



# eCIRTS Training Guide Eligibility Workflows V4

Florida Department of Elder Affairs (DOEA)

## Document Tracking

Versions			
Revision	Author/Editor	Date	Changes
1.0	J. Buck	12/20/23	Document creation
2.0	J. Buck	3/27/24	Updated with PSA and DOEA testing feedback.
3.0	J. Buck	5/6/24	Updated with feedback from Casey Anderson
4.0	J. Buck	5/13/24	Updated with feedback from WS Training Center. Minor updates.

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## Icons used in the Guide

Icon	Description
	<p><b>Tip</b></p> <p>Tips provide general recommendations on how to make it easier or more productive to use WellSky.</p>
	<p><b>Caution</b></p> <p>The Caution icon highlights areas of note or concern, where failure to use the system properly may cause or exacerbate problems.</p>
	<p><b>Note</b></p> <p>Notes provide additional information of general interest about a specific function or process of WellSky.</p>
	<p><b>Example</b></p> <p>Examples are provided to help you develop a better understanding of the subject area and how WellSky may be used in a specific scenario of relevance.</p>

## Eligibility Workflows Training Guide Overview & Objectives

WellSky Human Services application/eCIRTS will maintain the helpline, intake/screening and eligibility process throughout the state of Florida, previously completed in REFER and CIRTS.

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**Introduction** This training introduces you to the workflows completed by the eligibility staff in eCIRTS.

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**Importance** Your confidence in using eCIRTS for receiving caseload assignments, documenting contact attempts, completing pre-release research tasks, creating the Medicaid Waiver Timeline form, and creating CARES referrals will increase as you develop proficiency in the software.

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**Overview** To help develop the necessary skills and understanding to effectively use eCIRTS to perform the eligibility workflows.

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**Objectives** Following the steps in the guide to:

- Assign eligibility specialists to a case.
- Receive new caseload assignments.
- Document contact attempts.
- Document the completion of pre-release research tasks.
- Create and update Medicaid Waiver Timeline forms.
- Create the CARES Referral.

---

Eligibility specialists can receive any of the following types of referrals:

1. [EMS Release](#)
2. [APS to ALF referral](#)
3. [Regaining eligibility referral](#)

## EMS Release

Most of the cases assigned to eligibility specialists are an EMS release. Once AHCA provides the number of slots for release and the EMS Release Date, the interface will populate it on the client's Demographic record in eCIRTS. The date does NOT need to be manually added but you can view it.



### Role: eCIRTS Worker

1. Navigate to the Client record and select the **Demographics** tab.
2. The EMS Release Date is visible at the top of the page and within the Demographic summary section about halfway down the page.

MY WORK	CONTACTS	CLIENTS	CLIENT GROUPS	PROVIDERS	REPORTS
SSN	XXX-XX-8949	Priority Score	52		
DOB	4/24/1974	Assessment Date	04/25/2023		
Rank	5	EMS Release Date	3/1/2023		

Apple, Michelle (1412768)

Caregiver/Care Recipient

Associated People Appointments Medications

Programs Services Authorizations Activities

START-STOP TIMER **Demographics** Open/Close Referrals To Providers Forms Notes Eligibility

Demographics	
EMS Release Date	3/1/2023
eCIRTS Client ID	1412768
Former CIRTS ID	3332649103
First Name	Michelle
Last Name	Apple
Middle Initial	
AKA Name	
Date of Birth	4/24/1974
Date of Death	
SSN	XXX-XX-8949
Pseudo SSN	
Gender	Female
Age	49.6
Primary Race	White
Ethnicity	Non-Hispanic or Latino
Primary Language	English
Other Language	Spanish
Marital Status	Married

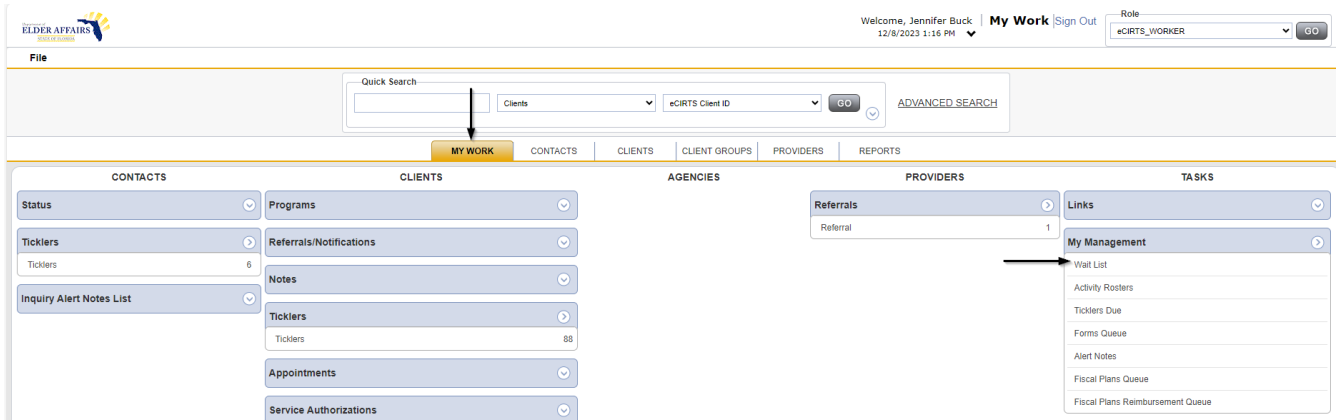
## Eligibility Specialist Assigned

Once the EMS release date is received from AHCA, the ADRC supervisor or designee will assign each client to an Eligibility Specialist.

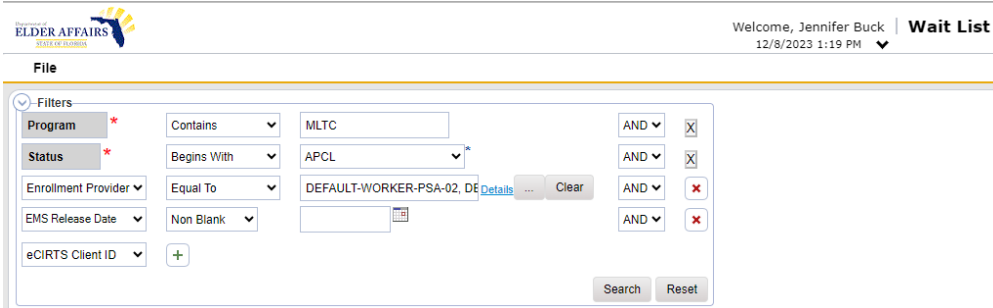


### Role: eCIRTS Worker

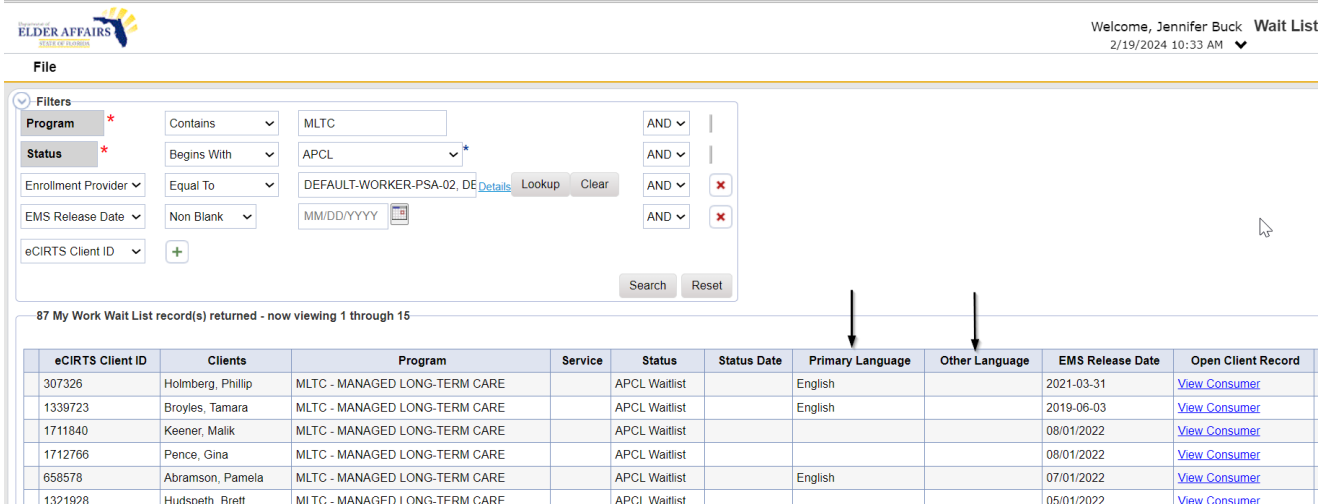
1. Use **EMS Release Report** or use the **My Work > Waitlist** queue filters to determine Eligibility Specialist assignments. Navigate to **My Work**.
2. Select the **Tasks > My Management > Wait List** queue.



3. Enter the following search filters:
  - a. **Program:** contains MLTC
  - b. **Status:** begins with APCL
  - c. **Enrollment Provider:** search for and select the generic Default PSA worker record for your PSA knowing the MLTC waitlist enrollments are assigned first to this 'queue' then assigned to an eligibility specialist.
  - d. **EMS Release Date:** not blank



4. Click **Search**. MLTC records in APCL status in your PSA that need to be assigned to an eligibility specialist are listed. Note **Primary Language** and **Other Language** are visible in the search results. These can help the assignment process.



- Each client will be assigned to an eligibility specialist by changing the Enrollment Provider on the MLTC program record. From the Wait List search results, select the **View Consumer link**. This will open the full client record. Select the **MLTC APCL** record from the **Programs** tab.

Filters

Program \* Contains MLTC AND

Status \* Begins With APCL AND

Enrollment Provider Equal To DEFAULT-WORKER-PSA-02, DE Details Lookup Clear AND X

EMS Release Date Non Blank MM/DD/YYYY AND X

eCIRTS Client ID +

Search Reset

87 My Work Wait List record(s) returned - now viewing 1 through 15

eCIRTS Client ID	Clients	Program	Service	Status	Status Date	Primary Language	Other Language	EMS Release Date	Open Client Record
307326	Holmberg, Phillip	MLTC - MANAGED LONG-TERM CARE		APCL Waitlist		English		2021-03-31	<a href="#">View Consumer</a>
1339723	Broyles, Tamara	MLTC - MANAGED LONG-TERM CARE		APCL Waitlist		English		2019-06-03	<a href="#">View Consumer</a>
1711840	Keener, Malik	MLTC - MANAGED LONG-TERM CARE		APCL Waitlist				08/01/2022	<a href="#">View Consumer</a>
1712766	Pence, Gina	MLTC - MANAGED LONG-TERM CARE		APCL Waitlist				08/01/2022	<a href="#">View Consumer</a>
658578	Abramson, Pamela	MLTC - MANAGED LONG-TERM CARE		APCL Waitlist		English		07/01/2022	<a href="#">View Consumer</a>
1321928	Hudspeth, Brett	MLTC - MANAGED LONG-TERM CARE		APCL Waitlist				05/01/2022	<a href="#">View Consumer</a>

- If you only need to edit the MLTC program record, you can just click it from the Wait List search results list. The **Program** details page displays.

Erick Colton  
Last Updated by Admin  
at 10/6/2022 5:31:56 PM

**Program**

File Tools

Program

Division \* AG

Referred From

Referral Date 04/28/2021

Program \* MLTC - MANAGED LONG-TERM CARE Details

Service

Status \* APCL Waitlist

Status Effective Date \* 12/08/2023

Historical Start Date/Billing Start Date \* 04/02/2021

- Select the **Enrollment Provider** subpage. Any worker ever associated with this enrollment will be listed. Add the eligibility specialist. From the **File** menu, select **Assign Enrollment Provider**.

Erick Colton  
12/8/2023 1:27 PM

**Enrollment Provider**

File Tools

Assign Enrollment Provider

Print

Close Enrollment Provider

Track Status

2 Enrollment Provider record(s) returned - now viewing 1 through 2

Enrollment Provider Name	Start Date	End Date	Active	Primary	
AREA AGENCY ON AGING FOR NORTH, DEFAULT-WORKER-PROV-20000	04/28/2021		Yes	No	<input type="checkbox"/>
DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02	08/31/2022		Yes	Yes	<input type="checkbox"/>

First Previous Records per page 15 Next Last



8. Search for and select the name of the assigned eligibility specialist.

The screenshot shows the 'Enrollment Provider' form in the 'File' menu. A search modal is open with 'Last Name' selected and 'buck' entered in the search text field. The search results table is as follows:

MEMBERID	Worker	Title	User ID	Active
155	Buck, Jennifer	Contact Person 2		Yes
2750	Buckingham, Tracey			No
21732	BUCKLE, RENAE			No
26278	BUCKLE, RENEE			Yes
14351	Buckley, Charnee			No
19622	BUCKLEY, LEAH			No
45444	Buckley, Tom			No

9. The page refreshes and the name is populated. Update the following fields:

- Start Date:** default to today. Can be backdated if needed.
- End Date:** leave blank. Can be added if/when this worker is no longer active with this case.
- Primary:** Check the box. Only one worker can be Primary, and you want it to be the eligibility specialist. The Primary worker is the one who will be able to see this client on their My Work queues.
- Active:** check the box

The screenshot shows the 'Enrollment Provider' form with the following fields updated:

- Enrollment Provider Name:** Buck, Jennifer
- Start Date:** 12/08/2023
- End Date:** (blank)
- Primary:**
- Active:**

10. From the **File** menu, select **Save and Close Enrollment Provider**.

11. The eligibility specialist will access his/her caseload on **My Work**. Proceed to the [View Caseload](#) section.

### View Caseload

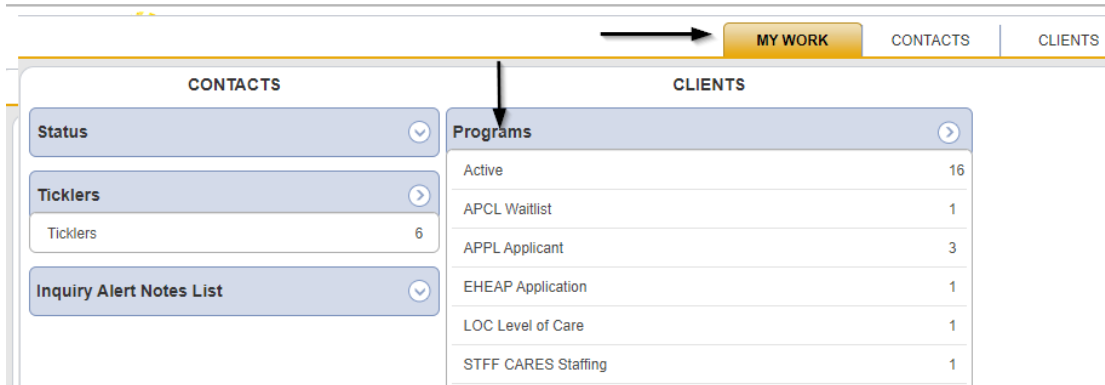
The eligibility specialist can use the queues on My Work to view and manage their caseload as the client's progress through the EMS release, CARES Assessment, LOC determination and eligibility process.



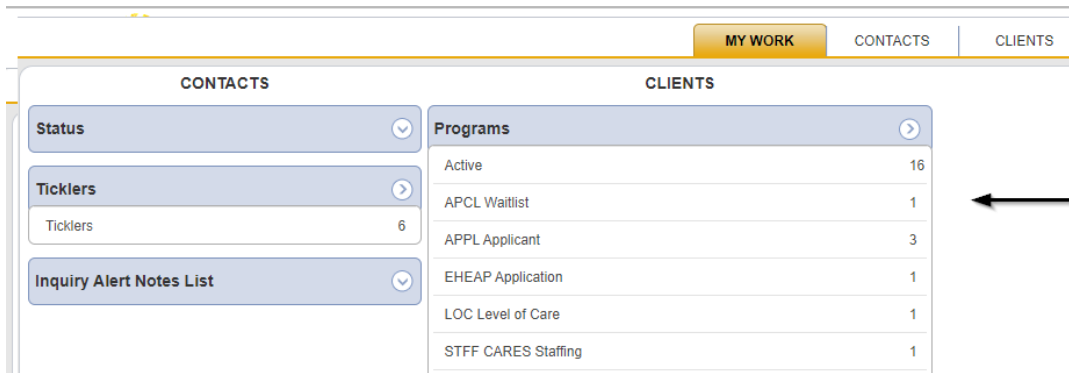
Role: **eCIRTS Worker**

To view newly assigned cases:

1. Navigate to **My Work**. Select the **Clients > Programs** queue.



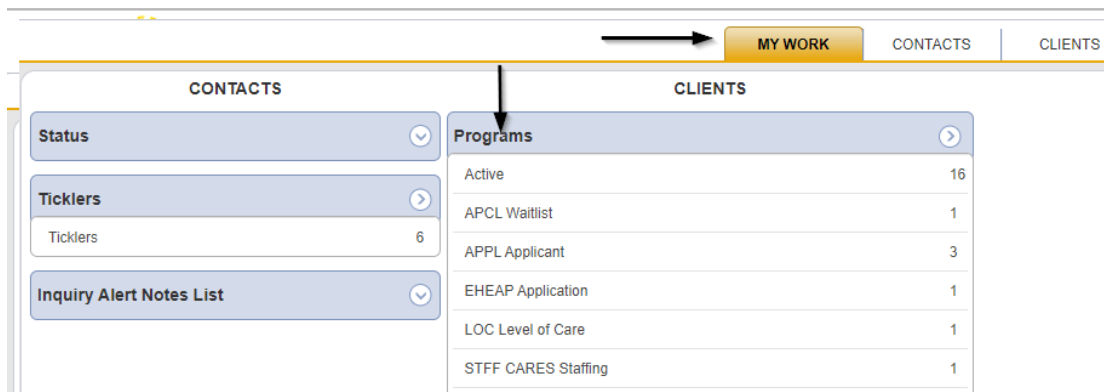
2. New cases that have been assigned to the eligibility specialist will be visible by selecting the **APCL Waitlist** queue.



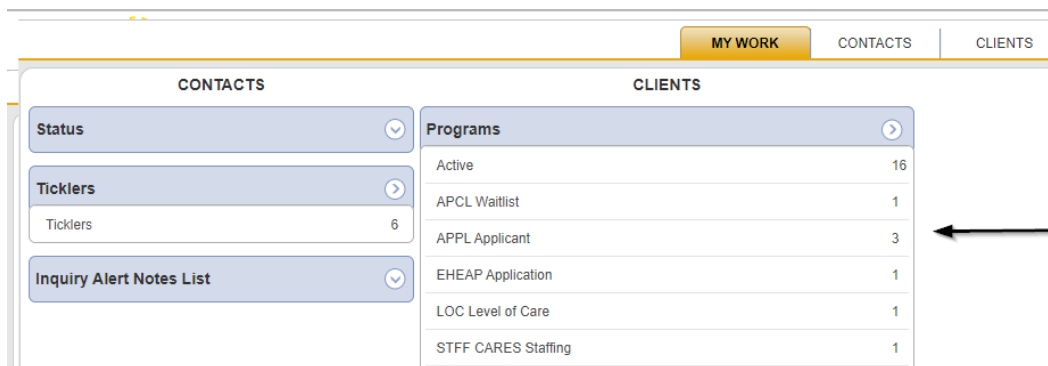
3. Each assigned case will need to be contacted to confirm the client's interest. Pre-research release tasks must also be completed. The PSA will determine which should come first but both must be completed before the MLTC record can go into APPL status and the CARES referral made. Proceed to the following sections:
  - a. [Contact Attempts](#)
  - b. [Pre-release Research Tasks](#)

To view cases referred to CARES awaiting LOC:

1. Navigate to **My Work**. Select the **Clients > Programs** queue.



2. Cases that have been referred to CARES and are awaiting LOC will be visible by selecting the **APPL Applicant**. Other cases in APPL Applicant status will also be visible in this queue.



## Contact Attempts

Eligibility specialists will make up to 3 contact attempts to reach the client and confirm their interest before making the CARES referral. Each contact attempt will be documented on a separate Contact record in eCIRTS. For some PSAs this step happens before the Pre-Release Research tasks. For other PSAs, the Pre-Release Research tasks come first. Regardless of the order, the steps to complete in eCIRTS are the same and both must be completed before making the CARES referral.

It's best practice to view past contacts before reaching out to a client. Also be prepared to update the client's demographic information as needed. See the [As Needed: View Contact Information](#) section.



Role: **eCIRTS Worker**

## Add Contact Record

The contact record houses the details of a call/contact attempt. A contact record can be added directly from a shortcut on the client search or a shortcut on the client > Demographic page.



Role: **eCIRTS Worker**

1. The eligibility specialist will first search for the existing client record.
2. From the existing client search results, select the flyout menu to the right of the client's name in the search results. Select **Add Contacts**. The Contact Details page displays.

3. Or, with the client record already open, select the **Demographics** tab. From the **File** menu, select **Add Contact**. The Contact Details page displays.

4. The Contact details page displays. Update the following fields:
  - a. **Division:** Required. Defaults to AG as is read only.
  - b. **Contact Date:** Required. defaults to today and is editable if needed.
  - c. **Contact Time:** Required. defaults to now and is editable if needed.
  - d. **Received By:** Required. defaults to the eligibility specialist adding the contact record.
  - e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
  - f. **Current Task:** Select Eligibility
  - g. **Contact Method:** Required. defines how the contact was made.
  - h. **Anonymous:** Leave blank
  - i. **eCIRTS ID:** populates automatically and is read only.
  - j. **Client First Name:** populates automatically.
  - k. **Client Last Name:** populates automatically.
  - l. **Call Back Phone:** populates automatically – update if needed.
  - m. **Caller if other than Client:** search field. If the Caller already exists on the client's Associated People tab, their name will be listed, and the eligibility specialist can pick it from the list to populate the field.

Client First Name: Randy  
 Client Last Name: Slaton  
 Call Back Phone: (555)572-0865  
 Caller if other than Client:   
 Relationship:   
 Contact Type \*

DialogRelationDataLookups

RECID	Name	Relationship	Phone	Date Of Birth
363759	Voncie Goldsmith	Aunt	(850) 494 7101	

Short Summary

If not, the eligibility specialist can close the search window by clicking the X at the top right and just type the name into the "Caller if other than client" box on the contact screen.

Client First Name: Randy  
 Client Last Name: Slaton  
 Call Back Phone: (555)572-0865  
 Caller if other than Client: John Smith  
 Relationship: Brother

- n. **REMINDER!**: ADD ASSOCIATED PEOPLE RECORD FOR CALLER. This message displays when a value is added to the Caller if Other than Client field.

Caller if other than Client: John Smith  
 Relationship:   
**REMINDER!** ADD ASSOCIATED PEOPLE RECORD FOR CALLER

- o. **Relationship**: enter the relationship of the caller to the client
- p. **Contact Type**: select SMMC LTCP – Eligibility
- q. **Short Summary**: leave blank. Will be updated later in the workflow.
- r. **Notes**: leave blank. Will be updated later in the workflow.
- s. **Contact Marker**: leave blank.
- t. **SNAP Submittal Date**: leave blank.
- u. **Reason for Contact**: leave blank. Will be updated later in the workflow.
- v. **Referral Type**: leave blank.
- w. **701S Appointment Date**: leave blank.
- x. **Unmet Needs Reason**: leave blank.
- y. **Assigned To**: see next sections.
- z. **Screener**: leave blank
- aa. **Contact Status**: can remain Draft. Will be updated later in the workflow.
- bb. **Duration**: will automatically populate after the record is saved.
- cc. **Client Primary Language**: leave blank. This field is used when the screening referral from the Helpline is created.
- dd. **Other Language**: leave blank. This field is used when the screening referral from the Helpline is created.
- ee. **Follow Up Date**: leave blank.
- ff. **Screening Referral Created Date**: leave blank.

5. From the **File** menu, select **Save Contact**.

6. Proceed to one of the following scenarios:

- a. [Unsuccessful Contact 1](#)
- b. [Unsuccessful Contact 2](#)
- c. [Unsuccessful Contact 3](#)
- d. [Successful Contact – Client Not Interested](#)
- e. [Successful Contact – Client Hospitalized/NH](#)
- f. [Successful Contact – Client Confirms Interest](#)

## Unsuccessful Contact 1

An unsuccessful contact is when a contact attempt is made, and the worker does not speak with the caller/client. The worker will make up to 3 contact attempts, all documented in separate eCIRTS Contact records. This section includes steps to document the first unsuccessful contact attempt.



Role: **eCIRTS Worker**

1. With the contact details page open, update the following fields to complete this contact record:
  - a. **Short Summary:** brief details about the unsuccessful attempt. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - c. **Contact Type:** remains SMMC LTCP - Eligibility
  - d. **Reason for Contact:** Waitlist Release - Attempt 1
  - e. **Contact Status:** update to Complete.
  - f. **Assigned To:** search for and select your own name if not already selected.
2. From the **File** menu, select **Save and Close Contact**.
3. When a contact record is saved with Contact Type = SMMC LTCP – Eligibility and Contact Status = Complete and Reason for Contact = Waitlist Release - Attempt 1, eCIRTS will automatically create a second contact record to track the second contact attempt. The eligibility specialist will filter the Contacts queue to view and manage contact attempts that require follow up. Proceed to the [Follow Up](#) section.

## Unsuccessful Contact 2

This section includes steps to document the second unsuccessful contact attempt.



Role: **eCIRTS Worker**

1. With the contact details page open, update the following fields to complete this contact record:
  - a. **Short Summary:** brief details about the unsuccessful attempt. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - c. **Contact Type:** remains SMMC LTCP - Eligibility
  - d. **Reason for Contact:** Waitlist Release - Attempt 2
  - e. **Contact Status:** update to Complete.
  - f. **Assigned To:** search for and select your own name if not already selected.
2. From the **File** menu, select **Save and Close Contact**.
3. When a contact record is saved with Contact Type = SMMC LTCP – Eligibility and Contact Status = Complete and Reason for Contact = Waitlist Release - Attempt 2, eCIRTS will automatically create a second contact record to track the second contact attempt. The eligibility specialist will filter the

Contacts queue to view and manage contact attempts that require follow up. Proceed to the [Follow Up](#) section.

### Unsuccessful Contact 3

This section includes steps to document the third unsuccessful contact attempt and close the case.




Role: **eCIRTS Worker**


1. With the contact details page open, update the following fields to complete this contact record:
  - a. **Short Summary:** brief details about the unsuccessful attempt and closing of the MLTC enrollment. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - c. **Contact Type:** remains SMMC LTCP - Eligibility
  - d. **Reason for Contact:** Waitlist Release - Attempt 3
  - e. **Contact Status:** update to Complete.
  - f. **Assigned To:** search for and select your own name if not already selected.
2. From the **File** menu, select **Save and Close Contact**.
3. When a contact record is saved with Contact Type = SMMC LTCP – Eligibility and Contact Status = Complete and Reason for Contact = Waitlist Release – Attempt 3, eCIRTS will NOT automatically create an additional contact record.
4. The eligibility specialist will also close the MLTC program record. From the open client record, select the **Programs** tab. A list of program enrollments is displayed. Select the MLTC program record in APCL status. Update the following fields:
  - a. **Status:** Terminate – APCL Waitlist
  - b. **Termination Reason:** Lost Contact

<b>Program</b>	Division *	AG
Enrollment Provider	Referred From	
Track Status	Referral Date	04/20/2023
	Program *	MLTC - MANAGED LONG-TERM CARE <a href="#">Details</a>
	Service	AGGREGATE ADC BASI CA CM CHO CNMI
	Status *	Terminate - APCL Waitlist
	Status Effective Date *	12/11/2023
	Historical Start Date/Billing Start Date *	04/20/2023
	AHCA County	
	Enrollment Exception	
	Exception Reason	
	Termination Reason *	Lost Contact
	End Date *	12/11/2023

- From the **File** menu, select **Save Programs**. Do NOT select Save and Close Programs.
- Select the **Enrollment Provider subpage**. Changing the enrollment provider from yourself back to the generic Default PSA provider for your PSA will remove this client from your caseload and it will no longer be visible on your My Work page. For those PSAs who honor the [Return to Pipeline](#) – 6 month period, this step might not be completed right away as the eligibility specialist will remain assigned to the case for the 6 month waiting period in case the client re-engages.
- When this does need to be completed, complete the following steps to change the Primary designation from yourself to the generic Default PSA worker for your PSA. From the **Enrollment Provider subpage**. Select the Default PSA Worker record for your PSA.


Emily Cares  
12/11/2023 5:00 PM

Enrollment Provider

**File** 

Program

**Enrollment Provider**

Track Status

Filters

Enrollment Provider Name  +


Search Reset

3 Enrollment Provider record(s) returned - now viewing 1 through 3

Enrollment Provider Name	Start Date	End Date ▲	Active	Primary	<input type="checkbox"/>
DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02	04/20/2023		Yes	No	<input type="checkbox"/>
Buck, Jennifer	05/26/2023		Yes	Yes	<input type="checkbox"/>

- The Enrollment Provider details page displays. Update the following fields:
  - Primary**: check the box
  - End Date**: enter the date you are making the change.





**ELDER AFFAIRS**  
STATE OF KANSAS

Emily Cares  
Last Updated by jbucket  
at 5/30/2023 9:51:27 AM

**Enrollment  
Provider**

---

**File**

---

Enrollment Provider

**Enrollment Provider**

Enrollment Provider Name *	DEFAULT-WORKER-PSA-02, DEF	<a href="#">Details</a>
Start Date *	04/20/2023	
End Date	12/11/2023	
Primary	<input checked="" type="checkbox"/>	
Active	<input checked="" type="checkbox"/>	

9. From the **File** menu, select **Save and Close Enrollment Provider**.

10. If the client reaches out within 6 months of closing the MLTC record, proceed to the [Return to Pipeline](#) section.

### Successful Contact – Client Not Interested

This workflow should be used when a contact attempt is made, and the client is reached but has decided NOT to pursue services.



#### Role: eCIRTS Worker

1. With the contact details page open, update the following fields to complete this contact record:
  - a. **Short Summary:** Note the client was not interested. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - c. **Contact Type:** remains SMMC LTCP – Eligibility
  - d. **Reason for Contact:** Waitlist Release
  - e. **Contact Status:** update to Complete.
  - f. **Assigned To:** defaults to self. Can remove value or leave as is.
2. From the **File** menu, select **Save and Close Contact**.
3. The eligibility specialist will also close the MLTC program record. From the open client record, select the **Programs** tab. A list of program enrollments is displayed. Select the MLTC program record in APCL status. Update the following fields:
  - a. **Status:** Terminate – APCL Waitlist
  - b. **Termination Reason:** By Client

**File Tools**

**Program**

Enrollment Provider

Track Status

Division \* AG

Referred From

Referral Date 04/20/2023

Program \* MLTC - MANAGED LONG-TERM CARE [Details](#)

Service  
AGGREGATE  
ADC  
BASI  
CA  
CM  
CHO  
CNMI

Status \* Terminate - APCL Waitlist

Status Effective Date \* 12/11/2023

Historical Start Date/Billing Start Date \* 04/20/2023

AHCA County

Enrollment Exception

Exception Reason

Termination Reason \* By Client

End Date \* 12/11/2023

4. From the **File** menu, select **Save Programs**. Do NOT select Save and Close Programs.
5. Select the **Enrollment Provider** subpage. Changing the enrollment provider from yourself back to the generic Default PSA provider for your PSA will remove this client from your caseload and it will no longer be visible on your My Work page. Select the Default PSA Worker record for your PSA.

Department of  
**ELDER AFFAIRS**  
STATE OF FLORIDA

Emily Cares  
12/11/2023 5:00 PM

**Enrollment Provider**

**File Tools**

Program

**Enrollment Provider**

Track Status

Filters

Enrollment Provider Name

Search Reset

3 Enrollment Provider record(s) returned - now viewing 1 through 3

Enrollment Provider Name	Start Date	End Date ▲	Active	Primary	<input type="checkbox"/>
DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02	04/20/2023		Yes	No	<input type="checkbox"/>
Buck, Jennifer	05/26/2023		Yes	Yes	<input type="checkbox"/>

6. The Enrollment Provider details page displays. Update the following fields:
  - a. **Primary**: check the box
  - b. **End Date**: enter the date you are making the change.

The screenshot shows a web interface for 'ELDER AFFAIRS STATE OF KANSAS'. In the top right, it says 'Emily Cares Last Updated by jbucket at 5/30/2023 9:51:27 AM' and 'Enrollment Provider'. Below this is a 'File' menu. The 'Enrollment Provider' form is open, showing the following fields:

Enrollment Provider	
Enrollment Provider Name *	DEFAULT-WORKER-PSA-02, DEF <a href="#">Details</a>
Start Date *	04/20/2023
End Date	12/11/2023
Primary	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>

- From the **File** menu, select **Save and Close Enrollment Provider**

### Successful Contact – Client Hospitalized/Nursing Home

This workflow should be used when the client has been hospitalized or placed in a nursing home and wants to continue the eligibility process.



#### Role: eCIRTS Worker

- With the contact details page open, update the following fields to complete this contact record:
  - Short Summary:** Note the client was hospitalized or placed in a nursing home. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - Contact Type:** remains SMMC LTCP – Eligibility
  - Reason for Contact:** Waitlist Release
  - Contact Status:** update to Complete.
  - Assigned To:** defaults to self. Can remove value or leave as is.
- From the **File** menu, select **Save and Close Contact**.
- The eligibility specialist will also close the MLTC program record. From the open client record, select the **Programs** tab. A list of program enrollments is displayed. Select the MLTC program record in APCL status. Update the following fields:
  - Status:** Terminate – APCL Waitlist
  - Termination Reason:** Client Hospitalized or Placed in Nursing Home

**File** **Tools**

**Program**

Enrollment Provider

Track Status

Division \* AG

Referred From

Referral Date 04/20/2023

Program \* MLTC - MANAGED LONG-TERM CARE [Details](#)

Service

AGGREGATE  
ADC  
BASI  
CA  
CM  
CHO  
CNMI

Status \* Terminate - APCL Waitlist \*

Status Effective Date \* 12/11/2023

Historical Start Date/Billing Start Date \* 04/20/2023

AHCA County

Enrollment Exception \*

Exception Reason

Termination Reason \* Client Hospitalized

End Date \* 12/11/2023

4. From the **File** menu, select **Save Programs**. Do NOT select Save and Close Programs.
5. Select the **Enrollment Provider** subpage. Changing the enrollment provider from yourself back to the generic Default PSA provider for your PSA will remove this client from your caseload and it will no longer be visible on your My Work page. For those PSAs who honor the [Return to Pipeline](#) – 6-month period, this step might not be completed right away.
6. When this does need to be completed, complete the following steps to change the Primary designation from yourself to the generic Default PSA worker for your PSA. From the **Enrollment Provider** subpage. Select the Default PSA Worker record for your PSA.

Department of  
**ELDER AFFAIRS**  
STATE OF FLORIDA

Emily Cares | **Enrollment Provider**  
12/11/2023 5:00 PM

**File** **Tools**

**Program**

**Enrollment Provider**

Track Status

Filters


Enrollment Provider Name

Search Reset

3 Enrollment Provider record(s) returned - now viewing 1 through 3

Enrollment Provider Name	Start Date	End Date ▲	Active	Primary	<input type="checkbox"/>
DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02	04/20/2023		Yes	No	<input type="checkbox"/>
Buck, Jennifer	05/26/2023		Yes	Yes	<input type="checkbox"/>

7. The Enrollment Provider details page displays. Update the following fields:
  - a. **Primary**: check the box
  - b. **End Date**: enter the date you are making the change.



**ELDER AFFAIRS**  
STATE OF KANSAS

Emily Cares  
Last Updated by jbucket  
at 5/30/2023 9:51:27 AM

**Enrollment  
Provider**

---

**File**

---

Enrollment Provider

**Enrollment Provider**

Enrollment Provider Name *	DEFAULT-WORKER-PSA-02, DEF	<a href="#">Details</a>
Start Date *	04/20/2023	
End Date	12/11/2023	
Primary	<input checked="" type="checkbox"/>	
Active	<input checked="" type="checkbox"/>	

8. From the **File** menu, select **Save and Close Enrollment Provider**.
9. If the client reaches out within 6 months of closing the MLTC record, proceed to the [Return to Pipeline](#) section.

### Successful Contact – Client Confirms Interest

This section includes steps to document a successful contact and update the MLTC program record when the client confirms interest.



Role: **eCIRTS Worker**

1. With the contact details page open, update the following fields to complete this contact record:
  - a. **Short Summary:** Note the client confirmed interest. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - c. **Contact Type:** remains SMMC LTCP – Eligibility
  - d. **Reason for Contact:** select Waitlist Release if this is the first contact attempt. Select Medicaid Eligibility if this is the second or third contact attempt.
  - e. **Contact Status:** update to Complete.
  - f. **Assigned To:** defaults to self. Can remove value or leave as is.
2. From the **File** menu, select **Save and Close Contact**.
3. The eligibility specialist will also update the MLTC program record. From the open client record, select the **Programs** tab. A list of program enrollments is displayed. Select the MLTC program record in APCL Waitlist status. Update the following fields:
  - a. **Status:** APPL Applicant

File Tools	
<b>Program</b>	Division * AG
Enrollment Provider	Referred From ARC or ADRC
Track Status	Referral Date 02/20/2023
	Program * MLTC - MANAGED LONG-TERM CARE <a href="#">Details</a>
	Service AGGREGATE ADC BASI CA CM CHO CNMI
	Status * APPL Applicant
	Status Effective Date * 12/12/2023
	Historical Start Date/Billing Start Date * 02/20/2023
	AHCA County
	Enrollment Exception
	Exception Reason

- From the **File** menu, select **Save and Close Programs**.
- You do NOT need to update the worker on the **Enrollment Provider subpage**. You want this client to remain visible on your My Work page so you can manage your caseload throughout the staffing process and level of care determination. The MLTC interface will change the enrollment provider from yourself to the MCO when the client is Medicaid active.
- Proceed to the [Medicaid Waiver Timeline Form](#) section.

### As Needed: View Contact Information

In eCIRTS, all callers, except anonymous ones, will have a client record. Contact records will then be added to the client record. This workflow allows eligibility specialists to view past contact information in several ways in eCIRTS.

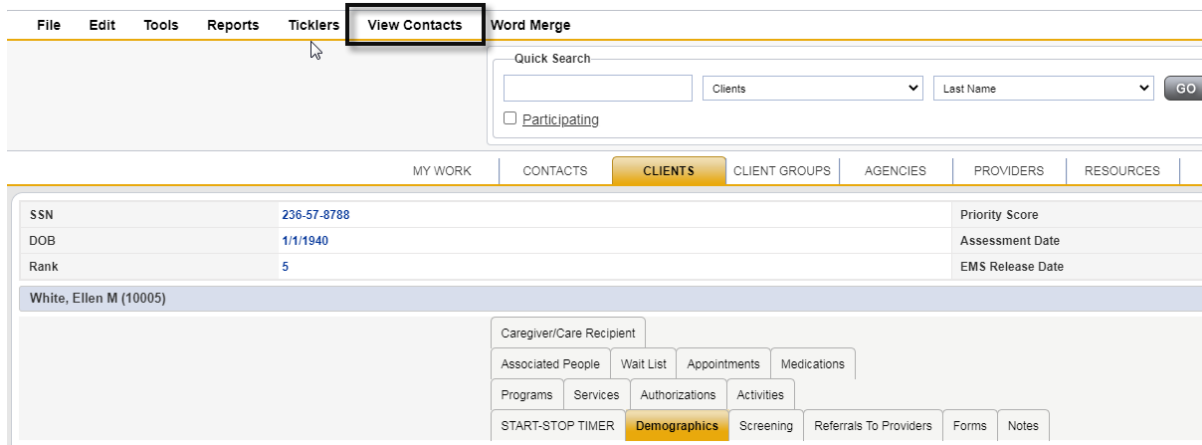
- The View Contacts list is an easily accessible list of the client's past contacts because knowing the details of previous contacts may assist with the current contact.
- The Contacts Queue is a full list of all contacts that can be filtered down so eligibility specialists can manage their workloads and supervisors can oversee work.
- In addition to the queue, there is also a report that displays all past contacts for a client. The report can be run from any open contact record and will automatically display information on all past contacts for the client record you are on, without having to add any report filters.

Workers also need to be prepared to review and update the client's demographic information as needed.

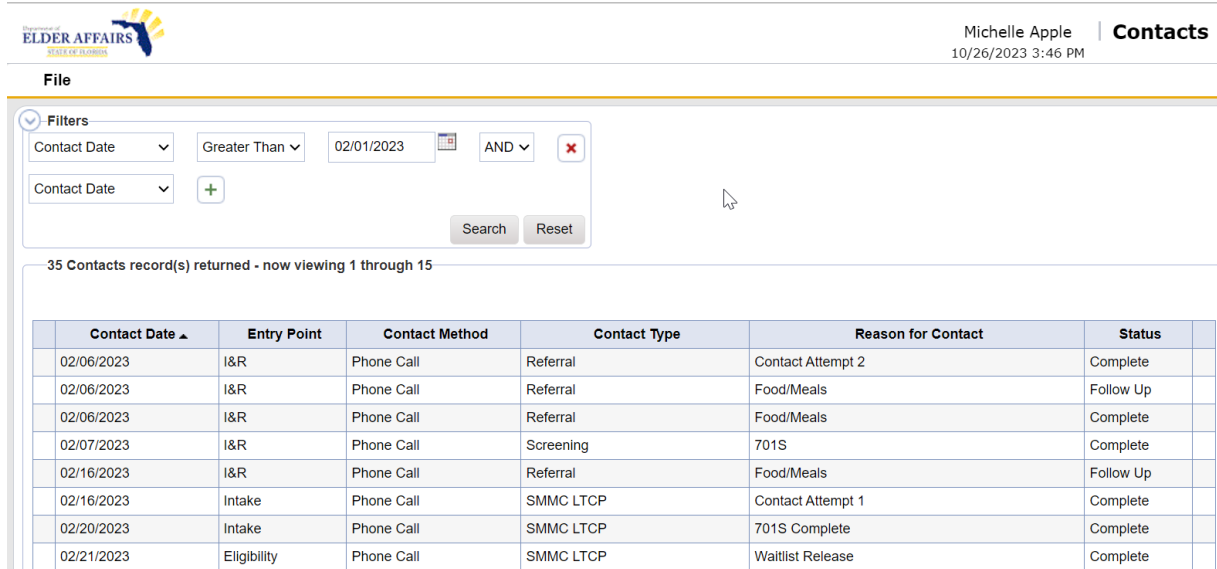


### Role: eCIRTS Worker

- There are several ways to view previous contacts for a client. From the **Clients** chapter, from any tab on the client's record, select **View Contacts** from the top menu bar.



- A limited summary view of the client’s past contacts displays. This list does NOT display the Short Summary field from the contact record.



- Select a record for more information. The Contact record will open. If it is in complete status, all of the fields will be read only, but the information is still visible.
- When finished, the eligibility specialist can close the Contact record and close the View Contacts window.
- A more detailed list of previous contact information is available by selecting the **Contacts** chapter. A full list of previous contacts for all clients is available but too long to look through. The filters are essential to making this list manageable and useful. Search by **eCIRTS Client ID** to display only the previous contacts for one client.

MY WORK CONTACTS CLIENTS CLIENT GROUPS RESOURCES REPORTS

Filters  
Save Filter Screener - Jennifer Search Filter Save As Default Save As Delete

Screener Equal To Buck, Jennifer Details Clear AND X

PSA  
eCIRTS Client ID  
Contact Date  
Client First Name - Adding Contact to Client  
Client Last Name  
Client DOB  
Call Back Phone  
Caller if Other Than Client  
Contact Type  
Reason for Contact  
Referral Type  
701S Appointment Date  
Follow Up Date  
Screening Referral Created Date  
Primary Language  
Other Language  
Short Summary  
Assigned To  
Screener

row viewing 1 through 15

Client First Name - Adding Contact to Client	Client Last Name	Client DOB	Call Back Phone	Caller if Other Than Client	Contact Type	Reason for Contact	Referral Type	701S Appointment Date	Follow Up Date	Screening Referral Cr
Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Assessment Not Needed - Client Declined				06/28/2023
Sarah	Apple	01/01/1940			SMMC LTCP - Screening	701S Complete				06/29/2023
Sarah	Apple	01/01/1940		Michael Apple	SMMC LTCP - Screening	Contact Attempt 1	Initial			06/28/2023
Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 1	Rescreening			
Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 1	Initial			
Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 1	APS - Intermediate			
Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 1	Initial			
Sarah	Apple	01/01/1940			SMMC LTCP - Screening	Contact Attempt 2	Initial			
Sarah	Apple	01/01/1940			SMMC LTCP - Screening	30 Day NCL	Initial			
2 1750746	07/06/2023	Sarah	Apple	01/01/1940	SMMC LTCP - Screening	Contact Attempt 1				
2 1750746	07/06/2023	Sarah	Apple	01/01/1940	SMMC LTCP - Screening	701S Scheduled				
1412768	05/22/2023	M	Ap	04/24/1944	Screening	Contact Attempt 1				
2 1412768	05/23/2023	M	Ap	04/24/1944	Screening					
	05/19/2023	Jeremy	Apple		(555)555-5555	Screening				
	05/19/2023	Johnny	Applesseed		(555)555-5555	Information				
	1412768	05/19/2023	Test	Visibility	04/24/1944	Screening				
	1412768	05/19/2023	M	Ap	04/24/1944	Screening				



### TIP

Saved filters are key. Be sure to take the time to create several saved filters specific to your day-to-day workload.

- Finally, if you have a contact record open, select **Previous Contact Report** from the **Reports** menu.
- The report displays all previous contact information for the client record you have opened.
- With the contact record still open, the worker should confirm the client's Demographics and update as needed. Since this workflow started on the client record, the worker can easily view the client's demographic information on the **Client** subpage.
- Click on the record to view additional demographic data. You can see the data; you cannot edit it from this page. To open the client record where the Demographics can be updated, from the **Tools** menu, select "View Client." See the [As Needed: Update Demographics](#) section for details on editing this page. Once complete, return to the open Contact record.

## As Needed: Update Demographics

You can edit Demographics from this same page. For existing clients, the Demographics summary page shows first and displays the most frequently referenced Demographic fields. There are more Demographics data elements to view but the user must select **Edit Demographics** from the **File** menu to view/edit them.



Role: **eCIRTS Worker**



Demographics			
EMS Release Date	02/01/2021	SSN	236-57-8788
eCIRTS Client ID	10005	Pseudo SSN	
Former CIRTS ID		Gender	Female
First Name	Ellen	Age	81
Last Name	White	Race	Asian, White
Middle Initial	M	Ethnicity	Non Hispanic or Latino
AKA Name		Primary Language	English
Date of Birth	1/1/1940	Other Language	
Date of Death	1/1/2021		
Contact Information			
Address Type	Mailing	PSA	2
Address Category	Assisted Living Facility	Agency - populated by places list?	2B
Street	123 Home St	Best Contact	(259) 744-8878
Street 2		Home Phone	
City	TALLAHASSEE	Work Phone	(850) 235-9774
State	FL	Mobile Phone	(850) 333-7777
Zip Code	32305	Email	
County	LEON		
Rank	5		
Priority Score	50		
Assessment Date	06/01/2021		
Interpreter Services Used	Yes		

1. To edit or add demographic information or see additional Demographic information not displayed on the Demographic Summary page, select **Edit Demographics** from the **Edit** menu. The Demographic Details page displays.

Ellen White  
Last Updated by System  
at 5/11/2021 10:14:19 AM

**Demographics** Sign Out

Role: DOEA Main GO

File Edit Tools Reports Ticklers View Contacts Word Merge

**Edit Demographics**

Participating

Clients Last Name GO ADVANCED SEARCH

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

SSN	236-57-8788	Priority Score	50
DOB	1/1/1940	Assessment Date	
Rank	5	EMS Release Date	02/01/2021

White, Ellen M (10005)

Caregiver/Care Recipient

Case Relations Authorizations Activities Medications

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

2. The Demographic Details page has several sections. The eCIRTS user may need to revisit this page several times to collect all the data from the client. The only required fields that must be completed before the Demographics page can be saved are First Name, Last Name, Date of Birth, Gender, Race, Ethnicity, County and PSA.

### Basic Demographics:

- a. **EMS Release Date:** AHCA provides the EMS Release Date for a set number of clients.
- b. **Former CIRTS ID:** the ID number for the client in the legacy CIRTS system
- c. **First Name\*:** client's first name
- d. **Last Name\*:** client's last name
- e. **Middle Initial:** client's middle initial

- f. **AKA Name:** alias name for the client if applicable
- g. **Title:** the client's title
- h. **Date of Birth\*:** client's birthday
- i. **DOB Unknown:** use this field when the DOB is not known, and the DOB field will be hidden and no longer required.
- j. **Age:** client's age
- k. **Date of Death:** client's date of death, if applicable
- l. **SSN:** client's social security number. The SSN in this field will populate in other places of the application like 701S and 701B assessments.



**NOTE**

In March 2022, DOEA approved the change to mask SSN in eCIRTS to comply with requirements.

Only users with the eCIRTS SSN Manager role can see a full SSN. All other users can only see the last 4 digits.

Users can still search by full SSN in the Quick Search or use the Advanced Search to search by the last 4 digits.



**NOTE**

Several roles can add SSN but only the eCIRTS SSN Manager role can unmask and edit the SSN. Only certain users will be given the eCIRTS SSN Manager role. The SSN can also be added/updated from the 701 Assessments. The SSN saved on assessments will also update the SSN on the Demographics page.

- m. **Pseudo SSN:** Pseudo SSN for the client when a real SSN is not known. The Pseudo SSN does not populate on the 701B assessment.
- n. **Medicaid Number:** Medicaid number of the client if applicable
- o. **Gender\*:** client's gender
- p. **Marital Status:** the marital status of the client
- q. **Head of Home:** Check if Yes. Leave blank if No.
- r. **Disabled:** NAPIS/OAAPS required field that pulls from the Assessment
- s. **Are you a veteran?:** Yes or No
- t. **Veteran Status:** If Are you a Veteran is equal to Yes, then answer this question.
- u. **Do you have Adult Cystic Fibrosis?:** Yes or No
- v. **Primary Race\*:** client's race.
- w. **Additional Race:** Multi select field to record additional race.
- x. **Ethnicity\*:** client's ethnicity
- y. **Primary Language:** The primary language of the client
- z. **Other Language:** Use this field to record other languages for the client.
- aa. **Other Communication Method:** Other communication method used by the client.
- bb. **Interpreter Service Used?:** Check this box if services were used. This will be tracked for invoicing purposes.
- cc. **Client has limited ability reading, writing, speaking or understanding English:** Yes or No

File Tools Reports

Demographics	Basic Demographics
Client Addresses	EMS Release Date: 3/1/2023
Client Phones	Former CIRT'S ID: 3332649103
	First Name *: Michelle
	Last Name *: Apple
	Middle Initial:
	AKA Name:
	Title:
	Date of Birth *: 04/24/1944
	DOB Unknown: <input type="checkbox"/>
	Age: 79.5
	Date of Death:
	SSN: XXX-XX-9103
	Pseudo SSN:
	Medicaid Number: 1112649103
	Gender *: Female
	Marital Status: Married
	Head of Home: <input type="checkbox"/>
	Annual Income:
	Disabled: <input type="checkbox"/>
	Are you a veteran?:
	Veteran Status:
	Do you have Adult Cystic Fibrosis?:
	Primary Race *: White
	Additional Race: American Indian/Alaska Native, Asian, Black/African American, Native Hawaiian/Pacific Island, Other, Unknown, White
	Ethnicity *: Non Hispanic or Latino
	Primary Language: English
	Other Language: Spanish
	Other Communication Method:
	Interpreter Services Used?: <input type="checkbox"/>
	Client has limited ability reading, writing, speaking, or understanding English: <input type="radio"/> Yes <input type="radio"/> No

**Contact Information:**

- Homeless?:** Yes or No
- Address Type:** Defaults to Physical. The physical address should be the primary address. Home and Mailing address can be added under the Client Address subpage.
- Address Category:** When Address Type is Physical, this field is visible and required.
- Facility Name:** Enter the facility name when applicable.
- Street:** Enter the street address
- Street 2:** Enter the street address.
- City:** Enter the city
- State:** The places list presents a list of values based on the city selected.
- Zip Code:** The places list presents a list of values based on the city, state selected.
- County\*:** The places list presents a list of values based on the city, state, zip selected.

**Note**

Several reports use the client's county to display results so be sure to enter this field.

- k. **PSA\***: The places list presents a list of values based on the city, state, zip, county selected.

**Note**

Several reports use the client's PSA to display results so be sure to enter this field.

- l. **Agency**: This field is populated by the places list with the Agency name.

**Note**

Several reports and behind the scenes automations use the full Agency Name in this field. Be sure to enter this field.

- m. **Best Contact**: The best number to reach the Client. This could be the Home, Work or Mobile phone number.
- n. **Phone Note**: description of the Best Contact number (i.e. sister, caregiver)
- o. **Home Phone**: The home phone number of the Client.
- p. **Work Phone**: The work phone number of the Client.
- q. **Work Extension**: The work phone number extension of the Client.
- r. **Mobile Phone**: The mobile or cell phone number of the Client.
- s. **Email**: The email address of the Client.
- t. **Address Note**: This field is used for notes about the address. It was added so users would record real USPS address information in the street fields instead of notes.

Contact Information	
Homeless?	<input type="checkbox"/>
Address Type	<input type="text" value="Physical"/>
Address Category *	<input type="text" value="Private Residence"/>
Facility Name	<input type="text"/>
Street	<input type="text" value="123 Test St"/>
Street 2	<input type="text"/>
City	<input type="text" value="Tallahassee"/> <input type="button" value="Clear"/>
State	<input type="text" value="FL"/> <input type="button" value="Clear"/>
Zip Code	<input type="text" value="32304"/> <input type="button" value="Clear"/>
County *	<input type="text" value="Leon"/> <input type="button" value="Clear"/>
Client PSA *	<input type="text" value="2"/> <input type="button" value="Clear"/>
Agency Name	<input type="text"/> <input type="button" value="Clear"/>
Best Contact	<input type="text" value="(555)264-9103"/>
Phone Note	<input type="text" value="this is the sister's phone number"/>
Home Phone	<input type="text" value="x(xxx)xxx-xxxx"/>
Work Phone	<input type="text" value="(777)264-9103"/>
Work Extension	<input type="text"/>
Mobile Phone	<input type="text" value="(888)264-9103"/>
Email	<input type="text" value="mreed@email.com"/>
Address Note	<input type="text"/>

**Additional Information:**

- a. **Rank:** The Priority rank from the most recent assessment and is updated every time a 701S, 701A or 701B is saved. It is read only.
- b. **Priority Score:** The Priority score from the most recent assessment is updated every time a 701S, 701A or 701B is saved. It is read only.
- c. **Assessment Date:** The date of the most recent assessment is updated every time a 701S, 701A or 701B is saved. It is read only.
- d. **Eligible for SS Disability:** Answer Yes or No.
- e. **Is Rural?:** OAAPS required field that is populated automatically based on the zip code in the Places List.
- f. **Lives Alone?:** OAAPS required field that pulls from the Assessment.
- g. **In Poverty?:** OAAPS required field that pulls from the Assessment.
- h. **NSIP Meal Eligible:** OAAPS required field that pulls from the Assessment.
- i. **NSIP Eligibility Type:** OAAPS required field that pulls from the Assessment.
- j. **Below 150% Poverty Level:** OAAPS required field that pulls from the Assessment.
- k. **High Nutrition Risk:** OAAPS required field that pulls from the Assessment.
- l. **Cognitive Impairment:** OAAPS required field that pulls from the Assessment.
- m. **ADL Score:** OAAPS required field that pulls from the Assessment.
- n. **IADL Score:** OAAPS required field that pulls from the Assessment.
- o. **CoPay:** Populate this field for client’s who have a copay

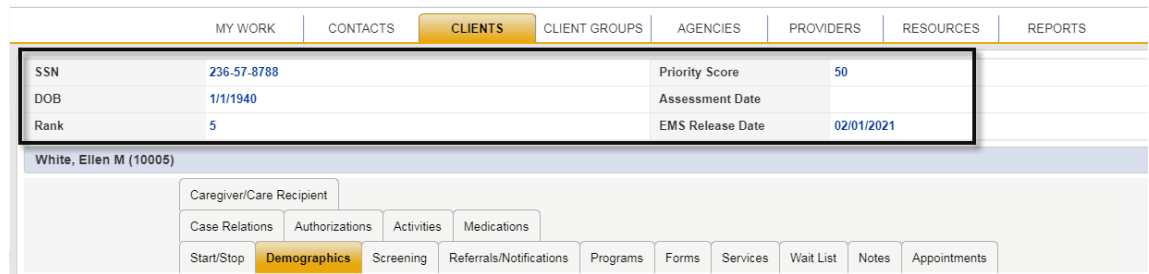
Additional Information	
Rank	5
Priority Score	52
Assessment Date	04/25/2023
Eligible for SS Disability	<input type="checkbox"/>
Is Rural?	<input type="checkbox"/>
Lives Alone?	<input checked="" type="checkbox"/>
In Poverty?	<input checked="" type="checkbox"/>
NSIP Meal Eligible	<input type="checkbox"/>
NSIP Eligibility Type	
Below 150% Poverty Level	<input checked="" type="checkbox"/>
High Nutrition Risk	<input type="checkbox"/>
Cognitive Impairment	<input type="checkbox"/>
ADL Score	24
IADL Score	20
CoPay	

3. When finished, from the **File** menu, select **Save and Close Demographics**.

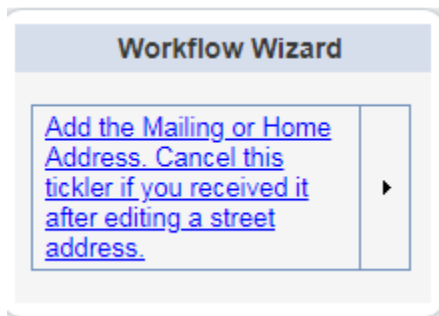


### Note

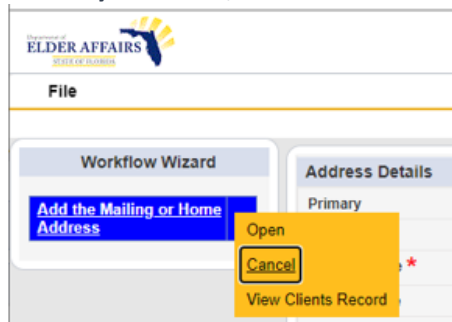
SSN, DOB, Rank, Priority Score, Assessment Date and EMS Release Date from the Demographics page are also visible in the header that remains visible on any tab of the Client record. As data for these fields changes on Demographics, it will also change in the header.



- 4. A workflow wizard triggers a tickler when street is added or edited on the Demographics page. The tickler is to add a second address, either Mailing or Home. The tickler lands the user on the Client Address details page. Proceed to step 6 of the [Client Address](#) section.



- 5. If you are editing the address and already have a second address, the tickler can be cancelled. From the tickler **flyout** menu, select **Cancel**.



### Client Address

The Demographics page houses many data elements including one primary address. If a client has multiple addresses, they are recorded on the Client Address subpage. Only the primary address is visible on the Demographics page.



Role: **eCIRTS Worker**

- 1. Navigate to the client’s record and select the **Demographics** tab.

2. From the File menu, select **Edit Demographics**.
3. The Demographics detail page displays. The Client Addresses and Client Phone subpages are listed on the left.
4. Select the **Client Address subpage**. The address visible on the demographics detail page, the primary active address, will also be visible on this subpage.
5. To add an additional address, from the **File** menu, select **Add Client Address**.
6. The Address Details page displays. Update the following fields:
  - a. **Address Type:** Defaults to Physical. The physical address should be the primary address. Home and Mailing address can be added under the Client Address subpage.
  - b. **Address Category:** When Address Type is Physical, this field is visible and required.
  - c. **Facility Name:** Enter the facility name when applicable.
  - d. **Street:** Enter the street address
  - e. **Street 2:** Enter the street address.
  - f. **City:** Enter the city
  - g. **State:** The places list presents a list of values based on the city selected.
  - h. **Zip Code:** The places list presents a list of values based on the city, state selected.
  - i. **County\***: The places list presents a list of values based on the city, state, zip selected.



**Note**

Several reports use the client's County to display results so be sure to enter this field.

- j. **PSA\***: The places list presents a list of values based on the city, state, zip, county selected.



**Note**

Several reports use the client's PSA to display results so be sure to enter this field.

- k. **Agency:** This field is populated by the places list with the Agency name.

Department of ELDER AFFAIRS STATE OF FLORIDA

Michelle Apple 11/22/2023 3:43 PM Client Addresses

File

Demographics Client Addresses Client Phones

Filters Search Reset

7 Client Addresses record(s) returned - now viewing 1 through 7

Address Type	Street	City	State	Zip code	Active	Primary
Physical	12 Hawaii Blvd	Spring Grove	FL	60081	No	No
Home	12 Hawaii Blvd	Spring Grove	FL	60081	Yes	No
Physical	12 Hawaii Blvd	Spring Grove	FL	60081	Yes	No

FL eCIRTS Sandbox (Copy of PROD 10/6/22) - Personal - Microsoft Edge

https://hssflecstage.wellsky.com/stage-humanservices/Pages/Harmony.aspx?ChapterID=204&ViewType...

Department of ELDER AFFAIRS STATE OF FLORIDA

Michelle Apple 11/22/2023 3:43 PM Address

File

Address Details

Primary

Active

Address Type \*

Facility Name

Street

Street 2

City  Clear

State  Clear

Zip Code  Clear

County \*  Clear

Client PSA \*  Clear

Agency Name  Clear

Start Date 11/22/2023

Descriptive Address

Contact Type

Contact Name, ID, Prefix

7. From the **File** menu, select **Save and Close Address**.

### Client Phone

The Demographics page houses many data elements including phone numbers. Phone numbers can also be added on Client Phones subpage. The phone numbers visible on the demographics detail page are also visible on this subpage.





## Note

Because best contact, home and work phone numbers are captured on the Demographics page, it is not likely you will use this page to add phone numbers, but it is available.

Best Contact	(555)264-9103
Phone Note	this is the sister's phone number
Home Phone	x(xxx)xxx-xxxx
Work Phone	(777)264-9103
Work Extension	
Mobile Phone	(888)264-9103

If you want to track the effective dates of a phone number you would want to add them from the Client Phones subpage instead of Demographics.



## Role: eCIRTS Worker

1. Navigate to the client's record and select the **Demographics** tab.
2. From the **File** menu, select **Edit Demographics**.
3. The Demographics detail page displays. The Client Addresses and Client Phone subpages are listed on the left.
4. Select the **Client Phones**. The phone numbers that are visible on the demographics detail page and will also be visible on this subpage.
5. To add an additional phone number, from the **File** menu, select **Add Client Phone**.
6. The Phone Details page displays. Update the following fields:
  - a. **Phone Type**: Select the type of phone number.
  - b. **Phone Category**: Select Current, Previous, Unknown or Other
  - c. **Phone Number**: enter the phone number in (###)###-#### format.
  - d. **Extension**: enter if applicable
  - e. **Active**: check this box if this phone number currently in use. The phone number must be active to display on Demographics.
  - f. **Primary**: check this box if you want this phone number to display on Demographics.
  - g. **Contact Type**: Will default to Consumer and is read only.

File

Demographics

Client Addresses

Client Phones

Filters  
Search Reset

9 Client Phones record(s) returned - now viewing 1 through 9

Phone Type	Phone Category	Phone	Extension	Active	Primary
Current Physical Location				False	False
Home				False	False
Current Physical Location				True	False
Home				False	True
Home					
Best Contact					
Home1					
Work					
Cell					

FL eCIRTS Sandbox (Copy of PROD 10/6/22) - Personal - Microsoft Edge

https://hssflecstage.wellsky.com/stage-humanservices/Pages/Harmony.aspx?ChapterID=204...

Michelle Apple | Client Phone  
11/22/2023 3:45 PM

File

Phone

Phone Type \*

Phone Category

Phone Number \*

Extension

Active

Primary

Contact Type

- From the **File** menu, select **Save and Close Client Phone**.

## Follow Up

Eligibility specialists can manage their day-to-day workload from the My Work page. Any contact records assigned to the worker for follow up or subsequent contact attempts will be listed on the My Work > Contacts page. However, it is recommended eligibility specialists view their assignments from the Contact queue. There are more data elements available in the queue for quick view of the record and filtering options. Also, records are visible to all eligibility specialists and supervisors, not just those the contact is assigned to like on My Work. (i.e. eligibility specialists covering for each other, supervisors monitoring the work of their staff.)



### Role: eCIRTS Worker

- Select the **Contacts** tab.
- To view a list of contact attempt follow ups assigned to you, select the following search filters:
  - Assigned To:** search for and select your name if not already selected
  - Contact Type:** SMMC LTCP - Eligibility
  - Contact Status:** Assigned
  - Reason for Contact:** Waitlist Release - Attempt 2 or Waitlist Release - Attempt 3
- Select **Search**. Results are returned.



## Note

Recommend creating a user saved filter to list all follow ups that require an additional contact attempt. The next time you use the Contact queue, you can select your saved Filter from the list and click **Search Filter**. This will populate the search filters, saving you time from looking them up again.

4. Select a record to open the contact details page.
5. Follow one of the scenarios:
  - a. [Unsuccessful Contact 2](#)
  - b. [Unsuccessful Contact 3](#)
  - c. [Successful Contact – Client Not Interested](#)
  - d. [Successful Contact – Client Hospitalized/Nursing Home](#)
  - e. [Successful Contact – Client Confirms Interest](#)
6. To view a list of follow ups you assigned to yourself in the [As Needed: Pre-release Research Follow Up](#) section, select the following search filters:
  - a. **Assigned To:** search for and select your name if not already selected.
  - b. **Contact Type:** SMMC LTCP - Eligibility
  - c. **Contact Status:** Follow Up
7. Select a record to open the contact details page.
8. Complete your follow up tasks and document updates in the open contact record. Update the following fields:
  - a. **Short Summary:** brief details about follow-up. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - c. **Contact Type:** remains SMMC LTCP - Eligibility
  - d. **Reason for Contact:** remains Waitlist Release
  - e. **Contact Status:** update to Complete.
  - f. **Assigned To:** defaults to self. Can remove value or leave as is.
9. From the **File** menu, select **Save and Close Contact**.
10. Proceed to the [Medicaid Waiver Timeline Form](#) section.

## As Needed: Return to Pipeline

If a client began the EMS release process but did not finish, he/she has 6 months to contact the eligibility specialist to restart the process. The client will not have to start the process from the beginning. A contact record will be added and the MLTC program record will be updated.



### Role: eCIRTS Worker

1. The eligibility specialist will first search for the existing client record.
2. From the existing client search results, select the flyout menu to the right of the client's name in the search results. Select **Add Contacts**. The Contact Details page displays.

ELDER AFFAIRS  
STATE OF FLORIDA

Welcome, Jennifer Buck  
10/26/2023 12:41 PM

Client - Search For Existing

File

Filters

Last Name \* Contains Apple AND X

First Name \* Contains Michelle OR X

eCIRTS Client ID +

Search Reset Add New

1 Client - Search For Existing record(s) returned - now viewing 1 through 1

eCIRTS Client ID	Last Name	First Name	PSA	Best Contact Phone	Date of Birth	SSN	Pseudo SSN	Street	Street 2	City	State	Zip Code	County	Email	Gender
1412768	Apple	Michelle	2	(555)555-5555	04/24/1944	XXX-XX-9103		123 Test St		Tallahassee	FL	32304	Leon	mreed@email.com	Female

First Previous Records per page 15 Next Last

Add Contacts

3. Or, with the client record already open, select the **Demographics** tab. From the **File** menu, select **Add Contact**. The Contact Details page displays.

ELDER AFFAIRS  
STATE OF FLORIDA

Michelle Apple  
Last Updated by jrbuck  
at 8/10/2023 10:40:21 AM

Demographics

File Edit Tools Ticklers View Contacts Word Merge

Add New Client - Search For Existing 103

Print

Close Demographics

Add Contacts

Caregiver/Care Recipient

Associated People Appointments Medications

Programs Services Authorizations Activities

Demographics Open/Close Referrals To Providers Forms Notes Eligibility

Demographics	
EMS Release Date	3/1/2023
eCIRTS Client ID	1412768
Former CIRTS ID	3332649103
SSN	XXX-XX-9103
Pseudo SSN	
Gender	Female

4. The Contact details page displays. Update the following fields:
  - a. **Division:** Required. Defaults to AG as is read only.
  - b. **Contact Date:** Required. defaults to today and is editable if needed.
  - c. **Contact Time:** Required. defaults to now and is editable if needed.
  - d. **Received By:** Required. defaults to the eligibility specialist adding the contact record.
  - e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
  - f. **Current Task:** Select Eligibility
  - g. **Contact Method:** Required. defines how the contact was made.
  - h. **Anonymous:** Leave blank

- i. **eCIRTS ID:** populates automatically and is read only.
- j. **Client First Name:** populates automatically.
- k. **Client Last Name:** populates automatically.
- l. **Call Back Phone:** populates automatically – update if needed.
- m. **Caller if other than Client:** search field. If the Caller already exists on the client's Associated People tab, their name will be listed, and the eligibility specialist can pick it from the list to populate the field.

The screenshot shows a contact form with the following fields: Client First Name (Randy), Client Last Name (Slaton), Call Back Phone ((555)572-0865), Caller if other than Client (empty), Relationship (dropdown), Contact Type (dropdown), and Short Summary. A search dialog box titled "DialogRelationDataLookups" is open, displaying a table with the following data:

RECID	Name	Relationship	Phone	Date Of Birth
363759	Voncie Goldsmith	Aunt	(850) 494 7101	

If not, the eligibility specialist can close the search window by clicking the X at the top right and just type the name into the "Caller if other than client" box on the contact screen.

The screenshot shows the contact form with the following fields: Client First Name (Randy), Client Last Name (Slaton), Call Back Phone ((555)572-0865), Caller if other than Client (John Smith), Relationship (Brother), and Short Summary.

- n. **REMINDER!:** ADD ASSOCIATED PEOPLE RECORD FOR CALLER. This message displays when a value is added to the Caller if Other than Client field.

The screenshot shows the contact form with the following fields: Caller if other than Client (John Smith), Relationship (dropdown), and a grey reminder message: "REMINDER! ADD ASSOCIATED PEOPLE RECORD FOR CALLER".

- o. **Relationship:** enter the relationship of the caller to the client
- p. **Contact Type:** select SMMC LTCP – Eligibility
- q. **Short Summary:** Note the contact with the client within 6 months and confirmed interest. Will be updated later in the workflow.
- r. **Notes:** leave blank. Will be updated later in the workflow.
- s. **Contact Marker:** leave blank.
- t. **SNAP Submittal Date:** leave blank.
- u. **Reason for Contact:** Medicaid Eligibility
- v. **Referral Type:** Return to Pipeline
- w. **701S Appointment Date:** leave blank.
- x. **Unmet Needs Reason:** leave blank.
- y. **Assigned To:** defaults to self. Can remove value or leave as is.
- z. **Screener:** leave blank
- aa. **Contact Status:** Complete
- bb. **Duration:** will automatically populate after the record is saved.
- cc. **Client Primary Language:** leave blank.
- dd. **Other Language:** leave blank.
- ee. **Follow Up Date:** leave blank.
- ff. **Screening Referral Created Date:** leave blank.

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

6. The eligibility specialist will also update the MLTC program record. From the open client record, select the **Programs** tab. A list of program enrollments is displayed. Select the MLTC program record in Terminate – APCL Waitlist status.
7. You must first reverse the status of this record before you can update it. From the **File** menu, select **Reverse Disposition**.

Department of ELDER AFFAIRS  
STATE OF MISSOURI

Michelle Apple  
Last Updated by j buck  
at 12/12/2023 2:42:34 PM

**Program**

File Tools

History  
Spell Check  
Delete Program  
**Reverse Disposition**  
Print  
Close Program

Division *	AG
Referred From	ARC or ADRC
Referral Date	02/20/2023
Program *	MLTC - MANAGED LONG-TERM CARE <a href="#">Details</a>
Service	AGGREGATE ADC BASI CA CM CHO CNMI
Status *	Terminate - APCL Waitlist
Status Effective Date *	12/12/2023
Historical Start Date/Billing Start Date *	02/20/2023

8. The page refreshes and the fields are now editable. Update the following fields:
  - a. **Status:** APPL Applicant

Department of ELDER AFFAIRS  
STATE OF MISSOURI

Michelle Apple  
Last Updated by j buck  
at 6/9/2023 5:39:52 PM

**Program**

File Tools

Program

Enrollment Provider

Track Status

Division *	AG
Referred From	ARC or ADRC
Referral Date	02/20/2023
Program *	MLTC - MANAGED LONG-TERM CARE <a href="#">Details</a>
Service	AGGREGATE ADC BASI CA CM CHO CNMI
Status *	APPL Applicant
Status Effective Date *	12/12/2023
Historical Start Date/Billing Start Date *	02/20/2023
AHCA County	
Enrollment Exception	
Exception Reason	

9. From the **File** menu, select **Save and Close Programs**.
10. You may need to update the worker on the **Enrollment Provider subpage**. You want this client to be visible on your My Work page so you can manage your caseload throughout the staffing process and level of care determination. You may need to change the enrollment provider from the generic Default PSA provider for your PSA to yourself.
11. Complete the steps in the [Eligibility Specialist Assigned](#) section if you have never been listed as an enrollment provider for this client.

12. Otherwise, select your worker record from the list.

Department of ELDER AFFAIRS  
STATE OF IOWA

Emily Cares  
12/11/2023 5:00 PM

**Enrollment Provider**

File Tools

Program

Enrollment Provider

Track Status

Filters

Enrollment Provider Name

Search Reset

3 Enrollment Provider record(s) returned - now viewing 1 through 3

Enrollment Provider Name	Start Date	End Date ▲	Active	Primary	<input type="checkbox"/>
DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02	04/20/2023		Yes	No	<input type="checkbox"/>
Buck, Jennifer	05/26/2023		Yes	Yes	<input type="checkbox"/>

13. The Enrollment Provider details page displays. Update the following fields:

- Primary:** check the box
- Active:** check the box
- Start Date:** enter the date you are making the change.
- End Date:** can be blank.

Department of ELDER AFFAIRS  
STATE OF IOWA

Michelle Apple  
Last Updated by j buck  
at 2/27/2023 11:11:19 AM

**Enrollment Provider**

File

Enrollment Provider

Enrollment Provider

Enrollment Provider Name \* Buck, Jennifer Details

Start Date \* 02/21/2023

End Date

Primary

Active

14. From the **File** menu, select **Save and Close Enrollment Provider**.

15. Proceed to the [Medicaid Waiver Timeline Form](#) section.

## Pre-release Research Tasks

If the client is coming off the MLTC waitlist through the EMS release process, several pre-release research tasks are completed before making the CARES Referral. The completion of the tasks is recorded as a Contact record in eCIRTS. The Pre-release Research Tasks include:

- Confirm the 3008 is on file.
- Confirm if the LOC is on file.
- Confirm Medicaid and DCF status.
- Send the Waitlist Release Notice

For some PSAs the contact attempts to confirm client interest happen before the Pre-Release Research tasks. For other PSAs, the Pre-Release Research tasks come first. Regardless of the order, the steps to complete in eCIRTS are the same and both must be completed before making the CARES referral.

## Sending/Receiving the 3008 Medical Certification Form

Following a screening if a client is ranked as a five, the screener may send the 3008 Medical Certification form to the client for completion by his/her physician. Once returned, the ADRC will scan and save it to a note in eCIRTS. See the [Screening Workflows Training Guide](#) for more information.

Later in the workflow when clients are coming off the MLTC waitlist, the eligibility specialist may find the 3008 has already been completed, returned and on file. If not, the eligibility specialist will complete the steps to obtain a complete 3008 from the client and his/her physician.



Role: **eCIRTS Worker**

Proceed to one of the following scenarios:

1. [3008 Received and Complete](#)
2. [3008 Received and NOT Complete](#)
3. [3008 Not Received](#)

### 3008 Received and Complete

1. Navigate to the **Notes** tab of the client record to confirm if the 3008 is already on file.
2. If the 3008 has already been sent to the client, there will be a note with Note Type: Referral Packet and Note Sub-Type: 3008 or equivalent. The eligibility specialist will check this note to confirm the 3008 is present and complete. Select the note to open it.
3. Open the attachment to view the 3008 form.



#### Note

In eCIRTS, you must save the attachment to your device before you can view it.

4. If the 3008 is complete, from the note details page, update the following fields:
  - a. **Note Type:** remains Referral Packet
  - b. **Note Sub-Type:** remains 3008 or equivalent.
  - c. **Note:** note the 3008 has been received and is complete
  - d. **Status:** select Complete
  - e. **Follow Up Date:** leave blank.
  - f. **Note Recipient:** leave blank.
  - g. **Attachment:** keep the attached 3008 attached.
5. From the **File** menu, select **Save and Close Notes**.
6. Proceed with the rest of the pre-release research tasks.
7. Once all the pre-release research tasks are completed, 3008 details will also be documented on the [Medicaid Waiver Timeline Form](#)

### 3008 Received and NOT Complete

1. Navigate to the **Notes** tab of the client record to confirm if the 3008 is already on file.



2. If the 3008 has already been sent to the client, there will be a note with Note Type: Referral Packet and Note Sub-Type: 3008 or equivalent. The eligibility specialist will check this note to confirm the 3008 is present and complete. Select the note to open it.
3. Open the attachment to view the 3008 form.



**Note**

In eCIRTS, you must save the attachment to your device before you can view it.

4. If the 3008 is NOT complete, the eligibility specialist will follow up with the client. From the note details page, update the following fields:
  - a. **Note Type:** remains Referral Packet
  - b. **Note Sub-Type:** remains 3008 or equivalent.
  - c. **Note:** enter details about the 3008 and what is missing
  - d. **Status:** select Follow Up
  - e. **ADD A NOTE RECIPIENT:** This message displays when the status is Follow Up. It is a reminder to add this note to a worker’s My Work > Notes queue for follow up. The worker is added as a Note Recipient.
  - f. **Follow Up Date:** enter a date you want to be prompted to follow up.
  - g. **Note Recipient:** search for and enter your name as the note recipient.
  - h. **Attachment:** keep the attached 3008 attached.
5. From the **File** menu, select **Save and Close Notes**.



**NOTE**

The Client has 30 days to return the completed 3008 Medical Certification Form. If it is not returned, on the 31<sup>st</sup> day eligibility staff will terminate the MLTC and inform the client that the information has not been received. The Client can return to APPL Applicant status if they return the form within 6 months of the EMS Release Date. Proceed to the [Return to Pipeline](#) section.

6. This note will be visible on the My Work page for the eligibility specialist. This can be helpful and serve as a reminder to the specialist to follow up on the 3008. From the **My Work** page, select the **Clients > Notes > Follow Up** queue.

The screenshot shows the 'MY WORK' SCHEDULER interface. At the top, there are navigation tabs: MY WORK (selected), CONTACTS, CLIENTS, CLIENT GROUPS, AGENCIES, PROVIDERS, RESOURCES, REPORTS, UTILITIES, and CLAIMS. Below these are five main filter categories: CONTACTS, CLIENTS, AGENCIES, PROVIDERS, and TASKS. Each category has a dropdown menu. The 'CLIENTS' dropdown is expanded, showing 'Programs', 'Referrals/Notifications', and 'Notes'. The 'Notes' dropdown is further expanded, showing 'Complete' with a count of 10 and 'Follow Up' with a count of 8 and a right-pointing arrow.

7. A list of notes where the eligibility specialist is the note recipient, and the status is follow up are displayed. Use the search filters and the Follow Up Date to narrow this list down to those that require follow up today/this week.

File Tools

Filters

Status Equal To Follow Up AND

Follow Up Date Less Than 02/19/2024 AND

Client ID +

Search Reset

9 My Work Notes record(s) returned - now viewing 1 through 9

Client ID	Client Name	Note Date	Note Type	Note Sub Type	Subject	Author	Status	Follow Up Date	View Record
1750771	Cares, Direct	02/14/2024	Contact	Outgoing Email	CARES 603 Form	Buck, Jennifer	Follow Up	02/15/2024	<a href="#">View</a>
1750771	Cares, Direct	01/08/2024	Follow Up	30 Day		Buck, Jennifer	Follow Up	02/08/2024	<a href="#">View</a>
1750772	Cares, EMS	01/25/2024	Contact	Scheduling	612	Buck, Jennifer	Follow Up	02/08/2024	<a href="#">View</a>
1750771	Cares, Direct	02/15/2024	Follow Up	90 Day		Buck, Jennifer	Follow Up	01/01/2024	<a href="#">View</a>
1750756	CARES, Pacer	07/25/2023	Contact	Outgoing Email	3007-DCF Communication Form	Buck, Jennifer	Follow Up	08/14/2023	<a href="#">View</a>
1750756	CARES, Pacer	07/25/2023	Contact	Outgoing Email	CARES 617 Form	Buck, Jennifer	Follow Up	08/14/2023	<a href="#">View</a>
1412768	Apple, Michelle	04/04/2023	CARES Referral Packet	3008 or Equivalent		Buck, Jennifer	Follow Up	04/18/2023	<a href="#">View</a>
1750727	Cares, Carrie	03/31/2023	Referral Packet	3008 or Equivalent		Buck, Jennifer	Follow Up	04/14/2023	<a href="#">View</a>
1750771	Cares, Direct	02/12/2024	Contact	Outgoing Email	3007-DCF Communication Form	Buck, Jennifer	Follow Up	02/20/2021	<a href="#">View</a>

8. Select the Referral Packet > 3008 or equivalent note from the list.
9. The Note details page displays. Update the following fields:
  - a. **Note Type:** remains Referral Packet
  - b. **Note Sub-Type:** remains 3008 or equivalent.
  - c. **Note:** note the 3008 has been received and is complete
  - d. **Status:** select Complete
  - e. **Follow Up Date:** leave blank.
  - f. **Note Recipient:** leave blank.
  - g. **Attachment:** scan and attach the completed 3008
10. From the **File** menu, select **Save and Close Notes**.
11. Proceed with the rest of the pre-release research tasks.
12. Once all the pre-release research tasks are completed, 3008 details will also be documented on the [Medicaid Waiver Timeline Form](#)

### 3008 Not Received

1. If there is NOT a note with Note Type of Referral Packet and Note Sub Type of 3008 or equivalent, the eligibility specialist must work with the client to complete one. The eligibility specialist will create the note. From the **File** menu, select **Add Note**.
2. The Note detail page displays. Update the following fields:
  - a. **Division:** Defaults to AG
  - b. **Note By:** Defaults to self.
  - c. **Note Date:** Defaults to today.
  - d. **Notes List:** select ADRC.
  - e. **Note Type:** Referral Packet
  - f. **Note Sub-Type:** 3008 or equivalent.
  - g. **Note:** enter details when the 3008 was sent to the client
  - h. **Status:** Follow Up
  - i. **ADD A NOTE RECIPIENT:** This message displays when the status is Follow Up. It is a reminder to add this note to a worker's My Work > Notes queue for follow up. The worker is added as a Note Recipient.

- j. **Follow Up Date:** enter a date you want to be prompted to follow up.
- k. **Note Recipient:** search for and select your name as the note recipient.
- l. **Attachment:** none. Later when the 3008 form is received, it will be scanned and saved to this same note as an attachment.

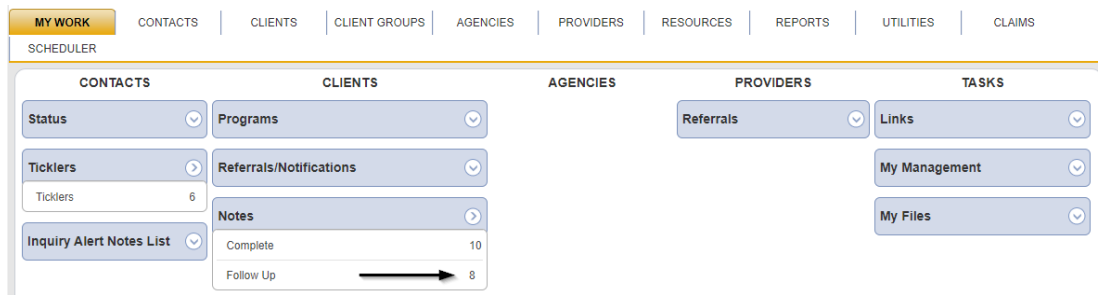
3. From the **File** menu, select **Save and Close Notes**. Send the 3008 Medical Certification form to the client for completion by his/her physician. The 3008 Medical Certification form is not printed from eCIRTS.



**NOTE**

The Client has 30 days to return the completed 3008 Medical Certification Form. If it is not returned, on the 31<sup>st</sup> day eligibility staff will terminate the MLTC and inform the client that the information has not been received. The Client can return to the APCL Waitlist if they return the form within 5 months. (6-month total time to be reinstated to the waitlist) Proceed to the [Return to Pipeline](#) section.

4. When the 3008 Medical Certification form is returned, it will be scanned and saved to the Referral Packet > 3008 or equivalent note in eCIRTS. You can find the note two ways.
  - a. **My Work** page, select the **Clients > Notes > Follow Up** queue. Select the existing Referral Packet > 3008 or equivalent note.



- b. Search for and select the existing client record. Select the **Notes** tab. From the list view, select the existing Referral Packet > 3008 or equivalent note.
5. The Note details page displays. Update the following fields:
  - a. **Note:** enter details the 3008 being received
  - b. **Status:** Complete
  - c. **Follow Up Date:** Leave blank.
  - d. **Note Recipient:** None needed.
  - e. **Attachment:** scan and attach the completed 3008 forms
6. From the **File** menu, select **Save and Close Notes**.
7. Proceed with the rest of the pre-release research tasks.
8. Once all the pre-release research tasks are completed, 3008 details will also be documented on the [Medicaid Waiver Timeline Form](#).

### Confirm if the Level of Care (LOC) is on File

The eligibility specialist will confirm if the LOC is already on file and less than 6 months old. Level of Care is housed on the Staffing screens in CIRTS. In eCIRTS, Level of Care is housed on the CARES Staffing Form on the client's Forms tab.



#### Role: **eCIRTS Worker**

1. The Level of Care data from the Staffing screens in CIRTS will be visible on a CARES Staffing Form in eCIRTS. From the client's record, select the **Forms** tab.
2. Review the list of completed forms, looking for a **CARES Staffing Information** form in a Signature or Complete status with an Assessment Date within the past 6 months. Click on the form to open it and review the details.

Division	Form	Assessment Type	Assessment Date	Assessor/Worker	Status
AG	701B Comprehensive Assessment v2	NH	12/01/2023	Buck, Jennifer	Complete
AG	CARES Staffing Information ←	NH	12/01/2023 ←	Buck, Jennifer	Signature
AG	CARES Case Information	NH	11/30/2023	Buck, Jennifer	Complete

- If a LOC exits and is less than 6 months old, a CARES Referral is not needed. Close the form. Document the existence of a current LOC in a note. Proceed to the [Pre-release Research Task Note](#) section. Then proceed to the [Medicaid Active](#) section.

**CARES Staffing Information**

**Consumer Assessments**

Division \* AG Assessment Type \* NH

Assessment Date \* 12/01/2023 Assessor/Worker \* Buck, Jennifer Details

Status \* Signature Data Entered By Buck, Jennifer Details

Last Completed 12/01/2023

---

**CARES Staffing Information**

Assessor/Case Manager Name: \* Buck, Jennifer

Staffing Information Received Date: \* 12/01/2023

Living Arrangement at Time of Assessment: \* NUHO=Nursing Home

Assessment History: \* AH

LOC Justification: \* LOC

Placement Recommendation \* NUHO=Nursing Home \*

Program Recommendation: \* NONE=No program considered \*

Level of Care: \* INO=Intermediate One ←

Level of Care Effective Date: \* 12/04/2023 ←

Level of Care Approved By: \* esignature

Staffing Date: \* 12/01/2023

LOC Export:

- If a LOC does not exist or if a LOC does exist but is more than 6 months old, a CARES Referral is needed. Close the form and proceed with the rest of the pre-release research tasks.
- Once all the pre-release research tasks are completed, LOC status will also be documented on the [Medicaid Waiver Timeline Form](#).

### Check Medicaid and DCF Status

The eligibility specialist will check the client’s Medicaid and DCF status outside of eCIRTS and document in eCIRTS.

FUTURE: Medicaid status will also be visible in eCIRTS on the client’s Eligibility tab.



Role: **eCIRTS Worker**

1. The eligibility specialist will log into FLORIDA, for example to obtain the client’s Medicaid status. It will be documented in the [Pre-release Research Tasks Note](#) section.
2. Once all the pre-release research tasks are completed, Medicaid and DCF status details will also be documented on the [Medicaid Waiver Timeline Form](#).

### Send the Waitlist Release Notice

Based on the status of the 3008 Medical Certification Form, Level of Care status and Medicaid/DCF application status, the ADRC will send one of the following waitlist release notices to the client.

- 100MYF - Some form of Medicaid/Yes Form 5000-3008
- 200NMNF - No Medicaid/No Form 5000-3008
- 300YMNF - Some form of Medicaid/No Form 5000-3008
- 400NMYF - No Medicaid/Yes Form 5000-3008
- 500SSYF - SSI/Yes Form 5000-3008
- 600SSNF - SSI/No Form 5000-3008

A copy of the notice is not saved in eCIRTS but the notice that is sent will be referenced in the Medicaid Waiver Timeline form and in a contact record by the eligibility specialist.

Most PSAs send these notices out in bulk, outside of eCIRTS. They can also be printed on demand, one by one in eCIRTS.

NOTE: The notice CAN be sent before a completed 3008 is on file, but a completed 3008 must be on file before a CARES referral can be made.

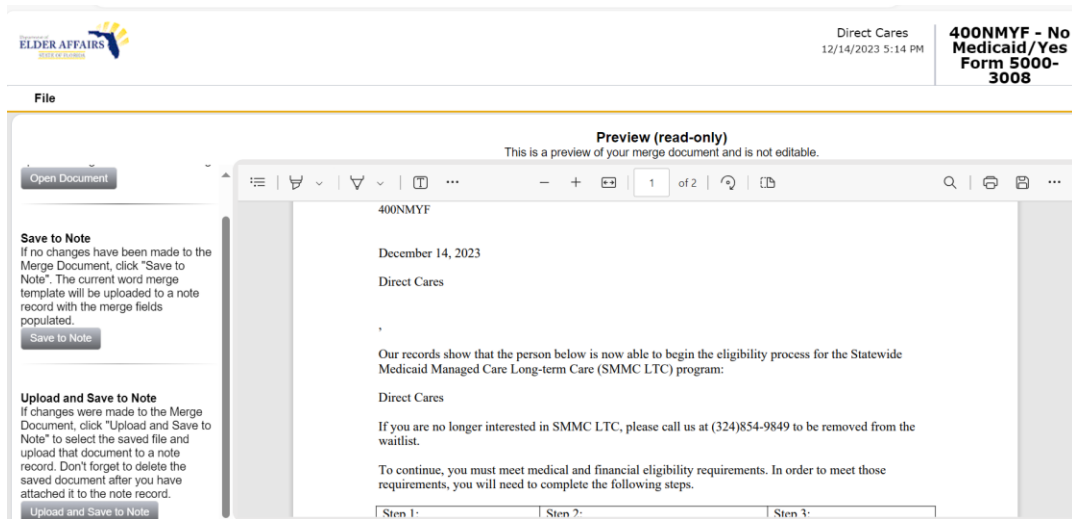


### Role: eCIRTS Worker

1. To print the notice from eCIRTS, navigate to the client’s record and select the **Demographics** tab.
2. From the **Word Merge** menu at the top of the page, select the notice.

The screenshot shows the eCIRTS interface for a client named 'Cares, Direct (1750771)'. The 'Word Merge' menu is open, displaying a list of notice options: 100MYF - Some form of Medicaid/Yes Form 5000-3008, 200NMNF - No Medicaid/No Form 5000-3008, 3008 - Medical Certification Form, 300YMNF - Some form of Medicaid/No Form 5000-3008, 400NMYF - No Medicaid/Yes Form 5000-3008, 500SSYF - SSI/Yes Form 5000-3008, 600SSNF - SSI/No Form 5000-3008, AHCA 5000-3008 Return Fax Cover, MCO Annual Return Cover Sheet, and No Contact Letter. The 'Demographics' tab is selected, showing fields for EMS Release Date, eCIRTS Client ID (1750771), Former CIRTS ID, First Name (Direct), Last Name (Cares), Middle Initial, AKA Name, Primary Race (White), Ethnicity (Non-Hispanic or Latino), and Primary Language (English).

3. The Word Merge preview page opens and shows a preview of the letter.



4. Some information auto-populates the notice and other information needs to be manually added. Select **Open Document**. It must be saved to your device first before it can be edited.
5. Select where on your device the notice should be saved.
6. Edit the notice. Once your edits have been made, save your changes to your device.
7. Send the notice to the client.
8. You do not have to save a copy of the notice to a note in eCIRTS but you will note which was sent in the [Pre-release Research Tasks Note](#).
9. Once all the pre-release research tasks are completed, waitlist release notice information will also be documented on the [Medicaid Waiver Timeline Form](#).

### Pre-release Research Tasks Note

When the client is coming off the MLTC waitlist through the EMS release process, several pre-release research tasks are completed before making the CARES Referral. The completion of the tasks is recorded as a contact record in eCIRTS. The Pre-release Research Tasks include:

- Confirm the 3008 is on file.
- Confirm if the LOC is on file.
- Confirm Medicaid and DCF status.
- Send the Waitlist Release Notice



Role: **eCIRTS Worker**

1. The eligibility specialist will first search for the existing client record.
2. From the existing client search results, select the flyout menu to the right of the client's name in the search results. Select **Add Contacts**. The Contact Details page displays.

ELDER AFFAIRS  
STATE OF FLORIDA

Welcome, Jennifer Buck  
10/26/2023 12:41 PM

**Client - Search For Existing**

**File**

Filters

Last Name \* Contains Apple AND X

First Name \* Contains Michelle OR X

eCIRTS Client ID +

Search Reset Add New

1 Client - Search For Existing record(s) returned - now viewing 1 through 1

eCIRTS Client ID	Last Name	First Name	PSA	Best Contact Phone	Date of Birth	SSN	Pseudo SSN	Street	Street 2	City	State	Zip Code	County	Email	Gender
1412768	Apple	Michelle	2	(555)555-5555	04/24/1944	XXX-XX-9103		123 Test St		Tallahassee	FL	32304	Leon	mreed@email.com	Female

First Previous Records per page: 15 Next Last

Add Contacts

3. Or, with the client record already open, select the **Demographics** tab. From the **File** menu, select **Add Contact**. The Contact Details page displays.

ELDER AFFAIRS  
STATE OF FLORIDA

Michelle Apple  
Last Updated by j buck  
at 8/10/2023 10:40:21 AM

**Demographics**

File Edit Tools Ticklers View Contacts Word Merge

Add New Client - Search For Existing 103

Print Priority Score 52

Close Demographics Assessment Date 04/25/2023

Add Contacts EMS Release Date 3/1/2023

Caregiver/Care Recipient

Associated People Appointments Medications

Programs Services Authorizations Activities

Demographics Open/Close Referrals To Providers Forms Notes Eligibility

**Demographics**

EMS Release Date	3/1/2023	SSN	XXX-XX-9103
eCIRTS Client ID	1412768	Pseudo SSN	
Former CIRTS ID	3332649103	Gender	Female

4. The Contact details page displays. Update the following fields:
  - a. **Division:** Required. Defaults to AG as is read only.
  - b. **Contact Date:** Required. defaults to today and is editable if needed.
  - c. **Contact Time:** Required. defaults to now and is editable if needed.
  - d. **Received By:** Required. defaults to the eligibility specialist adding the contact record.
  - e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
  - f. **Current Task:** Select Eligibility
  - g. **Contact Method:** NA
  - h. **Anonymous:** Leave blank
  - i. **eCIRTS ID:** populates automatically and is read only.
  - j. **Client First Name:** populates automatically.
  - k. **Client Last Name:** populates automatically.
  - l. **Call Back Phone:** populates automatically – update if needed.
  - m. **Caller if other than Client:** leave blank.
  - n. **Contact Type:** select SMMC LTCP – Eligibility
  - o. **Short Summary:** Document the completion of the pre-release research tasks, and which release letter was sent to the client and when. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - p. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - q. **Contact Marker:** leave blank.
  - r. **SNAP Submittal Date:** leave blank.
  - s. **Reason for Contact:** Waitlist Release



- t. **Referral Type:** leave blank.
- u. **701S Appointment Date:** leave blank.
- v. **Unmet Needs Reason:** leave blank.
- w. **Assigned To:** defaults to self. Can remove value or leave as is.
- x. **Screener:** leave blank
- y. **Contact Status:** Complete
- z. **Duration:** will automatically populate after the record is saved.
- aa. **Client Primary Language:** leave blank.
- bb. **Other Language:** leave blank.
- cc. **Follow Up Date:** leave blank.
- dd. **Screening Referral Created Date:** leave blank.

5. From the **File** menu, select **Save and Close Contact**.
6. Proceed to the [Medicaid Waiver Timeline Form](#) section.

### As Needed: Pre-release Research Follow Up

If additional follow up is needed with the client to complete the pre-release research tasks, each is documented on a separate Contact record in eCIRTS.



### Role: eCIRTS Worker

1. The eligibility specialist will first search for the existing client record.
2. From the existing client search results, select the flyout menu to the right of the client's name in the search results. Select **Add Contacts**. The Contact Details page displays.

The screenshot shows the eCIRTS system interface. At the top right, it says "Welcome, Jennifer Buck" and "10/26/2023 12:41 PM". The main header is "Client - Search For Existing". Below this is a "File" menu. The search filters are set to "Last Name" contains "Apple" and "First Name" contains "Michelle". The search results show one record with the following details:

eCIRTS Client ID	Last Name	First Name	PSA	Best Contact Phone	Date of Birth	SSN	Pseudo SSN	Street	Street 2	City	State	Zip Code	County	Email	Gender
1412768	Apple	Michelle	2	(555)555-5555	04/24/1944	XXX-XX-9103		123 Test St		Tallahassee	FL	32304	Leon	mreed@email.com	Female

At the bottom of the table, there is a yellow button labeled "Add Contacts".

3. Or, with the client record already open, select the **Demographics** tab. From the **File** menu, select **Add Contact**. The Contact Details page displays.

Michelle Apple  
Last Updated by Jbuck  
at 8/10/2023 10:40:21 AM

**Demographics**

File Edit Tools Ticklers View Contacts Word Merge

Add New Client - Search For Existing 103

Print

Close Demographics

Add Contacts

Caregiver/Care Recipient

Associated People Appointments Medications

Programs Services Authorizations Activities

**Demographics** Open/Close Referrals To Providers Forms Notes Eligibility

Demographics	
EMS Release Date	3/1/2023
eCIRTS Client ID	1412768
Former CIRTS ID	3332649103
SSN	XXX-XX-9103
Pseudo SSN	
Gender	Female

4. The Contact details page displays. Update the following fields:
  - a. **Division:** Required. Defaults to AG as is read only.
  - b. **Contact Date:** Required. defaults to today and is editable if needed.
  - c. **Contact Time:** Required. defaults to now and is editable if needed.
  - d. **Received By:** Required. defaults to the eligibility specialist adding the contact record.
  - e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
  - f. **Current Task:** Select Eligibility
  - g. **Contact Method:** NA
  - h. **Anonymous:** Leave blank
  - i. **eCIRTS ID:** populates automatically and is read only.
  - j. **Client First Name:** populates automatically.
  - k. **Client Last Name:** populates automatically.
  - l. **Call Back Phone:** populates automatically – update if needed.
  - m. **Caller if other than Client:** leave blank.
  - n. **Contact Type:** select SMMC LTCP – Eligibility
  - o. **Short Summary:** Document the need for follow up. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - p. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - q. **Contact Marker:** leave blank.
  - r. **SNAP Submittal Date:** leave blank.
  - s. **Reason for Contact:** Waitlist Release
  - t. **Referral Type:** leave blank.
  - u. **701S Appointment Date:** leave blank.
  - v. **Unmet Needs Reason:** leave blank.
  - w. **Assigned To:** defaults to self. Can remove value or leave as is.
  - x. **Screener:** leave blank
  - y. **Contact Status:** Follow Up.
  - z. **Duration:** will automatically populate after the record is saved.
  - aa. **Client Primary Language:** leave blank.
  - bb. **Other Language:** leave blank.
  - cc. **Follow Up Date:** leave blank.
  - dd. **Screening Referral Created Date:** leave blank.
  
5. From the **File** menu, select **Save and Close Contact**.

- Proceed to the [Follow Up](#) section.

## Medicaid Waiver Timeline Form

The eligibility specialist will document the completion of the pre-release research tasks and additional information as the client progresses through the staffing and eligibility process. The eligibility specialist will update this form many times during the release-staffing-eligibility process for the client. The status on the form is important. It will be updated to the 'last step completed' for the client. Status changes make it easy for specialists to group and manage their caseloads on the My Work page. See the [View Last Step Completed](#) section for more information.



Role: **eCIRTS Worker**

- The eligibility specialist does not have to create a Medicaid Waiver Timeline form until the pre-release research tasks are completed and the client has confirmed interest. The client's MLTC enrollment will be in APPL status before the Medicaid Waiver Timeline Form is created.
- To add a Medicaid Waiver Timeline form, navigate to the client's record and select the **Forms** tab.
- From the **File** menu, select **Add Form**.
- Select the **Medicaid Waiver Timeline Form** from the list.
- The form opens. In the header, update the following fields:
  - Status:** defaults to Draft. Change to Pending so it will be visible in the Forms Queue described in the [View Last Step Completed](#) section.
  - Assessment Type:** EMS Release
  - Last Completed:** remains blank. Will auto populate when the form status equals Complete.
  - Data Entered By:** remains blank. Will auto populate when the form status equals Complete.

Please Select Type: Medicaid Waiver Timeline

Consumer Assessments			
Division *	<input type="text" value="AG"/>	Assessment Type *	<input type="text" value="EMS Release"/>
Assessment Date *	<input type="text" value="12/14/2023"/>	Assessor/Worker *	<input type="text" value="Buck, Jennifer"/> ... <input type="button" value="Clear"/> <a href="#">Details</a>
Status *	<input type="text" value="Draft"/>	Data Entered By	<input type="text"/>
Last Completed	<input type="text"/>		

- Demographic information for the client auto populates on the form. It is pulling from the client's Demographic page.

MEDICAID WAIVER TIMELINE	
Refresh	<input type="button" value="v"/>
SSN	<input type="text" value="XXX-XX-7489"/>
CLIENT ID	<input type="text"/>
OWNER ID	<input type="text"/>
FIRST NAME	<input type="text" value="Direct"/>
MIDDLE NAME	<input type="text"/>
LAST NAME	<input type="text" value="Cares"/>
DOB	<input type="text" value="01/01/1940"/> <input type="button" value="📅"/>

7. Additional questions about the status of the client’s release process are displayed. The eligibility specialist will answer each as the information is known.



**NOTE**

With a future enhancement, eligibility specialists will be able to use the Refresh enhancement on the Medicaid Waiver Timeline form. Every time the form is saved and the value in the Refresh field is Yes, a behind the scenes process will look in several areas of the client’s record to fill in responses to the questions on the Medicaid Waiver Timeline form. Using this enhancement will reduce the amount of data entry the eligibility specialist has to complete.

MEDICAID WAIVER TIMELINE	
Refresh	<input type="button" value="→"/> <input type="button" value="Yes v"/>
SSN	<input type="text" value="XXX-XX-7489"/>
CLIENT ID	<input type="text"/>

8. Each time an update is made, the form should be saved, and the Assessment Type may need to be updated per the table below:

Assessment Type	Description
APS	Referral received from Adult Protective Services and should be treated with priority
EMS Release	A new EMS release referral and the CARES referral packet is not yet complete.
3008 Incomplete	An EMS referral with an incomplete 3008. Follow up is required.
DCF Pending	EMS referral is pending DCF financial eligibility determination
CARES Referral	Pre-release research tasks are complete, and the CARES Referral has been made.
Financial Eligibility Pending	Staffing has been completed and the case is pending financial eligibility determination
Medicaid Eligibility Pending	Staffing has been completed and the case is pending Medicaid eligibility determination
Medical Eligibility Pending	Staffing has been completed and the case is pending medical eligibility determination
SSI/TXIX/LTC	Staffing has been completed and the client already has SSI, TXIX or LTC benefits.

9. In the header, update the following fields:
  - a. **Status:** remains Pending until the client is active and the case is closed
  - b. **Assessment Type:** per table above
  - c. **Last Completed:** remains blank. Will auto populate when the form status equals Complete.
  - d. **Data Entered By:** remains blank. Will auto populate.
10. From the **File** menu, select **Save and Close Forms**.
11. Proceed to the [Create CARES Referral](#) section.

### View Last Step Completed

At any time, the eligibility specialist can keep track of their clients as they progress through the release process. The Assessment Type on the Medicaid Waiver Timeline Form is updated with the last step completed. The **My Work > Forms Queue** can be filtered to display the specialist's caseload by last step completed. The status of the Medicaid Waiver Timeline Form must be Pending to be visible in this queue.

- APS
- EMS Release
- 3008 Incomplete
- CARES Referral
- DCF Pending
- SSI/TXIX/LTC
- Financial Eligibility Pending
- Medicaid Eligibility Pending
- Medical Eligibility Pending



Role: **eCIRTS Worker**

1. Navigate to the **My Work** page.
2. From the right side of the page, select **Tasks > My Management > Forms Queue**.

Welcome, Jennifer Buck | My Work | Sign Out | Role: eCIRTS\_WORKER

12/18/2023 5:43 PM

irch

Contacts Contact Date GO ADVANCED SEARCH

MY WORK CONTACTS CLIENTS CLIENT GROUPS PROVIDERS REPORTS

CLIENTS AGENCIES PROVIDERS TASKS

Programs Referrals/Notifications Notes Ticklers Appointments Service Authorizations

Notes Referrals

Links My Management

- Wait List
- Activity Rosters
- Ticklers Due
- Forms Queue
- Alert Notes
- Fiscal Plans Queue
- Fiscal Plans Reimbursement Queue

3. The Form queue displays. Update the following search filters:
  - a. **Form:** Medicaid Waiver Timeline
  - b. **Assessment Type:** Select the last step completed you wish to view.

Department of ELDER AFFAIRS

Welcome, Jennifer Buck | Forms Queue

12/18/2023 5:46 PM

File Tools

Filters

Form Equal To Medicaid Waiver Timeline AND

Assessment Type Equal To

eCIRTS ID +

0 record(s) returned

Search Reset

- APS
- Initial
- Annual
- Significant Change
- Special Programs
- EMS Release
- 3008 Incomplete
- DCF Pending
- CARES Referral
- Financial Eligibility Pending
- Medical Eligibility Pending
- Medical Eligibility Pending
- EHEAP
- SSI/TXIX/LTC
- Reassessment

4. Select **Search**. A list of matching results is displayed. Medwaiver Timeline Forms on which you are the Assessor/Worker are listed.

Department of ELDER AFFAIRS

Welcome, Jennifer Buck | Forms Queue

12/18/2023 5:56 PM

File Tools

Filters

Form Equal To Medicaid Waiver Timeline AND

Assessment Type Equal To EMS Release AND

eCIRTS ID +

2 Forms Queue record(s) returned - now viewing 1 through 2

Search Reset

eCIRTS ID	Client Name	Form	Worker	Status	Assessment Type	Date Last Modified	Date Completed	Open Client Record	
550727	Schweizer, Clinton	Medicaid Waiver Timeline	Buck, Jennifer	Open	EMS Release	2/8/2023 1:50:51 PM		<a href="#">View Consumer</a>	<input type="checkbox"/>
1412768	Apple, Michelle	Medicaid Waiver Timeline	Reed, Monica	Complete	EMS Release	12/18/2023 5:56:08 PM	12/18/2023	<a href="#">View Consumer</a>	<input type="checkbox"/>

5. Select the form from the list to open the Medicaid Waiver Timeline form for the client.

Department of ELDER AFFAIRS STATE OF FLORIDA

Welcome, Jennifer Buck | Forms Queue  
12/18/2023 5:56 PM

File Tools

Filters

Form Equal To Medicaid Waiver Timeline AND X

Assessment Type Equal To EMS Release AND X

eCIRTS ID +

Search Reset

2 Forms Queue record(s) returned - now viewing 1 through 2

eCIRTS ID	Client Name	Form	Worker	Status	Assessment Type	Date Last Modified	Date Completed	Open Client Record
550727	Schweizer, Clinton	Medicaid Waiver Timeline	Buck, Jennifer	Open	EMS Release	2/8/2023 1:50:51 PM		<a href="#">View Consumer</a>
							12/18/2023	<a href="#">View Consumer</a>

FL eCIRTS Sandbox (Copy of PROD 10/6/22) - Personal - Microsoft Edge

https://hssflecstage.wellsky.com/stage-humanservices/Pages/Harmony.aspx?ChapterID=204&ViewType...

Department of ELDER AFFAIRS STATE OF FLORIDA

Clinton Schweizer | Form  
Last Updated by j buck  
at 2/8/2023 1:50:51 PM

File

Medicaid Waiver Timeline

Consumer Assessments

Division \* AG Assessment Type \* EMS Release

Assessment Date \* 02/08/2023 Assessor/Worker \* Buck, Jennifer  
Details

Status \* Open Data Entered By

Last Completed Note

MEDICAID WAIVER TIMELINE

Refresh Yes

SSN XXX-XX-2396

6. Select the **View Consumer** link instead if you want to open the full client record. Select the **Forms** tab to view the Medicaid Waiver Timeline.

The screenshot shows the ELDER AFFAIRS eCIRTS interface. At the top, it says 'Welcome, Jennifer Buck' and 'Forms Queue' with the date '12/18/2023 5:56 PM'. Below is a search filter section with the following criteria: Form: Medicaid Waiver Timeline, Assessment Type: EMS Release. The search results show 2 records, with the first record for Clinton Schweizer (eCIRTS ID: 550727) having a 'View Consumer' link highlighted. Below the search results, the client's record is shown with a 'Demographics' tab selected. The demographic information includes: SSN: XXX-XX-2396, DOB: 4/22/1977, Rank: 3, EMS Release Date: 1/1/2023, and other details like eCIRTS Client ID, Former CIRTS ID, First Name, and Age.

## Create CARES Referral

When the pre-research release tasks are complete and the client has been contacted and confirmed interest, the referral packet is considered complete, and the CARES referral can be made. The CARES referral will be made within eCIRTS. A separate email will no longer be needed.



### Role: eCIRTS Worker

1. Navigate to the client's record. Select the **Programs** tab. A list of existing program enrollments is displayed. From the **File** menu, select **Add Program**. Update the following fields:
  - a. **Division:** This system-required field will display AG and is read only.
  - b. **Referred From:** select the referral source for this client.
  - c. **Referral Date:** This date reflects when the referral to the program was made and defaults to today. It can be changed if needed. The other date fields on this page CANNOT be earlier than the Referral Date.
  - d. **Program:** select CARES.
  - e. **CARES PSA:** select the CARES PSA
  - f. **Service:** leave blank.
  - g. **Status:** select APPL Applicant
  - h. **Status Effective Date:** This field reflects the status start date and will change each time the Status is changed. The [Track Status](#) subpage is very helpful for viewing a history of the statuses.



- i. **Historical Start Date/Record Created Date:** This field is used to record when Program record was created. eCIRTS uses this date to enforce when a billing can begin under this program for the client.
- j. **Enrollment Provider. Always Select Default Provider Worker:** Search for and select the CARES Generic Worker for your CARES PSA. Search by Last Name = CARES. Be specific. Select 2A or 2B.

Search by:  Search Text:

19 record(s) returned

MEMBERID	Worker	Title	User ID Active
28592	CARES, PSA01 Generic Worker		No
28593	CARES, PSA02A Generic Worker		No
28617	CARES, PSA02B Generic Worker		No
28594	CARES, PSA03A Generic Worker		No
28618	CARES, PSA03B Generic Worker		No
28595	CARES, PSA04A Generic Worker		No
28619	CARES, PSA04B Generic Worker		No
28596	CARES, PSA05 Generic Worker		No
28597	CARES, PSA06A Generic Worker		No
28620	CARES, PSA06B Generic Worker		No
28598	CARES, PSA07A Generic Worker		No
28621	CARES, PSA07B Generic Worker		No
28620	CARES, PSA06B Generic Worker		No
28598	CARES, PSA07A Generic Worker		No
28621	CARES, PSA07B Generic Worker		No

- k. **AHCA County:** this field is ready only but will be populated later by the interface for MLTC program record only.
- l. **Enrollment Exception:** This will be used to explain when an enrollment is added on an exception basis because the Client is under 60, for MLTC, for Nutrition or to record services after DOD. Leave this field blank if it does not apply.
- m. **Exception Reason:** When an enrollment exception is selected, an exception reason should be selected.
- n. **CARES Staffing Reviewer:** leave blank. This will be completed later by the CARES Assessor.
- o. **CARES Staffing Date:** leave blank. This will be completed later by the CARES Assessor or stored procedure.
- p. **CARES Provider:** leave blank. This will be completed later by the CARES Assessor.

**File Tools**

Division *	AG
Referred From ←	ARC or ADRC
Referral Date ←	12/18/2023
Program *	CARES <a href="#">Details</a>
CARES PSA *	2B
Service	AGGREGATE ADC BASI CA CM CHO CNMI
Status *	APPL Applicant
Status Effective Date *	12/18/2023
Historical Start Date/Billing Start Date *	12/18/2023
Enrollment Provider. Always Select	DEFAULT-WORKER-PSA-02, DEF
Default Provider Worker. *	... Clear <a href="#">Details</a>
AHCA County	
Enrollment Exception	
Exception Reason	
CARES Staffing Reviewer	
CARES Staffing Date	
CARES Provider	

- From the **File** menu, select **Save and Close Program**.
- The CARES Staff Assistant will be the next worker to update this case when reviewing the packet to ensure it's complete. Please see the CARES EMS Release Workflow Training Manual.
- Proceed to the [New LOC – Eligibility Forms](#) section.

### As Needed: Referral Packet Incomplete

In the previous section, the eligibility specialist added the CARES program record which serves as making the CARES Referral. Before a new referral is assigned to a CARES Assessor, the packet is reviewed for completeness. If there is something missing, the CARES Staff will request additional information from the eligibility specialist in eCIRTS by updating the status and reassigning the CARES program record back to the specialist. Once the missing information/documentation is obtained, the eligibility specialist will update the status on the CARES program record again and reassign it to the CARES staff.



#### Role: eCIRTS Worker

- Eligibility specialists will be notified of a returned CARES referral by monitoring **My Work**. Returned referrals will be visible in the **My Work > Clients > Programs > Referral Returned** queue.

MY WORK CONTACTS CLIENTS CLIENT GROUPS AGENCIES

SCHEDULER

**CONTACTS**

Status ▾

Ticklers ▾

Inquiry Alert Notes List ▾

**CLIENTS**

Programs ▾

Active	17
APCL Waitlist	2
APPL Applicant	3
EHEAP Application	1
LOC Level of Care	1
Referral Returned	1
STFF CARES Staffing	1
STFF CARES Staffing 2	1



**Note**

Supervisors can view the returned referrals of their staff. This is done by updating the filters in the **My Work > Wait List** queue. Update the following filters:

**Program** begins with CARES.

**Status** Begins with Referral Returned

**Enrollment Provider** Equal To: Search for and select the name of the specialist assigned to the returned referral.

Department of ELDER AFFAIRS STATE OF IOWA

Welcome, Jennifer Buck Wait List  
2/19/2024 1:01 PM ▾

File

Filters

Program \* Begins With CARES AND ▾

Status \* Begins With Referral Returned AND ▾

Enrollment Provider Equal To Buck, Jennifer Details Lookup Clear AND ▾ X

eCIRTS Client ID +

Search Reset

1 My Work Wait List record(s) returned - now viewing 1 through 1

eCIRTS Client ID	Clients	Program	Service	Status	Status Date	Primary Language	Other Language	EMS Release Date	Open Client Record
1750772	Cares, EMS	CARES		Referral Returned	02/19/2024	English			<a href="#">View Consumer</a>

First Previous Records per page 15 Next Last

- Each record in this queue needs to be reviewed and follow-up actions taken to obtain the missing information and/or documentation. Select the record from the list to open the full client record.
- The CARES staff completed the *CARES ADRC Return Form* to document the missing information/documentation. The eligibility specialist will review it. Select the **Forms** tab. Select the completed **CARES ADRC Return Form** from the list.

Demographics Open/Close **Forms** Notes Eligibility

Filters  
 Form Contains AND X  
 Division +  
 Search Reset

6 Forms record(s) returned - now viewing 1 through 6

Division	Form	Referral Type	Assessment Date	Assessor/Worker	Status
AG	Medicaid Waiver Timeline	SSI/TXIX/LTC	06/05/2023	Buck, Jennifer	Complete
AG	CARES ADRC Return Form	ADRC/EMS	06/05/2023	Buck, Jennifer	Pending
AG	701S Screening Form	Initial	05/26/2023	Buck, Jennifer	Draft

4. Review the details in the form then close the form.

**CARES ADRC Return Form**

**Consumer Assessments**

Division *	AG	Referral Type *	CARES Referral
Assessment Date *	06/05/2023	Assessor/Worker *	Buck, Jennifer <a href="#">Details</a>
Status *	Complete	Data Entered By	Buck, Jennifer <a href="#">Details</a>
Last Completed	12/19/2023		

**ADRC Return Form**

Reason for Return:

- Unable to Contact Client/Repr
- Client/Representative Declined
- LOC Already Completed
- Other

- 3008 Incomplete
- 3008 is Incorrect

5. The eligibility specialist will add the missing information/documentation to the existing 3008 or equivalent note. Select the **Notes** tab. Select the completed **CARES Referral Packet > 3008 or equivalent note** from the list.

Demographics Open/Close Forms **Notes** Eligibility

Filters  
 Note Date +  
 Search Reset

4 Notes record(s) returned - now viewing 1 through 4

Note Date	Note By	Notes List	Note Type	Note SubType	Description	Status	Date Completed	Attachment	End Date
04/20/2023	Buck, Jennifer	ADRC	Referral Packet	3008 or Equivalent		Complete	12/19/2023	Yes	

6. The Note details page displays. The note is in complete status and not editable. From the **File** menu, select **Unlock Record**.

7. The page refreshes and the status of the note changes to Pending. Update the following fields:
- Note:** Add an update about the provided information/documentation. Click **Append Text to Note**
  - Status:** Complete
  - Attachments:** attach the requested missing documentation if any
  - Note Recipient:** none needed.

**Notes Details**

Division \* AG

Note By \* Buck, Jennifer [Details](#)

Note Date \* 04/20/2023

Notes List ADRC

Note Type \* CARES Referral Packet

Note Sub-Type 3008 or Equivalent

Description

On 5/26/2023 at 9:27 AM, Jennifer Buck wrote: sent the 3008 to client on 5/26. will get with MD  
 On 5/26/2023 at 9:34 AM, Jennifer Buck wrote: received and attached 3008  
 On 5/26/2023 at 9:40 AM, Jennifer Buck wrote: telling the story  
 On 5/26/2023 at 10:24 AM, Jennifer Buck wrote: tell my story on this same note. Had to get back in touch with the client - not done yet.  
 On 5/26/2023 at 10:26 AM, Jennifer Buck wrote: got what I needed from ish client - this is now really complete  
 On 10/18/2023 at 10:20 AM, Jennifer Buck wrote: update it - add more stuff. med list attached  
 On 12/19/2023 at 12:22 PM, Jennifer Buck wrote: adding med list

Note

New Text

B I U 16px A

added med list

Append Text to Note

Status \* Complete

Date Follow Up Scheduled

Date Completed 12/19/2023

Duration

**Attachments**

[Add Attachment](#)

Document	Description	Category	Action
3008 Emily	Emily Cares 3008		<a href="#">Remove</a>
Med List	Med List		<a href="#">Remove</a>

**Note Recipients**

Add Note Recipient:  [Clear](#)

Name	Date Sent	Date Read	Status	Date Signed
------	-----------	-----------	--------	-------------

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

9. The eligibility will now update the CARES program record, assigning it back to the CARES staff. Select the **Programs** tab. From the list. Select the **CARES Program record** in Referral Returned status.

**Programs**

Demographics Open/Close Forms Notes Eligibility

Filters

Status Date Greater Than 01/01/2000 AND

Program +

Search Reset

4 Programs record(s) returned - now viewing 1 through 4

Division	Program	Service	Enrollment Provider	Status	Termination Reason	Status Date	End Date	Historical Start Date/Billing Start Date
AG	CARES		Buck, Jennifer	Referral Returned		12/19/2023		06/05/2023


10. The Program details page displays. Update the following fields:

- Status:** APPL Applicant
- Status Effective Date:** Updates automatically when Status changes

<b>Program</b>	<b>Division *</b>	AG
Enrollment Provider	<b>Date Record Created *</b>	06/05/2023
Track Status	<b>Referral Source</b>	ARC or ADRC
	<b>Referral Date</b>	06/05/2023
	<b>Program *</b>	CARES <a href="#">Details</a>
	<b>CARES PSA *</b>	2A
	<b>Service</b>	AGGREGATE ADC BASI CA CM CHO CNMI
	<b>Status *</b>	APPL Applicant
	<b>Status Effective Date *</b>	12/19/2023
	<b>AHCA County</b>	
	<b>Enrollment Exception</b>	
	<b>Exception Reason</b>	
	<b>CARES Staffing Reviewer</b>	
	<b>CARES Staffing Date</b>	
	<b>CARES Provider</b>	

11. From the **File** menu, select **Save Program**. Do NOT select Save and Close Program.

12. This record needs to be reassigned back to CARES. Select the **Enrollment Provider** subpage. Select the **Generic CARES worker** from the list.



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Emily Cares  
12/19/2023 12:32 PM

**Enrollment  
Provider**

**File Tools**

Program

**Enrollment Provider**

Track Status

**Filters**

Enrollment Provider Name  +

Search Reset

4 Enrollment Provider record(s) returned - now viewing 1 through 4

Enrollment Provider Name	Start Date	End Date ▲	Active	Primary
Buck, Jennifer	06/05/2023		Yes	Yes
→ CARES, PSA02B Generic Worker	10/18/2023		Yes	No

13. The Enrollment Provider details page displays. Update the following fields:

- a. **Start Date:** Update to today.
- b. **End Date:** leave blank.
- c. **Primary:** check this box
- d. **Active:** check this box.

**File**

**Enrollment Provider**

**Enrollment Provider**

Enrollment Provider Name \* CARES, PSA02B Generic Worker [Details](#)

Start Date \* 10/18/2023

End Date

Primary

Active

14. From the **File** menu, select **Save and Close Enrollment Provider**.

15. The CARES Staff Assistant will be the next worker to update this case when reviewing the packet to ensure it's complete. Please see the CARES EMS Release Workflow Training Manual.

16. Proceed to the [New LOC – Eligibility Forms](#) section.

### As Needed: Lost Contact – Close the Case

When a CARES referral has been made and the CARES Assessor is not able to contact the client to schedule the assessment, the CARES Assessor will notify the eligibility specialist to close the case via a note in eCIRTS.



#### Role: eCIRTS Worker

1. The eligibility specialist will view the note sent by the CARES Assessor from the **My Work** page.
2. Select the Clients > Notes > Complete queue.

**MY WORK** CONTACTS CLIENTS

**CLIENTS**

Programs

Referrals/Notifications

Notes

Complete	10
Follow Up	8

3. Locate the note with the following information:
  - a. **Note Type:** Case Closure
  - b. **Note Sub Type:** LC=Lost Contact
4. Select the note from the list to view the note details. Select the **View** link to open the full client record.

**File Tools**

**Filters**

Status  Complete

Note Type  Case Closure

Client ID

1 Notes record(s) returned - now viewing 1 through 1

Client ID	Client Name	Note Date	Note Type	Note Sub Type	Subject	Author	Status	View Record
1750736	Cares, Emily	12/18/2023	Case Closure	LC=Lost Contact		Buck, Jennifer	Complete	<a href="#">View</a>

Records per page

5. The eligibility specialist will also update and complete the Medicaid Waiver Timeline form. Navigate to the client's **Forms** tab. Select the open **Medicaid Waiver Timeline** form from the list.
6. Update any remaining questions in the form. Update the following fields in the header:
  - a. **Status:** Complete
  - b. **Data Entered By:** default to self. You cannot change it.
  - c. **Last Completed:** defaults to today. You cannot change it.
7. From the **File** menu, select **Save and Close Forms**.
8. Finally, the eligibility specialist will close the MLTC program record. The CARES Assessor is responsible for closing the CARES program record. From the open client record, select the **Programs** tab. A list of program enrollments is displayed. Select the MLTC program record in APCL status. Update the following fields:
  - a. **Status:** Terminate – APPL Applicant
  - b. **Termination Reason:** Lost Contact



c. **End Date:** defaults to today

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STATE OF FLORIDA

Emily Cares | Program  
Last Updated by jrbuck  
at 10/18/2023 10:50:29 AM

File Tools

Program

Enrollment Provider

Track Status

Division \* AG

Referred From ARC or ADRC

Referral Date 04/20/2023

Program \* MLTC - MANAGED LONG-TERM CARE Details

Service

Status \* Terminate - APPL Applicant

Status Effective Date \* 12/18/2023

Historical Start Date/Billing Start Date \* 04/20/2023

AHCA County

Enrollment Exception

Exception Reason

Termination Reason \* Lost Contact

End Date \* 12/18/2023

9. No changes are needed to the Enrollment Provider. That can remain the Generic
10. From the **File** menu, select **Save Programs**.
11. Select the **Enrollment Provider** subpage. Change the Enrollment Provider from yourself to the generic default worker for your PSA so this case no longer displays on your My Work page.

## New Level of Care (LOC) – Eligibility Forms

After the [CARES Referral](#) is made, the eligibility specialist will wait for CARES to complete the staffing process and determine the Level of Care for the client before proceeding with the release process.

Daily, the eligibility specialist, or supervisor, will run the Level of Care (LOC) report from eCIRTS which lists cases where the staffing process has been completed and the LOC determinations made for the EMS releases. For each new LOC determination, the eligibility specialist will update the Med Waiver Timeline form for the client in eCIRTS, fax the 2515 HCBS Waiver Eligibility Certification form to DCF and document it was sent in a contact note in eCIRTS.



### Role: eCIRTS Worker

1. Daily, each ADRC will run the Level of Care report from eCIRTS.



#### NOTE

You can also find a list of your clients that are pending LOC by using the Forms Queue. Search by Assessment Type = CARES Referral. See the [View Last Step Completed](#) section.

2. If the client is SSI, TXIX or LTC, update the [Medicaid Waiver Timeline](#) form. Navigate to the clients record and select the **Forms tab**. Select the Pending **Medicaid Waiver Timeline form** from the list. Update the following fields:
  - a. **ASSESSOR/CM: Assessment date:** enter the date or use the stored procedure to populate.

- b. **Staffing Date:** enter the date or use the stored procedure to populate.
- c. **Level of Care Effective Date:** enter the date or use the stored procedure to populate.
- d. The remaining fields will be added later in the workflow and should remain blank for now.
- e. In the header, keep the form status as Pending.
- f. **Assessment Type:** SSI/TXIX/LTC

<b>17. ASSESSOR/CM: Assessment date:</b>	<input type="text"/>		
<b>Staffing Date:</b>	<input type="text"/>		
<b>Level of Care Effective Date:</b>	<input type="text"/>		

- 3. From the **File** menu, select **Save and Close Forms**. The eligibility specialist will update this record again once the client becomes [MLTC active](#).
- 4. For each client on the report that is NOT SSI, TXIX or LTC, the assigned eligibility specialist will fax the 2515 (HCBS Waiver Eligibility Certification Form) to DCF outside of eCIRTS and document that it has been sent in a contact note in eCIRTS. DCF Determines financial eligibility and communicates to ACHA.
- 5. The eligibility specialist will first search for the existing client record.
- 6. From the existing client search results, select the flyout menu to the right of the client’s name in the search results. Select **Add Contacts**. The Contact Details page displays.

- 7. Or, with the client record already open, select the **Demographics** tab. From the **File** menu, select **Add Contact**. The Contact Details page displays.

8. The Contact details page displays. Update the following fields:
  - a. **Division:** Required. Defaults to AG as is read only.
  - b. **Contact Date:** Required. defaults to today and is editable if needed.
  - c. **Contact Time:** Required. defaults to now and is editable if needed.
  - d. **Received By:** Required. defaults to the eligibility specialist adding the contact record.
  - e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
  - f. **Current Task:** Select Eligibility
  - g. **Contact Method:** NA
  - h. **Anonymous:** Leave blank
  - i. **eCIRTS ID:** populates automatically and is read only.
  - j. **Client First Name:** populates automatically.
  - k. **Client Last Name:** populates automatically.
  - l. **Call Back Phone:** populates automatically – update if needed.
  - m. **Caller if other than Client:** leave blank.
  - n. **Contact Type:** select SMMC LTCP – Eligibility
  - o. **Short Summary:** Document the 2515 was sent to DCF. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - p. **Notes:** leave blank. Will be updated later in the workflow.
  - q. **Contact Marker:** leave blank.
  - r. **SNAP Submittal Date:** leave blank.
  - s. **Reason for Contact:** Medicaid Eligibility
  - t. **Referral Type:** leave blank.
  - u. **701S Appointment Date:** leave blank.
  - v. **Unmet Needs Reason:** leave blank.
  - w. **Assigned To:** defaults to self. Can remove value or leave as is.
  - x. **Screener:** leave blank
  - y. **Contact Status:** Complete
  - z. **Duration:** will automatically populate after the record is saved.
  - aa. **Client Primary Language:** leave blank.
  - bb. **Other Language:** leave blank.
  - cc. **Follow Up Date:** leave blank.
  - dd. **Screening Referral Created Date:** leave blank.

9. From the **File** menu, select **Save and Close Contact**.

10. OPTIONAL: Some PSAs save a copy of the 2515 form as an attachment to a note in eCIRTS. Documentation for a client is housed on the Client > Notes tab. From the open client record, select the **Notes** tab. From the **File** menu, select **Add Note**. The Note Details page displays. Update the following fields:
  - a. **Division:** Will default to AG
  - b. **Note By:** Will default to the user creating the Note.
  - c. **Note Date:** Will default to today.
  - d. **Note Type:** Uploaded Forms
  - e. **Note Sub-Type:** Select 2515 HCBS Waiver Eligibility
  - f. **Description:** leave blank
  - g. **Note:** enter any additional notes
  - h. **Status:** Select Complete
  - i. **Date Completed:** When the Note Status equals Complete, the Date Completed field populates automatically and is read only.

- j. **Attachments:** attach a copy of the 2515 HCBS Waiver Eligibility Certification form to the note
- k. **Recipients:** NA

Notes Details	
Division *	AG
Note By *	Buck, Jennifer <span>... Clear Details</span>
Note Date *	12/20/2023 <span>📅</span>
Notes List	ADRC
Note Type *	Uploaded Forms
Note Sub-Type	2515 HCBS Waiver Eligibility
Description	
Note	<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>B</b> <i>I</i> <u>U</u> 16px <b>A</b></p> <p>2515 faxed to DCF on 12/20/23 - attached</p> </div>
Status *	Complete
Date Completed	12/20/2023
Attachments	
<a href="#">Add Attachment</a>	

11. From the **File** menu, select **Save and Close Notes**.
12. Once the 2515 is sent, the eligibility specialist will also update the [Medicaid Waiver Timeline form](#). Navigate to the client record and select the **Forms** tab.
13. Select the existing **Medicaid Waiver Timeline** form from the list. Update the following fields:
  - a. **701B Completed:** enter the date or use the stored procedure to populate.
  - b. **LOC Staffing Date:** enter the date or use the stored procedure to populate.
  - c. **2515 & LOC to DCF Date:** enter the date.
  - d. The remaining fields will be added later in the workflow and should remain blank for now.
  - e. In the header, keep the form status as Pending.
  - f. **Assessment Type:** DCF Pending
14. From the **File** menu, select **Save and Close Forms**.
15. Once AHCA has the LOC and program recommendation information from CIRTS and the financial eligibility information from DCF, AHCA will provide the MLTC active dates two to three times a month via the 'MLTC file.'
16. Proceed to the [Medicaid Active – Close the Case](#) section.

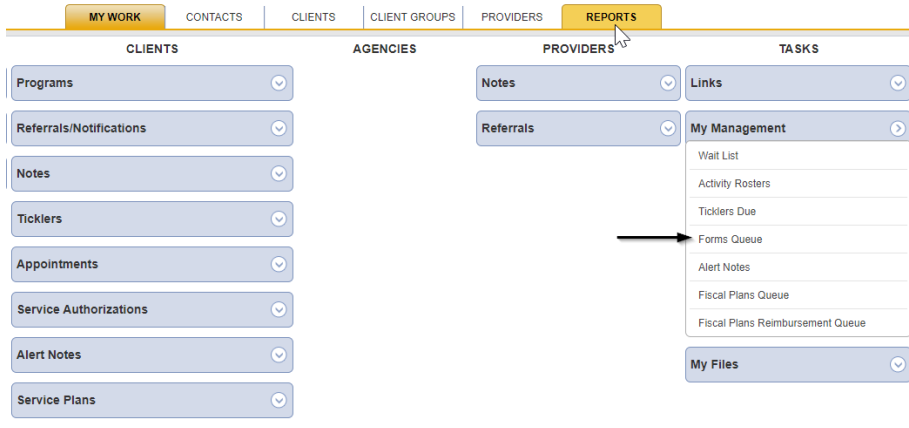
### Medicaid Active - Close the Case

Once the client is active for MLTC, the MCO providers will manage the client’s case and complete the annual assessment with the CARES staff. The eligibility specialist will close the loop with the client once they become active but will not have a role in the annual review process.



## Role: eCIRTS Worker

1. When the MLTC file from AHCA is imported, the client's MLTC or PACE program record will be added/updated. The status will be active, and the Medicaid plan information will be listed under the Enrollment Provider tab. If the client's name, SSN or Medicaid ID has been updated in the MLTC interface file, the client's data will also be updated in eCIRTS on the Demographic page.
2. The eligibility specialist can use reports and/or monitor their caseload for those that are MLTC active on My Work. Select **My Work**. Under **Tasks > My Management**, select **Forms Queue**.



3. The Forms queue displays. Update the following search filters:
  - a. **Form:** Medicaid Waiver Timeline AND
  - b. **Assessment Type:** DCF Pending OR
  - c. **Assessment Type:** SSI/TXIX/LTC AND
  - d. **Status:** Pending
  - e.

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Welcome, Jennifer Buck **Forms Queue**  
5/14/2024 4:23 PM

File Tools

Filters

Form	Equal To	Medicaid Waiver Timeline	AND	X
Assessment Type	Equal To	DCF Pending	OR	X
Assessment Type	Equal To	SSI/TXIX/LTC	AND	X
Status	Equal To	Pending	AND	X
eCIRTS ID	+			

Search Reset

3 My Work Forms Queue record(s) returned - now viewing 1 through 3

eCIRTS ID	Client Name	Form	Worker	Status	Assessment Type	Date Last Modified	Date Completed	Open Client Record
1750736	Cares, Emily	Medicaid Waiver Timeline	Buck, Jennifer	Pending	SSI/TXIX/LTC	12/20/2023 4:43:13 PM		<a href="#">View Consumer</a>
1750746	Apple, Sarah	Medicaid Waiver Timeline	Buck, Jennifer	Pending	DCF Pending	12/20/2023 10:18:25 PM		<a href="#">View Consumer</a>

4. A list of clients that were DCF Pending or SSI/TXIX/LTC the last time you updated the Medicaid Waiver Timeline form are listed. Select the **Date Last Modified** column to sort the list of forms in ascending order, to see the oldest first. Since the MLTC file from AHCA is imported every two weeks, it's likely the clients on this list are now MLTC active. You can check by Clicking the **View Consumer** link to open the

full client record.

Department of ELDER AFFAIRS STATE OF IOWA

Welcome, Jennifer Buck | Forms Queue  
12/20/2023 10:29 PM

File Tools

Filters

- Form: Medicaid Waiver Timeline
- Assessment Type: DCF Pending
- Assessment Type: SSI/TXIX/LTC
- Date Last Modified: Greater Than 12/06/2023
- Date Last Modified: Less Than 12/21/2023
- eCIRTS ID: +

Search Reset

Forms Queue record(s) returned - now viewing 1 through 2

eCIRTS ID	Client Name	Form	Worker	Status	Assessment Type	Date Last Modified	Date Completed	Open Client Record
1750746	Apple, Sarah	Medicaid Waiver Timeline	Buck, Jennifer	Pending	DCF Pending	12/20/2023 10:18:25 PM	→	<a href="#">View Consumer</a>
1750736	Cares, Emily	Medicaid Waiver Timeline	Buck, Jennifer	Pending	SSI/TXIX/LTC	12/20/2023 4:43:13 PM		<a href="#">View Consumer</a>

5. Select the **Programs** tab and note the status of the MLTC and other open program records.

Apple, Sarah (1750746)

Caregiver/Care Recipient

Associated People Appointments Medications

Programs Services Authorizations Activities

START-STOP TIMER Demographics Open/Close Referrals To Providers Forms Notes Eligibility

Filters

- Status Effective Date: Greater Than 01/01/2000
- Program: +

Search Reset

4 Programs record(s) returned - now viewing 1 through 4

Division	Program	Service	Enrollment Provider	Status	Termination Reason	Historical Start Date/Billing Start Date	Status Effective Date	End Date
AG	DOEA Services		Buck, Jennifer	Active		06/28/2023	06/28/2023	
AG	MLTC - MANAGED LONG-TERM CARE		FLORIDA COMMUNITY CARE,	Active	←	07/01/2023	08/01/2023	

6. The eligibility specialist may need to update the status of one or more of the program records for the client now that the client MLTC active. From the open client record, select the **Programs** tab. A list of program enrollments is displayed.

Apple, Sarah (1750746)

Caregiver/Care Recipient

Associated People Appointments Medications

Programs Services Authorizations Activities

START-STOP TIMER Demographics Open/Close Referrals To Providers Forms Notes Eligibility

Filters

- Status Effective Date: Greater Than 01/01/2000
- Program: +

Search Reset

4 Programs record(s) returned - now viewing 1 through 4

Division	Program	Service	Enrollment Provider	Status	Termination Reason	Historical Start Date/Billing Start Date	Status Effective Date	End Date
AG	DOEA Services		Buck, Jennifer	Active		06/28/2023	06/28/2023	
AG	MLTC - MANAGED LONG-TERM CARE		FLORIDA COMMUNITY CARE,	Active		07/01/2023	08/01/2023	
AG	GCE - COMMUNITY CARE FOR THE ELDERLY		DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02	APCL Waitlist	←	07/01/2023	07/01/2023	

7. Select the program record that needs to be terminated. The Program details page displays. Update the following fields:

- Status:** Terminate – Active, Terminate - APPL Applicant, or Terminate – APCL Waitlist
- Termination Reason:** Moved to Managed Long Term Care
- End Date:** populates to today. Update if needed.

8. From the **File** menu, select **Save and Close Programs**. You do NOT need to update the worker on the Enrollment Provider subpage.



**NOTE**

The ADRCs can run the following reports in eCIRTS to identify enrollments that need to be terminated for the newly active clients.

- a. MLTC Enrollees Receiving Services in Another Program
- b. ACTV PACE Clients who are ACTV, APPL or APCL in Another Program
- c. Active MLTC Clients Who are ACTV, APCL or APPL in Another Program
- d. Clients who are ACTV, APCL or APPL in the same program multiple times
- e. ACTV, APPL, APCL Clients who have moved to Another PSA

9. The eligibility specialist will complete the [Medicaid Waiver Timeline](#) form. Navigate to the clients record and select the **Forms** tab. Select the Pending **Medicaid Waiver Timeline form** from the list. Update the following fields:

- a. **Medicaid Approved/Denied Date:** enter the date.
- b. **APPL End Date:** enter the date or use the stored procedure to populate.
- c. **APPL Termination Reason:** enter the reason or use the stored procedure to populate.
- d. **ACTV Start Date:** enter the date or use the stored procedure to populate.
- e. In the header, change the form status to Complete.
- f. **Assessment Type:** remains DCF Pending or SSI/TXIX/LTC. Some PSAs may choose to change it back to EMS Release.

<b>Medicaid Approved/Denied Date</b>	<input type="text"/>	
<b>APPL End Date</b>	<input type="text"/>	
<b>APPL Termination Reason</b>	<input type="text" value="v"/>	
<b>ACTV Start Date</b>	<input type="text"/>	

10. From the **File** menu, select **Save and Close Forms**. The process is complete.

11. OPTIONAL: The eligibility specialist may contact the client to confirm all needs are met. If this is done the eligibility specialist will add a contact note in eCIRTS. Navigate to the client’s **Demographics** tab. From the **File** menu, select **Add Contact**.

12. The Contact details page displays. Update the following fields:
- a. **Division:** Required. Defaults to AG as is read only.
  - b. **Contact Date:** Required. defaults to today and is editable if needed.
  - c. **Contact Time:** Required. defaults to now and is editable if needed.
  - d. **Received By:** Required. defaults to the eligibility specialist adding the contact record.
  - e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
  - f. **Current Task:** Select Eligibility
  - g. **Contact Method:** NA
  - h. **Anonymous:** Leave blank
  - i. **eCIRTS ID:** populates automatically and is read only.
  - j. **Client First Name:** populates automatically.
  - k. **Client Last Name:** populates automatically.
  - l. **Call Back Phone:** populates automatically – update if needed.
  - m. **Caller if other than Client:** leave blank.
  - n. **Contact Type:** select SMMC LTCP – Eligibility
  - o. **Short Summary:** Document the closure of the case. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - p. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - q. **Contact Marker:** leave blank.
  - r. **SNAP Submittal Date:** leave blank.
  - s. **Reason for Contact:** Medicaid Eligibility
  - t. **Referral Type:** leave blank.
  - u. **701S Appointment Date:** leave blank.
  - v. **Unmet Needs Reason:** leave blank.
  - w. **Assigned To:** defaults to self. Can remove value or leave as is.
  - x. **Screener:** leave blank
  - y. **Contact Status:** Complete
  - z. **Duration:** will automatically populate after the record is saved.
  - aa. **Client Primary Language:** leave blank.
  - bb. **Other Language:** leave blank.
  - cc. **Follow Up Date:** leave blank.
  - dd. **Screening Referral Created Date:** leave blank.

13. From the **File** menu, select **Save and Close Contact**. The process is complete.

## APS to ALF Referral

APS to ALF referrals are received by the eligibility specialist via email when a client is removed from his/her home and placed in an ALF. These cases will be handled as high priority. The eligibility specialist will complete a subset of the steps for an EMS Release:



### Role: eCIRTS Worker

1. Eligibility specialist will be assigned to the case outside of eCIRTS.
2. The person making the assignment or the eligibility specialist him/herself, will create the MLTC program record. Navigate to the client's record. From the open client record, select the **Programs** tab. From the **File** menu, select **Add Program**.



3. The program details page displays. Update the following fields:
  - a. **Division:** This system-required field will display AG and is read only.
  - b. **Referred From:** select the referral source for this client.
  - c. **Referral Date:** This date reflects when the referral to the program was made and defaults to today. It can be changed if needed. The other date fields on this page CANNOT be earlier than the Referral Date.
  - d. **Program:** select MLTC.
  - e. **Service:** leave blank.
  - f. **Status:** select APPL Applicant
  - g. **Status Effective Date:** This field reflects the status start date and will change each time the Status is changed. The [Track Status](#) subpage is very helpful for viewing a history of the statuses.
  - h. **Historical Start Date/Record Created Date:** This field is used to record when Program record was created. eCIRTS uses this date to enforce when a billing can begin under this program for the client.
  - i. **Enrollment Provider. Always Select Default Provider Worker:** Search for and select the CARES Generic Worker for your CARES PSA. Be specific. Select 2A or 2B.

Search by:  Search Text:

19 record(s) returned

MEMBERID	Worker	Title	User ID Active
28592	CARES, PSA01 Generic Worker		No
28593	CARES, PSA02A Generic Worker		No
28617	CARES, PSA02B Generic Worker		No
28594	CARES, PSA03A Generic Worker		No
28618	CARES, PSA03B Generic Worker		No
28595	CARES, PSA04A Generic Worker		No
28619	CARES, PSA04B Generic Worker		No
28596	CARES, PSA05 Generic Worker		No
28597	CARES, PSA06A Generic Worker		No
28620	CARES, PSA06B Generic Worker		No
28598	CARES, PSA07A Generic Worker		No
28621	CARES, PSA07B Generic Worker		No
28620	CARES, PSA06B Generic Worker		No
28598	CARES, PSA07A Generic Worker		No
28621	CARES, PSA07B Generic Worker		No

- j. **AHCA County:** this field is read only but will be populated later by the interface for MLTC program record only.
- k. **Enrollment Exception:** This will be used to explain when an enrollment is added on an exception basis because the Client is under 60, for MLTC, for Nutrition or to record services after DOD. Leave this field blank if it does not apply.
- l. **Exception Reason:** When an enrollment exception is selected, an exception reason should be selected.

Michelle Apple | Program  
 Last Updated by j buck  
 at 6/9/2023 5:39:52 PM

**File**   **Tools**

**Program**  
 Enrollment Provider  
 Track Status

Division \*   AG  
 Referred From   ARC or ADRC  
 Referral Date   02/20/2023  
 Program \*   MLTC - MANAGED LONG-TERM CARE   Details  
 Service   AGGREGATE, ADC, BASI, CA, CM, CHO, CNMI  
 Status \*   APPL Applicant  
 Status Effective Date \*   12/12/2023  
 Historical Start Date/Billing Start Date \*   02/20/2023  
 AHCA County  
 Enrollment Exception  
 Exception Reason

4. From the **File** menu, select **Save and Close Programs**.
5. The eligibility specialist obtains the [3008 or equivalent](#) from the APS/API or the ALF worker.
6. The eligibility specialist creates the [Medicaid Waiver Timeline form](#).
7. The eligibility specialist [Creates the CARES Referral](#).
8. The eligibility specialist adds a contact note in eCIRTS summarizing the completion of the referral tasks.
9. The eligibility specialist will first search for the existing client record.
10. From the existing client search results, select the flyout menu to the right of the client's name in the search results. Select **Add Contacts**. The Contact Details page displays.

Welcome, Jennifer Buck  
 10/26/2023 12:41 PM

**Client - Search For Existing**

**File**

Filters  
 Last Name \*   Contains   Apple   AND  
 First Name \*   Contains   Michelle   OR  
 eCIRTS Client ID   +

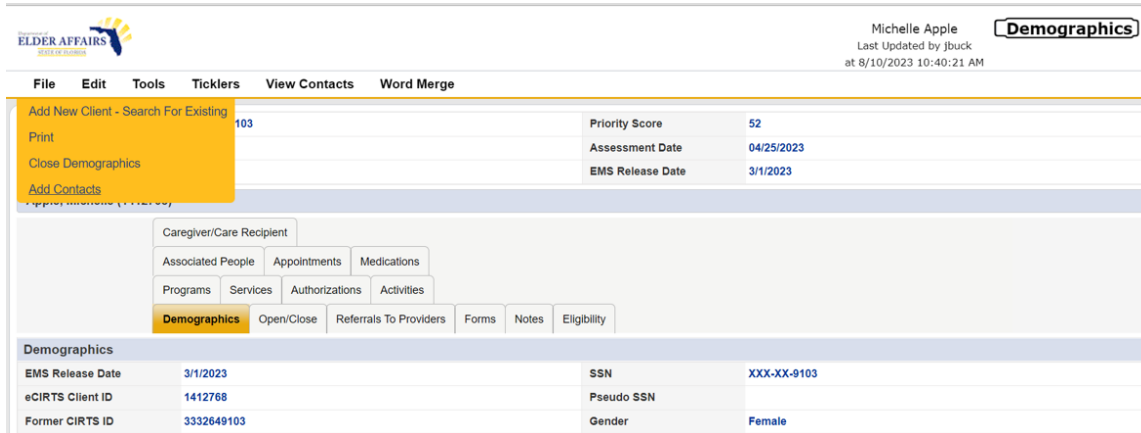
Search   Reset   Add New

1 Client - Search For Existing record(s) returned - now viewing 1 through 3

eCIRTS Client ID	Last Name	First Name	PSA	Best Contact Phone	Date of Birth	SSN	Pseudo SSN	Street	Street 2	City	State	Zip Code	County	Email	Gender
1412768	Apple	Michelle	2	(555)555-5555	04/24/1944	XXX-XX-9103		123 Test St		Tallahassee	FL	32304	Leon	mreed@email.com	Female

First   Previous   Records per page: 15   Next   Last   **Add Contacts**

11. Or, with the client record already open, select the **Demographics** tab. From the **File** menu, select **Add Contact**. The Contact Details page displays.



Michelle Apple  
Last Updated by Jbuck  
at 8/10/2023 10:40:21 AM

**Demographics**

File Edit Tools Ticklers View Contacts Word Merge

Add New Client - Search For Existing 103

Print

Close Demographics

Add Contacts

Caregiver/Care Recipient

Associated People Appointments Medications

Programs Services Authorizations Activities

**Demographics** Open/Close Referrals To Providers Forms Notes Eligibility

**Demographics**

EMS Release Date	3/1/2023	SSN	XXX-XX-9103
eCIRTS Client ID	1412768	Pseudo SSN	
Former CIRTS ID	3332649103	Gender	Female

12. The Contact details page displays. Update the following fields:
  - a. **Division:** Required. Defaults to AG as is read only.
  - b. **Contact Date:** Required. defaults to today and is editable if needed.
  - c. **Contact Time:** Required. defaults to now and is editable if needed.
  - d. **Received By:** Required. defaults to the eligibility specialist adding the contact record.
  - e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
  - f. **Current Task:** Select Eligibility
  - g. **Contact Method:** Required. defines how the contact was made.
  - h. **Anonymous:** Leave blank
  - i. **eCIRTS ID:** populates automatically and is read only.
  - j. **Client First Name:** populates automatically.
  - k. **Client Last Name:** populates automatically.
  - l. **Call Back Phone:** populates automatically – update if needed.
  - m. **Caller if other than Client:** leave blank.
  - n. **Relationship:** leave blank
  - o. **Contact Type:** select SMMC LTCP – Eligibility
  - p. **Short Summary:** brief details about the completion of the tasks above. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
  - q. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
  - r. **Contact Marker:** leave blank.
  - s. **SNAP Submittal Date:** leave blank.
  - t. **Reason for Contact:** Medicaid Eligibility
  - u. **Referral Type:** APS to ALF
  - v. **701S Appointment Date:** leave blank.
  - w. **Unmet Needs Reason:** leave blank.
  - x. **Assigned To:** defaults to self. Can remove value or leave as is.
  - y. **Screener:** leave blank
  - z. **Contact Status:** Complete
  - aa. **Duration:** will automatically populate after the record is saved.
  - bb. **Client Primary Language:** leave blank. This field is used when the screening referral from the Helpline is created.
  - cc. **Other Language:** leave blank. This field is used when the screening referral from the Helpline is created.
  - dd. **Follow Up Date:** leave blank.
  - ee. **Screening Referral Created Date:** leave blank.

- From the **File** menu, select **Save and Close Contact**.

## Regaining Eligibility

Some cases assigned to eligibility specialists are clients who are regaining eligibility. Eligibility specialists provide Medicaid application assistance to these clients mostly outside of eCIRTS but will document their actions taken with the client in eCIRTS contact notes.



### Role: eCIRTS Worker

- The eligibility specialist will call the client and walk them through the process of completing the paper application. The specialist will document the contact on a contact record in eCIRTS.
- The eligibility specialist will first search for the existing client record.
- From the existing client search results, select the flyout menu to the right of the client's name in the search results. Select **Add Contacts**. The Contact Details page displays.

Filters

Last Name \* Contains Apple AND X

First Name \* Contains Michelle OR X

eCIRTS Client ID +

Search Reset Add New

Client - Search For Existing record(s) returned - now viewing 1 through 3

eCIRTS Client ID	Last Name	First Name	PSA	Best Contact Phone	Date of Birth	SSN	Pseudo SSN	Street	Street 2	City	State	Zip Code	County	Email	Gender
1412768	Apple	Michelle	2	(555)555-5555	04/24/1944	XXX-XX-9103		123 Test St		Tallahassee	FL	32304	Leon	mreed@email.com	Female

First Previous Records per page: 15 Next Last

- Or, with the client record already open, select the **Demographics** tab. From the **File** menu, select **Add Contact**. The Contact Details page displays.

Michelle Apple

Last Updated by j buck at 8/10/2023 10:40:21 AM

File Edit Tools Ticklers View Contacts Word Merge

Add New Client - Search For Existing 103

Print

Close Demographics

Add Contacts

Caregiver/Care Recipient

Associated People Appointments Medications

Programs Services Authorizations Activities

Demographics Open/Close Referrals To Providers Forms Notes Eligibility

Priority Score	52
Assessment Date	04/25/2023
EMS Release Date	3/1/2023

EMS Release Date	3/1/2023	SSN	XXX-XX-9103
eCIRTS Client ID	1412768	Pseudo SSN	
Former CIRTS ID	3332649103	Gender	Female

- The Contact details page displays. Update the following fields:
  - Division:** Required. Defaults to AG as is read only.
  - Contact Date:** Required. defaults to today and is editable if needed.

- c. **Contact Time:** Required. defaults to now and is editable if needed.
- d. **Received By:** Required. defaults to the eligibility specialist adding the contact record.
- e. **PSA:** Required. Select your PSA from the list or populated by Stored Procedure
- f. **Current Task:** Select Eligibility
- g. **Contact Method:** Required. defines how the contact was made.
- h. **Anonymous:** Leave blank
- i. **eCIRTS ID:** populates automatically and is read only.
- j. **Client First Name:** populates automatically.
- k. **Client Last Name:** populates automatically.
- l. **Call Back Phone:** populates automatically – update if needed.
- m. **Caller if other than Client:** leave blank.
- n. **Relationship:** leave blank
- o. **Contact Type:** select SMMC LTCP – Eligibility
- p. **Short Summary:** brief details about the contact with the client to complete the application. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
- q. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
- r. **Contact Marker:** leave blank.
- s. **SNAP Submittal Date:** leave blank.
- t. **Reason for Contact:** Regaining Eligibility
- u. **Referral Type:** leave blank.
- v. **701S Appointment Date:** leave blank.
- w. **Unmet Needs Reason:** leave blank.
- x. **Assigned To:** search for and select your name if not already selected.
- y. **Screener:** leave blank
- z. **Contact Status:** Follow Up
- aa. **Duration:** will automatically populate after the record is saved.
- bb. **Client Primary Language:** leave blank. This field is used when the screening referral from the Helpline is created.
- cc. **Other Language:** leave blank. This field is used when the screening referral from the Helpline is created.
- dd. **Follow Up Date:** enter a date you want to be prompted to follow up.
- ee. **Screening Referral Created Date:** leave blank.

File	Tools	Reports
<b>Contact</b>	<b>Contact Information</b>	
Resources Provided	Division * AG	
Client	Contact Date * 12/19/2023	
OOD Resources	Contact Time * 11   33   AM	
	Received By * Buck, Jennifer ... Clear Details	
	PSA 2 ... Clear	
	Current Task * Eligibility	
	Contact Method * Phone Call	
	Anonymous? <input type="checkbox"/>	
	eCIRTS ID	
	Client First Name Apple	
	Client Last Name Michelle	
	Call Back Phone (850)235-7787	
	Caller if other than Client	
	Relationship	
	Contact Type * SMMC LTCP - Eligibility	
	Short Summary Talked to client over the phone to fill out application	
	Notes will put it in the mail tomorrow.	
	Language Interpreter Services	
	<b>Contact Marker</b>	
	SNAP Submittal Date	
	Reason for Contact Regaining Eligibility	
	Referral Type	
	701S Appointment Date	
	Unmet Needs Reason	
	Assigned To (I&R & Eligibility) Buck, Jennifer ... Clear Details	
	Screener ... Clear	
	Contact Status * Follow Up	

6. From the **File** menu, select **Save and Close Contact**.
7. If the client is filling out the application, the eligibility specialist's job is done for now. The client will sign the completed application and return it to the specialist. The eligibility specialist will fax the signed application and requested verifications to DCF and update the existing contact record.
8. If the eligibility specialist filled out the application for the client over the phone, the specialist will mail the completed application to the client for signature. The client will sign the completed application and return it to the specialist. The eligibility specialist will fax the signed application and requested verifications to DCF and update the existing contact record.
9. This contact can be tracked on the **Contacts queue** because it will be updated when the application is received from the client. Use the following search filters:
  - a. **Assigned To:** search for and select your name if not already selected.
  - b. **Contact Status:** Follow Up
  - c. **Reason for Contact:** Regaining Eligibility
  - d. **Follow Up Date:** enter date parameters.



## Note

Recommend creating a user saved filter to list all regaining eligibility cases that require follow up. The next time you use the Contact queue, you can select your saved Filter from the list and click **Search Filter**. This will populate the search filters, saving you time from looking them up again.

The screenshot shows a 'Filters' interface with a 'Save Filter' button and a 'Search Filter' dropdown. Below this are several filter criteria:

Field	Operator	Value	Logic	Action
Assigned To	Equal To	Buck, Jennifer	AND	Details ... Clear
Contact Status	Equal To	Follow Up	AND	X
Follow Up Date	Greater Than	12/18/2023	AND	X
Reason for Contact	Equal To	Regaining Eligibility	AND	X
Contact ID				+

Buttons: Search, Reset

10. Click **Search**.

11. Select the Regaining Eligibility contact record created in step 1 from the list. The contact details page displays. Update the following fields:

- Contact Type:** remains SMMC LTCP – Eligibility
- Reason for Contact:** remains Regaining Eligibility
- Short Summary:** brief details about receiving application and faxing to DCF. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
- Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
- Contact Status:** change to Complete.

12. From the **File** menu, select **Save and Close Contact**.