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

Course Description

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

Prerequisites

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

Suggested Resources, Materials, and Credentials

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

Learning Outcomes

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

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Scenario 1: Update a Program Record

This scenario is not universal, meaning not all Providers are expected to update the status of General Revenue or Older Americans Act program records. The demonstrations will utilize the APPL Applicant status for these programs. The status change is a good visual, but this does not constitute a requirement. You are not required to update from APCL Waitlist to APPL Applicant for GR or OAA programs if you are currently not required to do so.

Scenario 2: Scheduling an assessment

To schedule an assessment with a client, the eCIRTS user will need to conduct contact attempts. Contact attempts for scheduling an assessment will be conducted and tracked using the Notes tab on the client's record. The appointment can be documented within eCIRTS using the Appointments tab.

Scenario 3: Conduct the Assessment

Any screenings or assessments will be documented in eCIRTS on the Forms tab of the client's record. The data entry and documentation of assessments, such as the 701A, B, or C, will occur on the Forms tab. Any notes about the assessment will be documented on the Notes tab. If the client has a primary Caregiver, the Caregiver information will need to be recorded on the Caregiver tab.

Scenario 4: Update Program Record(s)

After the completion of the assessment, the program record needs to be updated to reflect the status of the program. For example, the client could change from APCL Waitlist status to an Active Status. This update would occur for the specific program record(s) that are addressed by the entity conducting the assessment.

Scenario 5: Add Planned Services

Most services being provided to a client will be documented and authorized within eCIRTS. There are some exceptions for services requiring authorizations, so please reference the Training Manual or ask your superuser to obtain a list of those exceptions. Services will be added to a client on the Services tab of the client's record.

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Scenario 6: Create Authorizations

The provider will need to create authorizations for the services they intend to provide the client. Once a record of the services has been documents on the Services tab, the authorizations must be created. After the creation of the authorizations, the provider will approve the authorizations on the Authorizations tab on the client's record.

Scenario 7: Create a Referral to the Provider

A referral to the provider must exist on the Referrals to Providers tab prior to any billing activities can occur.

Scenario 8: Addressing follow-up tasks

eCIRTS has a new name for follow-up tasks, Ticklers. The tickler will act as a reminder that a task needs to be completed. The ticklers can be located on the My Work dashboard by expanding the Ticklers queue. The queue is equipped with filters that can be used to locate specific ticklers, or the user can merely work through the ticklers they have been assigned.