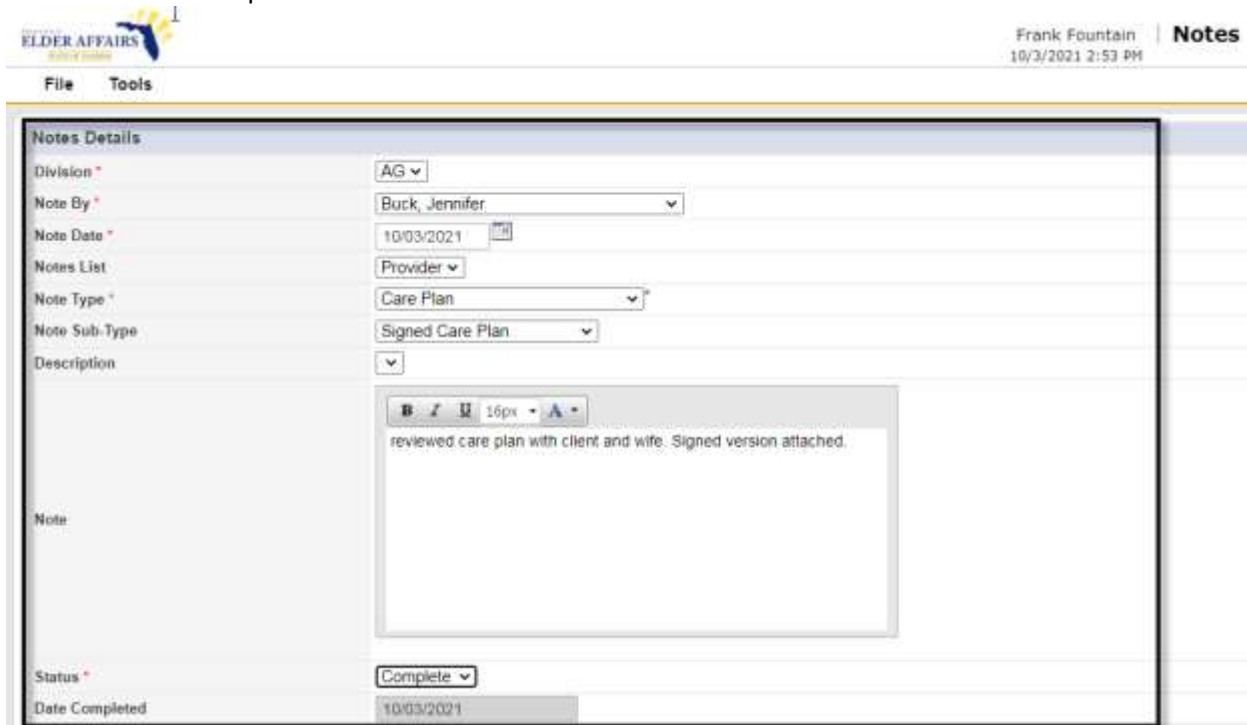
Case Manager: \_\_\_\_\_

All

Date: \_\_\_\_\_

7. The Report displays. Export it to Excel so you can make the final edits before reviewing with the client.
  - a. Delete the selected filter rows and any other columns that do not need to be displayed on the Care Plan.
8. Save a copy of the edited report to your workstation and print a copy for the client to sign.
9. The Case Manager will get the Care Plan signed or verbally signed by the Client.
10. Once the Care Plan has been reviewed and signed by the client, the Case Manager will save a copy to a Note.
11. Navigate to the client's record and select the **Notes** tab.

12. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
  - a. **Note Type**: Care Plan
  - b. **Note Sub-Type**: Signed Care Plan
  - c. **Attachment**: attach a scanned copy of the signed version of the Care Plan.
  - d. **Status**: Complete



The screenshot shows the 'Notes Details' form in the eCIRTS system. The form is titled 'Notes Details' and includes the following fields and values:

- Division: AG
- Note By: Buck, Jennifer
- Note Date: 10/03/2021
- Notes List: Provider
- Note Type: Care Plan
- Note Sub-Type: Signed Care Plan
- Description: (empty)
- Note: reviewed care plan with client and wife. Signed version attached.
- Status: Complete
- Date Completed: 10/03/2021

The top right corner of the form displays the user 'Frank Fountain' and the time '10/3/2021 2:53 PM'. The top left corner shows the 'ELDER AFFAIRS' logo and the 'Notes' title.

13. From the **File** menu, select **Save and Close Notes**.
14. The Case Manager will also update the pertinent care plan dates on the **Services** tab. Select the **General Information** record for the current year. Update the following fields:
  - a. **Care Plan Date**: enter the date the Care Plan was signed by the Client.

15. From the **File** menu, select **Save and Close Plan**.

16. When the General Information page is saved with a Care Plan Date, a Workflow Wizard triggers a tickler for the Worker on the General Information page (the Case Manager) to complete the 6-month Care Plan review. This tickler is not due right away so it will be visible in the Case Manager's **My Work > Ticklers** queue.

Client ID	Client Name	Tickler Name	Status	Date Created	Date Due	Date Completed	Assigned To
10000	White, Ellen	Complete the Annual Care Plan Update: Complete the current year's plan then "Duplicate" to create next year's plan	New	11/21/2021	11/21/2022		Buck, Jennifer
00000	White, Ellen	Complete 6 Month Care Plan Review: Document in a Note. Note Type = 6 Month Care Plan Review	New	11/21/2021	08/20/2022		Buck, Jennifer

## 6 Month and Annual Care Plan Review

The Case Manager will be reminded by a tickler in eCIRTS to complete a 6-month care plan review and an annual care plan review. The 6-month tickler is due 6 months after the Care Plan Date on the General Information page.

1. The Case Manager will monitor his/her **My Work > Ticklers** queue daily and work the ticklers due that day/week. Closer to when the 6-month review is due, the Case Manager will open the tickler from **My Work > Ticklers** queue and locate the tickler.



File

Filters

Status: [v] Equal To: [v] New: [v] And: [v] [x]

Client ID: [v] +

Apply Alert Days Before Due

[Search] [Reset]

84 Ticklers record(s) returned - now viewing 1 through 15

Client ID	Client Name	Tickler Name	Status	Date Created	Date Due	Date Completed	Assigned To
10003	Smith, Barry	Complete 6 Month Care-Plan Review. Document in a Note. Note Type = 6 Month Care Plan Review	New	04/23/2021	06/29/2020		Buck, Jennifer
10006	White, Ellen	Update all the charts that services have started. Document in a Note.	New	01/07/2021	10/16/2020		Buck, Jennifer
10005	White, Ellen	Complete 7015 Annual for Visit List	New	11/04/2020	11/04/2020		Buck, Jennifer
10005	White, Ellen	Complete the care plan and attach a signed version to a note	New	10/21/2021	03/19/2020		Buck, Jennifer

2. Select the 6-month review tickler to open the Note Details page. The Case Manager will contact the client and complete the review and document the details in a note in eCIRTS.
3. From the tickler, the Note Details page displays. Update the following fields:
  - a. **Division:** Defaults to AG
  - b. **Note By:** Defaults to self
  - c. **Note Date:** Defaults to today
  - d. **Note Type:** Care Plan
  - e. **Note Sub-Type:** 6 Month Care Plan Review
  - a. **Description:** None
  - f. **Note:** Enter details of the 6-month care plan review.
  - g. **Status:** Complete
  - h. **Note Recipient:** None

ELDER AFFAIRS Frank Fountain | Notes  
10/3/2021 2:56 PM

File Tools

Workflow Wizard

Complete 6 Month Care Plan Review. Document in a Note. Note Type = Care Plan. Sub-Type = 6 Month Care Plan Review

Notes Details

Division \* AG [v]

Note By \* Buck, Jennifer [v]

Note Date \* 10/03/2021 [calendar icon]

Notes List Provider [v]

Note Type \* Care Plan [v]

Note Sub-Type 6 Month Care Plan Review [v]

Description [v]

Note

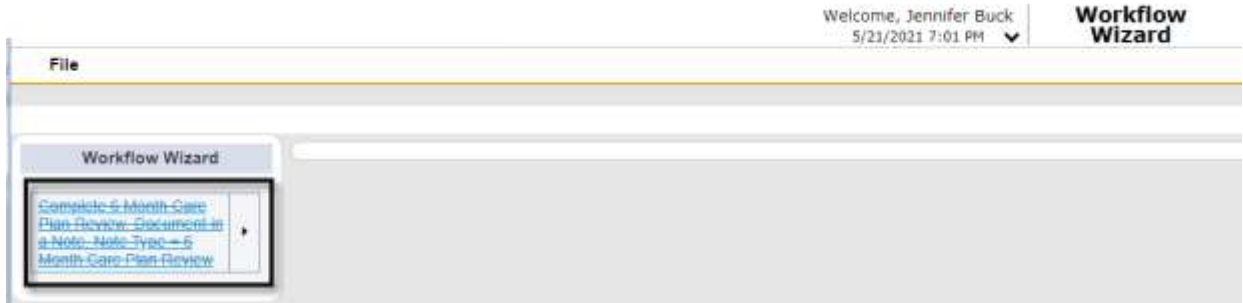
[B] [I] [U] 10pt [font size icon] [color icon]  
 6 month care plan review completed. no changes needed.

Status \* Complete [v]

Date Completed 10/03/2021



4. From the **File** menu, select **Save Note**. The tickler is marked as complete.



5. The Care Plan is reviewed annual as part of the annual reassessment/rescreening process. See the [Annual Rescreening/Reassessment](#) section for additional information.



## Entering Services and Billable Units in eCIRTS 3/25/22

### Activities

This tab is used to capture information about the services a provider delivers to a client for billing. In eCIRTS, billable services are called Activities. If service delivery information needs to be recorded for multiple consumers at once, the [Activity Roster](#) on **My Work** can be used. For larger service providers, the [Activity Import](#) on **My Work** can be used to upload service details for multiple clients at once, fed from the provider’s system and exported into an eCIRTS formatted file. This replaces the former ‘EDI Upload.’ Before a provider can submit activities for a client in any of the methods described above, the provider must have an open referral record for the client. See the [Referrals to Service Providers](#) section for more details.

### Before you Bill

DOEA required the new eCIRTS to have substantially more checks and balances regarding billing than legacy CIRTS. The checks and balances only work if the data in the system has been completely and correctly set up. Providers will not be able to bill until setup is correct. All of the setup steps are listed below for informational purposes only. Changes can only be completed by someone with the eCIRTS Finance or eCIRTS Admin role.

1. DOEA: Is the service allowed to be billed under the program you’ve selected? Check the Financial Configuration Workbook. This document lists the services and associated programs the Department approved to be set up in eCIRTS. If it’s not there it must be approved by DOEA before proceeding.
2. Service: Is the service your billing listed under the Services tab of the Program and effective before you are trying to bill?

Legacy Provider - LOC ID: CCE  
CCE - COMMUNITY CARE FOR THE ELDERLY (32141)

Provider ID Numbers | Linked Providers | Service Area

Providers | Divisions | Workers | **Services** | Referrals/Notifications | Authorizations | Contracts | Notes | Agencies

Filters: Active [v] Equal To [v] Yes [x] No [ ] AND [v] [x]  
Service Code [v] + [ ] Search [ ] Reset [ ]

63 Services record(s) returned - now viewing 1 through 15

Service Code	Description	Program	Active Date
ADC	Adult Day Care	CCE	01/01/2010
ADCO	ADCO ADULT DAY CARE - DAYS	CCE	01/01/2010
ADHC	ADHC ADULT DAY HEALTH CARE	CCE	01/01/2010
ADHCO	ADHC ADULT DAY HEALTH CARE - DAYS	CCE	01/01/2010
CA	CA CARE AIDE	CCE	01/01/2010
CHO	CHO CHORE	CCE	01/01/2010

3. Service: Is the service your billing active and under your Providers > Services tab and effective before you are trying to bill?



Entering Services and Billable Units in eCIRTS  
3/25/22

CHARLOTTE COUNTY SENIOR SERVICES (27211)

Provider ID Numbers    Linked Providers    Service Area

Providers    Divisions    Workers    **Services**    Referrals/Notifications    Authorizations    Contracts    Notes    Agencies

Filters

Active    Equal To    Yes    No    AND    X

Service Code    +

Search    Reset

55 Services record(s) returned - now viewing 1 through 15

Service Code	Description	Program	Active Date	Service End Date
BASI	BASI BASIC SUBSIDY	HCE	07/01/2021	06/30/2022
CA	CA CASE AIDE	ADI	07/01/2021	06/30/2022

4. Provider: Are you billing under the correct provider? In CIRTS, billing was under the 'parent.' In eCIRTS you bill under the location/who delivered the service. Each location has their own Provider record in eCIRTS.

Provider Name	Provider ID	Former CIRTS ID
CHARLOTTE COUNTY SENIOR SERVICES	27211	81301-01
HOME HEALTH	27212	81301-02
ADT, LLC	27213	81301-03
A BETTER SOLUTION HOME CARE	27214	81301-04
FLORIDA RURAL LEGAL SERVICES	27215	81301-05
SUMMIT HOME RESPIRATORY	27219	81301-09
SENIOR FRIENDSHIP CENTERS	27220	81301-10
WITH A HEART, LLC	27221	81301-11
ALVIN DUBIN ALZHEIMERS RESOURCE	27223	81301-15
ASSISTING HANDS HOME CARE OF LEE AND CHARLOTTE COUNTIES	27225	81301-17
ARCADIA HEALTH CARE	27226	81301-18

5. Agency: Is your provider record listed under the Agency Providers tab for the agency you are trying to bill under?

Area Agency on Aging for Southwest Florida, Inc. (27155)

Agencies    Open/Close    Workers    **Agency Providers**    Agency Programs    Notes    Alias Plans

Filters

Provider Name    Contains    Charlotte    AND    X

ID    +

Search    Reset

8 Agency Providers record(s) returned - now viewing 1 through 8

ID	Provider Number	Provider Name	Start Date
27225	81301-17	ASSISTING HANDS HOME CARE OF LEE AND CHARLOTTE COUNTIES	07/15/2020
27211	81301-01	CHARLOTTE COUNTY SENIOR SERVICES	09/15/1993
27288	81301-75	Charlotte AAABWFL	12/12/2001
27222	81301-12	COUNCIL ON AGING OF CHARLOTTE COUNTY	11/09/2007
27693	83005-01	DCF ADULT SERVICES CHARLOTTE	02/07/1997
27191	81300-05	8.8 ELDER HELPLINE CHARLOTTE	02/09/2002
27194	81900-01	SERVICES IN CHARLOTTE COUNTY	12/13/1994

6. Program: Is the program you're adding on the Activity page under the Agency Program tab for the agency you are trying to bill under?



Entering Services and Billable Units in eCIRTS  
3/25/22

Area Agency on Aging for Southwest Florida, Inc. (32185)

Agencies Open/Close Workers Agency Providers **Agency Programs** Notes Area Plans

Filters: ID [ ] [ + ] [ Search ] [ Reset ]

60 Agency Programs record(s) returned - now viewing 1 through 15

ID	Provider Name	Start Date
32128	AC - AMERICORPS	01/01/1990
32129	ADDGS - ADDGS GRANT (PSA 11)	01/01/1990
32130	ADI - ALZHEIMER'S DISEASE INITIATIVE	01/01/1990
32131	ALFBP - ASSISTED LIVING FACILITY SPECIAL SUBSIDY PROJECT - PSA 11 ONLY	01/01/1990
32132	ALW - ASSISTED LIVING WAIVER	01/01/1990
32133	ARR1 - AMERICAN RECOVERY AND REINVESTMENT ACT FOR O3C1	01/01/1990

7. Program: Does the client have an open enrollment for the program you are billing and for a date before you are trying to bill?

S (1412768)

Caregiver/Care Recipient

Associated People Appointments Medications

**Programs** Services Authorizations Activities

START-STOP TIMER Demographics Screening Referrals To Providers Forms Notes

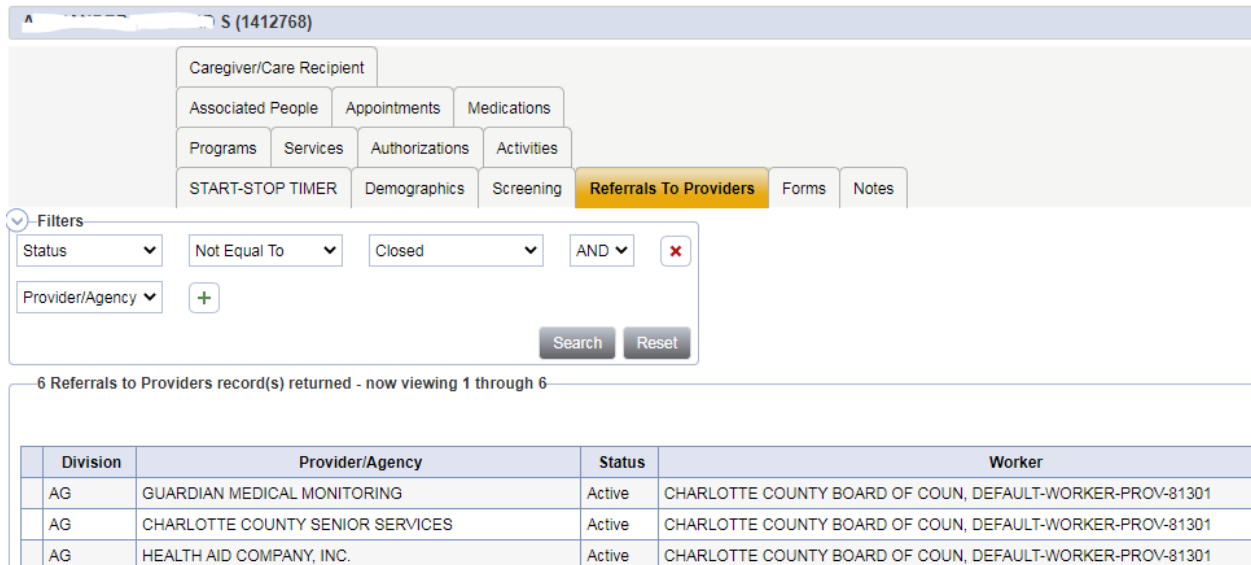
Filters: Status Effective Date [ ] Greater Than [ ] 01/01/2000 [ ] AND [ ] [ X ]

Program [ ] [ + ] [ Search ] [ Reset ]

13 Programs record(s) returned - now viewing 1 through 13

Division	Program	Service	Enrollment Provider	Status	Termination Reason	Historical Start Date/Billing Start Date	Status Effective Date
AG	ADI - ALZHEIMER'S DISEASE INITIATIVE		CHARLOTTE COUNTY BOARD OF COUN. DEFAULT-WORKER-PRDN-81301	Active		06/04/2021	06/04/2021
AG	DOEA Services		CHARLOTTE COUNTY BOARD OF COUN. DEFAULT-WORKER-PRDN-81301	Active		12/11/2021	12/11/2021

8. Referral to Providers: Does the client have a referral record for your Provider for a date before you are trying to bill?



Division	Provider/Agency	Status	Worker
AG	GUARDIAN MEDICAL MONITORING	Active	CHARLOTTE COUNTY BOARD OF COUN, DEFAULT-WORKER-PROV-81301
AG	CHARLOTTE COUNTY SENIOR SERVICES	Active	CHARLOTTE COUNTY BOARD OF COUN, DEFAULT-WORKER-PROV-81301
AG	HEALTH AID COMPANY, INC.	Active	CHARLOTTE COUNTY BOARD OF COUN, DEFAULT-WORKER-PROV-81301

### For Aggregate Billing

Aggregate services are added to a Client Group, not an individual client record. Most of the same checks and balances exist for Client Group as we just reviewed for Clients.

1. DOEA: Is the service allowed to be billed under the program you've selected? Check the Financial Configuration Workbook. This document lists the services and associated programs the Department approved to be set up in eCIRTS. If it's not there it must be approved by DOEA before proceeding.
2. Service: Is the service your billing listed under the Services tab of the Program and effective before you are trying to bill?
3. Service: Is the service your billing active and under your Providers > Services tab and effective before you are trying to bill?
4. Provider: Are you billing under the correct provider? In CIRTS, billing was under the 'parent.' In eCIRTS you bill under the location/who delivered the service. Each location has their own Provider record in eCIRTS.
5. Agency: Is your provider record listed under the Agency Providers tab for the agency you are trying to bill under?
6. Program: Is the program you're adding on the Activity page under the Agency Program tab for the agency you are trying to bill under?
7. Program: Is the program you're adding on the Activity page under the Program tab for the Client group?

MY WORK CONTACTS CLIENTS **CLIENT GROUPS** AGENCIES PROVIDERS RESOURCES REPORTS UTILITIES CLAIMS

AGGREGATE CLIENT-03 (10975)

Details Open Close **Programs** Activities

Filters  
Disposition: [v] Not Equal To [v] [v] AND [v] [x]  
Program [v] +  
[Search] [Reset]

24 Programs record(s) returned - now viewing 1 through 15

Division	Program	Disposition	Disposition Date	Enrolled Date	Discharge Date	Worker
AG	DOEA Services	Active	12/11/2021	12/11/2021		DEFAULT-WORKER-PSA-03; DEFAULT-WORKER-PSA-03
AG	ADI - ALZHEIMER'S DISEASE INITIATIVE	Active	01/01/2010	01/01/2010		BROWARD CTY ELDERLY AND VETERA; DEFAULT-WORKER-PROV-10015
AG	CA3B - COVID CARES ACT - OAA 3B	Active	01/01/2010	01/01/2010		OKEECHOBEE SENIOR SERVICES; DEFAULT-WORKER-PROV-0400
AG	CA3C - COVID CARES ACT - OAA 3C	Active	01/01/2010	01/01/2010		UNITED HOME CARE SERVICES; DEFAULT-WORKER-PROV-11905
AG	CA3E - COVID CARES ACT - OAA 3E	Active	01/01/2010	01/01/2010		MEALS ON WHEELS SOUTH FLORIDA; DEFAULT-WORKER-PROV-10021
AG	OCE - COMMUNITY CARE FOR THE ELDERLY	Active	01/01/2010	01/01/2010		MEALS ON WHEELS SOUTH FLORIDA; DEFAULT-WORKER-PROV-10021
AG	COC2 - CORONAVIRUS CONSOLIDATED APPROPRIATIONS ACT	Active	01/01/2010	01/01/2010		CHARLOTTE COUNTY BOARD OF COUN; DEFAULT-WORKER-PROV-01301
AG	COVA CORONAVIRUS CONSOLIDATED APPROPRIATIONS ACT	Active	01/01/2010	01/01/2010		UNITED HOME CARE SERVICES; DEFAULT-WORKER-PROV-11905

### Add Billable Services for One Client

This functionality will most likely be used to enter services for APS High Risk clients. The ADRC would also bill for Intake and Screening services for a client on this page. Finally, the Lead Agency or OAA provider could use the Activities tab to bill for Screenings and Assessment services.

1. Open the Client record and select the **Activities** tab.

MY WORK CONTACTS **CLIENTS** CLIENT GROUPS AGENCIES PROVIDERS

SSN	236-57-8788	Priority Score
DOB	1/1/1940	Assessment Date
Rank	5	EMS Release Date

White, Ellen M (10005)

Caregiver/Care Recipient

Associated People Wait List Appointments Medications

Programs Services Authorizations **Activities**

START-STOP TIMER Demographics Screening Referrals To Providers Forms Notes

2. From the **File** menu, select **Add Activities**.
3. The Activities Details page displays. Update the following fields:
  - a. **Start Date:** Enter the start date of the service delivery. The field defaults to today.
  - b. **Start Time:** leave blank. None of the services used by DOEA are time based so this field is not required.
  - c. **End Date:** Enter the end date of the service delivery. The field defaults to today.



**Note**

If the number of units being billed is for multiple dates of service, enter the first date of service as the start date and the last as the end date.

- d. **End Time:** leave blank. None of the services used by DOEA are time based so this field is not required.

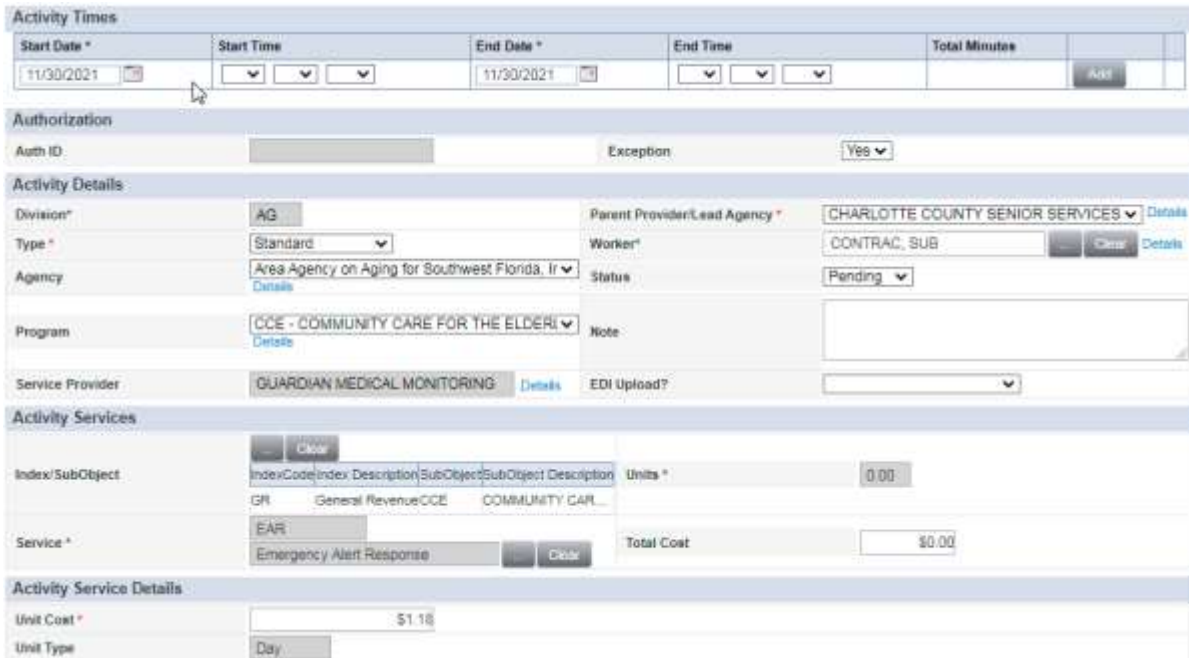
- e. **Auth ID:** search for and select the authorization for the service being billed. eCIRTS has been configured to prevent a provider from billing services if the Service/Auth doesn't exist on the client record. Only services/authorizations with status: Approved will display in the list.
- f. **Exception:** If services need to be delivered outside of the authorization limits, the provider can switch the Exception field to Yes to remove the requirement for an Auth ID. Also, providers can bill for services before a client is active in a program, meaning no records will be on the services tab yet so no Auth ID will exist. The Auth ID requirement needs to be removed. Examples include intake, activities completed when coming off the waiting list, but the client never becomes active, and client specific NDP services.
- g. **Division:** This system-required field will display AG.
- h. **Type:** Select Standard
- i. **Service Provider:** this field auto populates when the authorization is selected. When an authorization is not used, search for and select the name of the provider who delivered the service.

**Note**

Select the provider/location who rendered the service, not the agency/parent.

- j. **Parent Provider:** When the Service provider is selected, if they have a 'Parent' provider, the name will populate in this field. If there is no parent, the name of the Service Provider will also populate as the Parent Provider. This is how activities can be reported at the provider/location and/or lead agency level.
- k. **Agency:** The agency of the provider.
- l. **Program:** The program under which the service is being delivered.
- m. **Worker:** This field defaults to the user.
- n. **Status:** This field defaults to Pending and should be changed to Complete when all the service details have been entered.
- o. **Note:** This field will display notes, if applicable.
- p. **EDI Upload?:** This field is read only and will be populated with "EDI Upload" only if the Activity was added from the EDI upload. See the [Import Activities for Multiple Clients](#) section for additional information.
- q. **Index Sub Object:** the value selected in this field impacts the Area Plans functionality. Select the Index Sub Object for the program you selected in the Program field.
- r. **Service:** If the authorization is associated to only one service, this field will auto populate when the Auth ID is selected.  
If the authorization is associated to multiple services, the user must search for and select the service. If an authorization is not used for this service, a list of active services for the selected provider is displayed for the ISO you selected. Be sure to select the correct service for the Program you are billing for.
- s. **Units:** Enter the number of units being billed
- t. **Total Cost:** This field will auto populate when the service and units are entered. It can be edited if needed, especially if the service selected does not have a default cost because it varies between client, like supplies. Those services will have a default cost of \$0 and the user will need to update the Total Cost to the actual amount.
- u. **Unit Cost:** This field will auto populate when the service is entered.
- v. **Unit Type:** This field will auto populate when the service is entered.





4. From the **File** menu, select **Save and Close Activity**.

## Add Activities for Multiple Clients – Activity Roster

The Activity Rosters feature lets you search for and group clients receiving the same service from the same provider, such as a case management services, and create activities for many clients in one session. Use this feature to save time when creating the same activity for the same service for multiple recipients. This process includes four main steps:

- Filter for the type of service and client location
- Add the information that you will assign to all activities
- Filter to find clients eligible for specific services
- Record service units for each client



### Example

A Billing Sheet for Case Management services is received from a Provider. The eCIRTS ID is listed as the Client identifier instead of the SSN. The eCIRTS Unit Posting staff will create an activity roster of active case management authorizations. This will return a list of clients with active Case Management authorizations. There shouldn't be anyone on the billing sheet that doesn't have an authorization ... with the occasional exception. The eCIRTS Unit Poster should find each client on the billing sheet in the matching consumers list in the Activity Roster and can key the number of units per day per client.



### Note

The Activity Roster cannot currently be used for services with a \$0 unit cost. Individual activities for clients must be added for these types of services. The roster will be updated in Spring 2022 to allow for \$0 unit cost services as well.

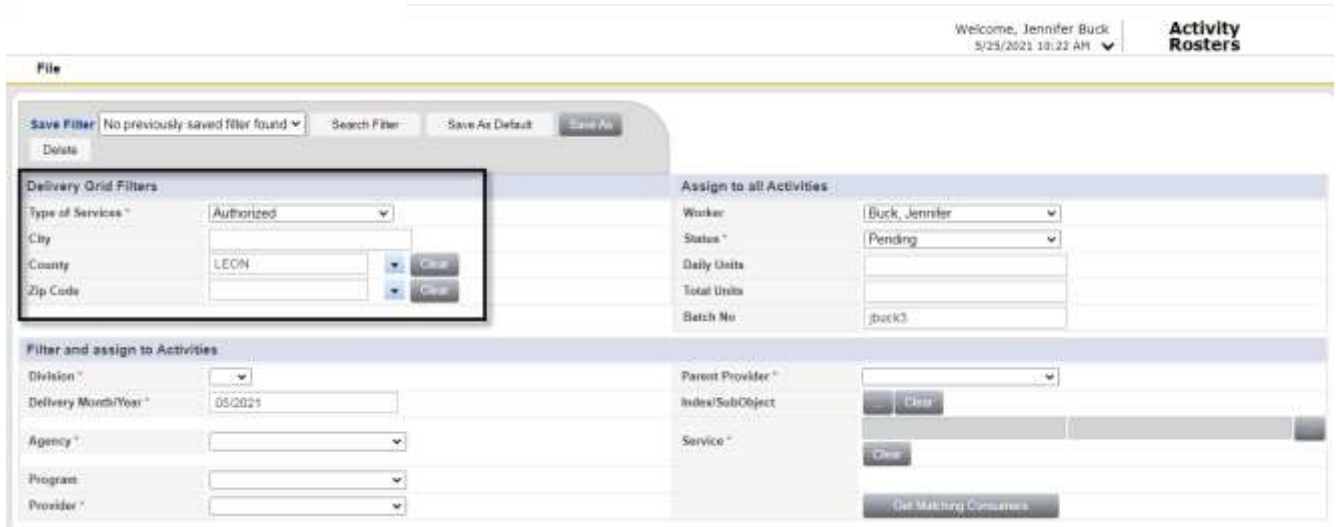


1. Navigate to **My Work**. From the **Tasks** queue on the right, select **Activity Rosters**.



2. The Activity Rosters page displays. There are several sections to be completed. First, search for the group of like clients in the **Delivery Grid Filters** section. Use the following filters to specify the type of service and find clients within specific geographic areas.

- **Type of Services:** Required field. Depending on the service you are billing, select Authorized, Non-Authorized or Planned and Not Authorized.
  - Select Authorized to search for authorizations.
  - Select Non-authorized to search clients Screening, Program and Referral to Provider records. For a Client to be found with these filters, the Clients status date for Program records, Referral to Provider records, and Screening record must overlap the delivery month and year that you enter by at least one day.
  - Select Planned and Not Authorized to search the same as above, plus clients with Services that have not yet been turned into Authorizations.
- **City:** select the city from the drop down or leave this field blank.
- **County:** select the county from the drop down. This list will be filtered by the city selected in the previous field or leave this field blank.
- **Zip:** select the zip code from the drop down. This list will be filtered by the city and county selected in the previous fields or leave this field blank.



3. Use the **Assign to all Activities** section to select information that will be added to all client activity records created in this session. The information in this section does not filter records. This information will be added to all the activity records that you create during this session. Update the following fields:

- **Worker:** You must have a worker selected before selecting “Get Matching Consumers” otherwise no results will be returned.
- **Status:** this defaults to Complete. You would change it to Pending only if you want all individual activity records created from the Activity Roster to be editable. This would require you to edit each one on the client record to eventually change it to a complete status.
- **Daily Units:** Skip this field. If a value was entered, it would apply it to all matching clients for each day in the month. One activity record for each day of the month is created for each client. You will enter daily units for some of the matching clients instead of all later in the workflow.



**Example**

Enter 2 in this field and 2 units will be applied on 5/1, 5/2, 5/3, 5/4, 5/5, 5/6, etc.

- **Total Units:** This field is optional. If entered, Total Units will be applied to all matching clients. One activity record that spans the month is created for each client. You will likely skip this field and enter units for some of the matching clients instead of all later in the workflow.



**Example**

Enter 20 in this field and 20 units will be applied for May for each client.

- **Batch No:** eCIRTS will assign a unique batch number/identifier for each session.



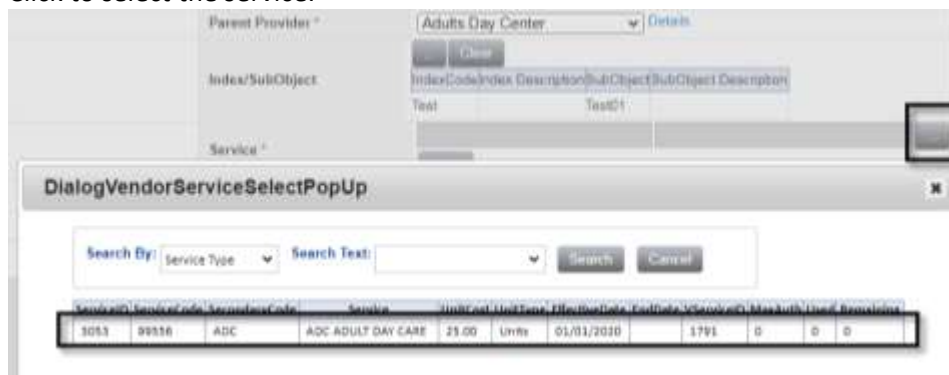
4. Use the **Filter and assign to Activities** section to further filter the list of matching clients. Only clients with matching information will be listed in the list view grid at the bottom of the page. Required fields are marked with a red asterisk (\*).

- **Division:** Defaults to AG. This filter will include clients who had an open screening record during the delivery month and year.
- **Delivery Month/Year:** Select the month in which the service is delivered. You can select the current month or past months, but not dates in the future. When you select the month and year, the application

filters to show values that have matching month and year information. This includes internal program, parent provider, Index SubObject, and Service. This field is required.

- **Agency:** The agency through which the service was provided. If the Unit Posting role is being used, the list of Agencies will be limited to only those your Provider record is associated to (Agency Providers tab.)
- **Program:** The program through which the service was provided. Matching clients will be returned if they have an open Program record with the selected program during the delivery month and year.
- **Service Provider:** Use this field to record the service provider name. If the Unit Posting role is being used, the list of Providers will be limited to only those you are a worker for. Matching clients will be returned if they have an open Referral record with the selected provider during the delivery month and year.
- **Parent Provider:** This is the provider organization under which the current service provider operates. It populates when Service Provider is selected.
- **Index/SubObject (ISO):** Use the ellipsis search icon to open the popup. Click to select an index/subobject from the popup. Select the ISO that aligns with the Program selected in the Program field.
- **Service:** This list will include Services that are active for the provider during the full delivery month/year for the selected ISO on the service record. Be sure to select the correct service for the Program you are billing for.

Use the ellipsis search icon to open the vendor service search popup. If necessary, use the Search By dropdown to select a search criteria. Type at least three characters of search value and click Search. Click to select the service.



The screenshot shows the 'Activity Rosters' interface. At the top, there is a 'File' menu and a 'Save Filter' section with options like 'No previously saved filter found', 'Search Filter', 'Save As Default', and 'Save As'. Below this is the 'Delivery Grid Filters' section with fields for 'Type of Services' (set to 'Authorized'), 'City', 'County' (set to 'LEON'), and 'Zip Code'. To the right is the 'Assign to all Activities' section with fields for 'Worker' (set to 'Buck, Jennifer'), 'Status' (set to 'Pending'), 'Daily Units', 'Total Units', and 'Batch No' (set to 'BUCK').

Below the filters is the 'Filter and assign to Activities' section. It includes fields for 'Division' (set to 'AG'), 'Delivery Month/Year' (set to '05/2021'), 'Agency' (set to 'Aging and Disability Resource'), 'Program' (set to 'ADI - ALZHEIMER'S DISEASE'), and 'Provider' (set to 'Adults Day Center'). To the right, there is a 'Parent Provider' dropdown (set to 'Adults Day Center') and an 'Index/SubObject' table. The table has columns for 'IndexCode', 'Index Description', 'SubObject', and 'SubObject Description'. A row is highlighted with 'Text' and 'Text01'. Below the table is a 'Service' dropdown (set to '9006 - ADC ADULT DAY CARE').

5. Select **Get Matching Clients** to retrieve consumer records that are eligible to receive services specified in the Filter and Assign to all Activities sections. Matching client records will display in the service delivery grid at the bottom of the page.

This screenshot is similar to the previous one, showing the 'Filter and assign to Activities' section. The 'Get Matching Clients' button at the bottom right is highlighted with a red box.



**Note**

If you are not seeing the expected results for matching consumers, you may need to close the Activity Roster page and start over. Sometimes fields on the filter criteria don't refresh between searches. Closing the page and reopening will fix the issue.

6. Use the service delivery grid to record the units delivered to each client. Select the date field and key the number of units. Scroll to the right to see additional date columns.



**Note**

You cannot record units for future dates. Those field will be grayed out/read only.  
You cannot record units for dates before the provider service is active. Those fields will be grayed out/read only.

7. You can enter units by day or Total Units Delivered for the month. Unsaved changes are highlighted in yellow.

Entering Services and Billable Units in eCIRTS  
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Filter and assign to Activities

Location: AG  
 Delivery Month/Year: 05/2021  
 Agency: Aging and Disability Resource  
 Program: ADI - ALZHEIMER'S DISEASE  
 Provider: Adults Day Center

Parent Provider: Adults Day Center  
 IndexSubObject: [Details]  
 Service: [Clear]

IndexCode: [Index Description] [SubObject: SubObject Description]  
 Text: [Text]

[Clear] [Clear]  
 [Get Matching Customers]

1 Activity Roster (month) Unsaved - now showing 1 through 1

Client	Client ID	Service	Service Name	Unit Type	Remaining Units	Total Units Delivered	01-May	02-May	03-May	04-May	05-May	06-May	07-May	08-May	09-May	10-May
Wills, Ellen	13885	8956	ADJ ADHLI DAY CARE	Units		3.00	4.00	3.00	2.00							
						5.00	4.00	3.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00



**Note**

When you add units by day, the roster will create one activity record for each day for each client. When you add units by Total Units Delivered, the roster will create one activity record that spans the month created for each client. The Start date will be the first of the month.

- If there are existing activity records for the consumer for the selected provider, program, and service you cannot enter Total Units Delivered. The total number of units by day will display on the Activity Roster in the date columns and the Total Units Delivered will be the sum and will be grayed out/read only.

Client	Client ID	Service	Service Name	Unit Type	Remaining Units	Total Units Delivered	01-Feb	02-Feb	03-Feb	04-Feb	05-Feb	06-Feb	07-Feb	08-Feb
	1363516	RESP	RE SP RE SPITE IN HOME	Hour		0	0	0	0	0	0	0	0	0
	1412786	RESP	RE SP RE SPITE IN HOME	Hour		23.00	4.00	4.00	2.00	1.00	1.00	1.00	1.00	0
	1501101	RESP	RE SP RE SPITE IN HOME	Hour		4.00	0	0	0	0	0	0	0	0
	502834	RESP	RE SP RE SPITE IN HOME	Hour		0	0	0	0	0	0	0	0	0

- From the File menu select **Save Activity Rosters** or **Save and Close Activity Rosters**.



**Note**

A popup message will display when you attempt to create an activity for ineligible records. For example, if you attempt to create an activity record for a client whose program enrollment ended mid-month, you will receive an alert message. If you attempt to create an activity for a service/program/provider that already exists, you will receive an alert message. Activities will still be created for the eligible client records.

- You can edit activities from the roster. If there are existing activity records for the consumer for the selected provider, program, and service they will be displayed under their respective date of service in the service delivery grid. If more than one activity record already exists for the client for the same service, provider and program the units will not be editable. For those that are editable, you can type a new number of units into the date field and after saving, the units on the original activity record are updated. It is preferred practice to update the activity from the client record instead of the roster.



**Note**

Several enhancements to the Activity Roster are coming Spring 2022.

Search results will load faster.

You will be able to lock the header row of the service delivery grid so when you scroll down, you know what field you are on.

You will be able to filter the search results by the status of the program. For example, return just active enrollments vs. those in APCL or APPL status.

As mentioned earlier, you will be able to use the Activity Roster to enter billable units for \$0 unit cost services.

**Saved Search Filters**

Save a filter that you'd like to reuse to save you time next time you use the Activity Roster. Filters are specific to the user and role. If you have access to multiple roles you will only see filters associated with your current role.

1. To save a filter, you must first complete the **Delivery Grid Filter** section, the **Assign to all Activities** section, and the **Filter and Assign to all Activities** section then click **Get Matching Consumers**.

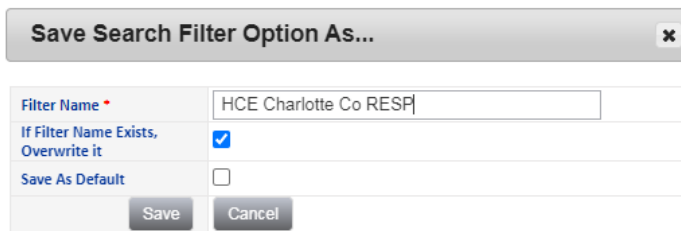


2. One the results are returned, select **Save As** at the top of the page.



3. Update the following fields:
  - a. **Filter Name:** Enter a name for the saved filter
  - b. **If Filter Name Exists, Overwrite it:** If you want this filter to replace an existing one with the same name, check this box. If not, keep it unchecked and a new filter will be created.
  - c. **Save as Default:** If this should be the filter that displays by default each time you open the Activity Roster, check this box.





The dialog box titled "Save Search Filter Option As..." contains the following fields and controls:

Filter Name *	HCE Charlotte Co RESP
If Filter Name Exists, Overwrite it	<input checked="" type="checkbox"/>
Save As Default	<input type="checkbox"/>

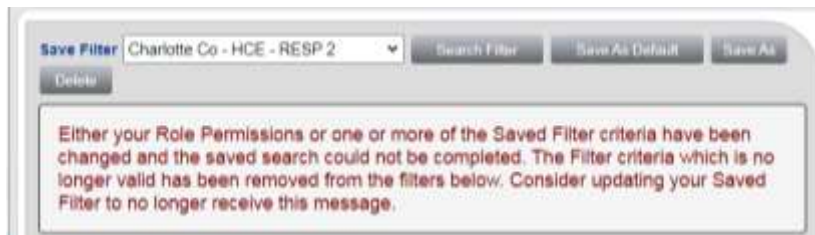
Buttons: Save, Cancel

4. Select **Save**.
5. The next time you use the Activity Roster, you can select your saved Filter from the list and click **Search Filter**. This will populate the Delivery Grid Filters, Assign to all Activities and Apply to all Activities sections, saving you time from looking them up again.



**Note**

If you saved a filter that now includes invalid data, the filter values that are no longer valid and will be returned as blank and will need to be selected again. For example if your saved filter was for a service that the provider is no longer contracted to provide, the service in the saved filter is now invalid data.



**Note**

After using a saved filter, if you change the Delivery Month/Year you will need to reselect your ISO and Service. You should save this updated search as a new filter for the new delivery month/year.

### Add Aggregate Services (Non-Client specific)

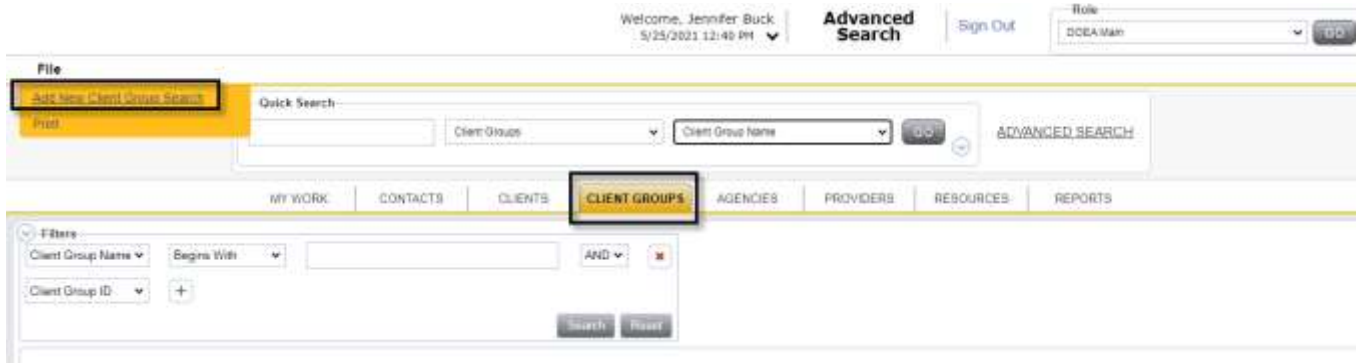
Aggregate services are billed through a Client Group in eCIRTS. Client Groups allow providers to bill for services/create activities that are not identified by individual clients. Some examples include an exercise class for senior citizens, telephone information and referral calls, legal assistance, or congregant meals.

Activities captured via Client Groups feed into OAPPS reporting. Once a Client Group is created, billable services can be recorded on the Client Groups > Activities tab. Each PSA has its own Client Group in eCIRTS. PSA 1 will use the Aggregate Client 01 client group. PSA 2 will use the Aggregate Client 02 client group, etc. eCIRTS users can use the standard report, Consumer Group Activities Export, to report on this data.

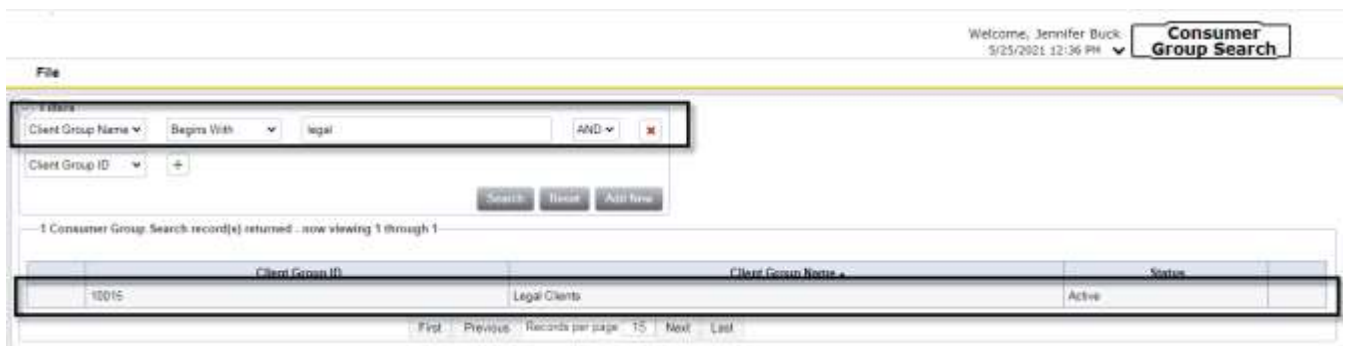
### Create Client Group

Eleven client groups have already been set up for use by the PSAs. Additional services or programs can be added/removed from Client Groups at any time by DOEA IT staff. If the need to add a new client group ever arises, it can be completed by the DOEA IT staff by following the steps below.

1. Open the **Client Groups** chapter. From the **File** menu, select **Add New Client Group Search**. The Demographics Search page opens. You must search for an existing Client Group before adding another.



2. Use the filters to search for an existing group. For example, you can search by Client Group Name.
3. If a matching group already exists, select it from the list to view the details. Make sure this isn't a duplicate group of the one you want to create.



4. If no matching group already exists, click **Add New**.

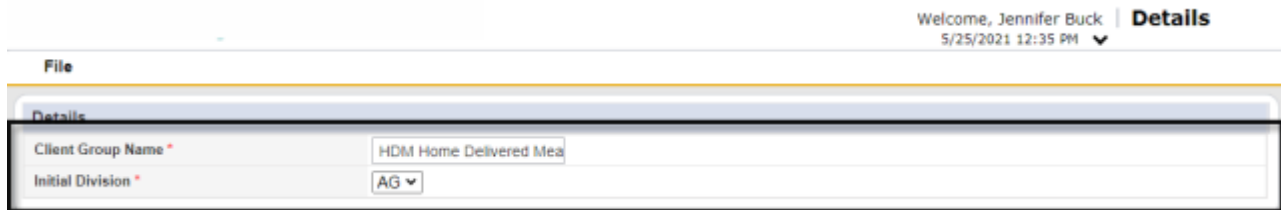


5. The Client Groups Details page opens. Update the following fields:

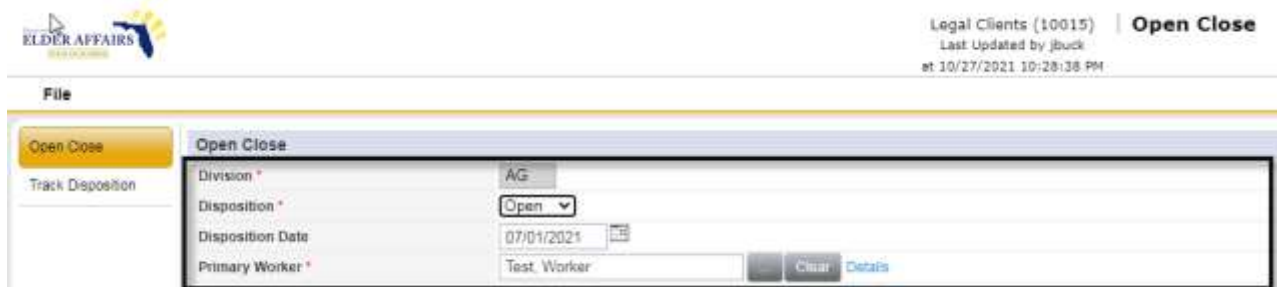


Entering Services and Billable Units in eCIRTS  
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- a. **Client Group Name:** Enter the name of the group.
- b. **Initial Fund Code:** Defaults to AG



6. Select **Save and Close Details** from the **File** menu.
7. The Open Close record displays. A client group must be open to AG Division before activity records can be created for the group. Update the following fields:
  - a. **Division:** Defaults to AG
  - b. **Disposition:** Select Open
  - c. **Disposition Date:** Default to today and will update anytime the status value changes.
  - d. **Primary Worker:** defaults to show the current worker, but you can use the search ellipsis to search for and select another worker, such as the generic worker for the PSA.



8. Select **Save Open Close** from the **File** menu.
9. The **Track Disposition** page becomes available in the left-hand navigation. You can use the Track Disposition page to view a history of changes to the Open Close disposition.

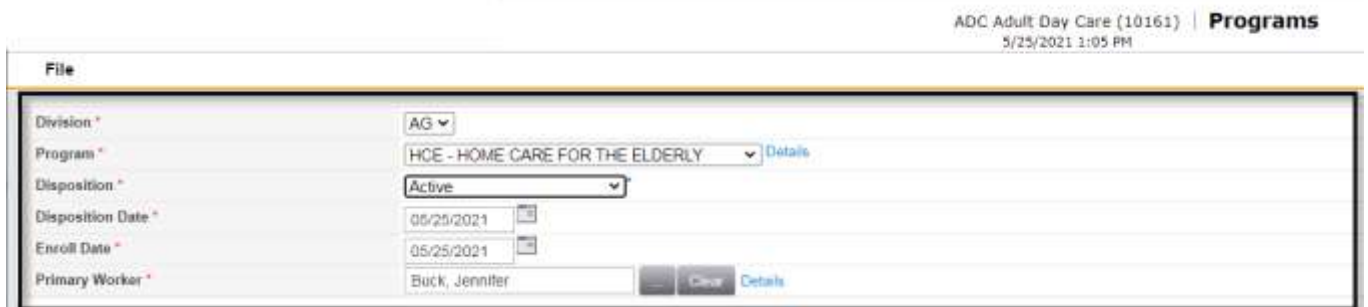
### Add Client Group Programs

1. Client groups are associated with programs under which providers can deliver services and activities for that group. The services that are assigned to a program are the ones a provider can enter activity data for in a client group.
2. Like Client Group records, DOEA IT can add Programs to Client Groups. To associate a Program to a Client Group, select the **Programs** tab.
3. From the **File** menu, select **Add Program**.

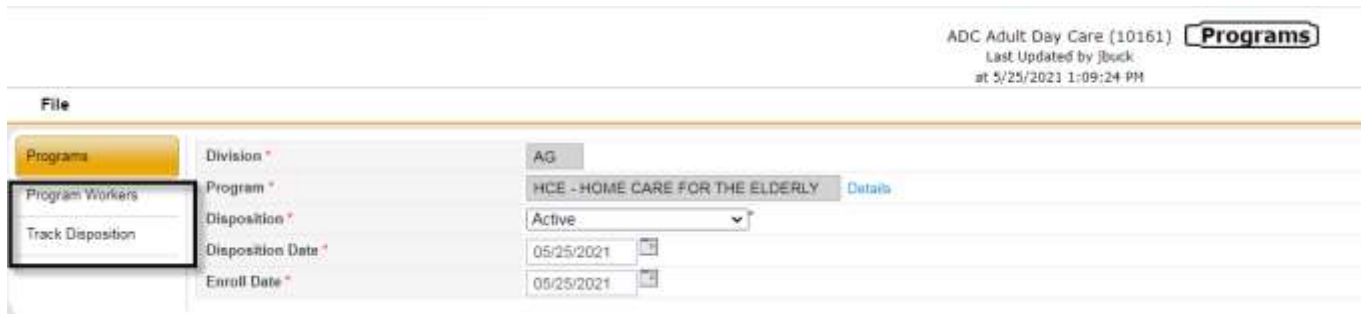
Entering Services and Billable Units in eCIRTS  
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4. The Program Details page displays. Update the following fields:
  - a. **Division:** Defaults to AG
  - b. **Program:** select the name of the program from the drop-down list
  - c. **Disposition:** Select Active
  - d. **Disposition Date:** Defaults to today and will update anytime the status value changes.
  - e. **Enroll Date:** defaults to today but can be changed if needed
  - f. **Primary Worker:** defaults to show the current worker, but you can use the search ellipsis to search for and select another worker.



5. From the **File** menu, select **Save Programs**.
6. The primary worker is saved on the **Program Workers** tab. The worker can be changed on this tab if needed, but it's not part of the current workflow.
7. The **Track Disposition** page becomes available in the left-hand navigation. You can use the Track Disposition page to view a history of changes to the Program.



### Add Aggregate Services for Client Groups

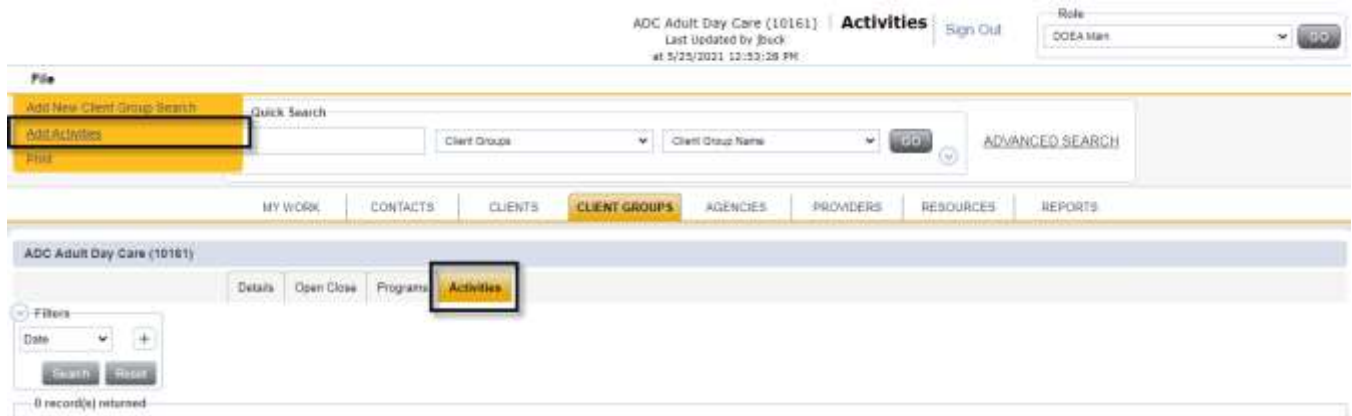
- Once a Client Group has been added and Programs assigned, the Providers can enter aggregate services for the group on the Activities tab. From the Client Group record, select the **Activities** tab.



**Note**

Legal Services is required to capture and report de-identified demographic data. DOEA will use the ACL Legal Services Excel tool to capture and upload the data into OAAPS, outside of eCIRTS.

- From the **File** menu, select **Add Activities**.



- The Client Group Activities page displays. Update the following fields:
  - Start Date:** Enter the start date of the activity
  - Start Time:** leave blank
  - End Date:** Enter the end date of the activity
  - End Time:** leave blank
  - Division:** Select AG
  - PSA:** select the PSA
  - Program:** select the Program. This list is filtered by the PSA selected in the field above.
  - Service Provider:** Select the Provider. This list is filtered by the PSA selected in the field above.
  - Parent Provider:** When the Service provider is selected, if they have a 'Parent' provider, the name will populate in this field. If there is no parent, the name of the Service Provider will also populate as the Parent Provider. This is how activities can be reported at the provider/location and/or lead agency level.

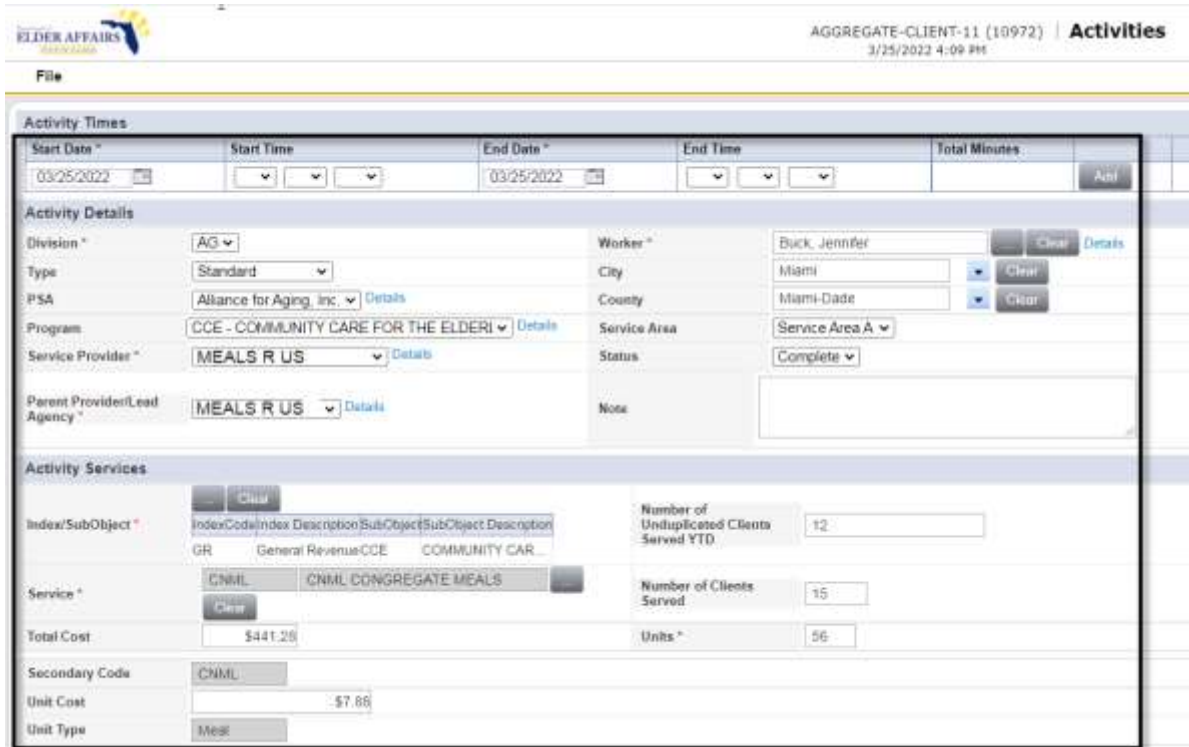
- j. **City:** Some PSAs report their aggregate services by City. They will use this field to record the City where services were rendered.
- k. **County:** Some PSAs report their aggregate services by County. They will use this field to record the County where services were rendered.
- l. **Service Area:** Some PSAs report their aggregate services by Service Area. They will use this field to record the Service Area where services were rendered.



**TIP**

Select the [Details](#) link after selecting a Service Provider to see more details about the provider, including Legacy CIRTS ID.

- m. **Worker:** Defaults to self but can be changed if Data Entry staff is entering on behalf of someone else
- n. **Status:** Defaults to Pending. When data entry is complete, the status can be changed to Complete making it read only.
- o. **Index/Sub Object:** Search for and select the correct ISO code which is a combination of funding source and program
- p. **Service:** Search for and select the Service. This list is filtered by the PSA and Program and Provider selected in the section above.
- q. **Number of Unduplicated Clients Service YTD:** Provider keeps track of the YTD number outside of eCIRTS and number will 'reset' at the beginning of each contract year. This will be a running total. Would expect the YTD number in Aug to be higher than the YTD number in July... assuming the provider continues to add consumers they are serving. This number is required for LSP services but optional for other programs. This field gives providers somewhere to put that data (for the services this applies to) instead of the PSA having to contact the provider for the information, required on the DOEA reports. Up to the PSA to decide if the field will be used or not and become part of the PSAs billing procedures that will be communicated to the provider.
- r. **Number of Clients Served:** Enter the number of clients served.
- s. **Units:** enter the total number of units delivered to the clients on the dates of service for the activity.
- t. The remaining fields will auto populate.



The screenshot shows the 'Activities' form in eCIRTS. The top header includes the WellSky logo, 'ELDER AFFAIRS', and the client information 'AGGREGATE-CLIENT-11 (10972) | Activities' with a timestamp of '3/25/2022 4:09 PM'. Below the header is a 'File' menu. The main form is divided into three sections:

- Activity Times:** Contains fields for Start Date (03/25/2022), Start Time, End Date (03/25/2022), End Time, and Total Minutes. There is an 'Add' button.
- Activity Details:** Contains various dropdown menus and text fields:
  - Division: AG
  - Type: Standard
  - PSA: Alliance for Aging, Inc.
  - Program: CCE - COMMUNITY CARE FOR THE ELDERI
  - Service Provider: MEALS R US
  - Parent Provider/Lead Agency: MEALS R US
  - Worker: Buck, Jennifer
  - City: Miami
  - County: Miami-Dade
  - Service Area: Service Area A
  - Status: Complete
  - Note: (empty text area)
- Activity Services:** Contains a table for services and associated metrics:
 

Index/SubObject	Index Code	Index Description	SubObject	SubObject Description	Number of Unduplicated Clients Served YTD
GR	General Revenue	CCE	COMMUNITY CAR		12
Service	CNML	CNML CONGREGATE MEALS			15

 Below the table, there are fields for Total Cost (\$441.26), Units (56), Secondary Code (CNML), Unit Cost (\$7.88), and Unit Type (Meal).

4. From the **File** menu, select **Save and Close Activities**. The activity data from this record is pulled into several reports used for invoicing and monitoring.

### Import Activities for Multiple Clients

Providers can import select service delivery data into eCIRTS in lieu of keying the data directly into the application. Providers will send service delivery data through an XML file for import directly into eCIRTS. An activity record will be created for each client in eCIRTS.

Each provider is responsible for creating their own XML file. There are several data elements required in the XML file. Some are values supplied by the provider, and others are eCIRTS generated data elements. A report exists in eCIRTS that provides the eCIRTS generated data elements. The provider or worker will upload the file into eCIRTS on the My Work page. Any errors with the upload can be viewed by the provider/worker in eCIRTS. The provider will update the failed records in the file and re-upload their file.

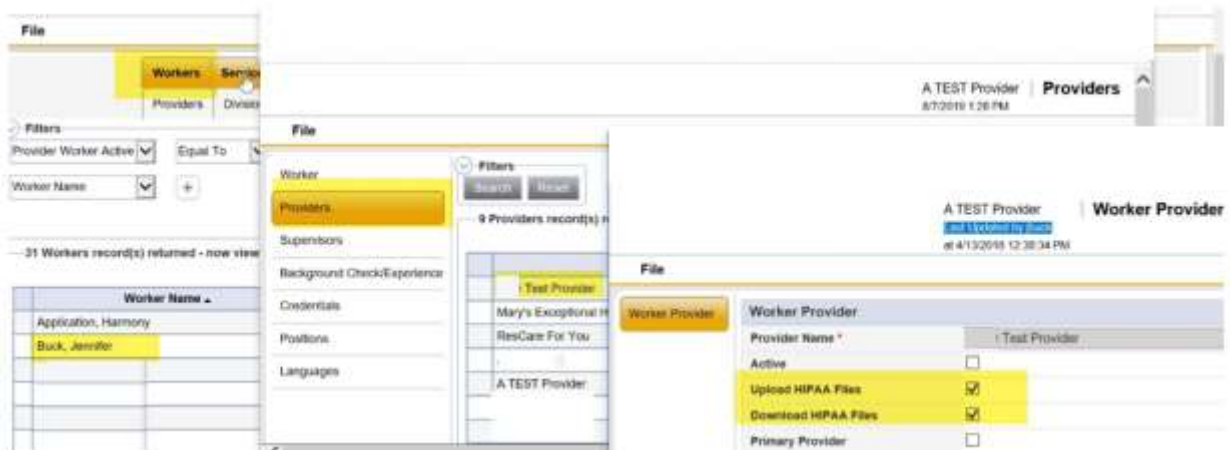
### Upload the XML File

1. Log into eCIRTS.
2. Using the eCIRTS Unit Posting, eCIRTS Vendor or eCIRTS Worker role, navigate to **My Work > Tasks > My Files > Upload**.



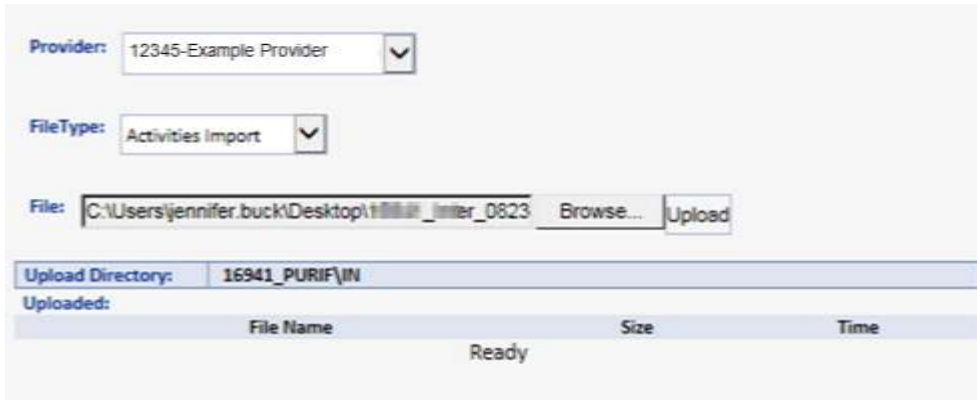
**Note**

The user will not be able to see the Upload option on My Work if access has not been granted. This access is defined at the provider > worker level and typically managed by the service providers. Navigate to the **Providers chapter**. Search for and select the worker’s Provider record. Select the **Worker** tab. Search for and select the applicable worker. Select the **worker record** to open. Select the **Providers** subpage. Select the applicable Provider record > the Worker Provider details page displays. Check the **Upload HIPAA Files and Download HIPAA Files** checkboxes. From the **File** menu, select **Save and Close**. This worker can now upload and download files for this provider in eCIRTS.



3. The File Upload window displays. Update the following fields:
  - a. **Provider:** Select the provider that is uploading the XML file. Only the providers the worker is associated to will display.
  - b. **File type:** Activities Import
  - c. **File:** Browse to the location of the XML file on your computer and select to upload.
  
4. Click **Upload**.

## Entering Services and Billable Units in eCIRTS 3/25/22



Provider: 12345-Example Provider

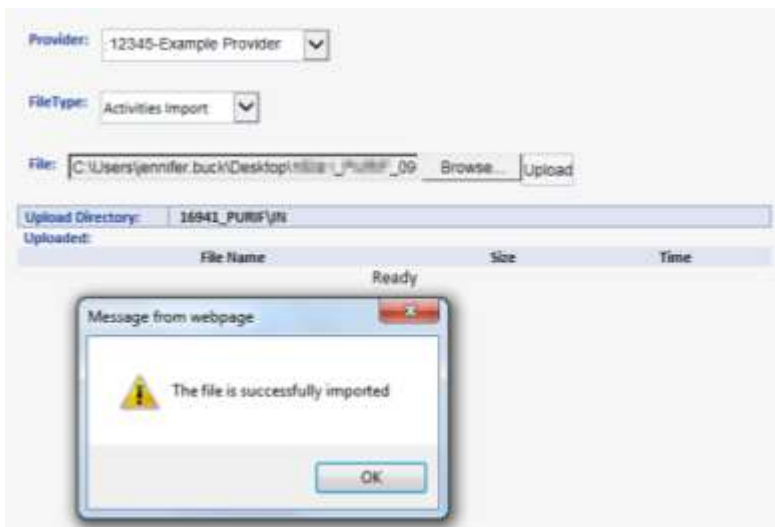
FileType: Activities Import

File: C:\Users\jennifer.buck\Desktop\16941\_PURIF\_IN\_0823 Browse... Upload

Upload Directory: 16941\_PURIF\IN

Uploaded:	File Name	Size	Time
	Ready		

5. Receive import success notification. Select **OK**.



Provider: 12345-Example Provider


FileType: Activities Import

File: C:\Users\jennifer.buck\Desktop\16941\_PURIF\_IN\_09 Browse... Upload

Upload Directory: 16941\_PURIF\IN

Uploaded:	File Name	Size	Time
	Ready		

Message from webpage

 The file is successfully imported

OK

### Viewing the Activity Record

1. Navigate to the Client's record that was in the XML file.
2. Select the **Activity** tab. From the list view, select the Activity record.



Entering Services and Billable Units in eCIRTS  
3/25/22

MY WORK | CONTACTS | **CLIENTS** | CLIENT GROUPS | AGENCIES | PROVIDERS | RESOURCES | REPORTS

SSN: 226-57-8788 | Priority Score: 50  
 DOB: 1/1/1948 | Assessment Date:  
 Rank: 5 | EMS Release Date: 02/01/2021

White, Ellen M (10095)

Case Relations | Authorizations | **Activities** | Medications

Start/Stop | Demographics | Screening | Referrals/Notifications | Programs | Forms | Services | Wait List | Notes | Appointments

Filters: Date [ ] [ + ] [ Search ] [ Reset ]

10 Activities record(s) returned - now viewing 1 through 10

Date	Agency	Program	Service Provider	Service Code	Service	Units	Status	Worker
05/11/2021	Elder Options	CCE - COMMUNITY CARE FOR THE ELDERLY	Meals R Us	99500	HDM HOME DELIVERED MEALS	5.00	Pending	Ladd, Casey
05/01/2021	Aging and Disability Resource Center of Broward County, Inc.	ADI - ALZHEIMER'S DISEASE INITIATIVE	Adults Day Center	99556	ADC ADULT DAY CARE	4.00	Pending	Buck, Jennifer
02/22/2021	Aging and Disability Resource Center of Broward County, Inc.	CCE - COMMUNITY CARE FOR THE ELDERLY	Meals R Us	99500	HDM HOME DELIVERED MEALS	1.00	Pending	Buck, Jennifer
02/10/2021	Aging and Disability Resource Center of Broward County, Inc.	CCE - COMMUNITY CARE FOR THE ELDERLY	Meals R Us	99500	HDM HOME DELIVERED MEALS	3.00	Pending	Buck, Jennifer
02/09/2021	Aging and Disability Resource Center of Broward County, Inc.	CCE - COMMUNITY CARE FOR THE ELDERLY	Meals R Us	99500	HDM HOME DELIVERED MEALS	4.00	Pending	Buck, Jennifer
01/07/2021	Aging and Disability Resource Center of Broward County, Inc.	LSP - LOCAL SERVICES PROGRAM	All Services Provider	99500	HDM HOME DELIVERED MEALS	6.00	Pending	Buck, Jennifer

3. The Activity Details page displays where the information uploaded from the XML file can be viewed.



**TIP**

If the status of the record is Pending, this page is still editable.

If the status of the record is Complete, this page will be read only.

ELDER AFFAIRS | Frank Fountain | Last updated by j buck | 10/20/2021 3:07:41 PM | **Activities**

File | Reports

**Activity Times**

Start Date *	Start Time	End Date *	End Time	Total Minutes
10/02/2021		10/02/2021		

**Authorization**

Auth ID: 140652 | Exception: No

**Activity Details**

Division: AG | Worker: Buck, Jennifer  
 Type: Standard | Status: Pending

Agency: Elder Source, The Area Agency on Aging of No | Note:  
 Program: ADI - ALZHEIMER'S DISEASE INITIATIVE | EDI Upload? [EDI Upload]  
 Service Provider: progwards inc

**Activity Services**

Index/SubObject *	Index Code	Index Description	SubObject	SubObject Description	Units *
GR	General Revenue	ADI	ALZHEIMER'S DIS.		3.00

Service: CHO | CHO CHORE | Total Cost: \$8.00

**Activity Service Details**

Unit Cost: \$4.00 | Unit Type: Hour

## File Upload Errors

There may be times in which the file upload fails. The user will receive an error message or instructions to check the error log for details.

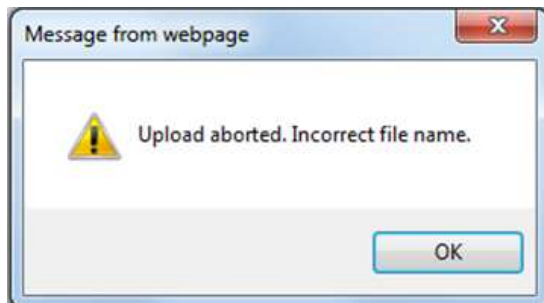
Some common file upload errors include:

1. **Incorrect File Name:** From the File Upload window, select Upload to upload the XML file > receive an error message about incorrect file name. The XML file is not uploaded, and the Activity records are not created in eCIRTS.

- a. **How to Correct:** The file name must match the required naming convention.

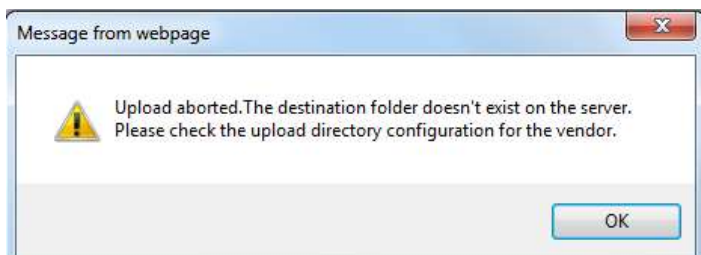
[Submitter ID]\_ MMDDYYYY\_HHMMAM or HHMMPM\_ActivitiesImport.xml

Example filename: 16941\_PURIF\_ 20190902\_1020AM\_ActivitiesImport.xml



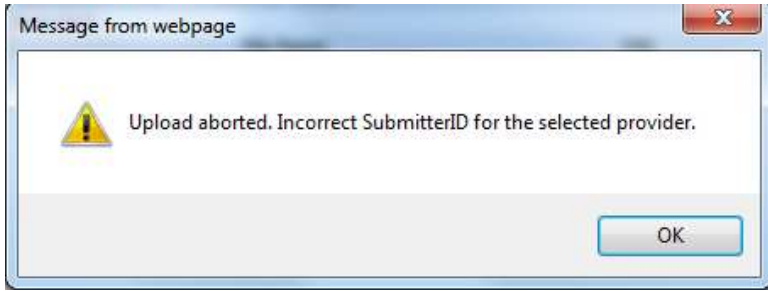
2. **Destination Folder:** From the File Upload window, select Upload to upload the XML file > receive an error message about a missing destination folder. The XML file is not uploaded, and the Activity records are not created in eCIRTS.

- a. **How to correct:** Contact eCIRTS Support Desk. A SenderID record needs to be created on the Provider's record in eCIRTS which is done by DOEA IT staff.

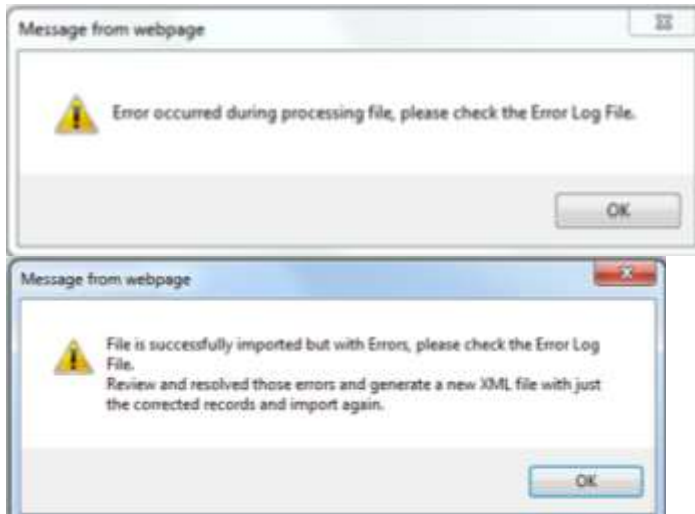


3. **Submitter ID:** From the File Upload window, select Upload to upload the XML file > receive an error message about mis-matching Submitter ID. The XML file is not uploaded, and the Activity records are not created in eCIRTS.

- a. **How to correct:** The Submitter ID in the XML file must be the eCIRTS Provider/Vendor ID plus the first 5 characters of the Providers last name and be the same as the Provider selected in the "Provider" field on the File Upload page.

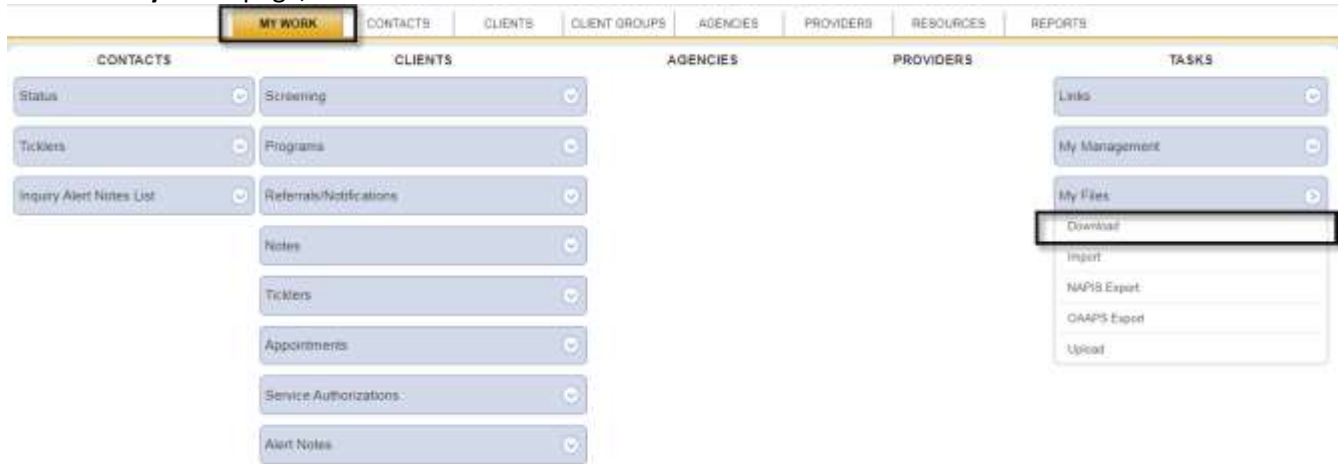


4. **Error Occurred.** From the File Upload window, select Upload to upload the XML file > receive an error message about an error processing the file. Not all records in the file imported successfully.
  - a. **How to correct:** Check the Downloads folder on My Work for the error log. Select the correct log file and click Download. Update the XML file for each error and resubmit the file. Records with the same case number, service, start and end date are considered duplicates and will not re-import, meaning the provider does not need to remove the successfully uploaded records from the XML file when making the corrections

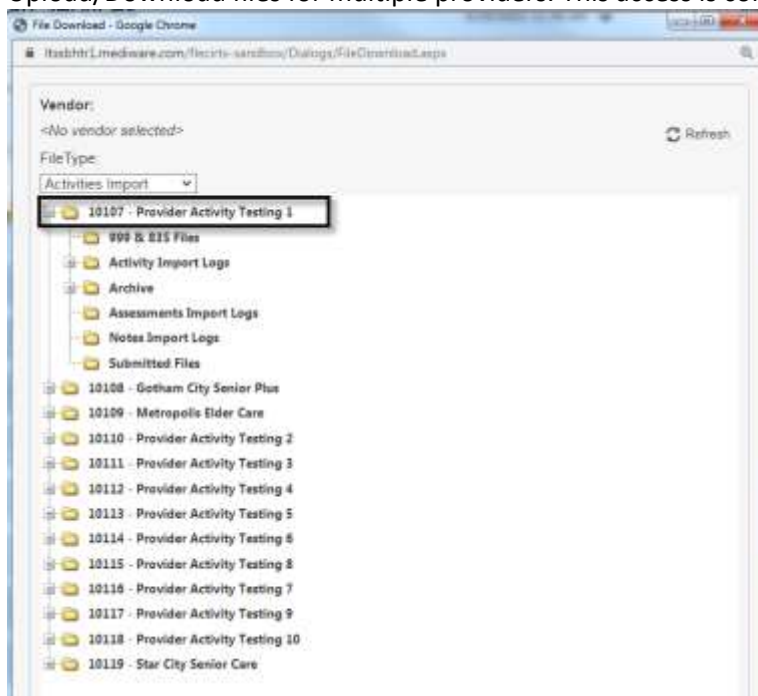


### Checking the Error Log

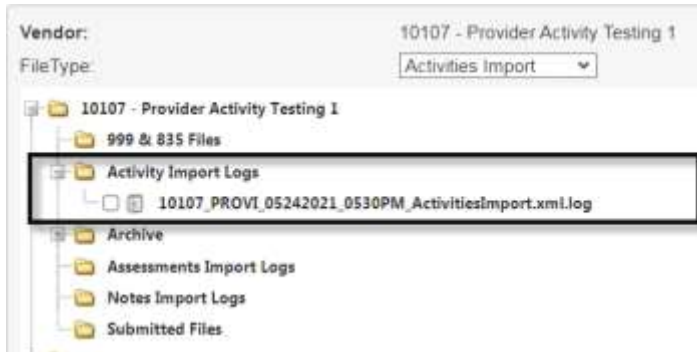
1. From the **My Work** page, select **Tasks > Download**.



2. Select the **Provider** who submitted the file. Multiple providers may exist in this list if the worker has access to Upload/Download files for multiple providers. This access is controlled by the DOEA IT Department.

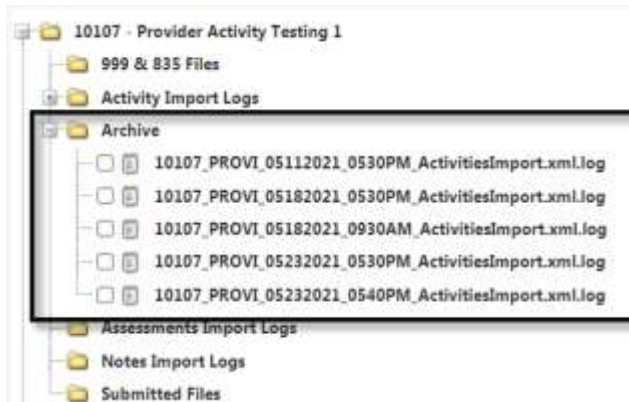


3. Select the **+** next to **Activity Import Logs** to list the error logs. DOEA is not using any of the other imports at this time so most of the remaining sections do not apply.

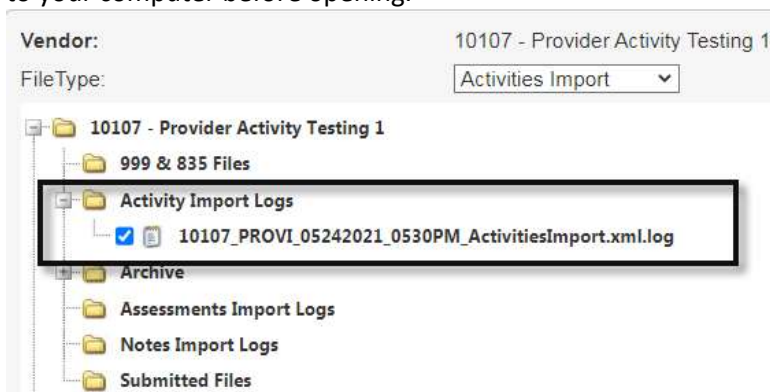


**Note**

Error Logs will periodically move from the Activity Import Logs folder to the Archive folder in case they need to be reviewed again.



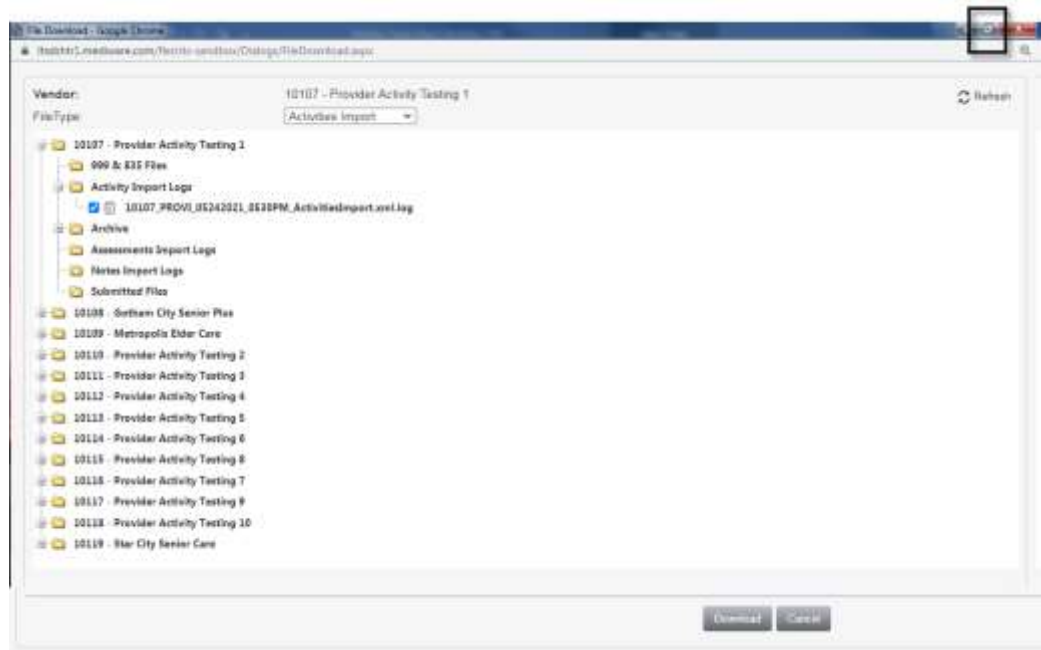
- 4. To view the error log, **check the box** next to the log and click the **Download** button. You will have to save the file to your computer before opening.





**TIP**

The File Download window must be maximized/full size to view the Download button. Click the **Restore** button in the top right corner of your browser window.



5. Review the details in the error logs. Update the XML file with the corrections and re-upload. Some common errors include:

a. Example 1: One record in the file successfully imported and one was rejected and not imported.

```
----- Start Log For Caseno: 61907 -----
End Log For Caseno: 61907
----- Start Log For Caseno: 66241 -----
At least one date range overlaps an existing activity. Following activity records overlap with existing records: case no(66241), service code(3888), start date(7/6/2020 1:00:00 PM), end date(7/6/2020 4:00:00 PM)
End Log For Caseno: 66241
```

b. Example 2: Null Reference Exception. The XML file does not contain all of the required placeholders. i.e. place of service, location, primary diagnosis.

```
2020-08-11 11:11:04.711 [INFO] ----- Start Log For Caseno: 61907 -----
2020-08-11 11:11:04.729 [ERROR] -- System.NullReferenceException: Object reference not set to an instance of an object.
at Fw.BusinessRules.ActivitiesImport.Engine.ValidateXmlValidations.ValidateRequiredFields(ActivityItemSetupModel activityItemSetupModel, Caseno caseno)
at Fw.BusinessRules.ActivitiesImport.Engine.ProcessInputFile(String filepath, String filename, String logpath, String connection, Int32 userId)
```

c. Example 3: Duplicates will not import. The XML file contains data for activity records that already exist in eCIRTS. Same case number, service, start and end dates.

```
----- Start Log For Caseno: 61907 -----
At least one date range overlaps an existing activity. Following activity records overlap with existing records: Case no(61907), Service code(3854), Start Date(7/9/2020 1:00:00 PM), End Date(7/9/2020 4:00:00 PM)
----- Start Log For Caseno: 61907 -----
----- Start Log For Caseno: 66241 -----
At least one date range overlaps an existing activity. Following activity records overlap with existing records: case no(66241), service code(3888), start date(7/6/2020 1:00:00 PM), end date(7/6/2020 4:00:00 PM)
----- Start Log For Caseno: 66241 -----
```