



eCIRTS Training Guide SHINE Workflows V2

Florida Department of Elder Affairs (DOEA)

Document Tracking

Versions			
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1.0	J. Buck	12/21/22	Document creation
2.0	J. buck	7/5/24	Document updated for Phase 2 go live.

Implementation Team





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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	<ul style="list-style-type: none">• Following the steps in the guide to:<ul style="list-style-type: none">▪ Receive new screening referrals.▪ Assign screening referrals.▪ Document contact attempts.▪ Complete the 701S.▪ Create APCL enrollments

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**.

Field	Operator	Value	Connector	Action
Last Name *	Contains		AND	
First Name *	Contains		AND	
PSA	Contains	%	AND	X
Best Contact Phone	Contains	%	AND	X
SSN	Ends With	%	AND	X
Date of Birth	Equal To		AND	X
Client ID				+



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.

ELDER AFFAIRS
STATE OF FLORIDA

Welcome, Jennifer Buck Client - Search For Existing
5/14/2024 9:26 AM

File

Filters

Last Name * Contains Apple AND

First Name * Contains Michelle AND

PSA Contains % AND X

Best Contact Phone Contains % AND X

SSN Ends With % AND X

eCIRTS Client ID +

Search Reset Add New

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.

ELDER AFFAIRS
STATE OF FLORIDA

Welcome, Jennifer Buck Client - Search For Existing
5/14/2024 9:26 AM

File

Filters

Last Name * Contains Apple AND

First Name * Contains Michelle AND

PSA Contains % AND X

Best Contact Phone Contains % AND X

SSN Ends With % AND X

eCIRTS Client ID +

Search Reset Add New

2 Clients Client - Search For Existing record(s) returned - now viewing 1 through 2

eCIRTS Client ID	Last Name	First Name	PSA	Home Phone	Best Contact Phone	SSN	Date of Birth	Pseudo SSN	Street	Street 2	City	State	Zip Code	County	Email	Gender
1760817	Apple	Michelle	2			XXX-XX-1111							32059	Madison		Female
1412768	Apple	Michelle	2B		(555)264-9103	XXX-XX-8949	04/24/1974		123 Test St		Tallahassee	FL	32304	Leon	mreed@ema	Add Contacts

- 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**.

Department of
ELDER AFFAIRS
STATE OF FLORIDA

Welcome, Jennifer Buck Client - Search For Existing
10/26/2023 4:22 PM

File

Filters

Last Name * Contains Match AND X

First Name * Contains No OR X

Client ID +

Search Reset Add New

0 record(s) returned

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.

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

Clients Last Name

Participating

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 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***: Client'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



File	Tools	Reports																																																													
Demographics																																																															
Client Addresses	Basic Demographics																																																														
Client Phones	<table style="width: 100%; border-collapse: collapse;"> <tr><td>EMS Release Date</td><td><input type="text" value="3/1/2023"/></td></tr> <tr><td>Former CIRTS ID</td><td><input type="text" value="3332649103"/></td></tr> <tr><td>First Name *</td><td><input type="text" value="Michelle"/></td></tr> <tr><td>Last Name *</td><td><input type="text" value="Apple"/></td></tr> <tr><td>Middle Initial</td><td><input type="text"/></td></tr> <tr><td>AKA Name</td><td><input type="text"/></td></tr> <tr><td>Title</td><td><input type="text"/></td></tr> <tr><td>Date of Birth *</td><td><input type="text" value="04/24/1944"/></td></tr> <tr><td>DOB Unknown</td><td><input type="checkbox"/></td></tr> <tr><td>Age</td><td><input type="text" value="79.5"/></td></tr> <tr><td>Date of Death</td><td><input type="text"/></td></tr> <tr><td>SSN</td><td><input type="text" value="XXX-XX-9103"/></td></tr> <tr><td>Pseudo SSN</td><td><input type="text"/></td></tr> <tr><td>Medicaid Number</td><td><input type="text" value="1112649103"/></td></tr> <tr><td>Gender *</td><td><input type="text" value="Female"/></td></tr> <tr><td>Marital Status</td><td><input type="text" value="Married"/></td></tr> <tr><td>Head of Home</td><td><input type="checkbox"/></td></tr> <tr><td>Annual Income</td><td><input type="text"/></td></tr> <tr><td>Disabled</td><td><input type="checkbox"/></td></tr> <tr><td>Are you a veteran?</td><td><input type="text"/></td></tr> <tr><td>Veteran Status</td><td><input type="text"/></td></tr> <tr><td>Do you have Adult Cystic Fibrosis?</td><td><input type="text"/></td></tr> <tr><td>Primary Race *</td><td><input type="text" value="White"/></td></tr> <tr><td>Additional Race</td><td> <div style="border: 1px solid #ccc; padding: 2px;"> American Indian/Alaska Native Asian Black/African American Native Hawaiian/Pacific Island Other Unknown White </div> </td></tr> <tr><td>Ethnicity *</td><td><input type="text" value="Non Hispanic or Latino"/></td></tr> <tr><td>Primary Language</td><td><input type="text" value="English"/></td></tr> <tr><td>Other Language</td><td><input type="text" value="Spanish"/></td></tr> <tr><td>Other Communication Method</td><td><input type="text"/></td></tr> <tr><td>Interpreter Services Used?</td><td><input type="checkbox"/></td></tr> <tr><td>Client has limited ability reading, writing, speaking, or understanding English</td><td><input type="radio"/> Yes <input type="radio"/> No</td></tr> </table>			EMS Release Date	<input type="text" value="3/1/2023"/>	Former CIRTS ID	<input type="text" value="3332649103"/>	First Name *	<input type="text" value="Michelle"/>	Last Name *	<input type="text" value="Apple"/>	Middle Initial	<input type="text"/>	AKA Name	<input type="text"/>	Title	<input type="text"/>	Date of Birth *	<input type="text" value="04/24/1944"/>	DOB Unknown	<input type="checkbox"/>	Age	<input type="text" value="79.5"/>	Date of Death	<input type="text"/>	SSN	<input type="text" value="XXX-XX-9103"/>	Pseudo SSN	<input type="text"/>	Medicaid Number	<input type="text" value="1112649103"/>	Gender *	<input type="text" value="Female"/>	Marital Status	<input type="text" value="Married"/>	Head of Home	<input type="checkbox"/>	Annual Income	<input type="text"/>	Disabled	<input type="checkbox"/>	Are you a veteran?	<input type="text"/>	Veteran Status	<input type="text"/>	Do you have Adult Cystic Fibrosis?	<input type="text"/>	Primary Race *	<input type="text" value="White"/>	Additional Race	<div style="border: 1px solid #ccc; padding: 2px;"> American Indian/Alaska Native Asian Black/African American Native Hawaiian/Pacific Island Other Unknown White </div>	Ethnicity *	<input type="text" value="Non Hispanic or Latino"/>	Primary Language	<input type="text" value="English"/>	Other Language	<input type="text" value="Spanish"/>	Other Communication Method	<input type="text"/>	Interpreter Services Used?	<input type="checkbox"/>	Client has limited ability reading, writing, speaking, or understanding English	<input type="radio"/> Yes <input type="radio"/> No
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Client has limited ability reading, writing, speaking, or understanding English	<input type="radio"/> Yes <input type="radio"/> No																																																														

Contact Information:

- a. **Homeless?:** Yes or No
- b. **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.
- 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.



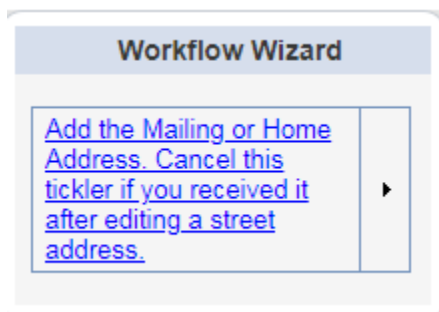
Note

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

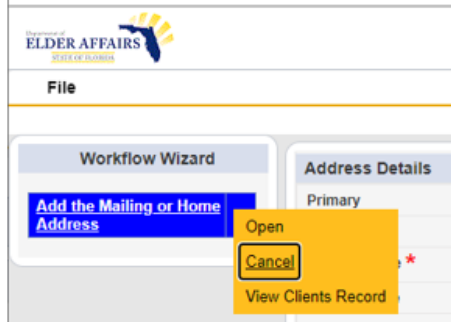
- m. **Best Contact:** The best number to reach the Client. This could be the Home, Work or Mobile phone number.
- n. **Phone Note:** description of the Best Contact number (i.e. sister, caregiver)
- o. **Home Phone:** The home phone number of the Client.
- p. **Work Phone:** The work phone number of 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.

Contact Information	
Homeless?	<input type="checkbox"/>
Address Type	Physical <input type="checkbox"/>
Address Category *	Private Residence <input type="checkbox"/>
Facility Name	<input type="text"/>
Street	123 Test St
Street 2	<input type="text"/>
City	Tallahassee <input type="checkbox"/> Clear
State	FL <input type="checkbox"/> Clear
Zip Code	32304 <input type="checkbox"/> Clear
County *	Leon <input type="checkbox"/> Clear
Client PSA *	2 <input type="checkbox"/> Clear
Agency Name	<input type="text"/> <input type="checkbox"/> Clear
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	<input type="text"/>
Mobile Phone	(888)264-9103
Email	mreed@email.com
Address Note	<input type="text"/>

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 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.

The screenshot displays the 'Client Addresses' section of the eCIRTS system. At the top, the user is identified as Michelle Apple on 11/22/2023 at 3:43 PM. The interface includes a 'File' menu, a sidebar with navigation options (Demographics, Client Addresses, Client Phones), and a table of client addresses. Below the table, a browser window shows the URL for the address details page. The 'Address Details' form is visible, containing fields for Primary, Active, Address Type, Facility Name, Street, Street 2, City, State, Zip Code, County, Client PSA, Agency Name, Start Date, Descriptive Address, Contact Type, and Contact Name, ID, Prefix.

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	No	No
Physical	12 Hawaii Blvd	Spring Grove	FL	60081	Yes	No

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.



Michelle Apple | **Open/Close**
 11/22/2023 4:53 PM

File

Divison *	<input type="text"/>			
Created By *	<input type="text" value="Buck, Jennifer"/>	...	Clear	Details
Status *	<input type="text"/>			
Status Date	<input type="text" value="11/22/2023"/>			

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**.

The screenshot shows the eCIRTS interface for a client named Martha Simpson. The user is logged in as Martha Simpson, last updated by j buck at 9/27/2021 1:55:24 PM. The 'Demographics' tab is selected. The 'File' menu is open, and 'Add Contacts' is highlighted. The client's details include a Rank of 3, a Priority Score of 35, and an Assessment Date of 08/27/2021. The 'Demographics' sub-tab is also selected.

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**.

The screenshot shows the eCIRTS search results for a client named Apple Michelle. The search filters are set to Last Name: Apple and First Name: Michelle. The search results table shows 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

The 'Add Contacts' button is visible next to the search result.

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.

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 (with a red asterisk), 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 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.

The screenshot shows the contact form with the "Caller if other than Client" field populated with "John Smith" and the "Relationship" dropdown set to "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.

The screenshot shows the contact form with "John Smith" in the "Caller if other than Client" field and "Brother" in the "Relationship" dropdown. A grey reminder box is displayed at the bottom with the text: "REMINDER! ADD ASSOCIATED PEOPLE RECORD FOR CALLER".

- 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

Contact Information	
Division *	AG
Contact Date *	06/27/2024
Contact Time *	12:00 PM
Received By *	Buck, Jennifer Lookup Clear Details
PSA *	2 Clear
Current Task *	I&R
Contact Method *	Phone Call
Anonymous?	<input type="checkbox"/>
eCIRTS Client ID	1412768
Client First Name	Michelle
Client Last Name	Apple
Call Back Phone	(555)264-9103
Caller if other than Client	
Relationship	
Contact Type *	Information
Short Summary	SHINE Referral
Notes	Longer notes if needed go here
Reason for Contact	
Referral Type	
701S Appointment Date	MM/DD/YYYY
UnMet Needs Reason	
Contact Marker	<ul style="list-style-type: none"> Caregiver Related Complaint COVID19 Food Assessment Tool COVID19 Testing/Information COVID19 Vaccine Disability Related Contact Disaster Related
SNAP Submittal Date	MM/DD/YYYY
Assigned To (I&R and Eligibility)	Buck, Jennifer Lookup Clear Details
Screener	Lookup Clear
Contact Status *	Draft

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.

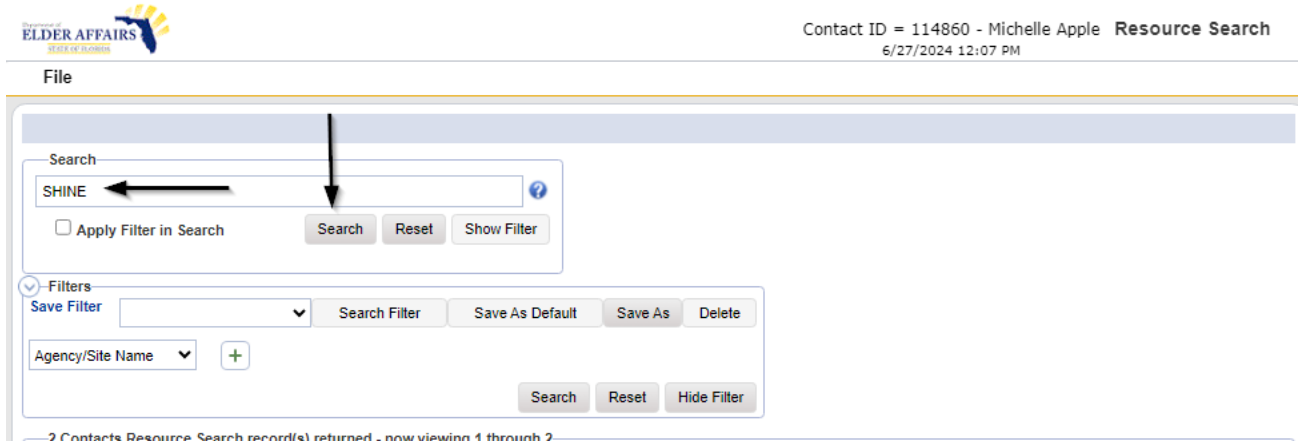
Contact ID = 10400 **Contact**
 Last Updated by j buck
 at 7/30/2021 9:44:29 AM

File	Tools	Reports										
<ul style="list-style-type: none"> Contact Resources Provided Track Status 	<table border="1"> <thead> <tr> <th colspan="2">Contact Information</th> </tr> </thead> <tbody> <tr> <td>Division</td> <td>AG</td> </tr> <tr> <td>Contact Date *</td> <td>07/30/2021</td> </tr> <tr> <td>Contact Time</td> <td>09:28 AM</td> </tr> <tr> <td>Received By *</td> <td>Test_Worker</td> </tr> </tbody> </table>		Contact Information		Division	AG	Contact Date *	07/30/2021	Contact Time	09:28 AM	Received By *	Test_Worker
Contact Information												
Division	AG											
Contact Date *	07/30/2021											
Contact Time	09:28 AM											
Received By *	Test_Worker											

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

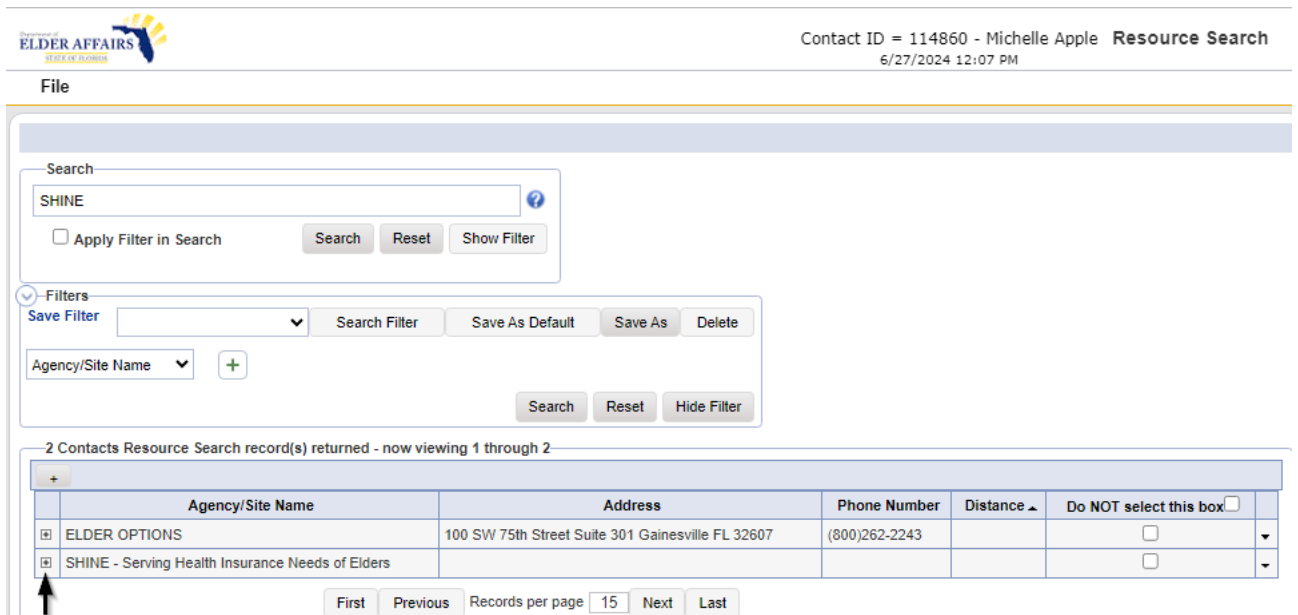


7. The **Resource Search** is displayed. In the text bar at the top, enter “SHINE.” Click **Search**.



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.

1 Resource Search record(s) returned - now viewing 1 through 1

+					
	Agency/Program Name ▲	Address	Street	Phone Number	Do NOT select this box <input type="checkbox"/>
<input type="checkbox"/>	SHINE				<input checked="" type="checkbox"/>
Select Service <input type="checkbox"/>					
	Taxonomy Term/Service			Accepts Males	Accepts Females
<input checked="" type="checkbox"/>	Senior Community Service Employment Programs				



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.

1 Resource Search record(s) returned - now viewing 1 through 1

+					
	Agency/Program Name ▲	Address	Street	Phone Number	Do NOT select this box <input type="checkbox"/>
<input type="checkbox"/>	SHINE				<input checked="" type="checkbox"/>

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.

Itssbht1.mediaware.com says

2 Referral record(s) 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:

An asterisk (*) indicates a required field

Consumer Assessments

Division *	<input type="text" value="AG"/>	Assessment Type *	<input type="text" value="Special Programs"/>
Assessment Date *	<input type="text" value="06/27/2024"/>	Assessor/Worker *	<input type="text" value="Buck, Jennifer"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/> Details
Status *	<input type="text" value="Draft"/>	Data Entered By	<input type="text"/>
Last Completed	<input type="text"/>		

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:	<input type="text" value="Michelle"/>
Client Last Name:	<input type="text" value="Apple"/>
Client Street 1:	<input type="text" value="123 Test St"/>
Client Street 2:	<input type="text"/>
Client City:	<input type="text" value="Tallahassee"/>
Client State:	<input type="text" value="FL"/>
Client Zip Code:	<input type="text" value="32304"/>
Client Address Type:	<input type="text" value="Home"/>
Client County:	<input type="text"/>
Client Home Phone:	<input type="text" value="(555)264-9103"/>
Client Email:	<input type="text" value="mreed@email.com"/>

3. Answer the questions in the form.

Additional Details:	
Do You Have Medicare Now?	<input type="text" value="v"/>
Is your individual monthly income less than \$1610?	<input type="text" value="v"/>
Is your monthly couple income less than \$2177?	<input type="text" value="v"/>
Is your individual asset limit less than \$14,790?	<input type="text" value="v"/>
Is your couple asset limit less than \$29,520?	<input type="text" value="v"/>
Comments:	<input type="text"/>

Request Information On:	
Medicare Assistance:	<input type="checkbox"/>
Military Health Benefits/Veterans Explanation or General Assistance:	<input type="checkbox"/>
MIPPA (Medicare Financial Assistance LIS, MSP) Explanation, Application Assistance:	<input type="checkbox"/>
Senior Medicare Patrol Program (SMP) Possible Medicare Fraud, Waste, Abuse or Other Scam:	<input type="checkbox"/>
SHINE Issues and Complaints (Please explain):	<input type="checkbox"/>
Wants to Volunteer:	<input type="checkbox"/>
Notes:	<input type="text"/>

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: <input type="text" value="SHINE Data Form"/>			
An asterisk (*) indicates a required field			
Consumer Assessments			
Division *	<input type="text" value="AG"/>	Assessment Type *	<input type="text" value="Special Programs"/>
Assessment Date *	<input type="text" value="06/27/2024"/>	Assessor/Worker *	<input type="text" value="Buck, Jennifer"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/> <input type="button" value="Details"/>
Status *	<input type="text" value="Complete"/>	Data Entered By	<input type="text" value="Buck, Jennifer"/> <input type="button" value="Details"/>
Last Completed	<input type="text" value="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 ELDER
 - 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.

File

Division *	AG
Referred By	Buck, Jennifer <input type="button" value="..."/> <input type="button" value="Clear"/> Details
Referral Date	05/14/2021 <input type="button" value="..."/>
Provider/PSA *	Provider <input type="button" value="..."/>
Provider *	SHINE - SERVING HEALTH INSURANCE NEE <input type="button" value="..."/> Details
Provider Worker *	Reed, Monica <input type="button" value="..."/> <input type="button" value="Clear"/> Details
SHINE Counselor Name	<input type="text"/>
Status *	Notification <input type="button" value="..."/>
Status Date	05/14/2021
Start Date	05/14/2021 <input type="button" value="..."/>
Comments	<input type="text"/>
Provider Referred Services	
Primary Referred Service	<input type="text"/>
Secondary Referred Service	<input type="text"/>
Tertiary Referred Service	<input type="text"/>

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.

Division *	AG
Referred By	Buck, Jennifer ... Clear Details
Referral Date	05/14/2021 📅
Provider/PSA *	Provider ▼
Provider *	SHINE - SERVING HEALTH INSURANCE NEE ▼ Details
Provider Worker *	Reed, Monica ... Clear Details
SHINE Counselor Name	
Status *	Notification ▼
Status Date	05/14/2021
Start Date	05/14/2021 📅

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

MY WORK	CONTACTS	CLIENTS	CL
----------------	----------	---------	----

CLIENTS

Screening ▼

Programs ▼

Referrals/Notifications ▶

Active	5
Closed	4
Notification	5

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

Welcome, Jennifer Buck 5/14/2021 2:42 PM ▼
Referrals/Notification

File

Filters

Status ▼ Equal To ▼ Notification ▼ AND ▼ ✕

Status ▼ +

Search Reset

5 Referrals/Notifications record(s) returned - now viewing 1 through 5

Client ID	Client ▼	Provider	Type	Worker	Status	Status Date
10005	White, Ellen	SHINE - SERVING HEALTH INSURANCE NEEDS OF ELDER		Buck, Jennifer	Notification	4/16/2021 12:00:00 AM
10005	White, Ellen	SHINE - SERVING HEALTH INSURANCE NEEDS OF ELDER		Buck, Jennifer	Notification	5/14/2021 12:00:00 AM
10005	White, Ellen	SHINE - SERVING HEALTH INSURANCE NEEDS OF ELDER		Buck, Jennifer	Notification	5/14/2021 12:00:00 AM

4. If your PSA doesn't assign referrals directly to an individual 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.

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

SHINE - SERVING HEALTH INSURANCE NEEDS OF ELDERLS (10096)

Provider ID Numbers Linked Providers Directory Info Hours Conditions Service Area

Providers Divisions Workers Services **Referrals/Notifications** Authorizations Forms Contracts Notes Credentials Agencies

Filters

Status Not Equal To Closed * AND x

Status +

Search Reset

3 Referrals/Notifications record(s) returned - now viewing 1 through 3

Division	Client ID	Client	Status	Start Date	View Record
AG	10005	White, Ellen	Notification		View
AG	10005	White, Ellen	Notification	05/14/2021	View
AG	10005	White, Ellen	Notification	05/14/2021	View

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**.

MY WORK CONTACTS CLIENTS CLIENT GROUPS AGENCIES **PROVIDERS** RESOURCES REPORTS UTILITIES CLAIMS SCHEDULER

Legacy Provider - LOC ID

SHINE - Serving Health Insurance Needs of Elders (32200)

Provider ID Numbers Linked Providers Service Area

Providers Divisions Workers Services **Referrals/Notifications** Authorizations Contracts Notes Agencies Appointments CAPs Poverty Gu

Filters

Enrollment Provider Contains psa-02 AND x

Status Equal To notification AND x

Enrollment Provider +

Search Reset

1 Providers Referrals/Notifications record(s) returned - now viewing 1 through 1

eCIRTS Client ID	Division	Enrollment Provider	Client	Status	Start Date	View Record
1412768	AG	DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02	Apple, Michelle	Notification	06/27/2024	View

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.

MY WORK CONTACTS CLIENTS CLIENT GROUPS AGENCIES **PROVIDERS** RESOURCES REPORTS UTILITIES CLAIMS SCHEDULER

Legacy Provider - LOC ID

SHINE - Serving Health Insurance Needs of Elders (32200)

Provider ID Numbers Linked Providers Service Area

Providers Divisions Workers Services **Referrals/Notifications** Authorizations Contracts Notes Agencies Appointments CAPs Poverty Gu

Filters

Enrollment Provider Contains psa-02 AND x

Status Equal To notification AND x

Enrollment Provider +

Search Reset

1 Providers Referrals/Notifications record(s) returned - now viewing 1 through 1

eCIRTS Client ID	Division	Enrollment Provider	Client	Status	Start Date	View Record
1412768	AG	DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02	Apple, Michelle	Notification	06/27/2024	View

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.

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

Filters

Status Not Equal To Closed AND Provider/Agency

Search Reset

15 Referrals/Notifications record(s) returned - now viewing 1 through 15

Division	Provider/Agency	Status	Referral Date
AG	SHINE - SERVING HEALTH INSURANCE NEEDS OF ELDERS	Notification	05/14/2021
AG	Aging and Disability Resource Center of Broward County, Inc.	Active	
AG	ADRC - PSA 10	Active	01/01/2020
AG	Transportation Providers Inc.	Referral	10/27/2020
AG	All Services Provider	Referral	10/27/2020
AG	All Services Provider	Referral	11/11/2020

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

Ellen White | Referral
Last Updated by j buck
at 5/14/2021 11:11:48 AM

File

Referral

Provider Workers

Track Status

Division * AG

Referred By Buck, Jennifer Clear Details

Referral Date 05/14/2021

Provider/PSA * Provider

Provider * SHINE - SERVING HEALTH INSURANCE NEEDS OF ELDERS Details

SHINE Counselor Name Sally Simpson

Status * Referral Complete

Status Date 05/14/2021

Start Date 05/14/2021

Comments

Provider Referred Services

Primary Referred Service

Secondary Referred Service

Tertiary Referred Service

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.

- 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**.

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

- Save the document to your device then attach to an email to the SHINE Counselor.
- The SHINE Data Form data for several clients at once can be sent to the SHINE Counselor using the SHINE Form Data Report.
- Select the **Reports** chapter.
- Select the **SHINE Form Data Report** from the list. Click **Run Report** at the top of the page.

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

Filter Report By

Type Category Retrieve

SHINE Form Data Report

Click on Run Report to view report. Run Report

Services Reported with Service Costs - Summary	Report ID 11382 - Services Reported with Service Costs - Summary. Grouped by Service Costs by County.
Services Wait List Report	Report ID 11407 - Lists of clients who are in APCL Wait list or Active status.
SHINE Form Data Report	Report ID 11278 - DOEAAR Report: SHINE
SHIP Beneficiary Contact Form Summary Report	Aggregated Beneficiary contact data
SHIP Client Contact Summary Report	Aggregated client contact data
SHIP Export Report	Summary of exported and not exported client contact and PAM data
SHIP Group Outreach and Education Report	The report will display aggregated data from the SHIP Group Outreach and Education form.
SHIP Media Outreach and Education	

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

Start Date: 12/1/2021 12:00:00 AM End Date: 4/30/2022 12:00:00 AM View Report

1 of 34 Find | Next

SHINE FORM DATA REPORT

Start Date: 12/1/2021
End Date: 4/30/2022

Name	Comments Notes	Phone Number	Address	Email	Date	Staff	Transaction ID
WOODRUFF, TRACY	Female 2021 / Assistance SHINE counselor	(816)848-8878	1818 127TH STREET NW, CARROLLTON, TX 75006		12/14/2021	STEPHEN, WOODRUFF	1813159
WRIGHT, TRACY	Female 2021 / Assistance SHINE counselor	(816)848-8878	1818 127TH STREET NW, CARROLLTON, TX 75006		12/14/2021	STEPHEN, WOODRUFF	1813230
WRIGHT, TRACY	Female 2021 / Assistance SHINE counselor	(816)848-8878	1818 127TH STREET NW, CARROLLTON, TX 75006		12/14/2021	STEPHEN, WOODRUFF	1813451
WRIGHT, TRACY	Female 2021 / Assistance SHINE counselor	(816)848-8878	1818 127TH STREET NW, CARROLLTON, TX 75006		12/15/2021	STEPHEN, WOODRUFF	1813547
WRIGHT, TRACY	Female 2021 / Assistance SHINE counselor	(816)848-8878	1818 127TH STREET NW, CARROLLTON, TX 75006		12/15/2021	STEPHEN, WOODRUFF	1813704

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.

Start Date: 12/1/2021 12:00:00 AM End Date: 4/30/2022 12:00:00 AM View Report

1 of 34 Find | Next

SHINE FORM DATA REPORT

Start Date: 12/1/2021
End Date: 4/30/2022

Save icon menu:

- XML file with report data
- CSV (comma delimited)
- PDF
- Excel
- TIFF file
- Word
- MHTML (web archive)

Name	Comments Notes	Address	Email	Date	Staff	Transaction ID
WOODRUFF, TRACY	Female 2021 / Assistance SHINE counselor	1818 127TH STREET NW, CARROLLTON, TX 75006		12/14/2021	STEPHEN, WOODRUFF	1813159

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



Department of
ELDER AFFAIRS
STATE OF ILLINOIS

Michelle Apple
Last Updated by jrbuck
at 6/27/2024 12:19:15 PM

Referral Details

File

Referral Details

Workers

Track Status

An asterisk (*) indicates a required field

Division *	AG
Referred By	Buck, Jennifer Lookup Clear Details
Referral Date	06/27/2024 📅
Provider/PSA *	Provider ▼*
Provider *	SHINE - Serving Health Insurance Needs of Elders Details
SHINE Counselor Name	Betty Jackson
Status *	Referral Incomplete ▼
Status Date	06/27/2024 📅
Start Date	06/27/2024 📅
Comments	<div style="border: 1px solid #ccc; padding: 5px; font-size: small;"> <p>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.</p> </div>

Provider Referred Services

Primary Referred Service	▼
Secondary Referred Service	▼
Tertiary Referred Service	▼

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.