WellSky

eCIRTS Training Guide

SHINE Workflows V2

Florida Department of Elder Affairs (DOEA)

Software and services for realizing care's potential

Document Tracking

Versions			
Revision	**Author/Editor**	**Date**	**Changes**
1.0	J. Buck	12/21/22	Document creation
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Icons used in the Guide.

Icon	Description
	**Tip** Tips provide general recommendations on how to make it easier or more productive to use WellSky.
	**Caution** The Caution icon highlights areas of note or concern, where failure to use the system properly may cause or exacerbate problems.
	**Note** Notes provide additional information of general interest about a specific function or process of WellSky.
	**Example** 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.

SHINE Workflows Training Guide Overview & Objectives

WellSky Human Services application/eCIRTS will maintain the SHINE referral process throughout the state of Florida, previously completed in REFER and CIRTS.

Introduction	This training introduces you to the workflows completed by the SHINE staff in eCIRTS.
Importance	Your confidence in using eCIRTS for managing SHINE referrals will increase as you develop proficiency in the software.
Overview	To help develop the necessary skills and understanding to effectively use eCIRTS to perform the SHINE referral process.
Objectives	• Following the steps in the guide to: ▪ Receive new screening referrals. ▪ Assign screening referrals. ▪ Document contact attempts. ▪ Complete the 701S. ▪ Create APCL enrollments

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Overview

Referrals for the SHINE program can be received by the Helpline/I&R Specialists or SHINE staff can receive a call directly from an interested client. Regardless of the entry point, the process in eCIRTS will be the same. A referral record will be created for the SHINE program and the SHINE Data Form will be completed in eCIRTS. The SHINE Liaison will be assigned as the worker. The SHINE Liaison will be responsible for assigning a SHINE Counselor and documenting their name on the SHINE Referral record in eCIRTS. The SHINE Liaison will notify the SHINE Counselor and provide the SHINE Data form information. The workflows for the SHINE Counselors will remain outside of eCIRTS. PSAs have the option to document unsuccessful contact with the client in eCIRTS if they choose.

Search for Existing Client Record

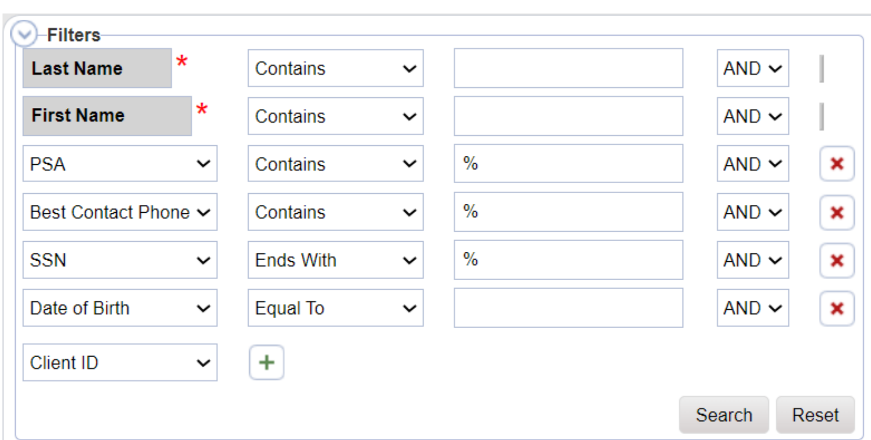
Every contact, except for Anonymous contacts, must be associated to a client record in eCIRTS.
The first step for almost every action in eCIRTS is to search for an existing client record. If one doesn't exist, a new client record will be added.

Role: **IR Specialist, eCIRTS Special Programs**

1. Click on the **Clients** Chapter.

2. From the **File** menu, select **Add New Client – Search for Existing**.

3. The search page opens. Update the following fields:
   a. **Last Name:** enter the full or partial last name. This is a required search filter.
   b. **First Name:** enter the full or partial first name. This is a required search filter.
   c. **PSA**: enter the PSA if desired. Otherwise leave the %.
   d. **Best Contact Phone:** enter the phone if desired. Otherwise leave the %.
   e. **SSN**: enter the SSN if desired. Otherwise leave the %.
   f. **DOB**: enter the DOB if desired. Otherwise, REMOVE the filter by clicking the red **X.**



NOTE

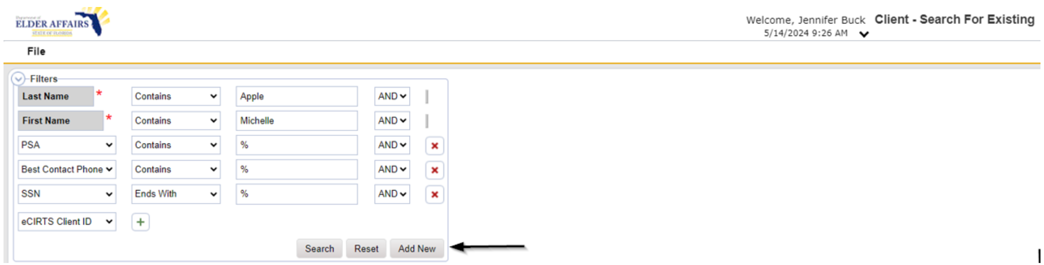
Each search filter contains four parts:

1. **Filter Field**: the data point to search on
2. **Operator**: the relationship between the filter field and the value described further in the table below.
3. **Value**: the filter field answer to search on. The % character is a wildcard and will return records that include anything in this field. These are the default values for most of the search filters. You do not have to enter a value if one is not known, just leave it as %.
4. **Connector**: the relationship between this filter and other filters in the search. **AND** tightens your search: only returns records that meets ALL filter criteria. **OR** broadens your search: returns records that meet ANY of the filter criteria.

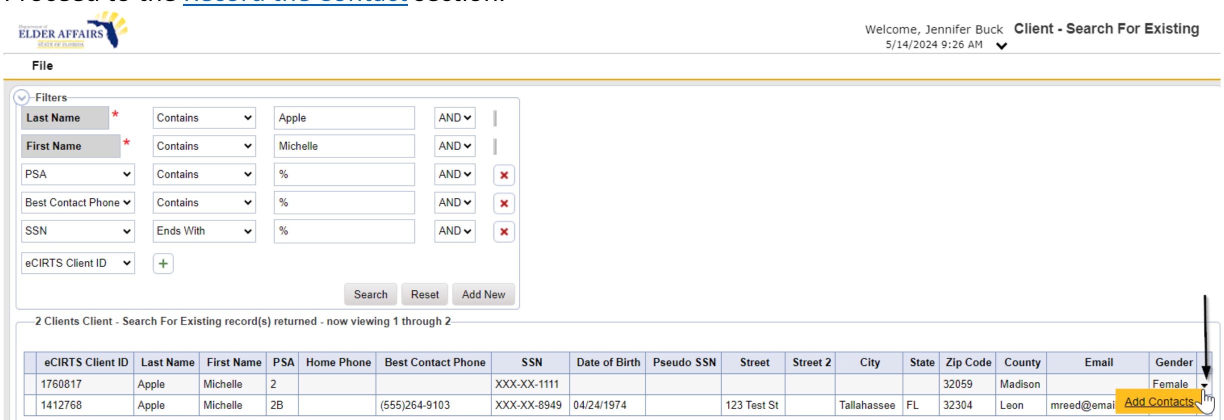
Operator	Definition
Equal To	Returns records that match the entered criteria. For example, if <Last Name> is entered as “equal to” a specific person’s name, the client records assigned to that worker will be returned.
Begins With	Returns records that begin with the entered criteria. For example, if 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

4. Click **Search**. Results are returned below.

5. If a match is NOT found, select **Add New**. Proceed to the Add a New Client Record section.



6. If a match IS found:
    a. and you are Helpline staff, use the flyout menu to the right of the list and select **Add Contact.** Proceed to the [Record the Contact](#) section.



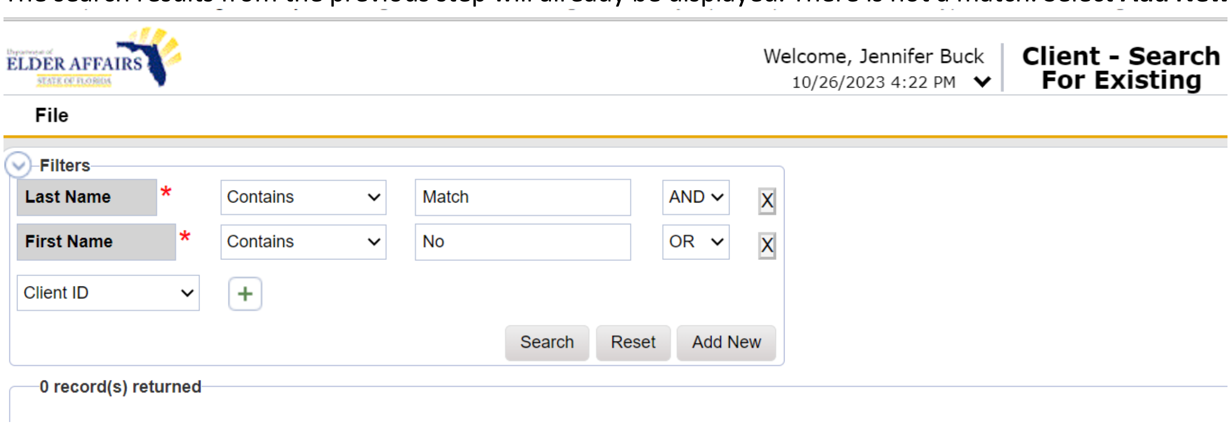
    b. And you are SHINE staff, a contact record does not need to be created in eCIRTS. Select the name from the list. The client record displays. Proceed to the [Add the Referral](#) section.

Add a New Client Record

If a [search for an existing client record](#) has already been completed and no matches exists, a new client record will be created in eCIRTS.

Role: **IR Specialist, eCIRTS Special Programs**

1. The search results from the previous step will already be displayed. There is not a match. Select **Add New**.



2. The Demographics page opens. Proceed to the [Demographics](#) section.

Demographics

The Demographic page is the first to display when a new client record is added. From the [Add a New Client Record]() section you learned a user must first search for an existing record before eCIRTS will allow them to create a new record. This section details all the data elements on the Demographics page, not just the ones required to create a client record. Users may complete this information with the client on the phone or come back to it later to complete.

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: **IR Specialist, eCIRTS Special Programs**

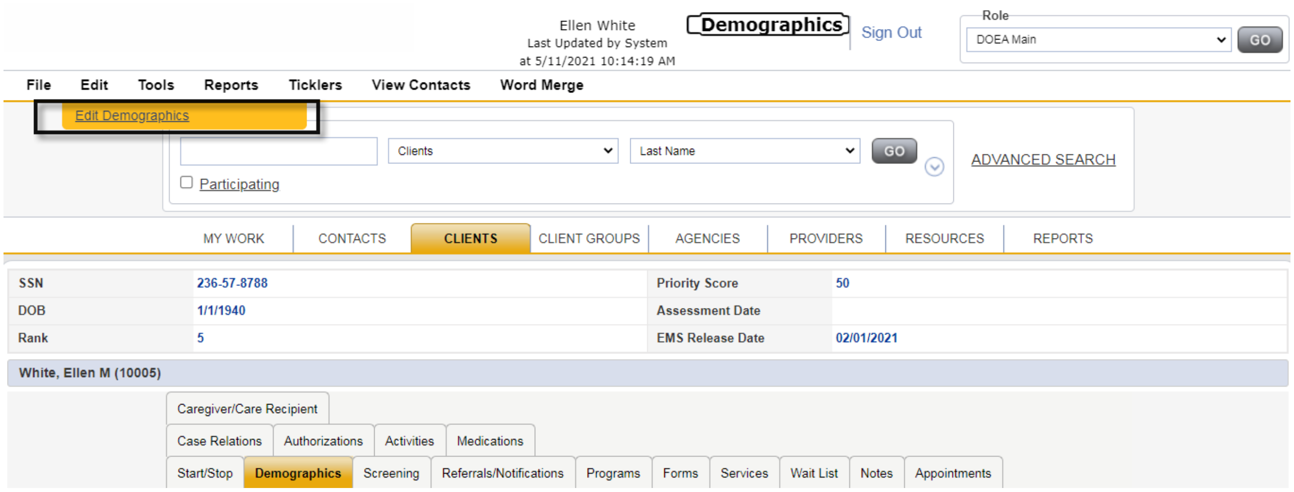
Demographics			
EMS Release Date	02/01/2021	SSN	236-57-8788
eCIRTS Client ID	10005	Pseudo SSN	
Former CIRTS ID		Gender	Female
First Name	Ellen	Age	81
Last Name	White	Race	Asian, White
Middle Initial	M	Ethnicity	Non Hispanic or Latino
AKA Name		Primary Language	English
Date of Birth	1/1/1940	Other Language	
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.



2. The Demographic Details page is also the landing page when adding a new Client record.

3. 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

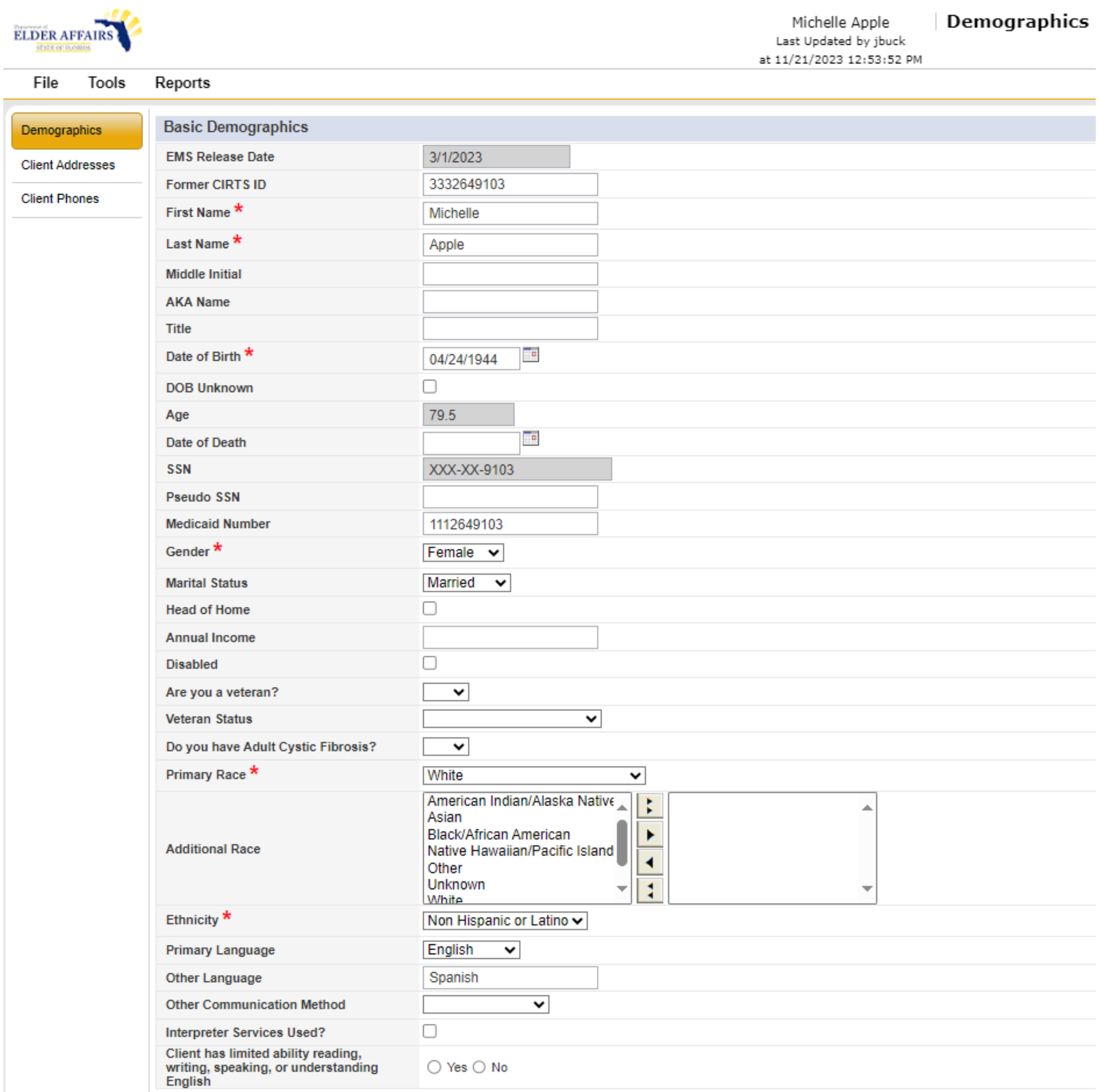
In March 2022, DOEA approved the change to mask SSN in eCIRTS to comply with requirements.

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.

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. **Annual Income**: leave blank
s. **Disabled**: NAPIS/OAAPS required field that pulls from the Assessment
t. **Are you a Veteran?:** Yes or No
u. **Veteran Status**: If Are you a Veteran is Yes, then answer this question.
v. **Do you have Adult Cystic Fibrosis?:** Yes or No
w. **Primary Race*: C**lient's race.
x. **Additional Race:** Multi select field to record additional race.
y. **Ethnicity***: Client's ethnicity
z. **Primary Language:** The primary language of the client
aa. **Other Language:** Use this field to record other languages for the client.
bb. **Other Communication Method**: Other communication method used by the client.
cc. **Interpreter Service Used?:** Check this box if services were used. This will be tracked for invoicing purposes.
dd. **Client has limited ability reading, writing, speaking or understanding English**: Yes or No



Contact Information:

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

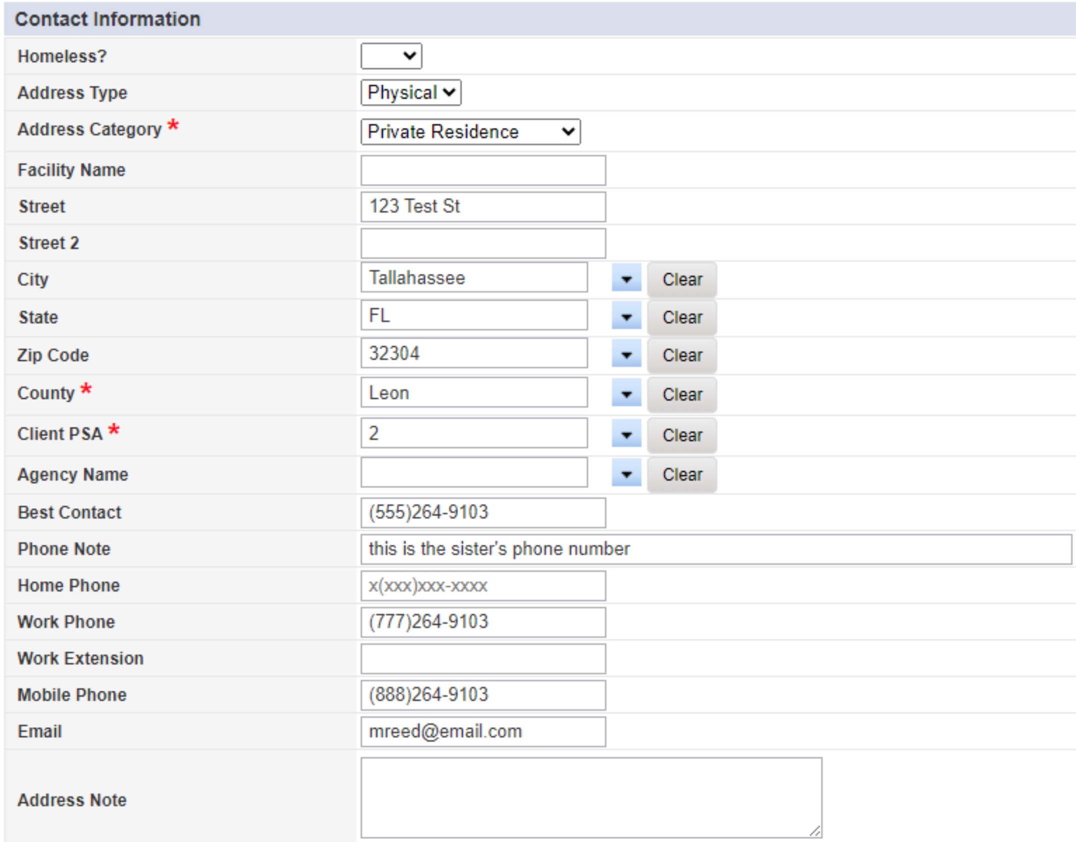
k. **PSA*:** The places list presents a list of values based on the city, state, zip, county selected.

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.

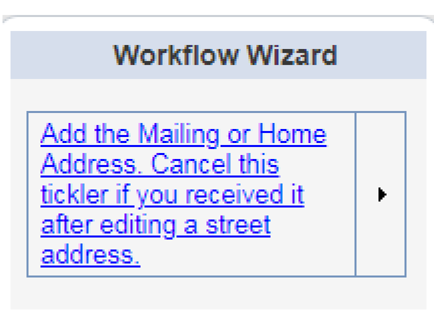


4. When finished, from the **File** menu, select **Save and Close Demographics.**
    a. For new clients**,** the Open/Close page will display. Proceed to the Add Open/Close Record section.
    b. For existing clients, the Demographics Summary page will be displayed. The updates are complete.

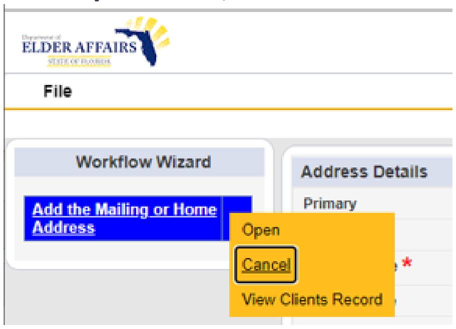
5. If you are Helpline staff, on the Demographics page, from the **File** menu, select **Add Contact.** Proceed to the Record the Contact section.

6. If you are SHINE staff, a contact record does not need to be created in eCIRTS. Proceed to the Add the Referral section.

7. 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.



8. 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: **IR Specialist, eCIRTS Special Programs**

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 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

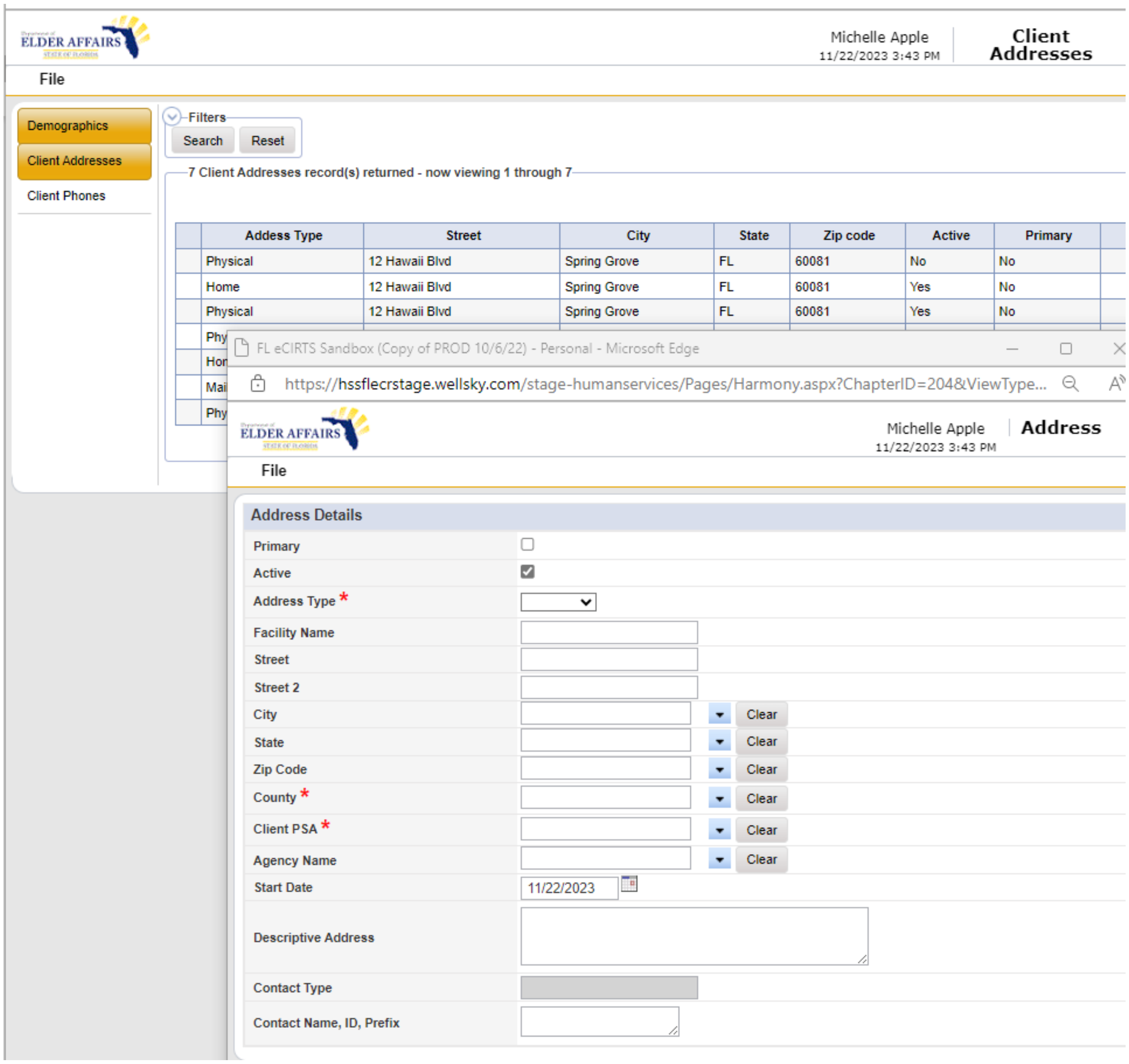
   Several reports use the client's county to display results so be sure to enter this field.

   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.



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

8. Proceed to the Add Open/Close Record section.

Add Open/Close Record

An Open/Close record serves as the 'parent' record in eCIRTS, and one will be created for every client. The Open/Close record is only created once… when the client record is first created. The Open/Close record will remain open until the client's record is archived which is not completed by SHINE staff.

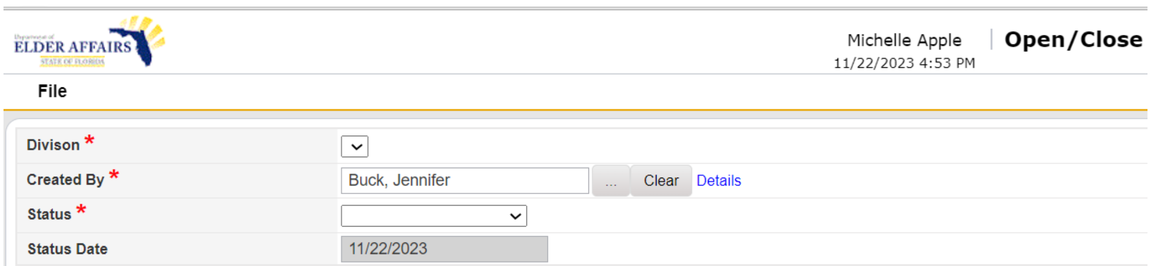
Role: **IR Specialist, eCIRTS Special Programs**

1. For new client records, the Open/Close Details page will be the landing page once the Demographics page is saved for the first time.

2. The Open/Close details page displays. Complete the following fields:
   a. **Division**: All clients will be associated with the AG division
   b. **Status**: Defaults to Pending. Change to Open.

Status	Use
Pending	This is the default value for all Open/Close records and should be changed. If you do not change it, the Division field on several pages in the client record like forms, programs, referrals, etc. will be blank and you will not be able to save the record.
Open	The client record is open so programs, assessments, notes, contacts, billable units, etc. can be added.
Closed	The Client record is closed to all programs. This is only done as part of the client archive process.

   c. **Status Date**: This field is used to record the date for the status. It will update each time the Status value is changed.
   d. **Created By:** is assigned when the client record is first created and is listed as the person who created the record. It does not need to be changed. It will be read only after saving the record the first time.



3. From the **File** menu, select **Save and Close Open/Close**.

4. If you are Helpline staff, select the client's Demographics tab. From the File menu, select **Add Contact.** Proceed to the Record the Contact section.

5. If you are SHINE staff, a contact record does not need to be created in eCIRTS. Proceed to the SHINE Data Form section.

Record the Contact

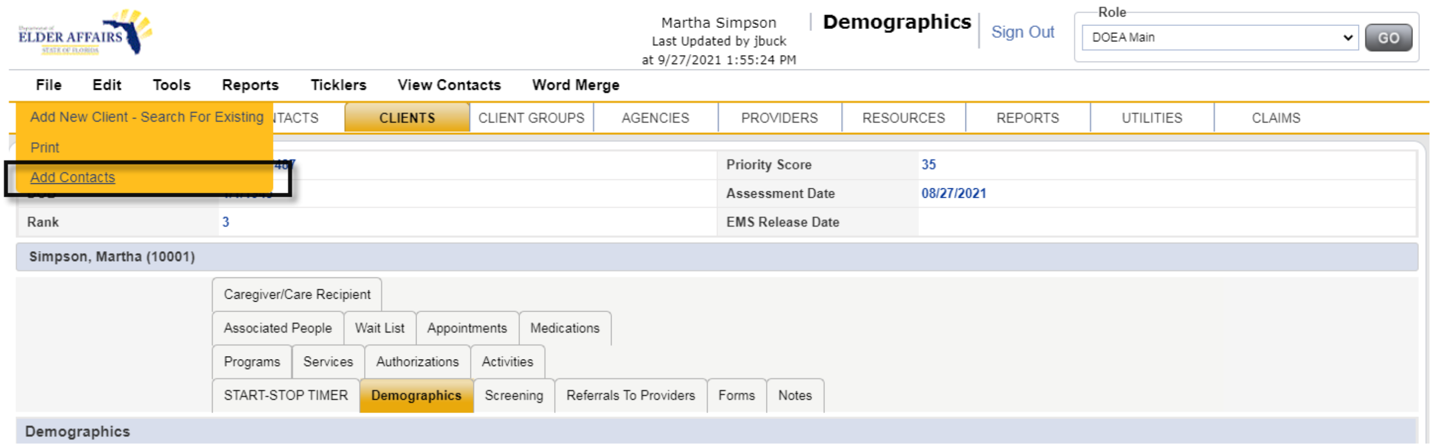
I&R or SHINE Staff can receive calls for clients interested in the SHINE program. I&R staff will record the call details on a Contact Record in eCIRTS and create a referral record. SHINE Staff will just create the referral record and can skip this section.

Note

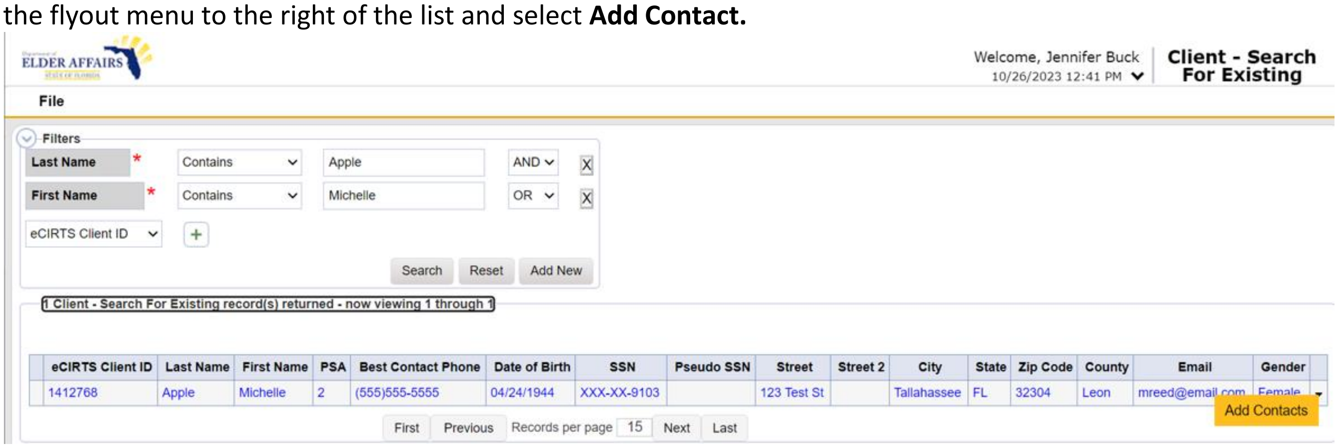
A Client record must exist before a Referral record can be created. See the [Search for an Existing Client record]() section of this manual for more information.

Role: **IR Specialist**

1. The IR Specialist can add a contact for the client from the **Demographics** tab. From the **File** menu, select **Add Contact**.

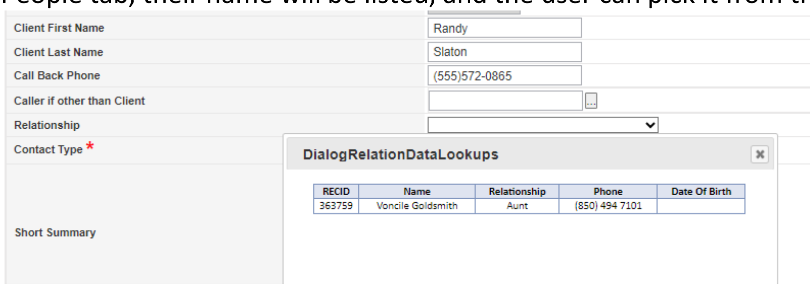


2. The IR Specialist can add a contract for the client from the Search for Existing Client search results. Use the flyout menu to the right of the list and select **Add Contact.**



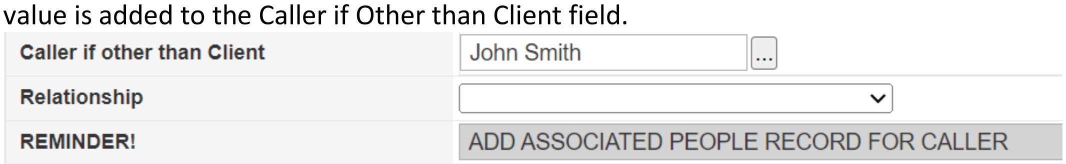
3. With the contact details page open, update the following fields:
    a. **Division**: Required. Defaults to AG as is read only.
    b. **Contact Date**: Required. defaults to today and is editable if needed.
    c. **Contact Time**: Required. defaults to now and is editable if needed.
    d. **Received By**: Required. defaults to the user adding the contact record.
    e. **PSA**: Required. Select your PSA from the list or populated by Stored Procedure
    f. **Current Task**: Select I&R
    g. **Contact Method**: Required. defines how the contact was received.

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 user can pick it from the list to populate the field.

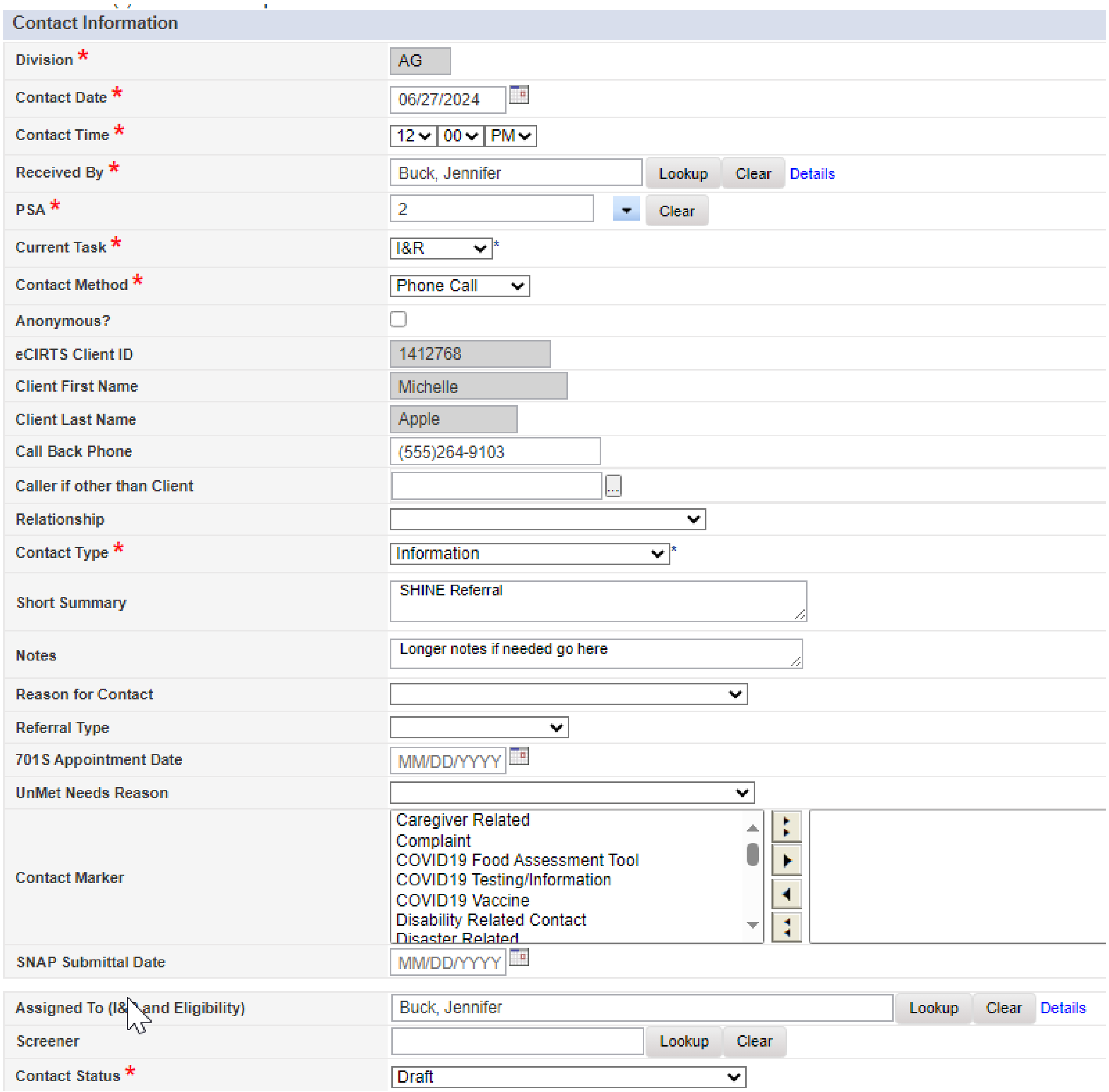


If not, the user can close the search window by clicking the X at the top right and just type the name into the "Caller if other than client" box on the contact screen.

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



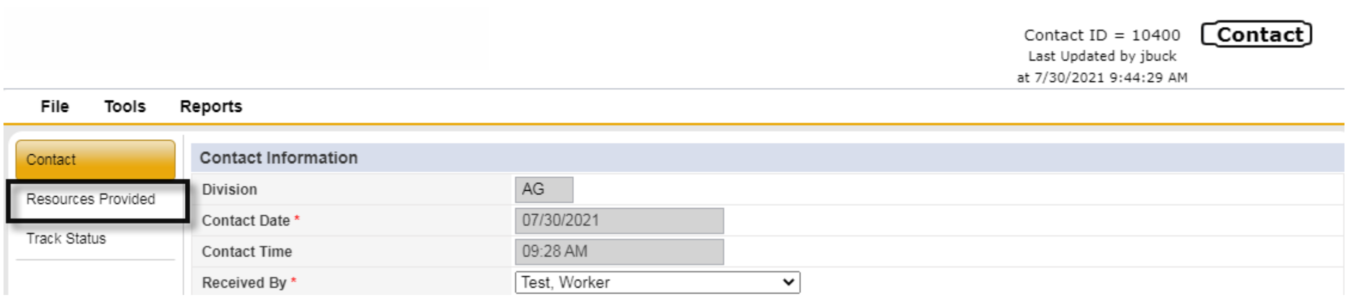
o. **Relationship:** enter the relationship of the caller to the client
p. **Contact Type**: select Information
q. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
r. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
s. **Contact Marker**: no changes needed.
t. **SNAP Submittal Date**: leave blank.
u. **Reason for Contact:** which one?
a. **Referral Type:** leave blank
v. **701S Appointment Date:** leave blank
w. **UnMet Needs Reason:** leave blank.
x. **Assigned To**: defaults to self.
y. **Screener**: leave blank
z. **Contact Status**: leave as Draft. Will be updated later in the workflow.
aa. **Duration**: will automatically populate after the record is saved.
bb. **Client Primary Language**: leave blank
cc. **Other Language**: leave blank
dd. **Follow Up Date:** leave blank.
ee. **Screening Referral Created Date:** leave blank



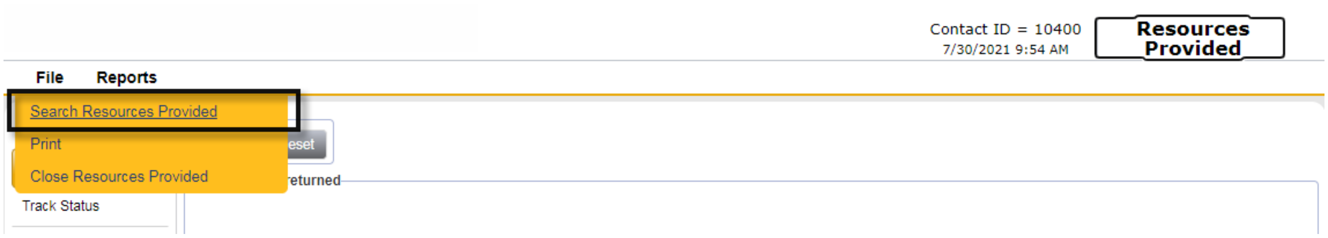
4. From the **File** menu, select **Save Contact**.

CAUTION
Select Save Contact, NOT Save and Close Contact to expose the subpages.

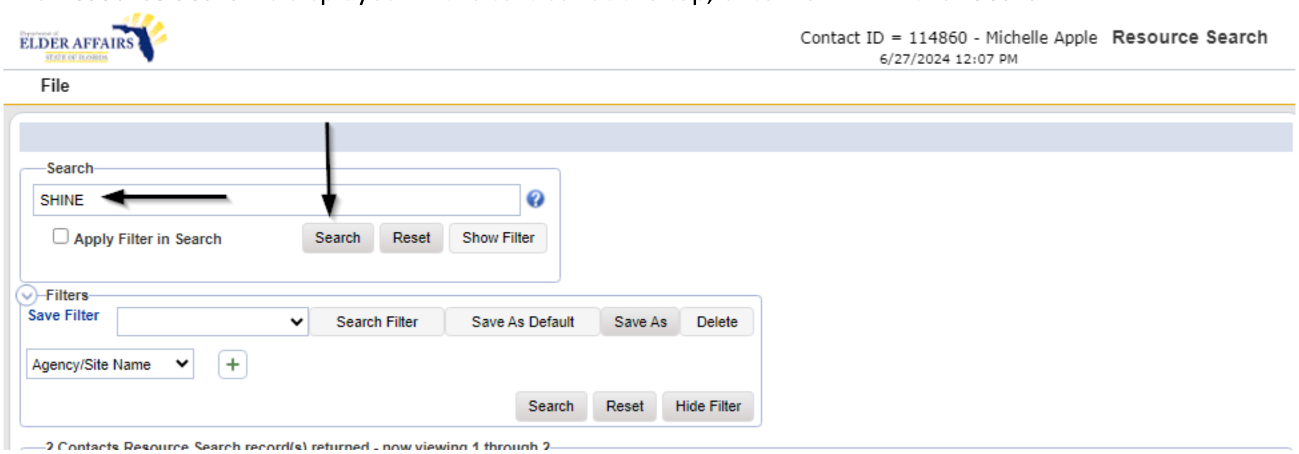
5. From within the open contact record, select the **Resources Provided** subpage.



6. From the **File** menu, select **Search Resources Provided**.

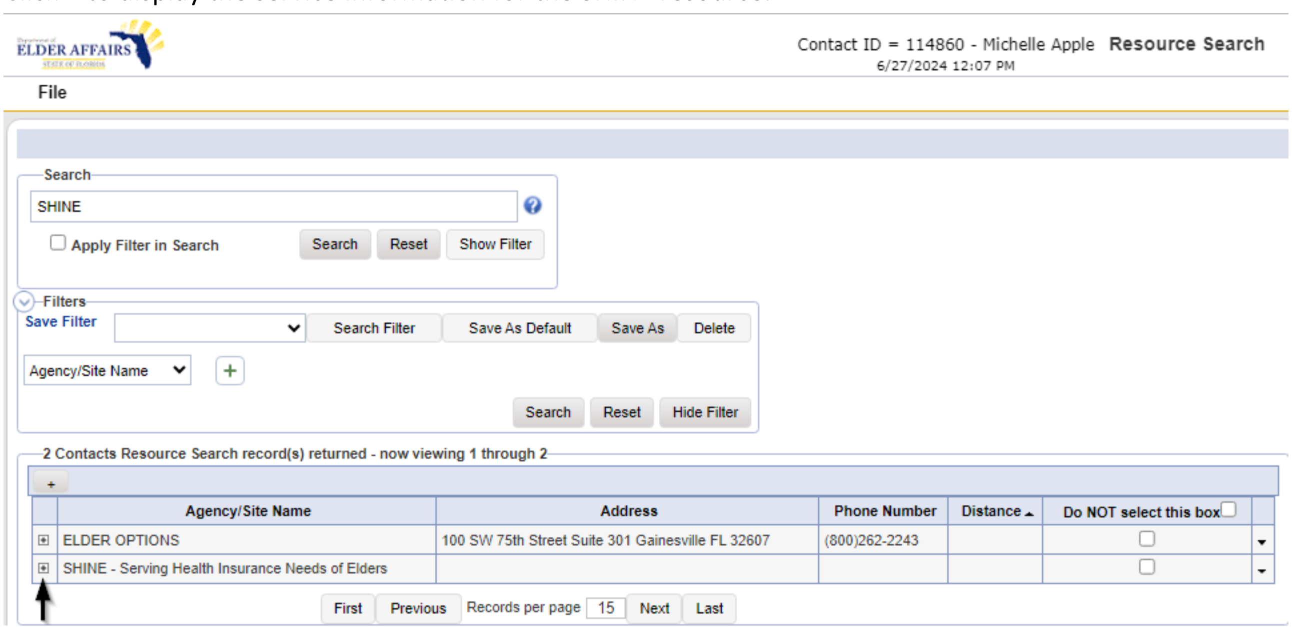


7. The **Resource Search** is displayed. In the text bar at the top, enter "SHINE." Click **Search**.



8. The SHINE resource is displayed in the list.

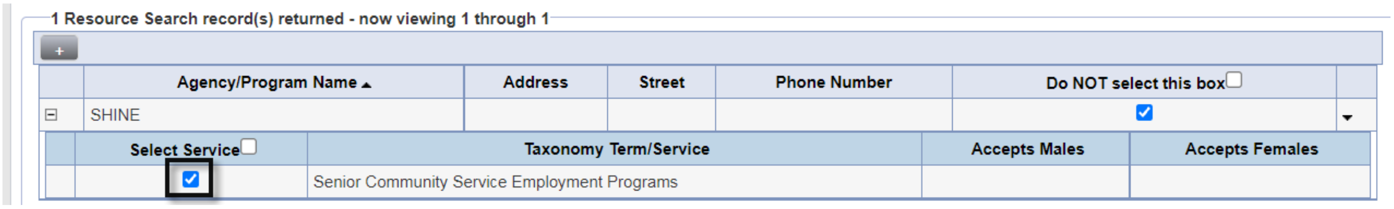
9. Click **+** to display the service information for the SHINE resource.



NOTE

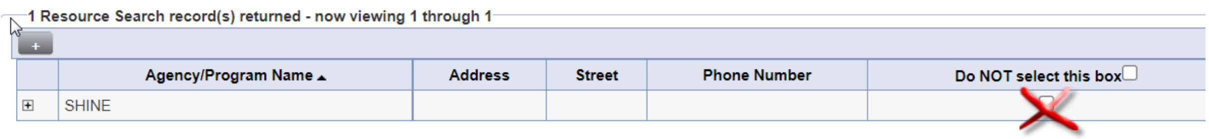
The large **+** will display the service information for all resources in the list. The small **+** will display the service information for one resource at a time.

10. Select the Service under the SHINE record. Use the **Select Service** checkboxes.

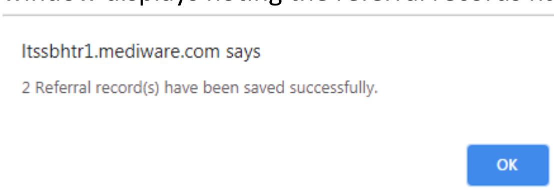


NOTE

Do not use the other check boxes on the right of the screen labeled, **Do NOT select this box**. Once the service checkbox is selected in the step above, the application will automatically check the required boxes in the Do NOT select this box field. The user should not select or unselect any of the Do NOT select this box checkboxes.



11. From the **File** menu, select **Save and Close Resource Search.** The page refreshes and a notification window displays noting the referral records have been saved successfully.



TIP

The term 'referral' in this window is an eCIRTS term and is not a screening referral. The message is telling the users the resources have been tagged to the contact record.

12. Keep the contact record open and return to the open client record. Proceed to the SHINE Data Form section.

SHINE Data Form

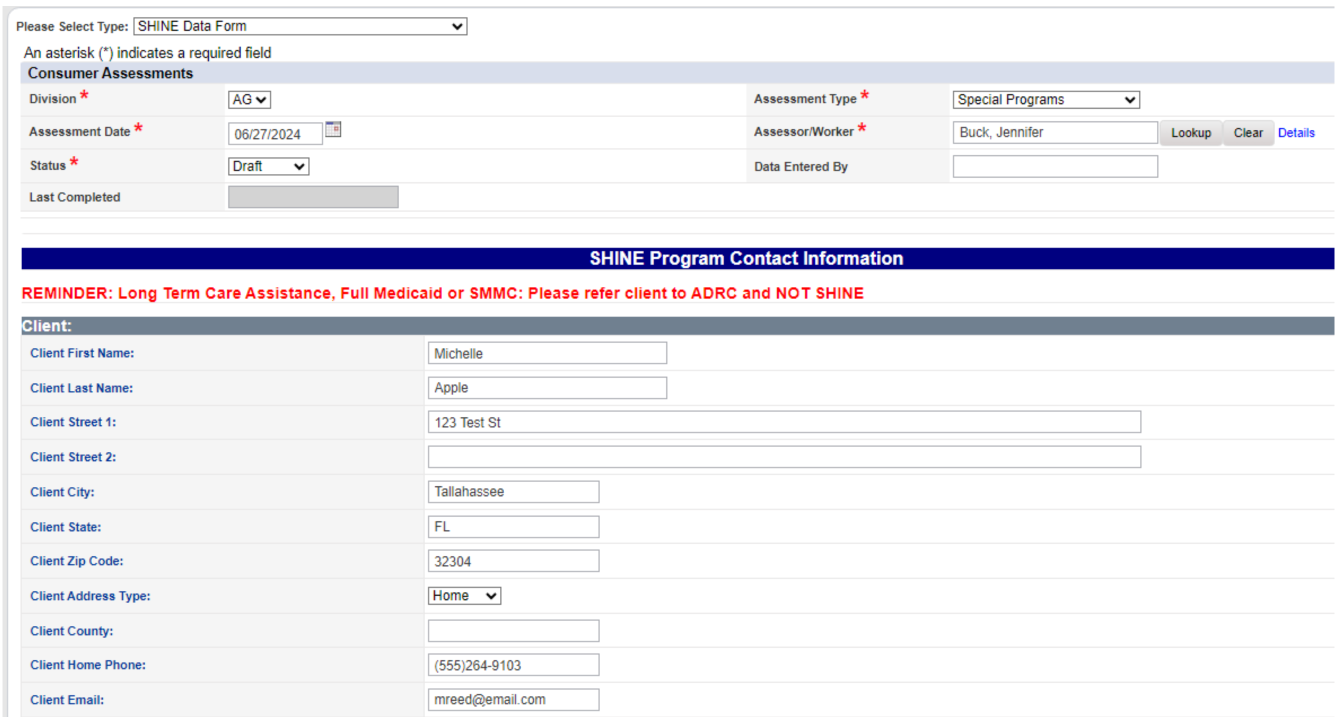
Note

In legacy REFER and CIRTS, not all PSAs complete the SHINE Data Form so this will be new for some.

Role: **IR Specialist, eCIRTS Special Programs**

1. Navigate to the client's record. Select the **Forms** tab. From the **File** menu, select **Add Form**.

2. The Form details page displays. Update the following fields:
    a. **In the header, Select Type**: SHINE Data Form
    b. **In the header, Division:** defaults to AG
    c. **In the header, Assessment Date:** defaults to today
    d. **In the header, Status:** defaults to Draft. Will be changed later in the workflow.
    e. **In the header, Last Completed:** remains blank until the form is saved as complete.
    f. **In the header**, **Assessment Type**: Special Programs
    g. **In the header, Assessor/Worker:** defaults to self
    h. **In the header, Data Entered By:** remains blank until the form is saved as complete.


Please Select Type: SHINE Data Form

An asterisk (*) indicates a required field

Consumer Assessments

Division *	AG	Assessment Type *	Special Programs
Assessment Date *	06/27/2024	Assessor/Worker *	Buck, Jennifer Lookup Clear Details
Status *	Draft	Data Entered By	
Last Completed			

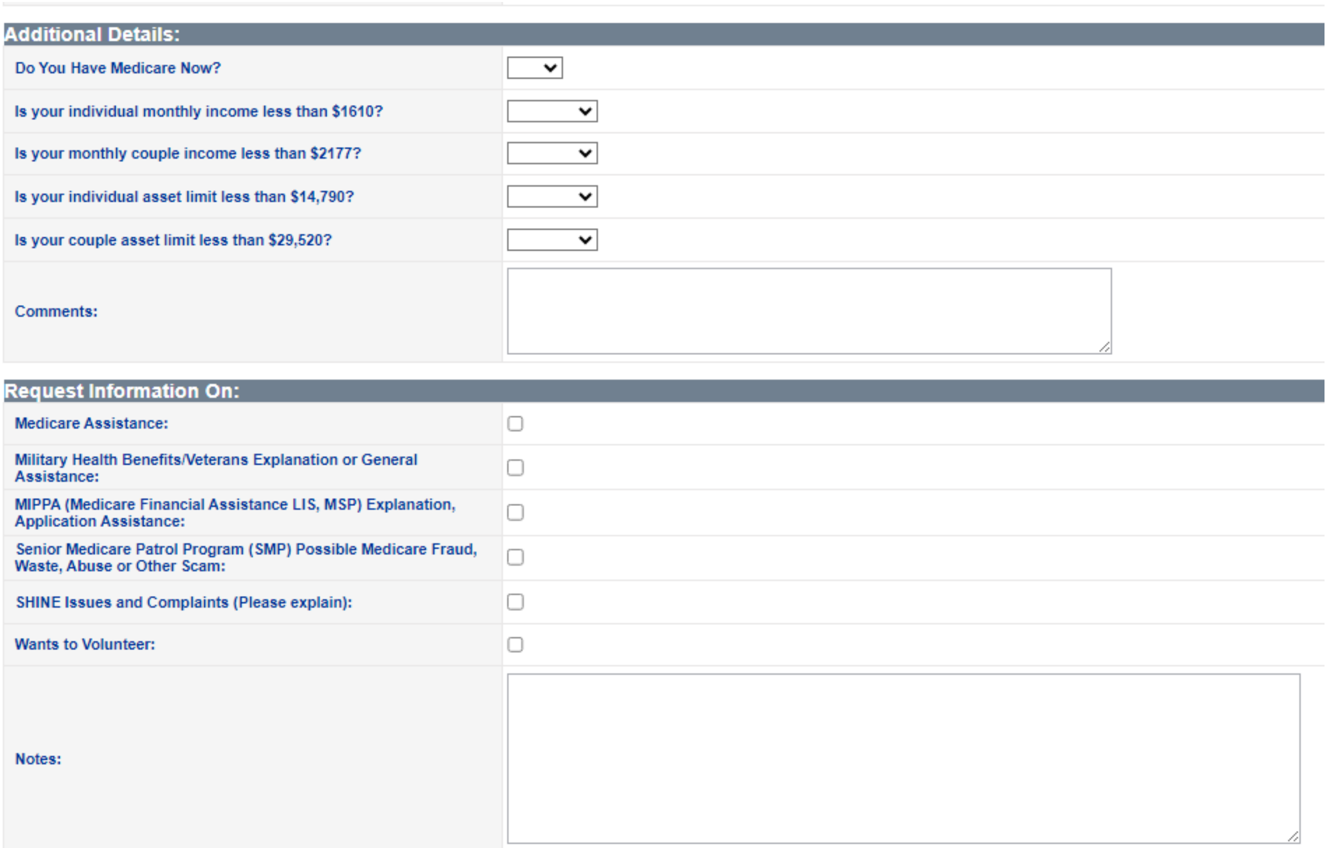
SHINE Program Contact Information

REMINDER: Long Term Care Assistance, Full Medicaid or SMMC: Please refer client to ADRC and NOT SHINE

Client:

Client First Name:	Michelle
Client Last Name:	Apple
Client Street 1:	123 Test St
Client Street 2:	
Client City:	Tallahassee
Client State:	FL
Client Zip Code:	32304
Client Address Type:	Home
Client County:	
Client Home Phone:	(555)264-9103
Client Email:	mreed@email.com

3. Answer the questions in the form.


Additional Details:

Do You Have Medicare Now?

Is your individual monthly income less than $1610?

Is your monthly couple income less than $2177?

Is your individual asset limit less than $14,790?

Is your couple asset limit less than $29,520?

Comments:

Request Information On:

Medicare Assistance:

Military Health Benefits/Veterans Explanation or General Assistance:

MIPPA (Medicare Financial Assistance LIS, MSP) Explanation, Application Assistance:

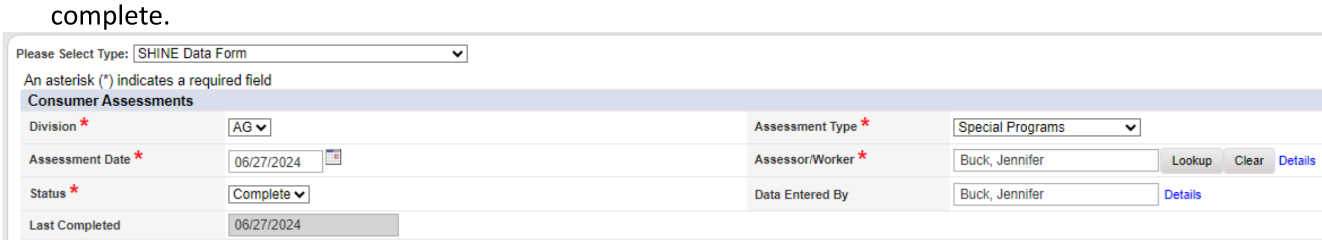
Senior Medicare Patrol Program (SMP) Possible Medicare Fraud, Waste, Abuse or Other Scam:

SHINE Issues and Complaints (Please explain):

Wants to Volunteer:

Notes:

4. When complete, update the following fields:
    a. **In the header, Status:** Complete
    b. **In the header, Last Completed:** auto populates with the date.
    c. **In the header, Data Entered By:** auto populates with your name, the user saving the form as complete.


Please Select Type: SHINE Data Form

An asterisk (*) indicates a required field

Consumer Assessments

Division *	AG	Assessment Type *	Special Programs
Assessment Date *	06/27/2024	Assessor/Worker *	Buck, Jennifer Lookup Clear Details
Status *	Complete	Data Entered By	Buck, Jennifer Details
Last Completed	06/27/2024		

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

6. Proceed to the Add the Referral section.

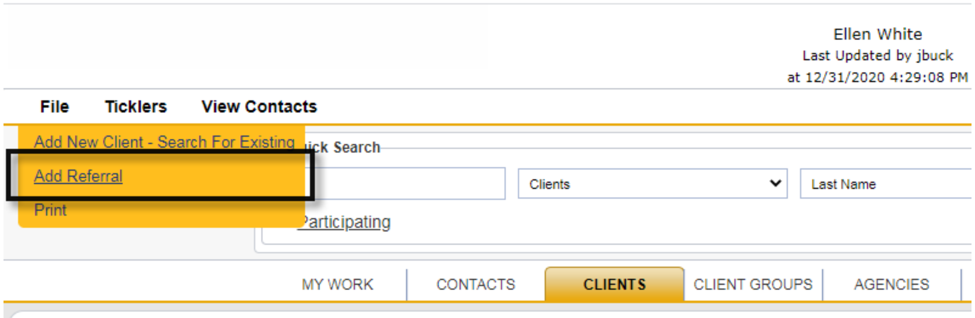
Add the Referral

A SHINE Referral record will be added for the client which serves as notification to the SHINE Liaisons to assign a SHINE counselor. A SHINE Referral will be added if the referral is being handle by the Helpline or directly by SHINE staff.

Role: **IR Specialist, eCIRTS Special Programs**

1. Navigate to the client's record and select the **Referrals to Providers** tab.

2. From the **File** menu, select **Add Referral Details**.



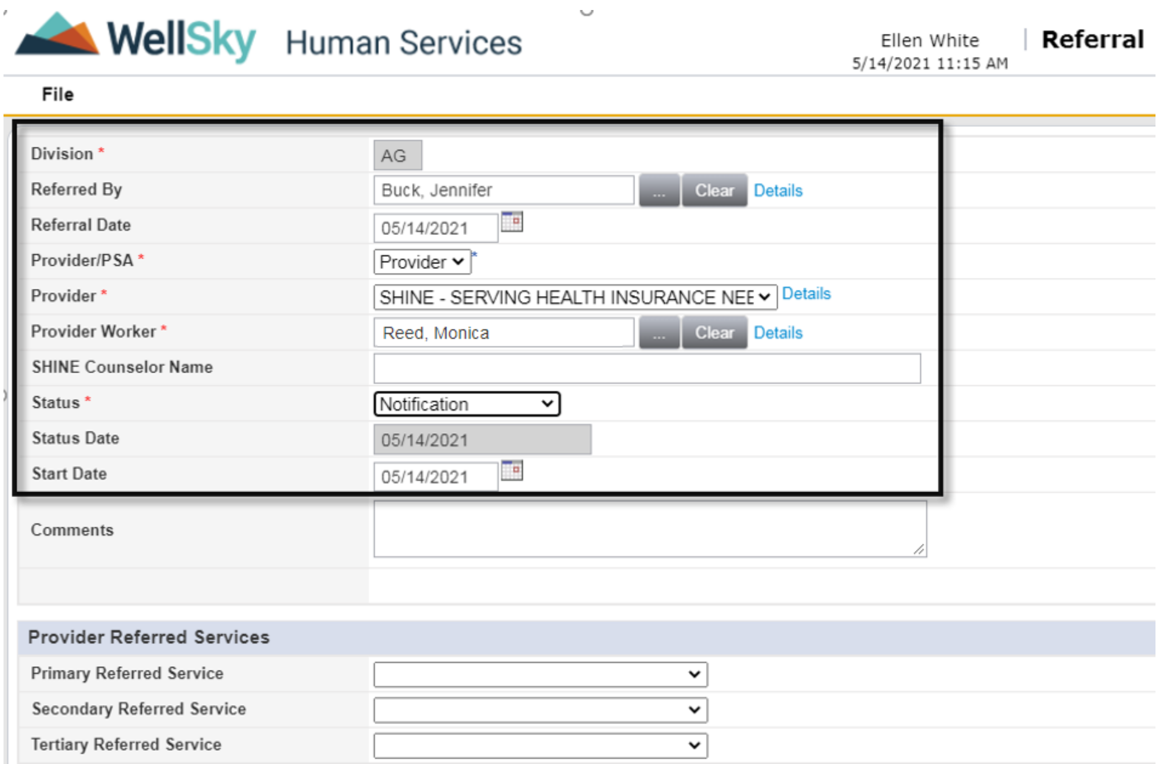
3. The Referrals details page will display. Update the following fields:
   a. **Division**: This field will display AG and be read only
   b. **Referred By**: This field will display the worker who added the referral record.
   c. **Referral Date:** This date reflects when the referral was made and defaults to today.
   d. **Provider/PSA:** The user must select if this is a Provider or PSA referral records. Select Provider.
   e. **Provider**: Search for and select SHINE- SERVING HEALTH INSURANCE NEEDS OF ELDERS
   f. **Worker**: Search for and select the name of the SHINE Liaison who will assign the SHINE Counselor. If the SHINE Liaison is not known, select the Generic worker for your PSA.

Note

Some PSAs have the I&R specialists assign the SHINE Counselor. They would still add SHINE Liaison as the Worker and add the SHINE Counselor name in the next field.

   g. **SHINE Counselor Name**: This field is visible when the provider is SHINE. This field will remain blank until the SHINE Counselor is assigned by the SHINE Liaison or I&R Specialist.
   h. **Status**: Select Notification if the referral was assigned to a SHINE Liaison. Select Referral Complete if the SHINE Counselor is already known.
   i. **Status Date**: defaults to today, the day the status was selected
   j. **Start Date**: defaults to today and does not need to be changed.
   k. **Comments**: use if needed
   l. **Provider Referred Services**: this section does not apply to SHINE referrals. Leave it blank.

11300 Switzer Road Overland Park, KS 66210



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

7. If you are SHINE Staff, proceed to Monitor Incoming SHINE Referrals section.

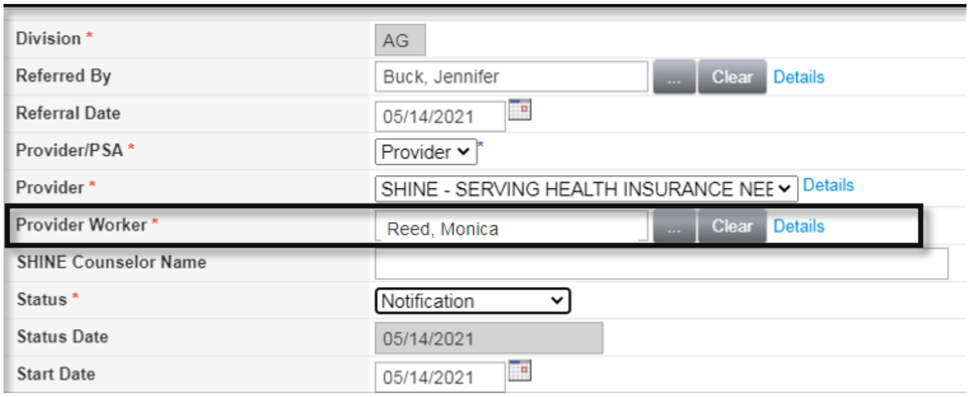
8. If you are Helpline staff, the contact record must be closed. Return to the open Contact record started in the Record the Contact section. Update the following fields:
   a. **Notes**: enter any additional notes if needed
   b. **Status**: select Complete

9. From the **File** menu, select **Save and Close Contact**. Proceed to the Monitor Incoming SHINE Referrals section.

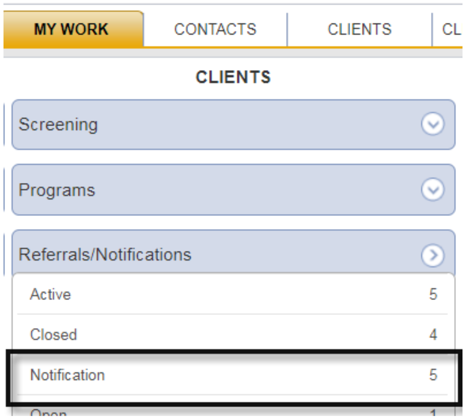
Monitor Incoming SHINE Referrals

Role**: eCIRTS Special Programs**

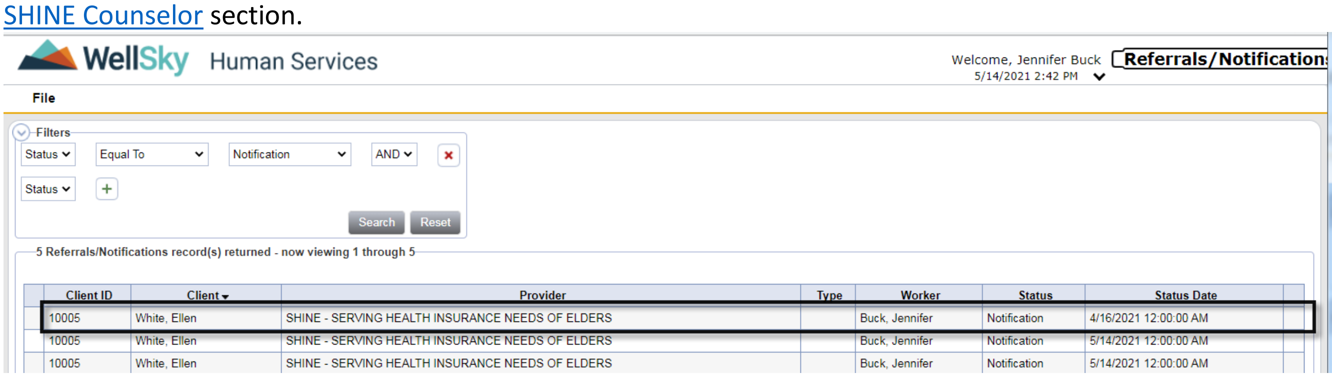
1. The SHINE Liaison, the person assigned as the Worker on the SHINE referral record, will monitor **My Work** for incoming SHINE referrals.



2. Select **Clients** > **Referrals to Providers** > **Notifications** to display a list of incoming SHINE notification records.

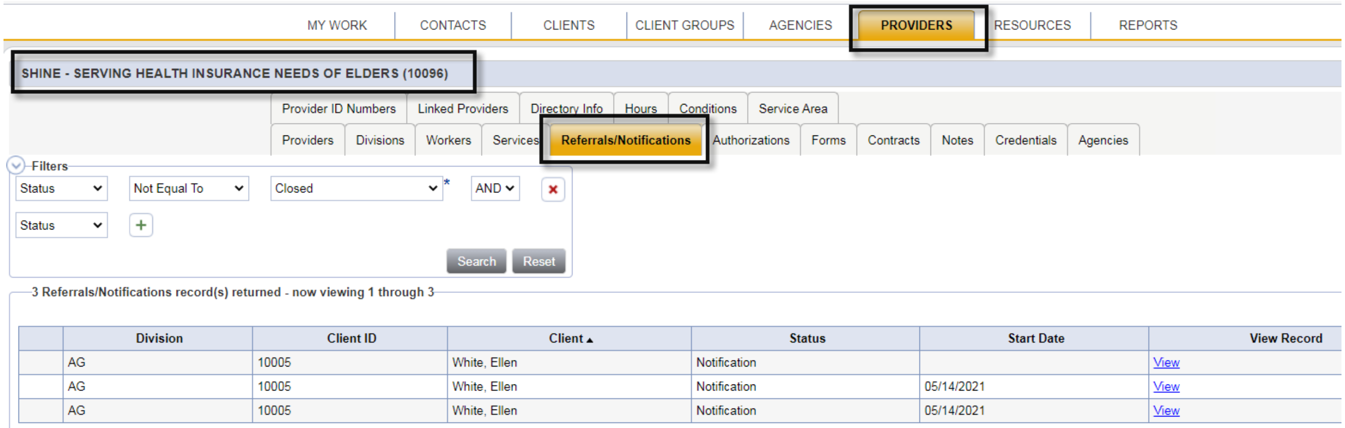


3. Select a record from the list. Each needs to have a SHINE Counselor assigned. Proceed to the [Assign SHINE Counselor]() section.



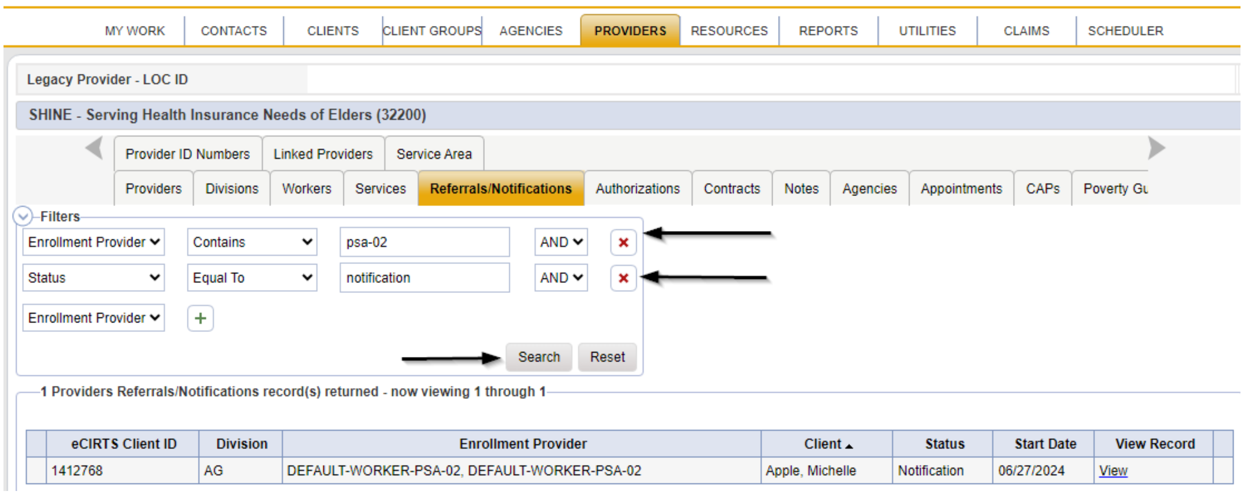
4. If your PSA doesn't assign referrals directly to an induvial and instead, assigns to the Generic Worker record for your PSA, incoming referrals can be monitored from the SHINE Provider record.

5. Select the **Providers** chapter. Search for and select the SHINE Provider record. Select the **Referrals/Notification** tab.

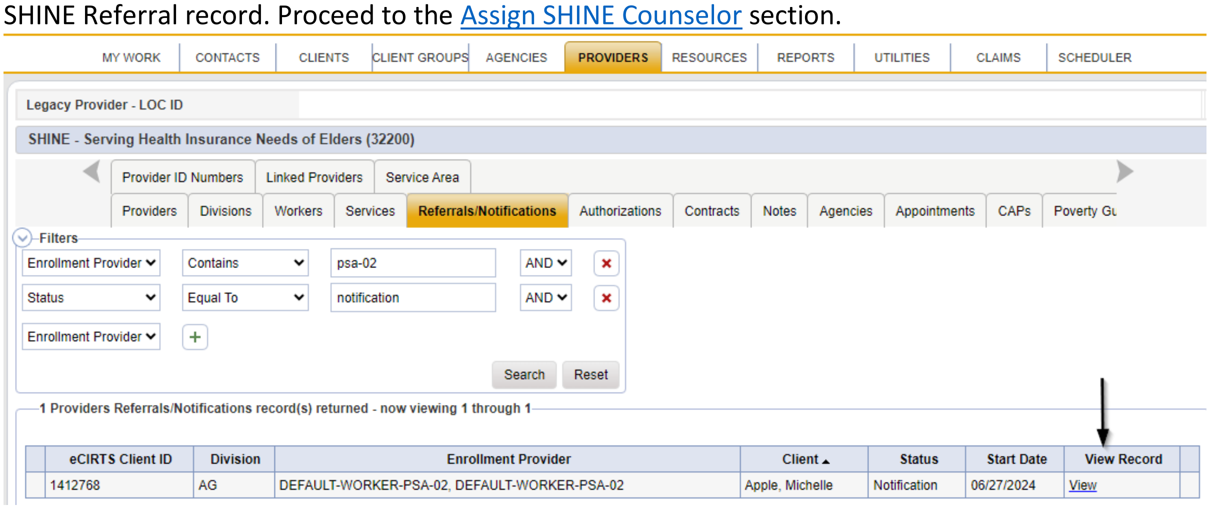


6. A list of SHINE referral notifications displays. Update the following filters:
   a. **Enrollment Provider**: Contains PSA-##". For example: PSA-02.
   b. **Status:** Equal to Notification.

7. Click **Search**.



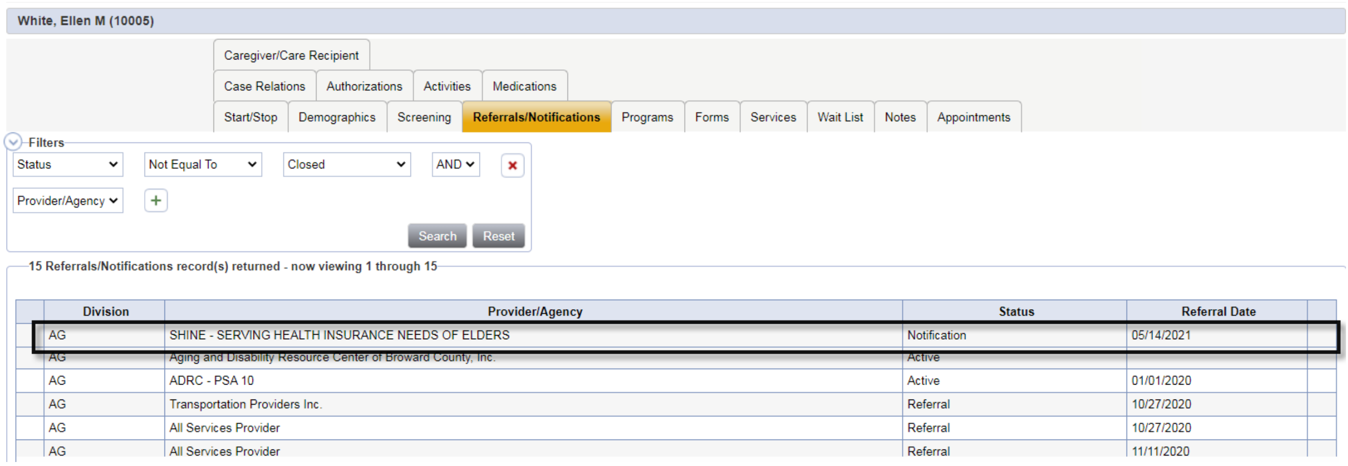
8. Use the **View Record** link to open the client's record. The SHINE Counselor will be added to the client's SHINE Referral record. Proceed to the Assign SHINE Counselor section.



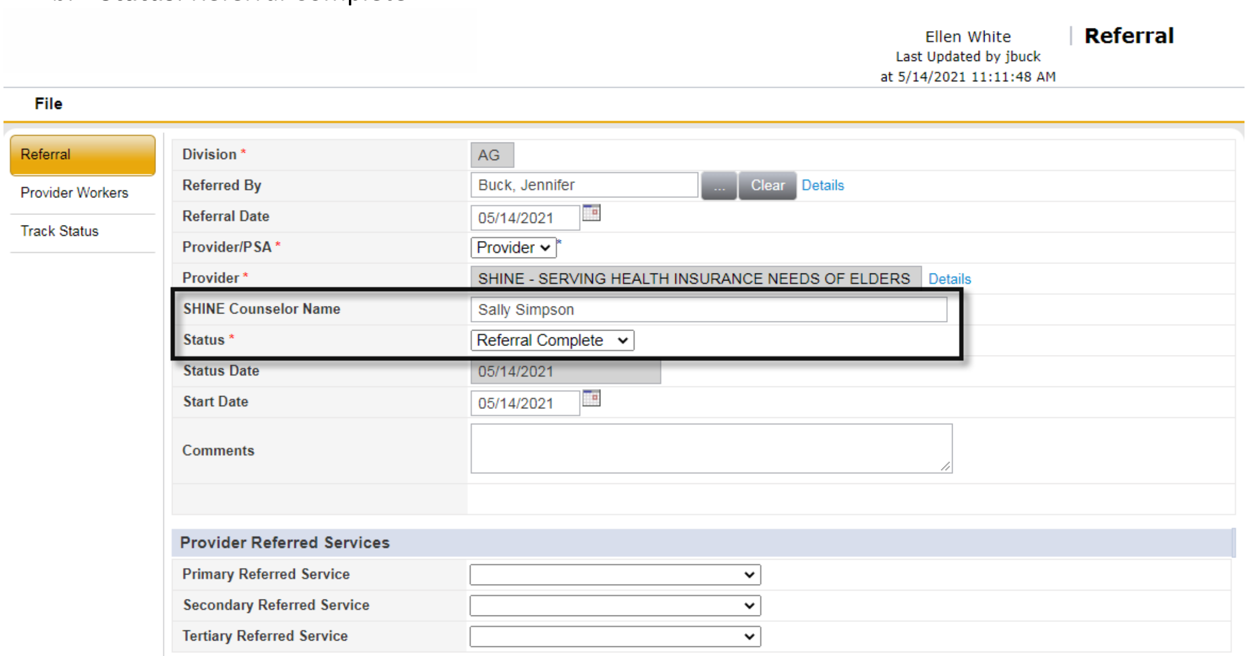
Assign SHINE Counselor

Role: **eCIRTS Special Programs**

1. Navigate to the client's record and select the **Referrals/Notification** tab. Select the SHINE record in Notification status from the list.



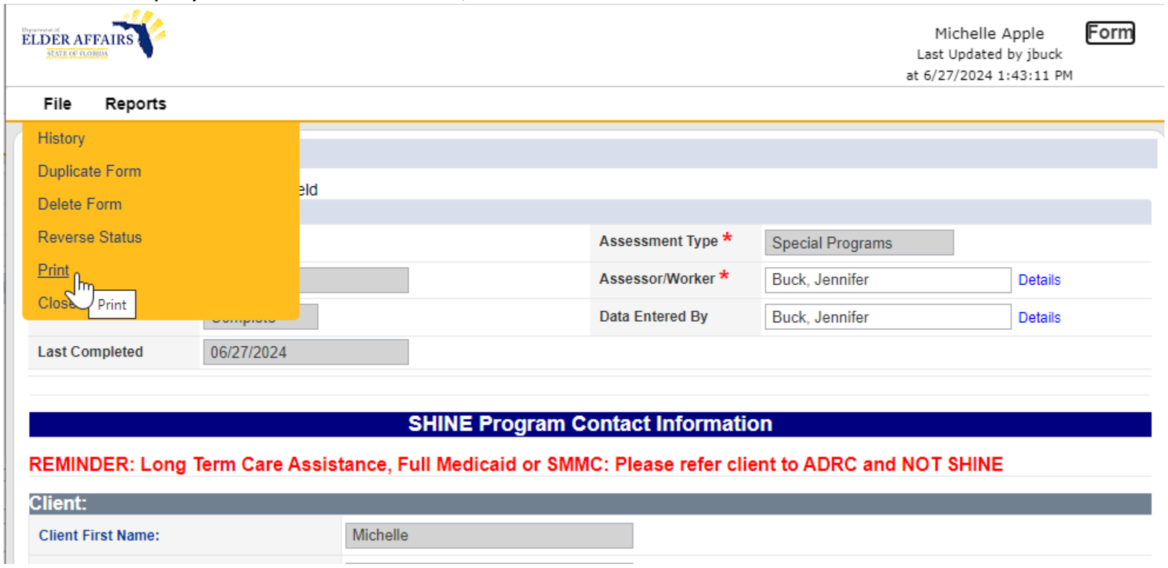
2. The Referral Details page displays. SHINE Liaison or SHINE worker will assign the SHINE Counselor and document his/her name on the SHINE referral record. Update the following fields:
   a. **SHINE Counselor Name**: enter the name of the counselor in the text box.
   b. **Status**: Referral Complete



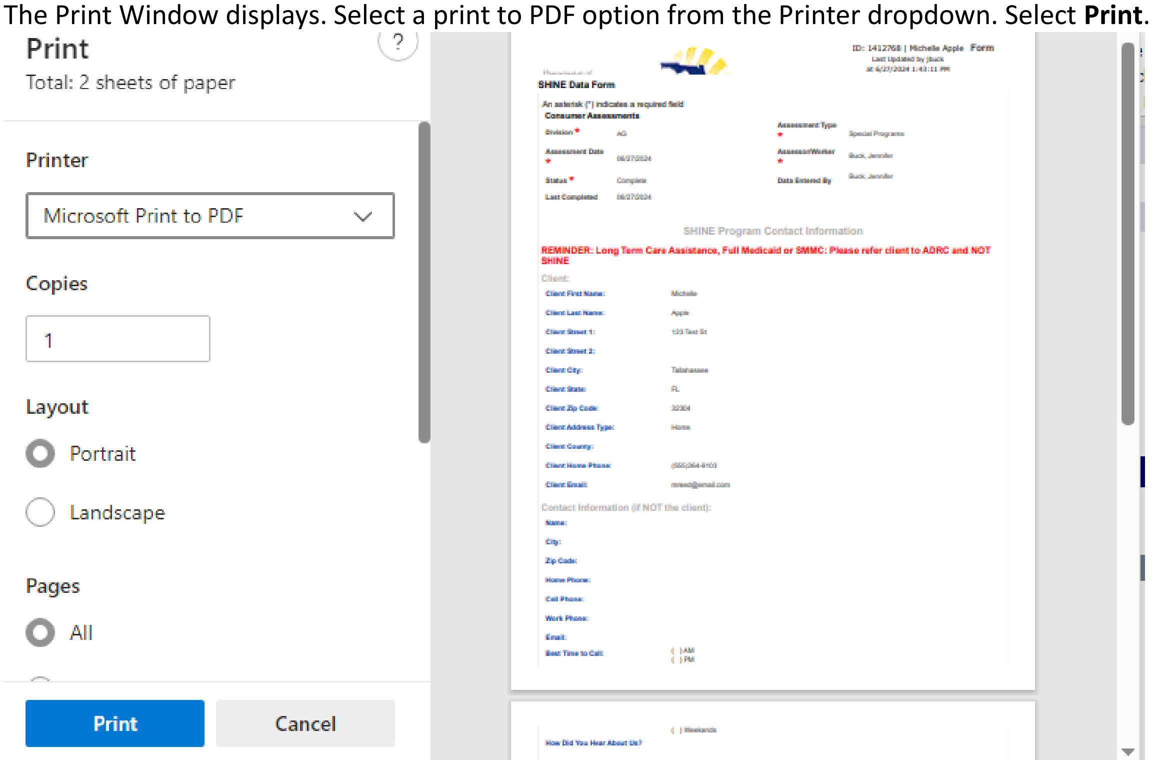
3. From the **File** menu, select **Save and Close Referral Details**.

4. The SHINE Liaison or SHINE Worker will send the SHINE Data Form data to the assigned Counselor. This can be completed by printing the SHINE Data Form to a PDF and attaching it to an email, or via a data export using the SHINE Form Data Export report.

5. To print to a PDF, select the **Forms** tab on the client record. Select the SHINE Data Form from the list. The form displays. From the **File** menu, select **Print**.



6. The Print Window displays. Select a print to PDF option from the Printer dropdown. Select **Print**.

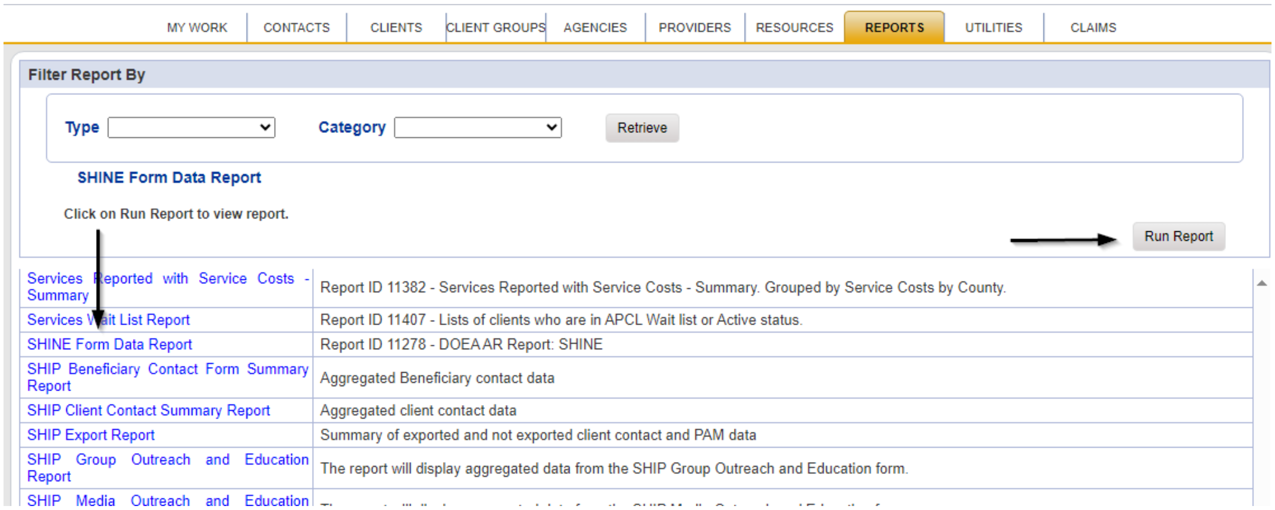


7. Save the document to your device then attach to an email to the SHINE Counselor.

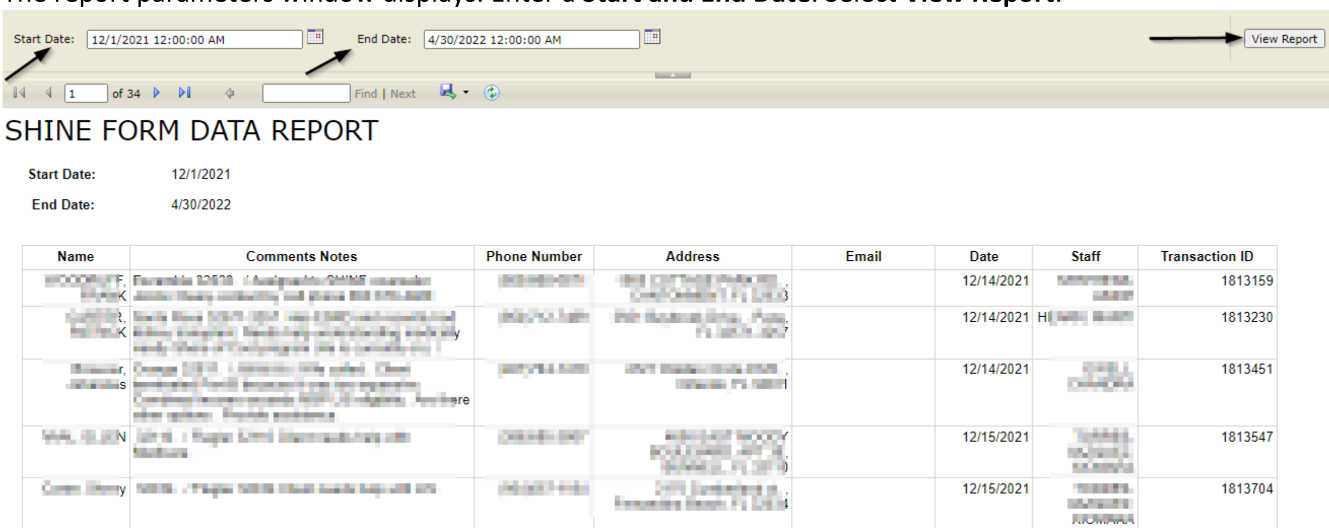
8. The SHINE Data Form data for several clients at once can be sent to the SHINE Counselor using the SHINE Form Data Report.

9. Select the **Reports** chapter.

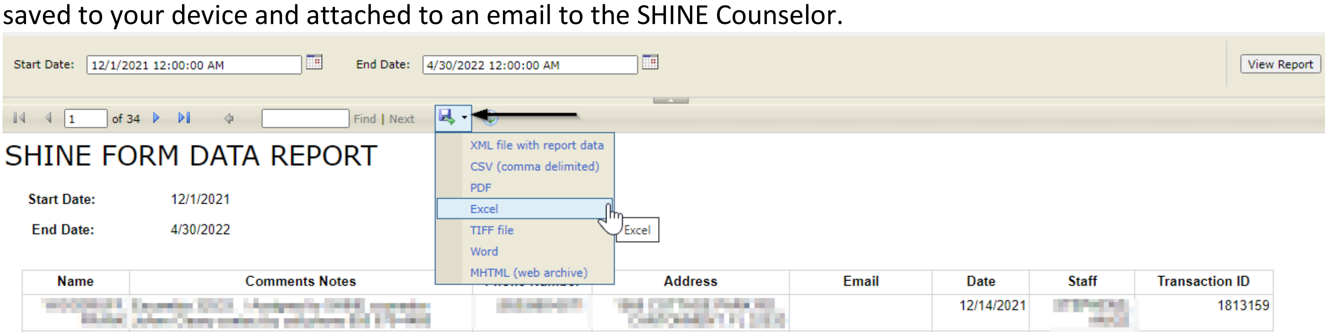
10. Select the **SHINE Form Data Report** from the list. Click **Run Report** at the top of the page.



11. The report parameters window displays. Enter a **Start and End Date**. Select **View Report**.



12. The report displays. Select the **Save icon** at the top of the page to save it to PDF or EXCEL. It will be saved to your device and attached to an email to the SHINE Counselor.



13. The SHINE Counselor will contact client and record their progress outside of eCIRTS.

Tracking Unsuccessful Contact Attempts

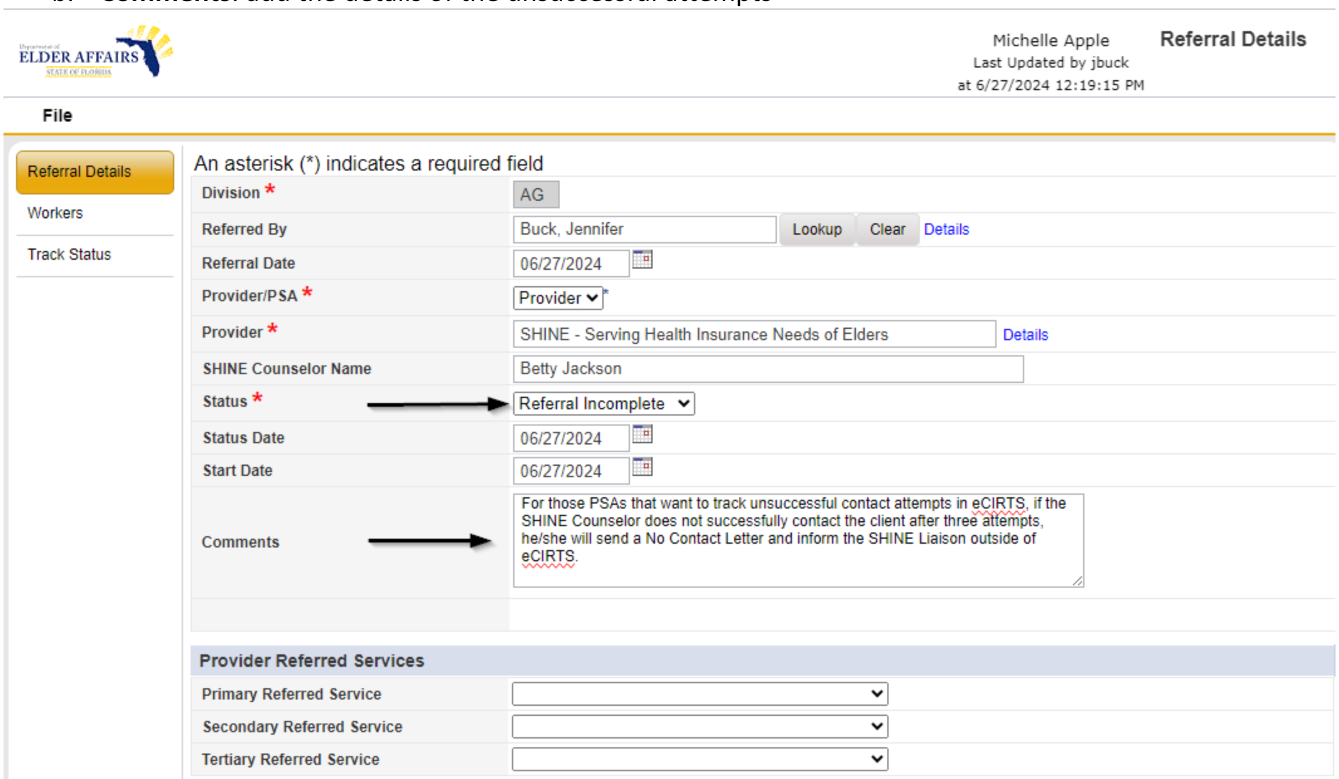
For those PSAs that want to track unsuccessful contact attempts in eCIRTS, if the SHINE Counselor does not successfully contact the client after three attempts, he/she will send a No Contact Letter and inform the SHINE Liaison outside of eCIRTS.

Role: **eCIRTS Special Programs**

1. In eCIRTS, the SHINE Liaison will navigate to the client's record and select the **Referrals to Providers** tab.

2. The SHINE Liaison will select the SHINE referral record from the list.

3. The Referral Details page displays. Update the following fields:
    a. **Status**: change from Referral Complete to Referral Incomplete
    b. **Comments**: add the details of the unsuccessful attempts



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

Note

If the client calls back after changing the SHINE Referral to incomplete, a new SHINE referral record will be created instead of updating the original.