FLORIDA DEPARMENT OF ELDER AFFAIRS

RESOURCE MANAGEMENT

Version 1

Author: Jennifer Buck

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Document Tracking

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Implementation Team

WellSky Implementation Team	
Name	**Email**
Jennifer Buck	Jennifer.Buck@Wellsky.com
Mandi Vogeler	Mandi.Vogeler@Wellsky.com
Mark Paulsen	Mark.Paulsen@Wellsky.com
Monica Reed	Monica.Reed@Wellsky.com

Customer Project Team	
Name	**Email**
Gretta Jones	Jonesg@elderaffairs.org
Gary Didio	g.didio@outlook.com
eCIRTS Task Force	several

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Resource Management

eCIRTS offers call tracking and searching of an integrated resource directory that features the AIRS taxonomy to efficiently handle increasing Elder Helpline call volume and requests for Information, Referral, and Assistance.

In Phase 2, the online resource directory will allow clients, caregivers, and loved ones to quickly search for local provider organizations and available services within their communities. Using a simple search box or an advanced search feature, resources and provider services can be found using a variety of parameters (e.g., service name, service area, provider name, etc.)

Before the resources are available in the resource directory search, they must first be added to eCIRTS in the Resources Chapter. The Department will initiate the process of adding a new resource by completing the application process and make sure the resource meets required inclusion and exclusion criteria. The Department will add the Resource record to eCIRTS, along with applicable taxonomy codes.

Designated PSA staff, those part of the Referral Workgroup, will finish and maintain the Resource records. The PSAs won't have access to add new Resource records, but they will be able to add additional information to an existing record. (i.e. hours, service description, program name, languages spoken, etc.)

Search for an Existing Resource Record

The first step for almost every action in eCIRTS is to search for an existing record. If one doesn't exist, a new record can be added.

1. Select the eCIRTS Admin role which has access to add records to the Resources Chapter and click **Go.**

2. Click on the **Resources** Chapter.

3. Select **Advanced Search**, enter the Resource Name and any other criteria in the search. Click **Search.**

4. Matches will be displayed in the list view under the search filters.

5. Select the Resource name from the List View grid.

Add a New Resource Record

You must search for a matching resource record before you can add a new resource record. This practice helps prevent duplicate records in the application. The Department will add new resource records. The PSAs can edit them once they've been added to the system.

1. Use the eCIRTS Admin role and select the **Resources** Chapter.

2. Select **Advanced Search**.

3. From the **File** menu, select **Add New Resource Search**.

4. Enter the Resource name, agency key, street and/or any other search filters. Select **Search**.

NOTE

Each search filter contains four parts:

1. **Filter Field**: the data point to search on
2. **Operator**: the relationship between the filter field and the value described further in the table below.
3. **Value**: the filter field answer to search on
4. **Connector**: the relationship between this filter and other filters in the search. **AND** tightens your search: only returns records that meets <u>ALL</u> filter criteria. **OR** broadens your search: returns records that meet <u>ANY</u> of the filter criteria.

Operator	Definition
Equal To	Returns records that match the entered criteria. For example, if <Last Name> is entered as "equal to" a specific person's name, the Member records assigned to that worker will be returned.
Begins With	Returns records that begin with the entered criteria. For example, if <Last Name> is entered as "begins with" 'T' the system will return records assigned to the worker having last names that start with 'T', such as Tester and Thomas.
Ends With	Returns records that end with the entered criteria. For example, if you search on <Last Name> "ends with" 'r', you can retrieve records where a Member's name ends in 'r', such as Tester.
Not Equal To	Returns records that do not match the entered criteria. For example, if a name is entered for <Last Name>, the system will return a list of records except those records for the name provided in the search criteria.
Greater Than	Returns records that are dated later than the entered criteria. For example, if <DOB> is entered as "greater than" '03/01/2015', the system will return all records whose dates of birth are after March 1, 2015.
Less Than	Returns records that are dated earlier than the entered criteria. For example, if <DOB> is entered as "less than" '03/31/2015', the system will return data for all records with a birth date before March 31, 2015.
Contains	Returns records that contain the entered criteria. For example, if <Last Name> is entered as "contains" specific values in the person's name, the Member Record(s) assigned to that worker with those values would be returned.
Blank	A record is returned where the selected field does not have a value in the field.
Non-Blank	Returns records where the selected field does have a value in the field.

6. If a match is not found, select **Add New**. Proceed to the Resource Details section.

7. If a match is found, select the Resource name from the List View grid and proceed to Edit a Resource Record.

Edit a Resource

You will be able to edit the basic Resource information which includes the Resource's name, number, contact information and address. The eCIRTS Admin role can edit this information. The ADRC Records Management role can also edit it, but cannot add it.

1. Open the provider record in the **Resources** Chapter.

2. Select the **Resources** tab. From the Edit menu in the toolbar, select **Edit Resource**.

3. The Resource Details page displays. Proceed to the Resource Details section for additional instruction.

4. From the **File** menu, select **Save and Close Resource** when complete.

Resource Details

The Resources tab contains the demographic data on agencies and programs. If you are adding the resource record, the Resource Details page displays after selecting **Add New**. If you are editing the resource record, the Resource Details page displays after you select Edit Demographics from the Toolbar.

1. The Resource Details page displays. Update any fields as needed.

Field	Use
Basic Information	
Agency Key Number	Select the PSA
Resource Name	Enter the name of the Resource
Other Name (AKA)	Enter any other names for the Resource
Active	A resource must be active to be visible in the Resource Directory
Exclude from Selection	A resource must not be excluded to be visible in the Resource Directory. The Department may exclude a resource from selection until they have finished the application process.
Active/Inactive Comments	Can be used by the Department to track progress through the application process and/or reason for inactivating.
Year Started	Enter the year if known
Tax ID number	Enter if ID number if known
IRS Status	Enter the status if known
Overview	Enter the overview of the agency or program
Facility Type	Select the facility type
Agency Type	Select the agency type
Formal Update	Used by the ADRCs to track the annual resource directory updates
Email Broadcast Date	Used by the ADRCs to track the annual resource directory updates
Printed in Local Directory?	Used by the ADRCs to track the annual resource directory updates
Include in Website?	Used by the ADRCs to track the annual resource directory updates
Intake Procedure	Select the intake procedure if known
Contact Address	
Street	Enter the street address
Street 2	Enter the suite, apartment number, etc.
City	Enter the city
State	Enter FL
Zip Code	Enter the zip code
Phone	Enter the best contact phone number
Email	Enter the email
Website	Enter the website of the agency or program
Mailing Address	
Mailing Address Same as Contact Address	Use this shortcut if the mailing address it the same as the Contact Address. The application will copy it over.
Mailing Name	If a different agency/program name is used for the mailing address, enter it here

Mailing Contact Name	Enter the name of the contact person if known
Mailing Street	Enter the street address
Mailing Street 2	Enter the suite, apartment number, etc.
Mailing City	Enter the city
Mailing State	Enter FL
Mailing Zip Code	Enter the zip code

2. When finished, from the **File** menu, select **Save or Save and Close Resource**.

3. Contact and Mailing address are the most common resource addresses, so they are accessible on the Resource Details page. Adding them on the Resource Details page also adds them to the Addresses subpage, one record per address. If there are additional addresses besides Contact and Mailing that need to be added, they are added on the Addresses subpage.

4. Contact (Physical) phone is the most common resource phone number so it is accessible on the Resource Details page. Add it to the Resource Details page also adds it to the Telephone Numbers subpage, one record per phone number. If there are additional phone numbers besides Contact (Physical) phone that needs to be added, it is added on the Telephone Numbers subpage.

Resource Addresses

Resource addresses will appear on the resource details page and on the addresses subpage. There can be several addresses for each of the Contact, Mailing and Correspondence types. There can be one address type selected as primary which will then display on the main resource page under the specific section for that address type.

1. Open the resource record. Select the **Resources** tab.

2. Select **File** > **Edit Resource**. The Resource detail page opens.

3. Select **Addresses** from the left-hand navigation menu.

4. The Addresses list view page opens. Existing addresses are shown in the list view grid. To edit an existing address, select it from the list view grid.

5. To add a new address, from the **File** menu, select **Add Address**.

6. The Address details page displays.

7. Update the following fields:

Note: In order for the address to appear on the Resource detail page the Address Type must be Contact or Mailing and the record must be marked as the primary address and active.

Field	Use
Address Type	Select Contact, Mailing or Correspondence.
Primary	Check this box if the address should also display on the Resource Details page. Address Type must be Contact or Mailing and the address record must also be active.
Street	Enter the street address
Street 2	Enter the suite, apartment number, etc.
City	Enter the city
State	Enter FL
Zip Code	Enter the zip code
Start Date	Enter a start/effective date for this address
End Date	Leave this field blank unless you are inactivating an address record. You would enter an end date and uncheck the Active checkbox.
Active	Check this box if the address should also display on the Resource Details page. Address Type must be Contact or Mailing and the address record must also be marked as primary.
Comments	Enter if needed

8. Select **File** > **Save and Close Address** when complete.

Resource Telephone Numbers

Resource phone numbers will appear on the resource details page and on the telephone numbers subpage. There can be several numbers for each of the Contact, Mailing and Correspondence types. There can be one address type selected as primary which will then display on the main resource page under the specific section for that address type

1. Open the resource record. Select the **Resources** tab.

2. Select **File** > **Edit Resource**. The Resource details page open.

3. To add a phone number via the Telephone Number(s) subpage, select **Telephone Number(s)** from the left-hand navigation. The Telephone Numbers list view page opens. Phone numbers added via the detail page will be displayed in the list view. To edit a phone number, select it from the list view.

4. To add a phone number, select **File** > **Add Telephone Number**.

5. The Telephone Number page displays.

6. Update the following fields:

Field	Use
Phone Type	Select a phone type for the number you're adding

Phone	Enter the phone number in (xxx)xxx-xxxx format
Extension	Enter the extension if known
Start Date	Enter the start date for this phone record.
End Date	Leave blank unless you are inactivating an old phone number.
Active	Needs to be checked unless you are inactivating an old phone number.
Primary	Needs to be checked if the Phone Type is _____ and this number should display on the Resource Details page.
Comments	Enter if needed.

7. Select **File** > **Save and Close Telephone Number** when finished.

Division

When a new resource record is created and the details page is saved, eCIRTS automatically opens the Division details page. All resources must have an open Division record before their Resource record can be created in eCIRTS. Once the Division record is created, it does not need to be changed, unless the Resource record needs to be closed.

1. For new resources, the Division details page opens when the Resource Details page is saved. Skip to step 3 to finish adding the Division record. Only the Department will be adding new resources and adding Division records to eCIRTS.

2. The Department may need to inactivate a resource. In those cases, the existing Division record will be closed. From the Resource record, navigate to the **Divisions** tab and select the record from the list.

3. The Division Details page opens. Update the following fields:

Field	Use
Division	All Resources will be associated with AG
Status	Select Open when creating a new Resource record. Select Pending when the Resource is still going through the application process. Select Closed when inactivating a Resource record.
Status Date	Enter the date the status was selected or changed
Open Date	Enter the start/open date for the Resource

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

Contacts - Workers

The Workers tab contains information about contacts for the resource. Contacts for the agency or program are added as workers in eCIRTS. i.e. Site Director, Program Director, Contact Person. Resource workers will be added into eCIRTS via the initial data conversion. If the Resource needs a new worker added after go live, the Department or PSA designees will follow the steps outlined below.

1. To view the Workers tab, open the Resource record and select the **Workers** tab. Existing worker records, if any, are shown in the list view grid.

2. Before you can add a new worker record, you must conduct a search to make sure that the worker doesn't already exist. This helps to prevent duplicate records.

3. Use the eCIRTS Admin or ADRC Records Management role to add a worker to the Resource record.

4. Search for and select the Resource record and select the **Workers** tab.

5. Select **File > Add New Worker Search**. The Worker Search page opens.

6. Enter in the Search criteria and click **Search**.

7. If a match is found, select it from the list view grid. The Worker record opens and information can be updated before attaching to the resource. Skip to step 9.

8. If a match is not found, add a new worker record by selecting **Add New**.

9. The Worker page opens. Update the following fields:

Note: Any information you entered in the worker search filter will pre-populate in the worker detail screen.

Field	Use
Member ID	This will auto populate after the record is saved. Each worker record receives a unique eCIRTS ID number.
Worker Type	Select a worker type
Last Name	Enter or update the last name
First Name	Enter or update the first name
Title	Enter the contact's title
Phone	Enter the phone number (xxx)xxx-xxxx format
Extension	Enter the extension if known
Email	Enter the email if known
Fax Number	Enter the fax number if known (xxx)xxx-xxxx format
Start Date	Effective dates can be added for workers. Enter the start date
End Date	Can leave blank unless the worker is being inactivated.
Active	To deactivate a worker, clear the "Active" option. Inactive workers are automatically not included in the worker dropdown lists throughout eCIRTS. If the worker is associated with multiple resources when the record is deactivated the worker will be inactive for all resources.

Gotham City Senior Center — Worker
Last Updated by jbuck at 11/11/2021 3:19:35 PM

Worker Details

Member ID	155
Worker Type	Contact Person 2
Last Name *	Buck
First Name *	Jennifer
Title	Contact Person 2
Phone	(324)854-9849
Extension	
Email	jennnifer.buck@wellsky.con
Fax Number	(324)587-8488
Start Date	01/01/2020
End Date	
Active	☑

10. Select **File > Save and Close Worker** when done. An eCIRTS generated Member ID has been assigned to this worker. The worker has been added to the Resource record.

Service Area

The Service Areas tab is contains information about what areas the resource serves in the community. Resources also have service-specific service areas. A master Service Area record must exist for the Resource first before service-specific service areas can be added.

1. Open the Resource record and select the **Service Areas** tab. Each resource will have a single service area record.

2. To edit an existing Service Area, from the File menu, select Edit Service Area.

3. To add a new Service Area, from the **File** menu, select **Add Service Area**.

4. The Service Area page displays. Select or update the service area. Select the values in the left-hand box and move them to the right-hand box using the arrows.

Note:
Select the most specific level of service area first and the application will populate other details. Do not go top down. For example, when you select the zip code, the application will populate the appropriate state, region, county, and city fields.

Gotham City Senior Center | **Service Area**
Last Updated by jbuck
at 11/11/2021 4:17:43 PM

Note:
To select multiple values, press CTRL while you select the values you want to apply. Use the arrow button to move the value from the left box to the right box.

- The double right arrow button will move all value from the left to right
- The single right arrow button will move selected values from left to right
- The single left arrow button will move all values from right to left
- The double left arrow button will move selected values from right to left

5. From the **File** menu, select **Save and Close Service Areas** when done.

The Services tab is where you can record the services, by Taxonomy code, that an agency or program would offer to the community. The Service/Taxonomy must exist first in the Service Codes Utility, managed by BIT, and then it can be associated with a Resource by the Department or PSA staff. A service/taxonomy must be added to a resource before it will be visible in the Resource Directory for the Helpline staff.

Note: The Service codes must be set up in the Service Code Setup Utility before you can add a service to a resource. For assistance, please contact your System Administrator.

Add or Edit a Service/Taxonomy

1. Open the Resource record and select the **Services** tab.

2. If you are editing a Service/Taxonomy select a record from the list.

3. If you adding a new Service/Taxonomy, from the **File** menu, select **Add Services**.

4. The **Service/Taxonomy** page will open in a new window. Update the following fields:

Field	Use
Service ID	Search for and select the service/taxonomy. See the Search tips section below.
Billable	Do not check this box
Active	This must be checked for the service to be visible for the resource in the Resource Directory.
Active Date	Enter a start/active date
End Date	Active service/taxonomy codes do not need an end date. Enter an end date when you are inactivating a service/taxonomy record for a resource.
Taxonomy Code	auto populates when you select the Service ID
Taxonomy Term/Service	auto populates when you select the Service ID
Secondary Code	This defaults as the Taxonomy code and does not need to be changed
Taxonomy Category	Enter the AIRS Problem Need. This field will change to a lookup field after Phase 1 go live.
Service Description/Guidelines	Enter the service description or any agency/program guidelines.
Hours	Hours are visible in the Service Description/Guidelines field for Phase 1. In Phase 2 they will be housed in a separate field.
Program Name(s)	A resource can have several Program Names. Program name is frequently used in the Resource directory search by the Helpline staff.

Payment Options/Eligibility	This used to be 2 fields in CIRTS and text fields. In eCIRTS, the fields are combined and multiple options can be selected
Resource Service Areas Allow	This box defaults to checked and should remain checked when the Resource record is created. Later when the PSA's update the Resource record, they will uncheck this box in order to add service specific service areas.
Unit Cost	Enter zero. This is an eCIRTS required field but doesn't have any functionality for Resources. If you do not add a value in this field, will get an error message when saving the page.

5. When finished, from the **File** menu, select **Save and Close Taxonomy**.

6. Once the service record is saved, the Areas Served subpage is displayed but is not editable. The PSA will update the Area Served later in the workflow. The update will be made from the Taxonomy/Service page but changes will be visible on the Area Served subpage.

Search Tips

1. Search by Service Type to filter the list by Service Category from REFER

2. Search by Service Category to filter the list by Sub-Category/Service Group from REFER

3. Search by Service to filter the list by Taxonomy Term from REFER.
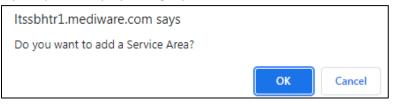
Service-Specific Service Area

Service areas are the locations in which a specific service is offered by the Resource. By default, services use the resource's service area location, which is recorded in the resource Service Areas tab. If you are setting up a service that will be offered in a different, or more limited service area, clear the "Resource Service Areas Allow" field and then save the more specific service area.

Note: Add the service area record under the Services page creates an additional record that is associated with the specific service and does not affect the Service Areas record under the Service Areas tab in the main resource record.

1. Search for and select the Resource.

2. Select the Services tab and select the Taxonomy/Service that needs the Service area.

3. Uncheck the "**Resource Service Areas Allow"** field.

4. A prompt will display asking if you want to add a Service Area. Select **Yes**.

5. The **Areas Served** page displays. By default, the State, County, City and Zip Code selected on the Resource > Service Area tab is populated.

6. Update the service area specific to this service. Select the values in the left-hand box and move them to the right-hand box using the arrows.

Note:
Select the most specific level of service area first and the application will populate other details. Do not go top down. For example, when you select the zip code, the application will populate the appropriate state, region, county, and city fields.

Note:
To select multiple values, press CTRL while you select the values you want to apply.
Use the arrow button to move the value from the left box to the right box.
- The double right arrow button will move all value from the left to right
- The single right arrow button will move selected values from left to right
- The single left arrow button will move all values from right to left
- The double left arrow button will move selected values from right to left

7. From the **File** menu, select **Save and Close Area Served** when done.

8. You are returned to the Taxonomy/Services page. From the **File** menu, select **Save Taxonomy/Service** or **Save and Close/Taxonomy Service.**

9. The service specific service area is visible on the Area Served subpage.

10. If you need to edit the service specific service area, select the Area Served subpage and update the values. As long as the "Resource Service Areas Allow" field is blank on the services page, the Area served can be edited for the service.

Conditions

The Conditions tab stores additional resource characteristics such as languages spoken, payment options, accessibility, and age and gender restrictions. This information helps users find an agency or program that offers the appropriate service. For example, not all agencies accept both male and female patients.

1. To add a new condition, use the eCIRTS Admin or ADRC Records Management role.

2. Search for and select the Resource record. Select the **Conditions** tab.

3. Each resource can have one Conditions record. If it already exists and needs to be updated, select Edit Conditions from the File menu.

4. If a condition record needs to be added, from the **File** menu, select **Add Conditions**.

5. The Conditions detail page displays. Select the values in the left-hand box and move them to the right-hand box using the arrows.

Field	Use

Accessibility	Select all values that apply to this resource.
Mission	Enter a mission if available for this resource.
Languages Spoken	Enter the languages spoken by the resource. This will be a text field for Phase 1 and change to a multi-select lookup (like the screenshot below) in Phase 2.
Notes	Note about the resource go into this field.
Females Served	Check this box if the resource serves females.
Minimum Age Females	Enter the minimum age served.
Maximum Age Females	Enter the maximum age served.
Males Served	Check this box if the resource serves males.
Minimum Age Males	Enter the minimum age served.
Maximum Age Males	Enter the maximum age served.

Note:

To select multiple values, press CTRL while you select the values you want to apply. Use the arrow button to move the value from the left box to the right box.

- The double right arrow button will move all value from the left to right
- The single right arrow button will move selected values from left to right
- The single left arrow button will move all values from right to left
- The double left arrow button will move selected values from right to left

6. When finished, from the **File** menu, select **Save and Close Conditions**.

Linked Resources

The Linked Resources tab shows the relationship between a parent agency and subsidiaries. The subsidiaries are known as child resources. You can edit the parent information without applying those changes to the child resource. You can also edit the child information without applying those changes to the parent resource.

1. Use the eCIRTS Admin or ADRC Records Management role to add a linked resource.

2. Search for and select the parent resource record. Select the **Linked Resources** tab.

3. If a linked resource relationship exists, it is shown in the list view grid. If you need to edit an existing linked relationship, select it from the list and skip to step 5.

4. To add a new linked resource, from the **File** menu, select **Link to a Vendor**.

Note:
Resources, Providers and Agencies are all considered "Vendor" records in eCIRTS

5. The Link a Resource page displays. Update the following fields:

Field	Use
Relationship	Since you are starting on the parent record, select Child as the relationship of the resource you are going to link.
Resource	Search for and select the child resource.

| Start Date | Enter a start date for the linked relationship |
| End Date | This field can remain blank unless you are ending a linked relationship. |

Note:

The Resource field uses the resource search popup. Select a search parameter from the **Search By** dropdown and then type your search criteria in the **Search Text** entry bar. Click **Search**. Results are returned. Click to select the Child resource from the popup window. The search popup closes, and the name of the child resource displays in the Resource field on the Linked Resources page.

6. From the **File** menu, select **Save and Close** or use the shortcut, **Save and Add Another** if you have another resource to link to this parent resource.

Unlink a Resource

1. Use the eCIRTS Admin or ADRC Records Management role to unlink a child resource from the parent.

2. Open the Resource record and select the **Linked Resources** tab.

3. Use the checkbox next to the child resource's name in the list view grid to select the linked resource.

4. From the **File** menu, select **Unlink Linked Resources**.

5. A confirmation message appears. Click **OK** to continue.

6. The record will be unlinked and will be removed from the list view grid. A second confirmation message appears. Click **OK.**

7. The unlinked resource is no longer visible on the Linked Resources list view.