DOEA eCIRTS

Module 5-A

Cheat Sheet Set up

This cheat sheet is designed to help ADRC staff who assist clients through the MLTC Waitlist/EMS Release process prepare clients for practice purposes. The I&R Specialists and the Intake Specialists or Screeners typically complete tasks associated with creating clients, conducting the initial 701S screening, and placing the clients on the waitlists. The training environment is not set up for ADRC Staff members who assist clients through the MLTC Waitlist/EMS Release process to simply pick up an existing client and conduct their tasks. Use this cheat sheet to set up clients for your practice purposes.

Create a Client

1. Search for existing client to ensure the client you want to create does not exist.
2. File - Add New Client
3. Complete the Demographics page
    a. Complete all required fields
    b. Complete the address according to the PSA
    c. Please use PSA 2, 3, 4, 6, or 7
        i. Street address
        ii. City
        iii. State
        iv. Zip Code
        v. County
        vi. PSA
        vii. Agency Name
    d. File – Save & close
4. Complete the Screening page
    a. Primary worker = Screener (keep as self)
    b. Status = Screening Completed
        i. *This should be the status when you receive the client*
    c. Screening Referral Date = Auto populates (Today)
    d. File – Save & Close

The address is a Smart field. The answers will narrow based on locations. When you get down to the County, PSA, and Agency Name, there should only be one choice.

Referrals and Program Records

5. Verify the Agency Referral populated on the Referrals to Providers Tab
6. Verify DOEA Services Program record exists on the Programs tab
    a. *Typically, the ADRC would have added waitlist records on this tab*
    b. Add Program enrollment record
        i. File – Add Program
            1. Referred from = ARC or ADRC
            2. Program = MLTC
            3. Status = APCL Waitlist
            4. Enrollment Provider = ADRC Generic Worker
            5. Save & Close Program

You are now ready to continue and move through Module 5-A.

**Since you are creating this client, some of the other documentation that would typically be expected on the client record will not be present. Tasks such as a completed 701S screening, Notes to document contact attempts, etcetera will be missing from this newly created client.*