eCIRTS Training Guide
Screening Workflows V4

Florida Department of Elder Affairs (DOEA)

Software and services for realizing care's potential

Document Tracking

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1.0	J. Buck	12/20/23	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.

Screening Workflows Training Guide Overview & Objectives

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

Introduction	This training introduces you to the workflows completed by the Screening/Intake staff in eCIRTS.
Importance	Your confidence in using eCIRTS for managing screening referrals, documenting contact attempts, completing the 701S and placing clients on the waiting list 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 Screening/Intake workflows.
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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Receive a Screening Referral

The need for a screening can be received in several ways.

1. Referral from Helpline
2. Annual re-screenings identified on the Assessment Due Report
3. Community referrals
4. Direct call to ADRC
5. APS referrals received via ARTT/email.
6. Lead Agency APS-High referrals back to Screening to get on MLTC wait list.
7. Aging out referrals received from DCF.

Regardless of how the referral is received, the same processes will be completed in eCIRTS. Screening referrals will be added as Contact records in eCIRTS.

Referral from Helpline

Screener Assigned

When Helpline saved the contact record with a SMMC-LTC referral with a screener assigned, eCIRTS automatically created a second contact record to track the screening referral and assigned it to the screener. Screening referrals received will be accessible in the Contacts queue.

Role: eCIRTS Worker

1. In some PSAs, Helpline staff schedule the screening. Helpline will continue to use Time Tap, Outlook, etc. to determine the scheduled appointment date outside of eCIRTS but document the date of the appointment and the screener on their contact record in eCIRTS. Those screeners can use the **Contacts queue** to view their assigned screening referrals.

2. To view a list of screening referrals assigned to a screener, select the **Contacts chapter**. Update the following search filters:
   a. **Contact Type**: SMMC LTCP - Screening
   b. **Screener**: search for and select the screener's name
   c. **Contact Status**: Assigned
   d. **Reason for Contact:** Contact Attempt 1

   Note
   Recommend creating a screener saved filter to list all new screening referrals received from the Helpline. The next time you use the Contact queue, you can select your saved Filter from the list and click **Search Filter**. This will populate the search filters, saving you time from looking them up again.

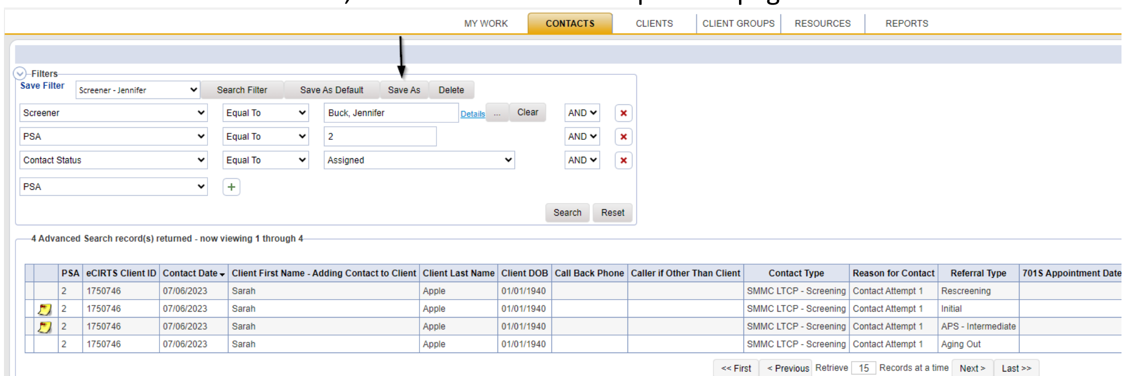
3. Select **Search**. Matching results are displayed. Select a record to display the Contact details page. Proceed to the Contact Attempts section.

TIP

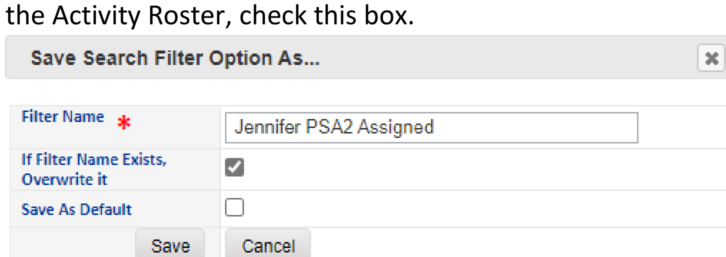
Saved filters are key. Be sure to take the time to create several saved filters specific to your most frequent intake step searches.

1. To save a filter, you must first complete **Filter** section and execute the search by clicking **Search**.

2. One the results are returned, select **Save As** at the top of the page.

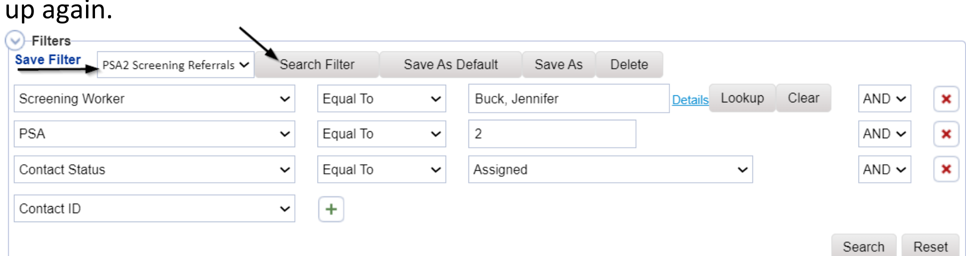


3. Update the following fields:
   a. **Filter Name**: Enter a name for the saved filter.
   b. **If Filter Name Exists, Overwrite it**: If you want this filter to replace an existing one with the same name, check this box. If not, keep it unchecked and a new filter will be created.
   c. **Save as Default**: If this should be the filter that displays by default each time you open the Activity Roster, check this box.



4. Select **Save**.

5. The next time you use the Contacts queue, you can select your saved Filter from the list and click **Search Filter**. This will populate the search filters, saving you time from looking them up again.



Screener Not Assigned

When Helpline saved the contact record with a SMMC-LTC referral and a screener assigned, eCIRTS automatically created a second contact record to track the screening referral and assigned it to a generic worker so it can be assigned. Screening referrals received from the Helpline will be accessible in the Contacts queue. Screening referrals received from other sources such as community referrals or Aging out referrals may also need a screener assigned. Screening referrals received from other sources will also be accessible in the Contacts queue.

Role: eCIRTS Worker

1. Those responsible for assigning screeners can use the Contacts queue to view new screening referrals. They will update the screener to the scheduled screener once assigned. Then those screeners can use the Contacts queue to view their assigned screening referrals.

2. To view a list of screening referrals that need to be assigned to a screener, select the **Contacts chapter**. Update the following search filters:
   a. **Contact Type**: SMMC LTCP - Screening
   b. **Screener**: search for and select the generic Default PSA worker record for your PSA

Search by: Last Name Search Text: psa Search Cancel

14 record(s) returned

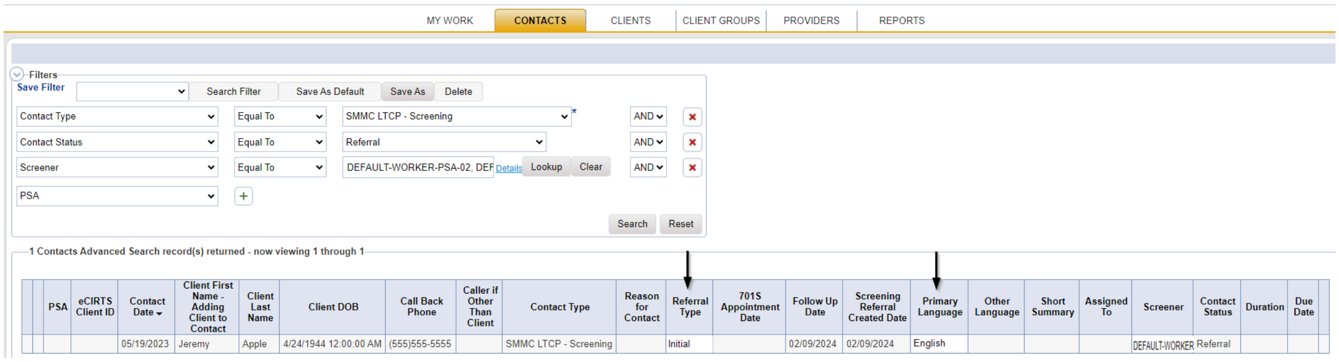
MEMBERID	Worker	Title	User ID Active
21221	DEFAULT-WORKER-PSA-01, DEFAULT-WORKER-PSA-01		No
20139	DEFAULT-WORKER-PSA-02, DEFAULT-WORKER-PSA-02		No
25705	DEFAULT-WORKER-PSA-03, DEFAULT-WORKER-PSA-03		No
20140	DEFAULT-WORKER-PSA-04, DEFAULT-WORKER-PSA-04		No
25706	DEFAULT-WORKER-PSA-05, DEFAULT-WORKER-PSA-05		No
20141	DEFAULT-WORKER-PSA-06, DEFAULT-WORKER-PSA-06		No
22475	DEFAULT-WORKER-PSA-07, DEFAULT-WORKER-PSA-07		No
27055	DEFAULT-WORKER-PSA-08, DEFAULT-WORKER-PSA-08		No
20709	DEFAULT-WORKER-PSA-09, DEFAULT-WORKER-PSA-09		No
22476	DEFAULT-WORKER-PSA-10, DEFAULT-WORKER-PSA-10		No

   c. **Contact Status**: Referral

TIP

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

3. Select **Search**. Matching results are displayed. Note the Referral Type field in the search results. This is where you can differentiate initial vs. reassessment vs. APS referrals, for example. Also note the Primary Language and Other Language fields as these can assist with assigning the correct screener.



4. Select a record to display the Contact details page. Proceed to [Assign the screener](#) section.

Receive a Screening Referral from Other Source

Screening referrals can also be received from sources other than Helpline such as:

1. Annual re-screenings will be identified on the Assessment Due report and assigned to a screener.
2. Community referrals
3. Direct calls
4. APS referrals from ARTT via email
5. APS-High referrals from the Lead Agency
6. Aging out referrals from DCF

Regardless of how they are received, they will all be documented as a contact record in eCIRTS.

Role: **eCIRTS Worker**

1. For each referral, the worker will first search for an existing client record. If one doesn't already exist, it will be created and then a contact record is added.

2. Review the following sections in the [Helpline Workflows Training Guide](#) then return to this manual to the [Add Contact Record](#) section.
   a. Seach for Existing Client Record
   b. Add a New Client Record
   c. Demographics
   d. Client Address
   e. Client Phone
   f. Add Open/Close Record

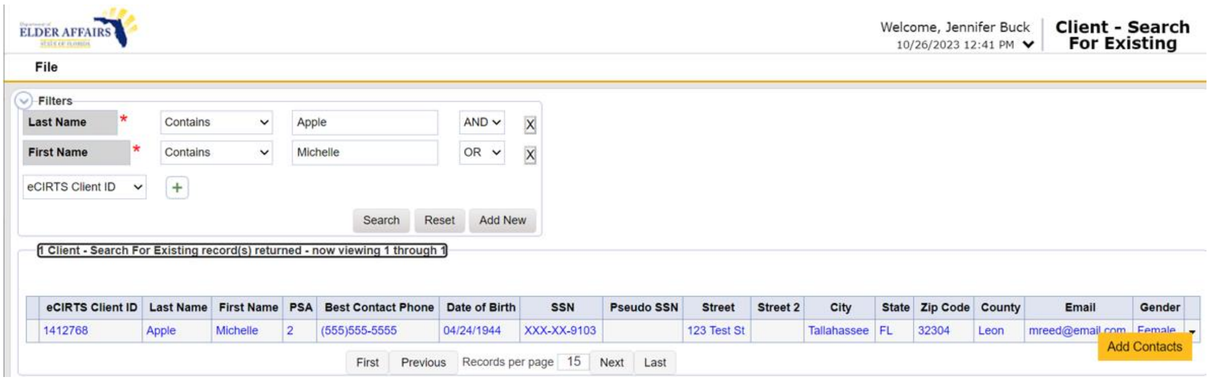
Add Contact Record

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

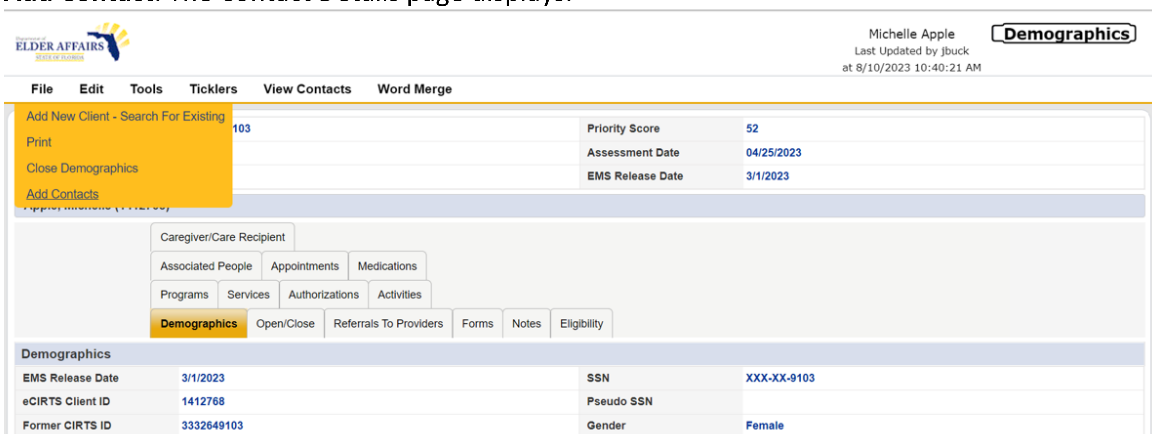
Role: **eCIRTS Worker**

1. The screener will first search for an existing client record or add a new client record if one doesn't already exist.

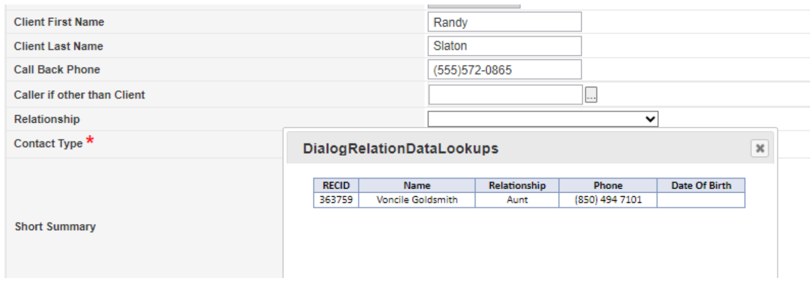
2. From the existing client search results, select the flyout menu to the right of the client's name in the search results. Select **Add Contacts.** The Contact Details page displays.



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

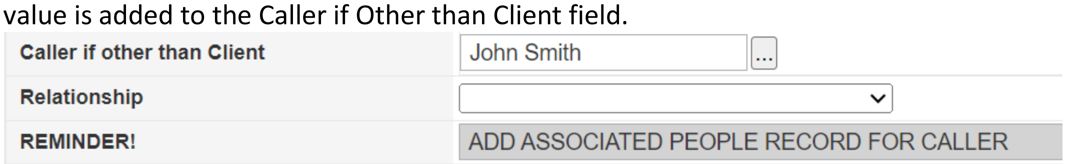


4. The Contact details page displays. Update the following fields:
   a. **Division**: Required. Defaults to AG as is read only.
   b. **Contact Date**: Required. defaults to today and is editable if needed.
   c. **Contact Time**: Required. defaults to now and is editable if needed.
   d. **Received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



If not, the screener 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 SMMC LTCP – Screening.

Note

If this is an APS-High Referral for PSA 11, select "Specific Program Use Screening" as the Contact Type.

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**: will be updated in the Contact Attempts section.
t. **SNAP Submittal Date**: leave blank.
u. **Reason for Contact:** Select Contact Attempt 1

Note

If this is an APS-High Referral for PSA 11, select "Record Review" as the Reason for Contact.

v. **Referral Type:** select the applicable Referral Type from the table below. Referral types help workers manage their caseloads easier in the Contacts queue.

Referral Type	Description
Aging Out	Aging out referrals received from DCF
APS-High	Specific to PSA 11. ADRC received the High-Risk referral from DCF and routes to the appropriate Lead Agency. For other PSAs, the High-Risk referrals from DCF go directly to the Lead Agency. While a Lead Agency is serving the client, all of the Leads across the state may also refer that client back to their ADRC to get on the MLTC wait list.

Referral Type	Description
APS-Intermediate	APS referral received from ARTT
APS-Low	APS referral received from ARTT
APS to ALF Referral	APS referral received via email from DCF Case Manager
Initial	Community referrals or referrals from Helpline
Rescreening	Annual re-screenings identified on the Assessment Due Report
Return to Pipeline	When a client may continue enrollment without being re-released following a termination per the EMS Procedures
Significant Change	When a client reports a significant change in their condition pursuant to Chapter 409.979 F.S.

w. **701S Appointment Date:** leave blank.
x. **Unmet Needs Reason:** leave blank.
y. **Assigned To**: defaults to self. Can remove value or leave as is.
z. **Screener**: search for and select the screener's name. If the screener needs to be assigned, select the generic Default PSA worker for your PSA. This referral will be assigned in the Screener Not Assigned section.
aa. **Contact Status**: select Assigned if the name of the screener is known. Select Referral if the screener needs to be assigned.
bb. **Duration**: will automatically populate after the record is saved.
cc. **Client Primary Language**: This field is used when the screening referral from the Helpline is created. Workers can manually add if needed which assists with the screener assignment process.
dd. **Other Language**: This field is used when the screening referral from the Helpline is created. Workers can manually add if needed which assists with the screener assignment process.
ee. **Follow Up Date:** leave blank.
ff. **Screening Referral Created Date:** This field is used when the screening referral from the Helpline is created. For other referrals, enter the date the referral is received.

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

8. If the screener has been assigned, proceed to the Contact Attempts section.

9. If the screener has not been assigned, proceed to the Assign the Screener section.

Assign the Screener

Screening referrals are assigned to screeners in the ADRC. In some PSAs the Helpline staff assign the screener. In other PSAs, a supervisor or designee in the ADRC assigns the screener. Referrals that are awaiting assignment are visible in the Contact queue. Complete the following steps to assign the referral to a screener.

Role: **eCIRTS Worker**

1. With the contact details page open from the previous section, update the following fields:

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a. **Short Summary:** Optional**.** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
b. **Notes:** Optional. This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
c. **Screener**: Complete the assignment process outside of eCIRTS. Search for and select the name of the assigned screener.
d. **Contact Status**: update to Assigned.
e. **All other fields can remain as is**. They will be updated by the screener.

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

3. Proceed to the Contact Attempts section.

Contact Attempts

You must complete a contact attempt when trying to reach the client to schedule the screening. Each contact attempt will be added as a separate contact record in eCIRTS. Screeners will have an existing contact record assigned to him/her in the Contact queue, that will be used to document the first contact attempt.
If the client missed a scheduled appointment and the screener must complete up to 3 contact attempts to reschedule the appointment, the screener will need to create his/her own contact record.
It's best practice to view past contacts before reaching out to a client. Also be prepared to update the client's demographic information as needed. See the As Needed: View Contact Information section.

Role: **eCIRTS Worker**

1. If the screener is creating a new contact record to reschedule a missed appointment, he/she will add a new contact record. On the **Demographic** tab on the client's record, from the **File** menu, select **Add Contact.** The Contact Details page displays.

2. If the screener is making their first contact attempt, he/she will use the Contacts queue to view a list of screening referrals assigned to him/her. Select the **Contacts chapter**. Update the following search filters:
   a. **Contact Type**: SMMC LTCP - Screening
   b. **Screener**: search for and select the screener's name
   c. **Contact Status**: Assigned

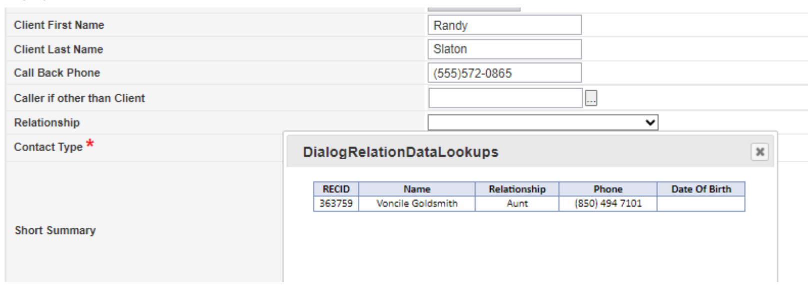
   Note

   Recommend creating a screener saved filter to list all new screening referrals received from the Helpline. The next time you use the Contact queue, you can select your saved Filter from the list and click **Search Filter**. This will populate the search filters, saving you time from looking them up again.

3. Select **Search**. Matching results are displayed. Select a record to display the Contact details page.

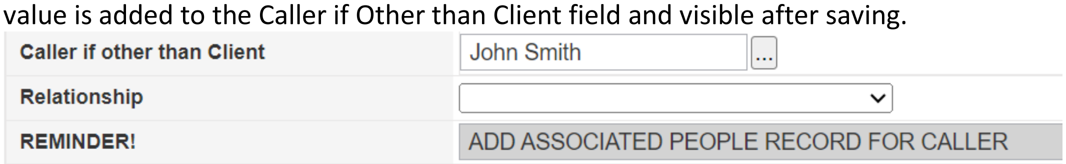
4. Update the following fields:

a. **Division**: Required. Defaults to AG as is read only.
b. **Contact Date**: Required. Update to today, the date the contact is made if needed.
c. **Contact Time**: Required. Update to now, the time the contact is made if needed.
d. **Received By**: Required. Update to self, the person completing the contact attempt if needed.
e. **PSA**: Required. Select your PSA from the list or populated by Stored Procedure.
f. **Current Task**: Screening.
g. **Contact Method**: Required. Update to how the contact is made.
h. **Anonymous:** Leave blank
i. **eCIRTS ID:** populates automatically and is read only.
j. **Client First Name:** populates automatically.
k. **Client Last Name:** populates automatically.
l. **Call Back Phone:** populates automatically – update if needed.
m. **Caller if other than Client:** search field. If the Caller already exists on the client's Associated People tab, their name will be listed, and the screener can pick it from the list to populate the field.



If not, the screener 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 and visible after saving.



o. **Relationship:** enter the relationship of the caller to the client
p. **Contact Type**: remains SMMC LTCP – Screening.
q. **Referral Type:** select the applicable Referral Type. Referral types help workers manage their caseloads easier in the Contacts queue. See Receive a Screening Referral from Other Source section for additional information.

5. From the **File** menu, select **Save**. Contact the client/caller using the Call Back Phone provided on the contact details page.

6. All remaining fields will be completed under one of the following scenarios:
   a. Unsuccessful Contact 1
   b. Unsuccessful Contact 2
   c. Unsuccessful Contact 3
   d. Successful Contact – Client Did Not Pursue
   e. Successful Contact – 701S Scheduled

f. Successful Contact – 701S Completed

Unsuccessful Contact 1

An unsuccessful contact is when a contact attempt is made, and the worker does not speak with the caller/client. For example, a worker is returning a voicemail, and the caller doesn't have voicemail. The worker will make 2 -3 contact attempts, all documented in the same eCIRTS Contact record. This section includes steps to document the first unsuccessful contact attempt.

Role: **eCIRTS Worker**

1. With the contact details page open, update the following fields to complete this contact record:
    a. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
    b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
    c. **Contact Marker**: select if applicable.
    d. **SNAP Submittal Date**: leave blank.
    e. **Contact Type**: remains SMMC LTCP - Screening
    f. **Reason for Contact:** Contact Attempt 1
    g. **701S Appointment Date:** leave blank.
    h. **Unmet Needs Reason:** leave blank.
    i. **Contact Status**: update to Complete.
    j. **Duration**: will automatically populate after the record is saved.
    k. **Follow Up Date:** leave blank.
    a. **Assigned To**: defaults to self. Can remove value or leave as is.
    b. **Screener**: remains self.

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

3. The screener will Add an activity record for INSC units based on the duration of the contact attempt on the client's Activity tab.

4. When a contact record is saved with Contact Type = SMMC LTCP – Screening and Contact Status = Complete and Reason for Contact = Contact Attempt 1, eCIRTS will automatically create a second contact record to track the second contact attempt. The screener will filter the Contacts queue to view and manage contact attempts that require follow up. Proceed to the Follow Up section.

Unsuccessful Contact 2

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

Role: **eCIRTS Worker**

1. With the contact details page open, update the following fields to complete this contact record:
    a. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
    b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
    c. **Contact Marker**: select if applicable.
    d. **SNAP Submittal Date**: leave blank.

e. **Contact Type**: remains SMMC LTCP - Screening
f. **Reason for Contact:** Contact Attempt 2
g. **701S Appointment Date:** leave blank.
h. **Unmet Needs Reason:** leave blank.
i. **Contact Status**: update to Complete.
j. **Duration**: will automatically populate after the record is saved.
k. **Follow Up Date:** leave blank.
a. **Assigned To**: defaults to self. Can remove value or leave as is.
b. **Screener**: remains self.

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

3. The screener will Add an activity record for INSC units based on the duration of the contact attempt on the client's Activity tab.

4. When a contact record is saved with Contact Type = SMMC LTCP – Screening and Contact Status = Complete and Reason for Contact = Contact Attempt 2, eCIRTS will automatically create a third contact record to track the third contact attempt. The screener will filter the Contacts queue to view and manage contact attempts that require follow up. Proceed to the Follow Up section.

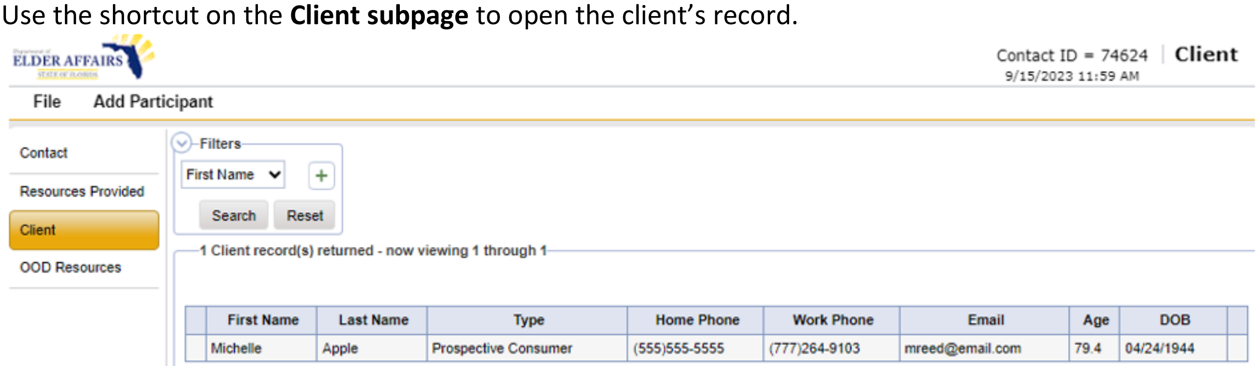
Unsuccessful Contact 3

This section includes steps to document the third unsuccessful contact attempt and sending of the No Contact Letter.

Role: **eCIRTS Worker**

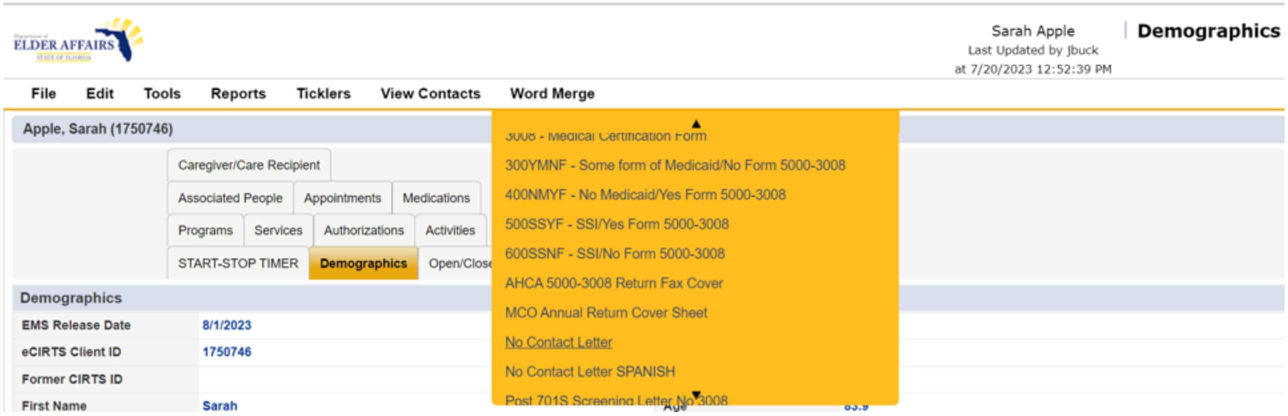
1. Keep the contact details page open and generate the **No Contact Letter**. This is done from the client's Demographics page.

2. Use the shortcut on the **Client subpage** to open the client's record.

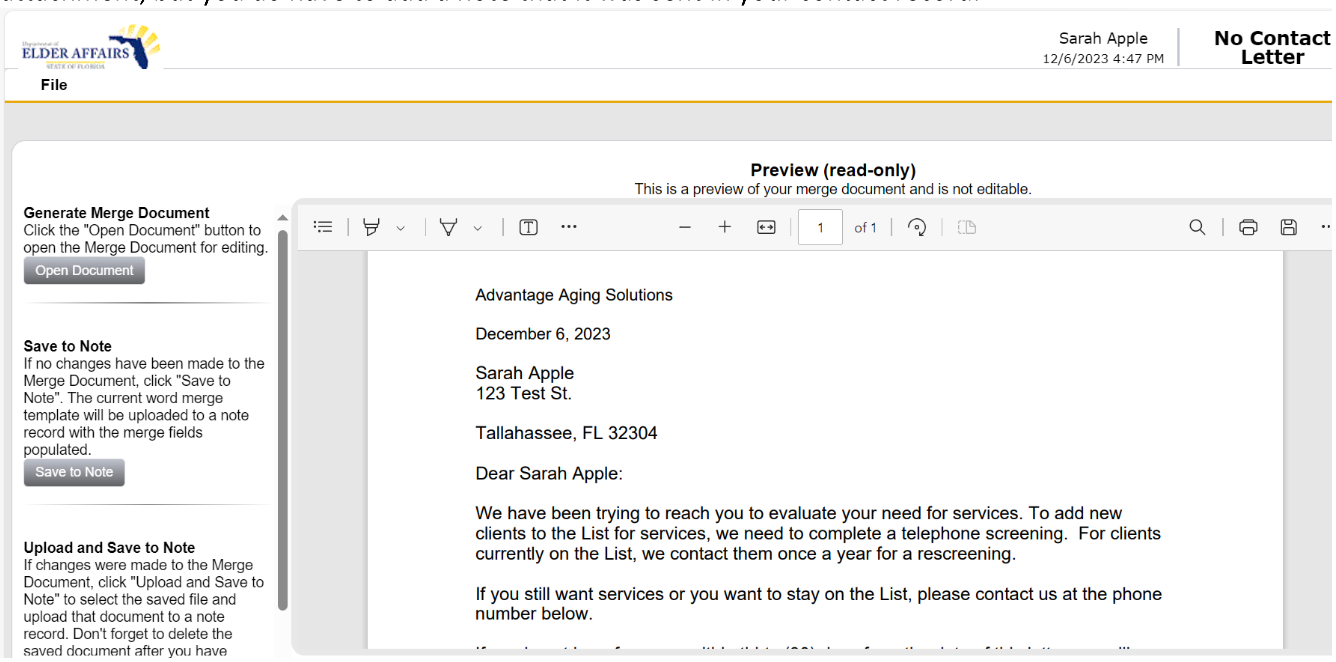


3. Click on the record to view additional demographic data. From the **Tools** menu, select **View Client.** The client record opens in a new window.

4. Select the **Demographics** tab. From the **Word Merge** menu at the top of the page, select **No Contact Letter**.



5. The Word Merge preview page displays the populated No Contact Letter. Print the letter or save it to a PDF. Send it to the client outside of eCIRTS. You do not have to save a copy of the letter to a note an attachment, but you do have to add a note that it was sent in your contact record.



Note

Some PSAs generate the No Contact Letters in bulk and outside of eCIRTS. Steps 2-5 can be skipped.

6. Return to the open contact record on the **Contact details** page. Update the following fields to complete this contact record:
    a. **Short Summary:** State that the No Contact Letter was sent. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
    b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
    c. **Contact Marker**: select if applicable.
    d. **SNAP Submittal Date**: leave blank.
    e. **Contact Type**: remains SMMC LTCP - Screening
    f. **Reason for Contact:** 30 Day NCL

g. **701S Appointment Date:** leave blank.
h. **Unmet Needs Reason:** leave blank.
i. **Contact Status**: update to Complete.
j. **Duration**: will automatically populate after the record is saved.
k. **Follow Up Date:** leave blank.
a. **Assigned To**: defaults to self. Can remove value or leave as is.
b. **Screener**: remains self.

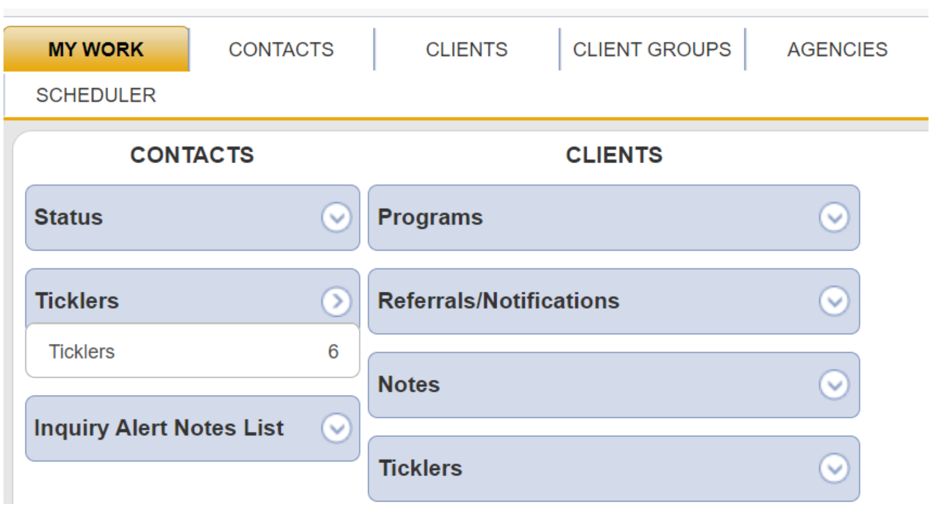
7. From the **File** menu, select **Save and Close Contact**.

8. The screener will Add an activity record for INSC units based on the duration of the contact attempt on the client's Activity tab.

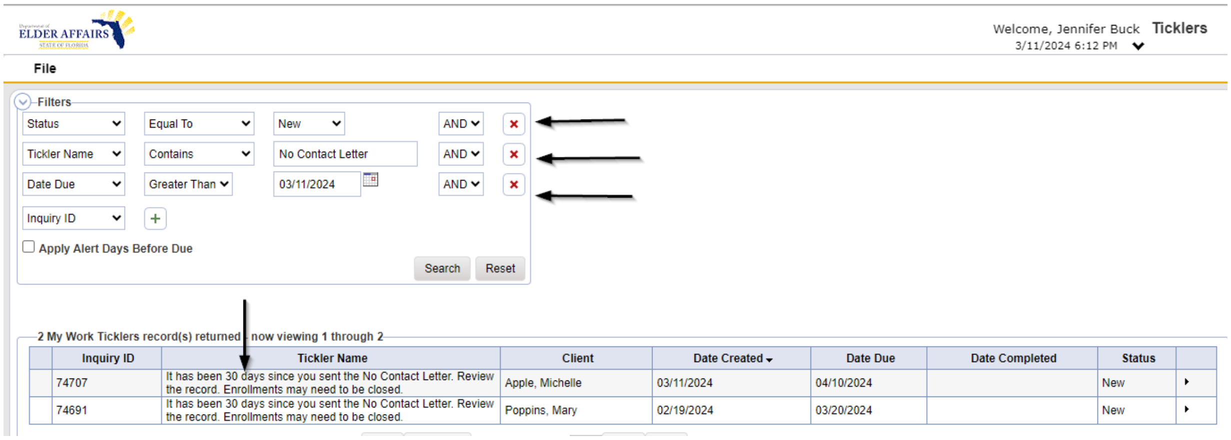
9. When a contact record is saved with Contact Type = SMMC LTCP – Screening and Contact Status = Complete and Reason for Contact = 30 Day NCL, eCIRTS will NOT automatically create an additional contact record but it will create a tickler/reminder that "It has been 30 days since you sent the No Contact Letter. Review the record. Enrollments may need to be closed."

10. The tickler/reminder will be accessible on the **My Work > Contacts > Ticklers queue** that the screener will monitor daily. It's expected the client will call back within 30 days of sending the NCL, so we don't want to close any open enrollments too quickly. The tickler will remind the screener to confirm if the client called back and if not, close any applicable enrollments.

11. Select the **My Work** chapter. Select the **Contacts > Ticklers queue**.

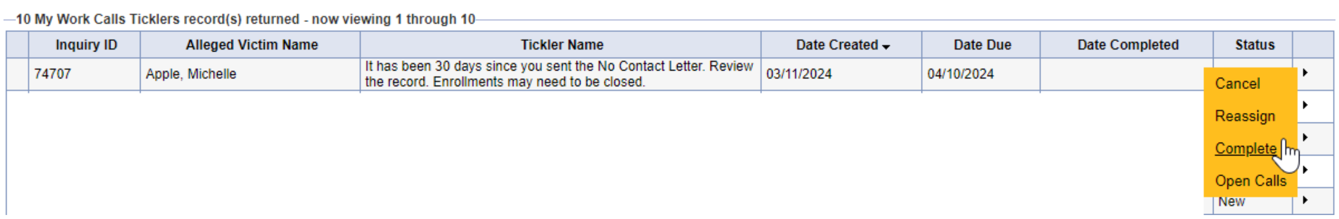


12. Use the following search filters to see only those reminders for the 30-day NCL follow up.
    a. **Status**: New
    b. **Tickler Name**: Contains No Contact Letter
    c. **Date Due**: greater than today.

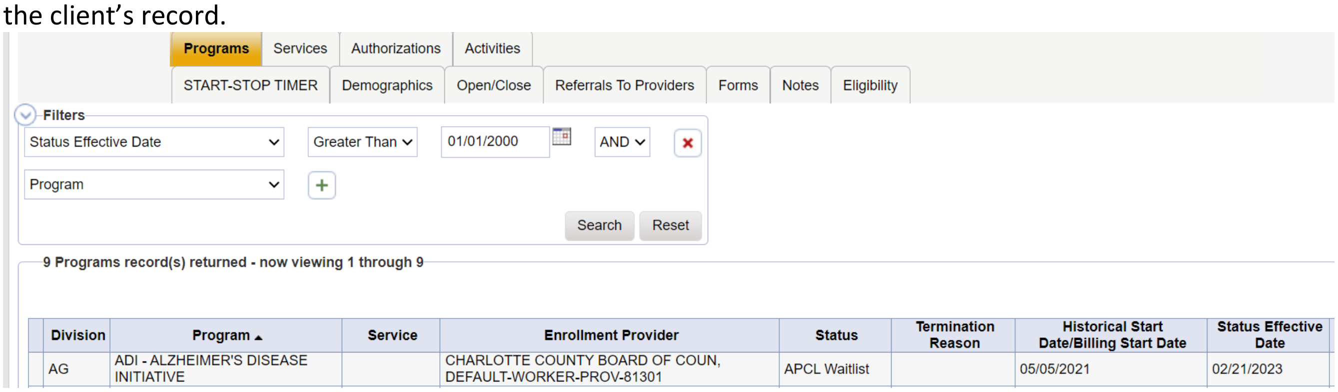


13. For each tickler that is due, check to see if the client called back by reviewing contacts for the client. See the As Needed: View Contact Information section.

14. If the client calls back within 30 days, they will contact the Helpline. Helpline will see the NCL was sent less than 30 days ago from viewing previous contacts. A new contact record will be created to treat this as a new screening referral according to the Helpline Workflows Training Manual, but Helpline will assign it to the original screener who sent the NCL. The original screener will proceed to the screener Assigned section. There are no enrollments that need to be closed. The Tickler can be closed. To close the tickler, select **Complete** from the tickler **flyout menu**.



15. If the client does NOT call back within 30 days, as the tickler suggests, the screener will close any applicable enrollments and add a contact record documenting the change. Enrollments are updated on the client's **Programs** tab. Use the **View Clients Record** shortcut from the **tickler flyout menu** to open the client's record.



16. Add a new contact record to document your updates. Navigate to the **Demographics** tab of the client record. From the **File** menu, select **Add Contact**.

17. The contact details page displays. Update the following fields:
    a. **Division**: Required. Defaults to AG as is read only.

b. **Contact Date**: Required. defaults to today and is editable if needed.
c. **Contact Time**: Required. defaults to now and is editable if needed.
d. **Received By**: Required. defaults to the screener adding the contact record.
e. **PSA**: Required. Select your PSA from the list or populated by Stored Procedure
f. **Current Task**: Select Screening
g. **Contact Method**: Required. Select N/A
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.
m. **Caller if other than Client:** leave blank.
n. **Relationship:** leave blank
o. **Contact Type**: select SMMC LTCP – Screening.
p. **Short Summary:** Note that enrollments were closed following NCL. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
q. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
r. **Contact Marker**: leave blank.
s. **SNAP Submittal Date**: leave blank.
t. **Reason for Contact:** Select 701S – Unable to Contact
u. **Referral Type:** select the applicable Referral Type from the table below. Referral types help workers manage their caseloads easier in the Contacts queue.

Referral Type	Description
Aging Out	Aging out referrals received from DCF
APS-High	Specific to PSA 11. Lead Agency sends APS-High referrals back to Screening to get on MLTC wait list.
APS-Intermediate	APS referral received from ARTT
APS-Low	APS referral received from ARTT
APS to ALF Referral	APS referral received via email from DCF Case Manager
Initial	Community referrals or referrals from Helpline
Rescreening	Annual re-screenings identified on the Assessment Due Report
Return to Pipeline	When a client may continue enrollment without being re-released following a termination per the EMS Procedures
Significant Change	When a client reports a significant change in their condition pursuant to Chapter 409.979 F.S.

v. **701S Appointment Date:** leave blank.
w. **Unmet Needs Reason:** leave blank.
x. **Assigned To**: defaults to self. Can remove value or leave as is.
y. **Screener**: leave blank
z. **Contact Status**: select Complete.
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.

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

Successful Contact – Client Did Not Pursue

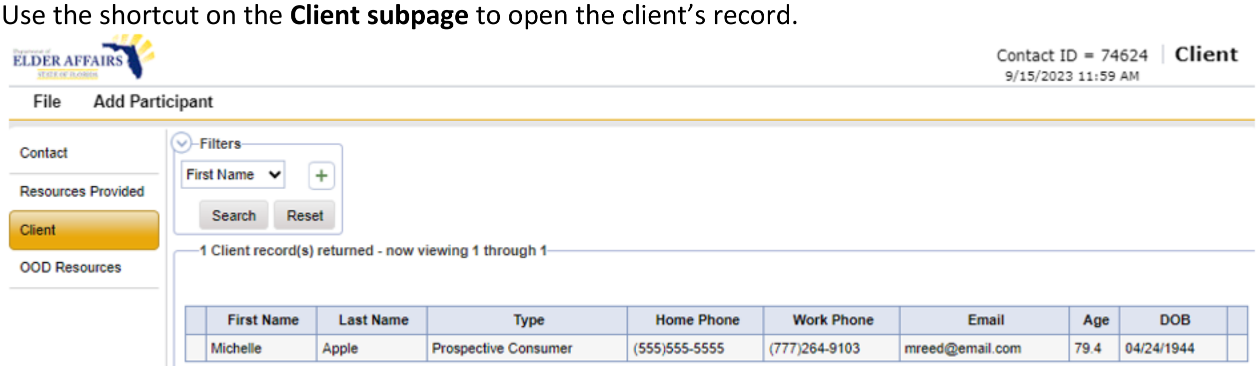
This workflow should be used when a contact attempt is made, and the client is reached but has decided NOT to pursue services. This section should be followed if a client does not pursue for any reason other than Lost Contact (i.e. death, nursing home, etc.

Role: eCIRTS Worker

1. With the contact details page open, update the following fields to complete this contact record:
    a. **Contact Type**: remains SMMC LTCP – Screening
    b. **Contact Marker**: ADRC 1st Call Back
    c. **SNAP Submittal Date**: leave blank.
    d. **Reason for Contact:** Assessment Not Needed – Client Declined
    e. **701S Appointment Date:** leave blank.
    f. **Unmet Needs Reason:** leave blank.
    g. **Contact Status**: do not change.
    h. **Duration**: will automatically populate after the record is saved.
    i. **Follow Up Date:** leave blank.
    j. **Assigned To**: defaults to self. Can remove value or leave as is.
    k. **Screener**: leave blank

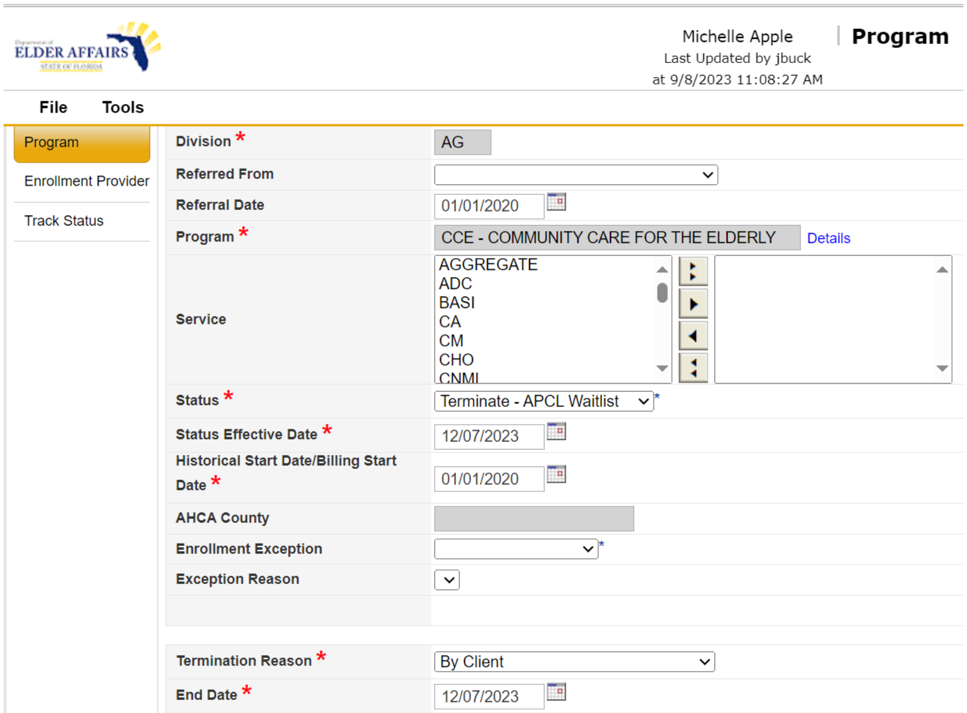
2. From the **File** menu, select **Save Contact**. Keep the contact record open. You will update it again after updating the program enrollments.

3. The screener will close the APCL program enrollments. This is completed on the client's Program page. Use the shortcut on the **Client subpage** to open the client's record.



4. Click on the record to view additional demographic data. From the **Tools** menu, select **View Client.** The client record opens in a new window.

5. Select the **Programs** tab. A list of program enrollments is displayed. Select the record that needs to be updated. Update the following fields:
    a. **Status**: Terminate – APCL Waitlist
    b. **Termination Reason**: By Client or Client Died or Placed in Nursing Home



6. From the **File** menu, select **Save and Close Programs**.

7. Return to the open contact record. Update the following fields:
    a. **Short Summary:** Note that the client declined or is deceased and enrollments that were closed if applicable. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
    b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
    c. **Contact Status**: Complete

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

9. The screener will Add an activity record for INSC units based on the duration of the contact attempt on the client's Activity tab.

Successful Contact – 701S Scheduled

This section includes steps to document a successful contact and the 701S appointment is scheduled.

Role: **eCIRTS Worker**

1. With the contact details page open, update the following fields to complete this contact record:
    a. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
    b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
    c. **Contact Marker**: leave blank.
    d. **SNAP Submittal Date**: leave blank.
    e. **Contact Type**: remains SMMC LTCP - Screening
    f. **Reason for Contact:** 701S Scheduled.
    g. **701S Appointment Date:** enter the appointment date of the screening.

h. **Unmet Needs Reason:** leave blank.
i. **Contact Status**: update to Complete.
j. **Duration**: will automatically populate after the record is saved.
k. **Follow Up Date:** leave blank.
a. **Assigned To**: defaults to self. Can remove value or leave as is.
b. **Screener**: remains self

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

3. The screener will Add an activity record for INSC units based on the duration of the contact attempt on the client's Activity tab.

4. Proceed to the 701S Completed section.

Successful Contact – 701S Completed

This section includes steps to document a successful contact where the screening is completed. This will be documented as a contact record and a form in eCIRTS. This section includes a screener who reaches the client on a contact attempt and is able to complete the screening in real time.
If the screener is calling the client for a scheduled appointment and the 701S is completed, proceed to the 701S Completed section.

Role: **eCIRTS Worker**

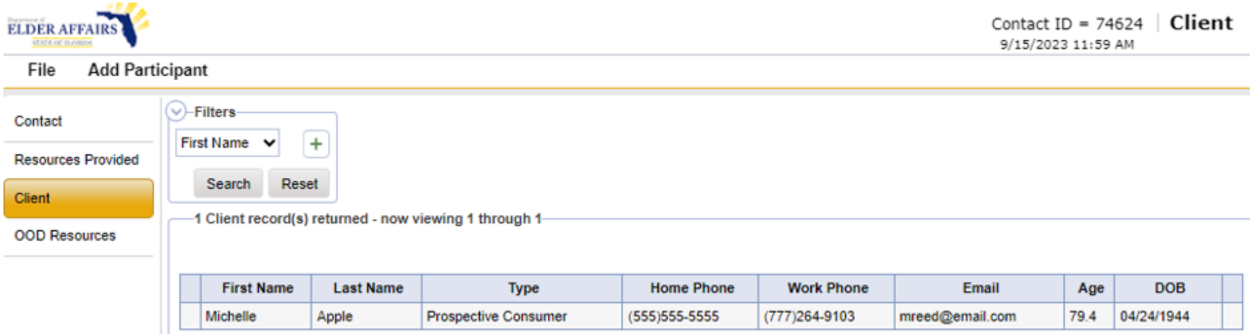
1. With the contact details page open, update the following fields:
    a. **Contact Type**: remains SMMC LTCP - Screening
    b. **Short Summary:** leave blank. Will update it later once the 701S form is started and the contact is completed.
    c. **Notes:** leave blank. Will update it later once the 701S form is started and the contact is completed.
    d. **Contact Marker**: update if needed.
    e. **SNAP Submittal Date**: leave blank.
    f. **Reason for Contact:** leave blank. Will update it later once the 701S form is started and the contact is completed.
    g. **701S Appointment Date:** enter the appointment date of the screening.
    h. **Unmet Needs Reason:** leave blank.
    i. **Contact Status**: leave as Draft. Will update it later once the 701S is completed and the contact is completed.
    j. **Duration**: will automatically populate after the record is saved.
    k. **Follow Up Date:** leave blank.
    l. **Assigned To**: defaults to self. Can remove value or leave as is.
    m. **Screener**: remains self

2. From the **File** menu, select **Save Contact**. Do NOT select Save and Close Contact. The 701S will be completed and then this contact record will be updated and completed.

Complete 701S Form

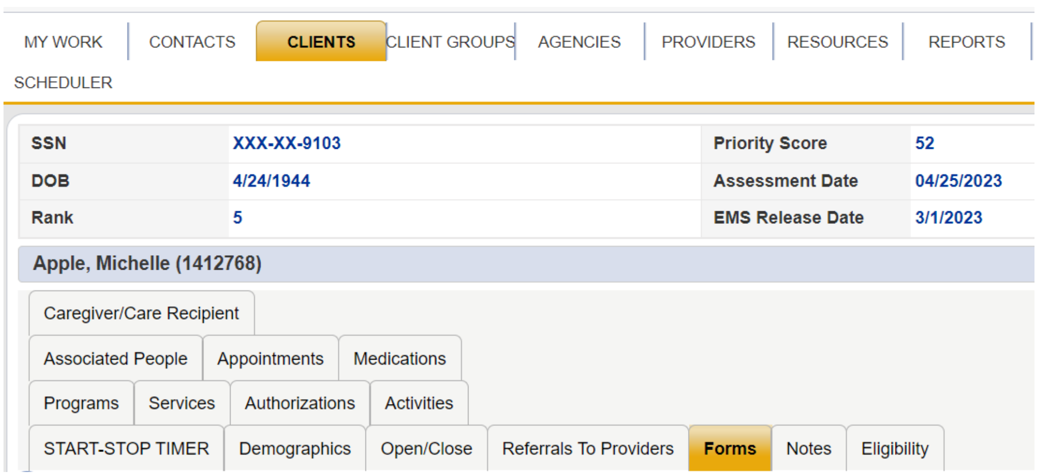
Role: **eCIRTS Worker**

1. Keep the contact details page open and complete the 701S form. This is done from the client's **Forms** page. Use the shortcut on the **Client subpage** to open the client's record.



2. Click on the record to view additional demographic data. From the **Tools** menu, select **View Client.** The client record opens in a new window.

3. Select the **Forms** tab.
4. .



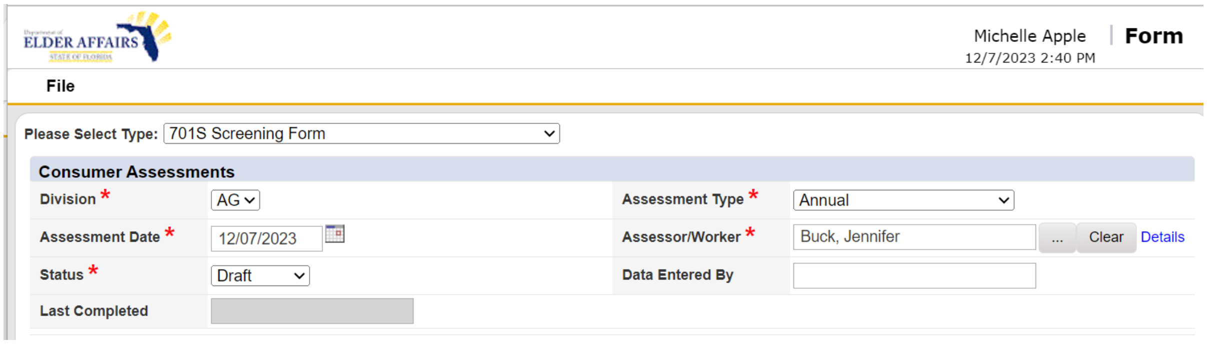
5. From the **File** menu, select **Add Form**.

6. In the **Select Type** field, select **701S Screening Form**.

7. Fill out the information in the header of the form. Update the following fields:
   a. **Division**: Defaults to AG
   b. **Assessment Date**: Defaults to today but is editable if needed.
   c. **Status**: Defaults to Draft and can be changed later in the workflow when it's complete.
   d. **Assessment Type**: select the applicable value. This is an eCIRTS required field.

Review Type	Use
Annual	Select this review type when completing the annual rescreening/assessment
Initial	Select this review type when completing the first screening or assessment. This review type is also used for most other one-time forms.
Regaining Eligibility	Select this review type when completing the screening for re-eligibility.

e. **Assessor/Worker**: Defaults to self but can be changed if needed.
f. **Last Completed**: This will auto populate with the date the status was changed to Complete. It will remain blank until then.
g. **Data Entered By**: This will auto populate with the name of the worker who changed the status to Complete. It will remain blank until then.



ELDER AFFAIRS

Michelle Apple | **Form**
12/7/2023 2:40 PM

File

Please Select Type: 701S Screening Form

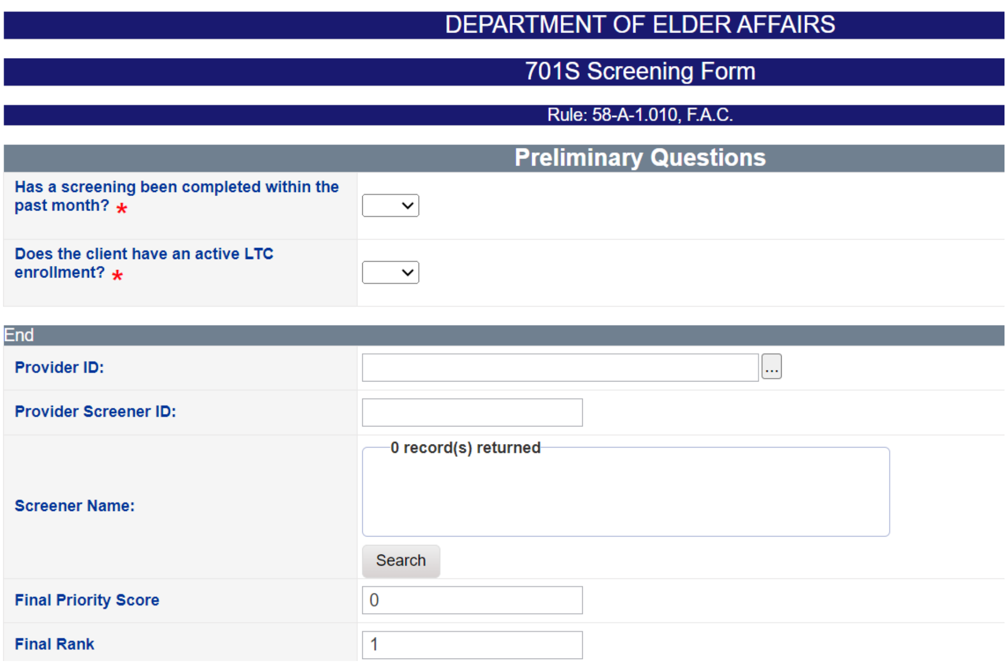
Consumer Assessments

Division *	AG	Assessment Type *	Annual
Assessment Date *	12/07/2023	Assessor/Worker *	Buck, Jennifer ... Clear Details
Status *	Draft	Data Entered By	
Last Completed			

8. With the form selected, the questions will be displayed on the screen. The eCIRTS user will answer the questions on the form.

9. Demographic fields on the form will pull from the Demographics page. If they need to be updated, the Assessor will update them on the form. Updating the address on the form WILL update the address on the Demographic page.

10. The Assessor will answer the questions on the form. The Required questions are noted with a red asterisk.



DEPARTMENT OF ELDER AFFAIRS

701S Screening Form

Rule: 58-A-1.010, F.A.C.

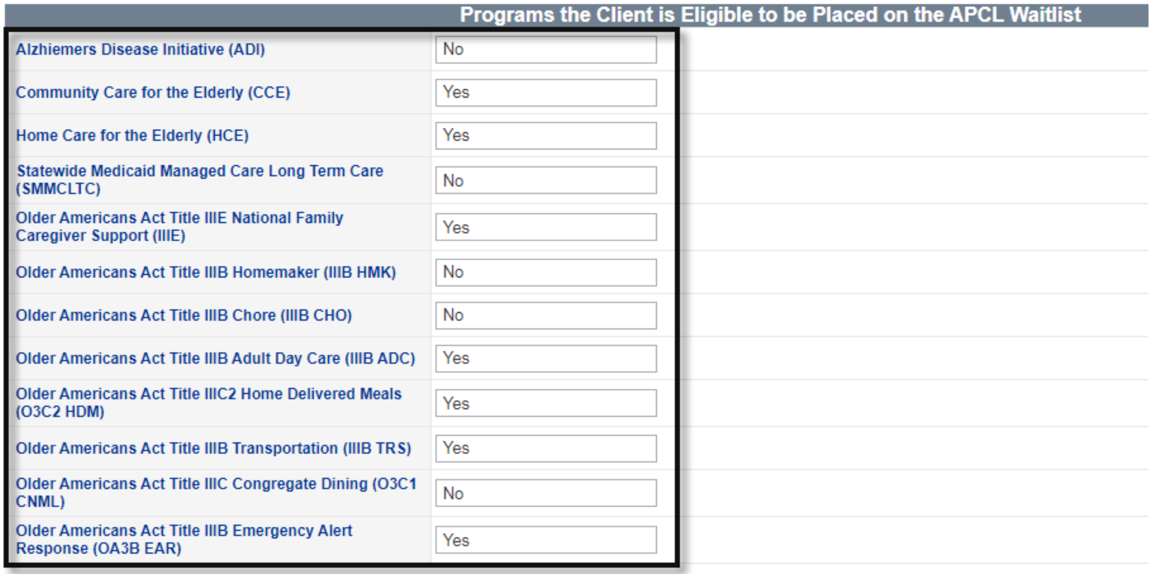
Preliminary Questions

Has a screening been completed within the past month? *	
Does the client have an active LTC enrollment? *	

End

Provider ID:	...
Provider Screener ID:	
Screener Name:	0 record(s) returned Search
Final Priority Score	0
Final Rank	1

11. The assessment forms have a new section at the bottom that lists the programs the client is eligible to be placed on the waitlist. These fields display Yes or No depending on the responses to certain 'trigger' questions within the assessment. The Assessor should know eligibility criteria and verify for accuracy.



Programs the Client is Eligible to be Placed on the APCL Waitlist	
Alzhiemers Disease Initiative (ADI)	No
Community Care for the Elderly (CCE)	Yes
Home Care for the Elderly (HCE)	Yes
Statewide Medicaid Managed Care Long Term Care (SMMCLTC)	No
Older Americans Act Title IIIE National Family Caregiver Support (IIIE)	Yes
Older Americans Act Title IIIB Homemaker (IIIB HMK)	No
Older Americans Act Title IIIB Chore (IIIB CHO)	No
Older Americans Act Title IIIB Adult Day Care (IIIB ADC)	Yes
Older Americans Act Title IIIC2 Home Delivered Meals (O3C2 HDM)	Yes
Older Americans Act Title IIIB Transportation (IIIB TRS)	Yes
Older Americans Act Title IIIC Congregate Dining (O3C1 CNML)	No
Older Americans Act Title IIIB Emergency Alert Response (OA3B EAR)	Yes

12. Once the questions in the form have been answered, the user should change the **Status** in the header of the form to **Complete**.

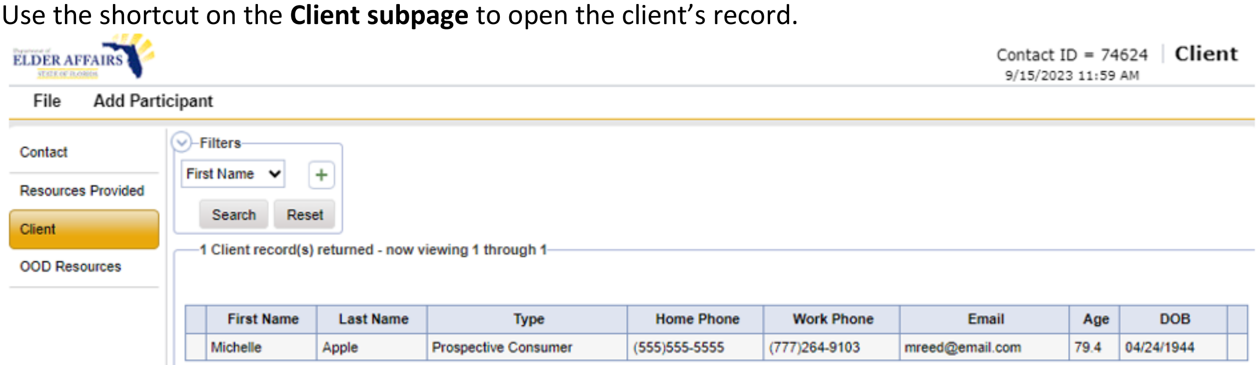
13. From the **File** menu, select **Save and Close Forms**.

As Needed: Add APCL Enrollments

The screener/Assessor will discuss the waitlists the client is eligible for with the client and then add program records for the ones they wish to pursue. This is completed on the client's Program page.

Role: **eCIRTS Worker**

1. Use the shortcut on the **Client subpage** to open the client's record.



2. Click on the record to view additional demographic data. From the **Tools** menu, select **View Client.** The client record opens in a new window.

3. Select the **Programs** tab. A list of existing program enrollments is displayed. From the **File** menu, select **Add Program.** Update the following fields:
    a. **Division:** This system-required field will display AG and is read only.
    b. **Referred From:** select the referral source for this client.

c. **Referral Date:** This date reflects when the referral to the program was made and defaults to today. It can be changed if needed. The other date fields on this page CANNOT be earlier than the Referral Date.

d. **Program:** This system-required field where the user will search for and select the Program name. If this is an EMS release, the MLTC program record must be added.

e. **Service:** This field lists the service (s) the client will be receiving under the respective program. Some PSAs place their clients on a waiting list by Program and by service. For those PSAs that do not, leave this field blank. More than one service can be selected.

f. **Status:** This field is used to track the status of the client within the Program and will change over time. For now, select APCL Waitlist.

g. **Status Effective Date:** This field reflects the status start date and will change each time the Status is changed. The Track Status subpage is very helpful for viewing a history of the statuses.

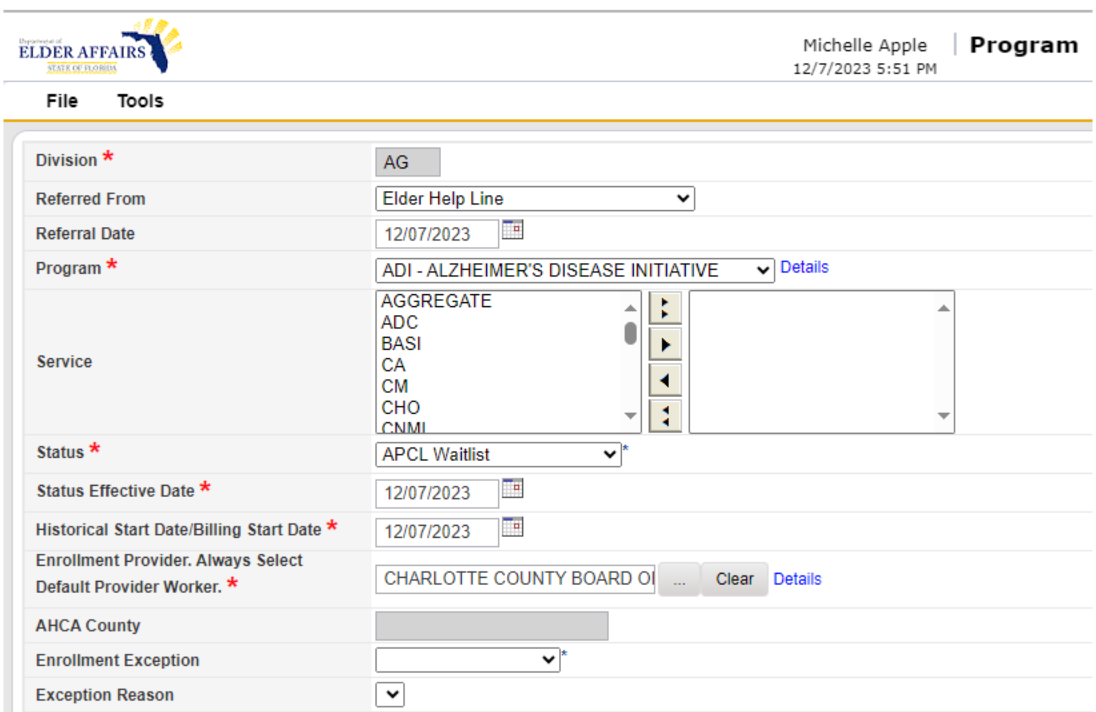
h. **Historical Start Date/Record Created Date:** This field is used to record when Program record was created. eCIRTS uses this date to enforce when a billing can begin under this program for the client.

i. **Enrollment Provider. Always Select Default Provider Worker:** Search for and select the Generic Worker for the PSA or the Provider or lead agency.

j. **AHCA County:** this field is ready only but will be populated by the interface for MLTC program record only.

k. **Enrollment Exception:** This will be used to explain when an enrollment is added on an exception basis because the Client is under 60, for MLTC, for Nutrition or to record services after DOD. Leave this field blank if it does not apply.

l. **Exception Reason:** When an enrollment exception is selected, an exception reason should be selected.



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

Note

An APCL Waitlist record may be added for MLTC. Follow the workflows in the eCIRTS Eligibility Workflows Training Guide when coming off of the waiting list as an EMS Release.

As Needed: Rank 5, Send 3008

After completing the screening, if the client is a rank 5 or above and qualifies for the MLTC waitlist, the screener should initiate the 3008 form completion process with the client. This form must be completed by the client's physician. It will be required as part of the EMS Release process so it's best practice to begin the process early.

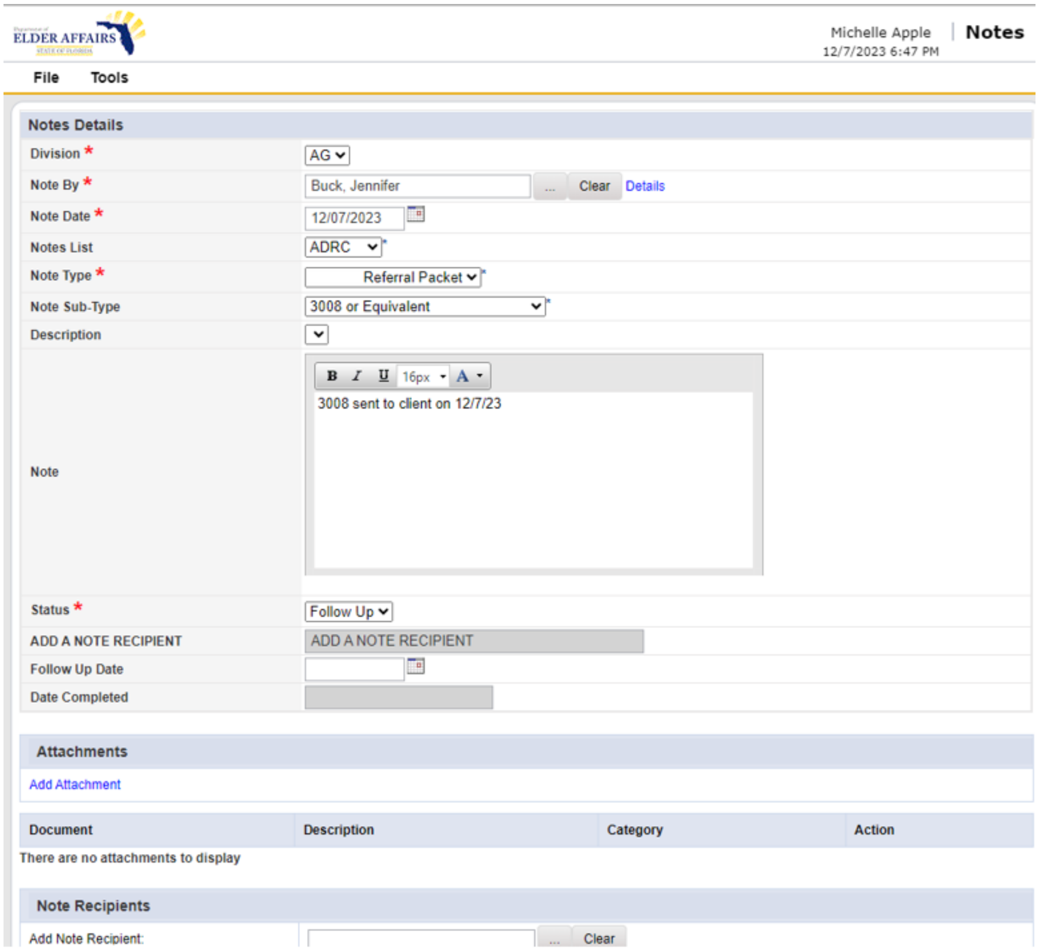
Role: **eCIRTS Worker**

1. The screener will send a blank 3008 – Medical Certification Form from eCIRTS and document that it has been provided as a note in the client record.

2. Navigate to the clients record and select the **Notes** tab.

3. From the **File** menu, select **Add Note**.

4. The Note detail page displays. Update the following fields:
   a. **Division**: Defaults to AG
   b. **Note By:** Defaults to self.
   c. **Note Date**: Defaults to today.
   d. **Notes List**: select ADRC.
   e. **Note Type**: Referral Packet
   f. **Note Sub-Type**: 3008 or equivalent.
   g. **Note**: enter details about the 3008 and whether is complete or not
   h. **Status**: Follow Up
   i. **ADD A NOTE RECIPIENT**: This message displays when the status is Follow Up. It is a reminder to add this note to a worker's My Work > Notes queue for follow up. The worker is added as a Note Recipient.
   j. **Follow Up Date:** Leave blank.
   k. **Note Recipient:** None needed. This note can be accessed by anyone who receives the completed 3008 from the client's notes tab. A specific recipient is not needed.
   l. **Attachment**: none. Later when the 3008 form is received, it will be scanned and saved to this same note as an attachment.



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

6. Later, when the 3008 is returned, anyone in the ADRC could receive it. Regardless of who receives it, it will be saved to the same note that was created when it was originally sent to the client.

7. Search for and select the existing client record. Select the Notes tab. From the list view, select the existing Referral Packet > 3008 or equivalent note.

8. The Note details page displays. Update the following fields:
    a. **Note**: enter details when the 3008 being received
    b. **Status**: remains Follow Up. It will be marked complete later in the workflow by the eligibility staff after it's reviewed and considered complete.
    c. **ADD A NOTE RECIPIENT**: This message displays when the status is Follow Up. It is a reminder to add this note to a worker's My Work > Notes queue for follow up. The worker is added as a Note Recipient.
    d. **Follow Up Date:** Leave blank.
    e. **Note Recipient:** None needed. The eligibility specialist will access the note from the client's notes tab. A specific recipient is not needed.
    f. **Attachment**: scan and attach the 3008 forms

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

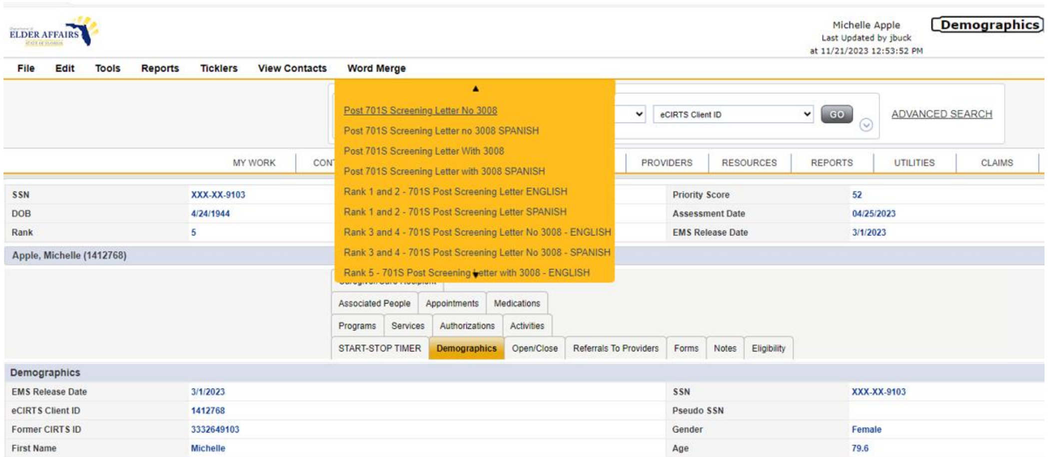
Print and Send Post 701S Letter

When the screening is complete and the APCL Waitlist program records have been added, the screener will send the Post 701S letters to the client.

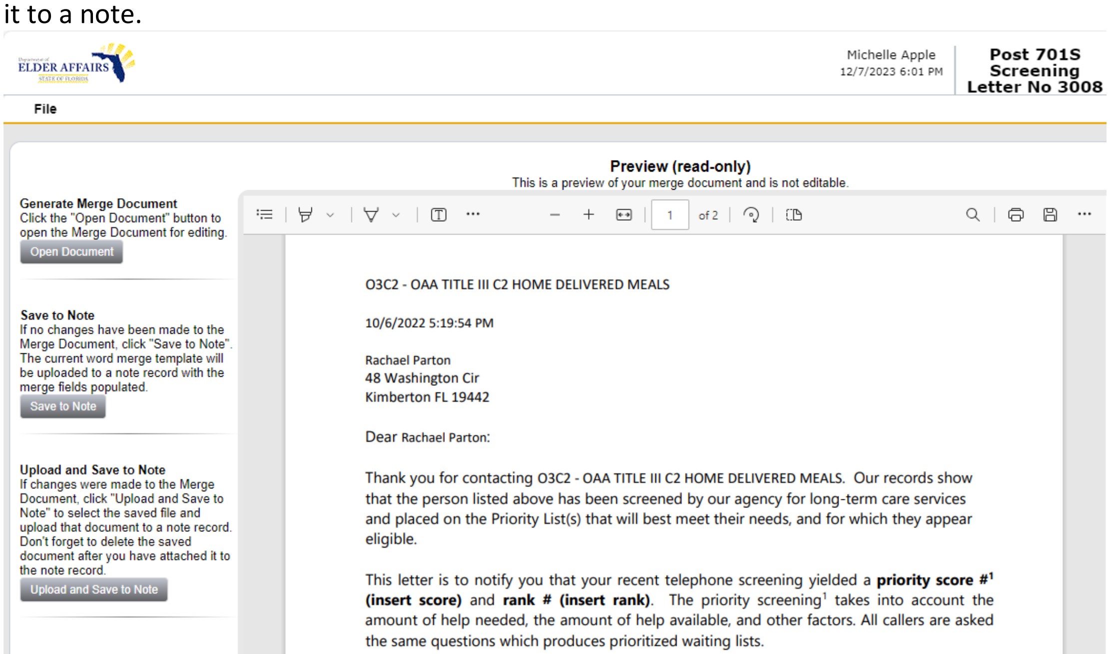
Role: **eCIRTS Worker**

1. The letters can be printed from eCIRTS and are located on the **Demographics** tab of the Client record.

2. Navigate to the client's **Demographics** tab. From the **Word Merge** menu, select the correct Post 701S letter from the list.



3. It will open in a preview window and include data from the client record. From the word merge preview, you can choose to open the document, save it to a note, or upload an edited version and save it to a note.

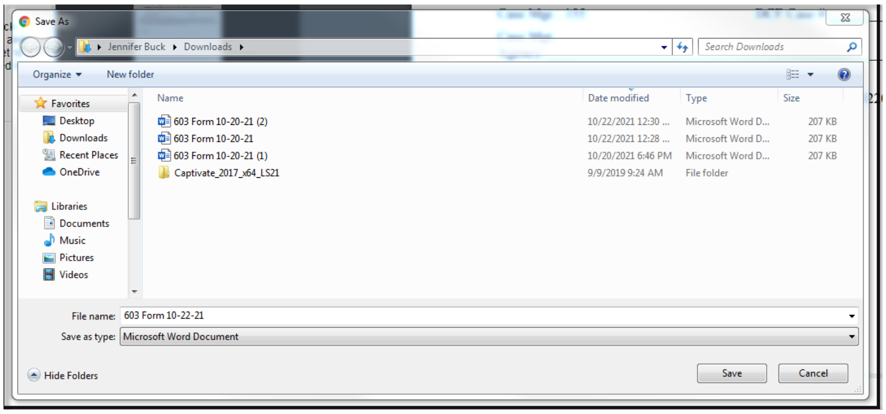


4. To edit the document, you need to open it. From the Word Merge preview menu, select **Open Document.**

5. The Save As window displays. Select a location on your computer to first save this document as a WORD document.

TIP

When the Word Merge preview page opens, by default the option to save the document displays. This is the same window that displays if you were to select the Open Document link in the Word Merge preview menu.



6. **The document opens. Edit** the Word Merge Document as necessary.

7. When finished with editing the Word Merge Document, click **File > Save as** to save the updated Word Merge to a specified folder on the user's workstation. You do NOT have to save a copy of the letter to a note in eCIRTS, but you do have to document which letter was sent in your contact record.

Close Contact Record

Role: **eCIRTS Worker**

1. Return to the open contact record on the **Contact details** page. Update the following fields to complete this contact record:
   a. **Short Summary:** State the screening was completed, which 701S letter was sent, and the programs for which the client was added to the waitlist. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
   b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
   c. **Contact Type**: remains SMMC LTCP - Screening
   d. **Reason for Contact:** 701S Complete
   e. **Contact Status**: update to Complete.
   f. **Duration**: will automatically populate after the record is saved.
   g. **Follow Up Date:** leave blank.
   i. **Assigned To**: defaults to self. Can remove value or leave as is.
   ii. **Screener**: remains self or you can remove it

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

3. The screener will Add an activity record for INSC units based on the duration of the contact attempt on the client's Activity tab.

As Needed: View Contact Information

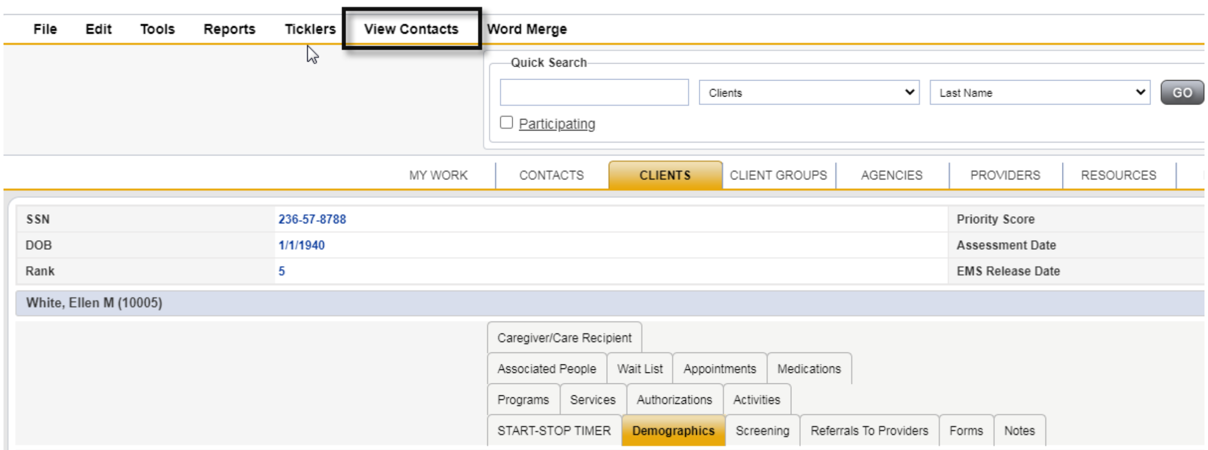
In eCIRTS, all callers, except anonymous ones, will have a client record. Contact records will then be added to the client record. This workflow allows screeners to view past contact information in several ways in eCIRTS.

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

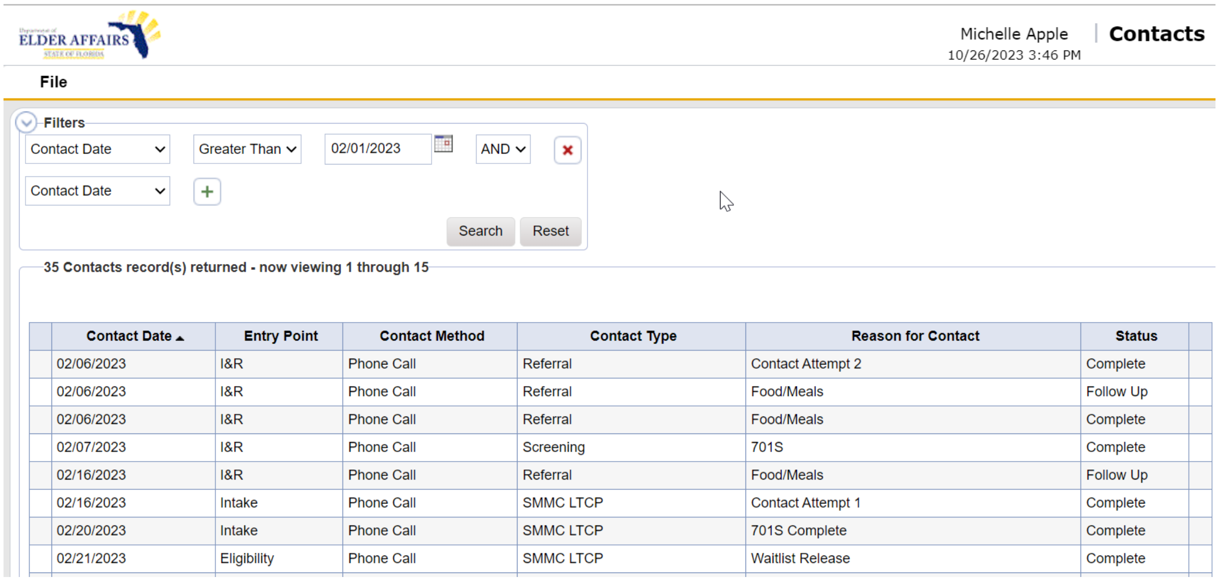
Workers also need to be prepared to review and update the client's demographic information as needed.

Role: eCIRTS Worker

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



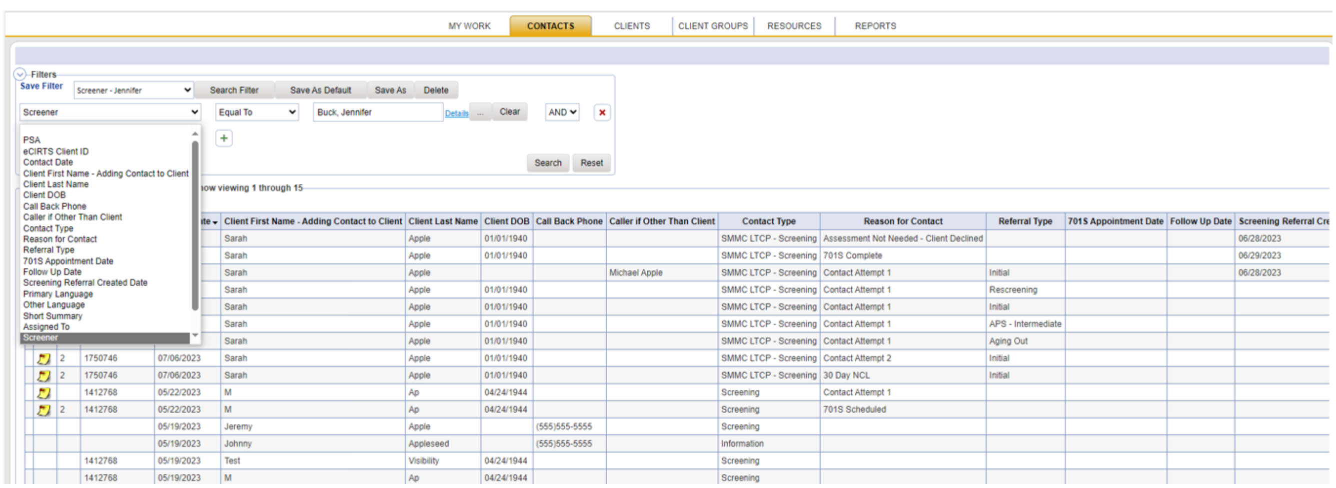
2. A limited summary view of the client's past contacts displays. This list does NOT display the Short Summary field from the contact record.



3. Select a record for more information. The Contact record will open. If it is in complete status, all of the fields will be read only, but the information is still visible.

4. When finished, the screener can close the Contact record and close the View Contacts window.

5. A more detailed list of previous contact information is available by selecting the **Contacts** chatper. A full list of previous contacts for all clients is available but too long to look through. The filters are essential to making this list managable and useful. Search by **eCIRTS Client ID** to display only the previous contacts for one client.



TIP

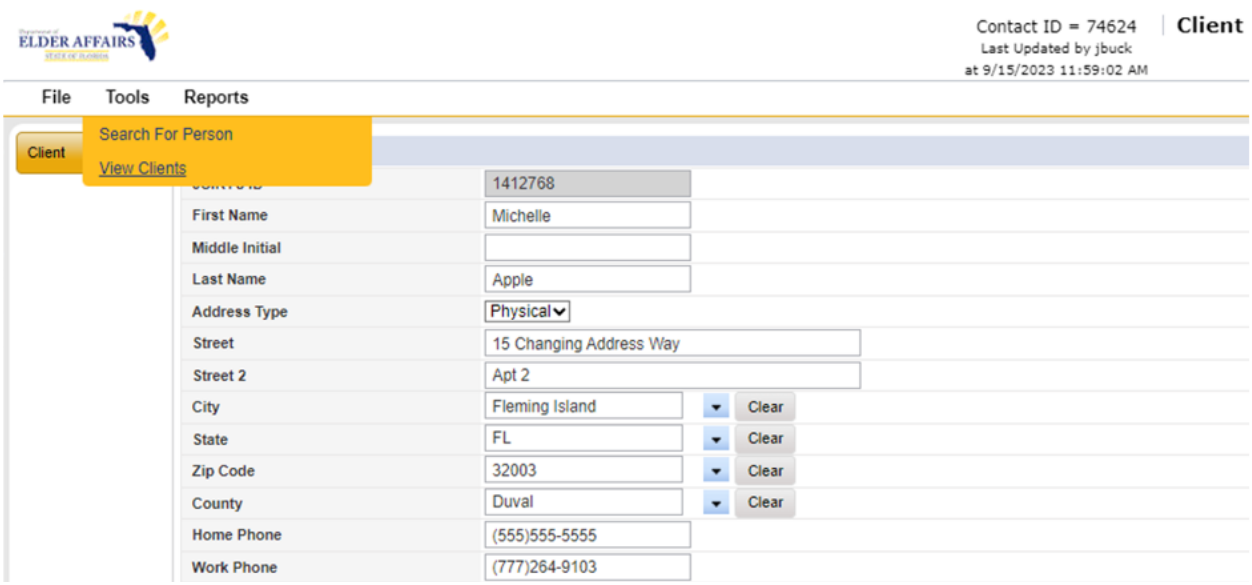
Saved filters are key. Be sure to take the time to create several saved filters specific to your day-to-day workload.

6. Finally, if you have a contact record open, select **Previous Contact Report** from the **Reports** menu.

7. The report displays all previous contact information for the client record you have opened.

8. With the contact record still open, the worker should confirm the client's Demographics and update as needed. Since this workflow started on the client record, the worker can easily view the client's demographic information on the **Client** subpage.

9. Click on the record to view additional demographic data. You can see the data; you cannot edit it from this page. To open the client record where the Demographics can be updated, from the **Tools** menu, select "View Client." See the [Demographics](#) section for details on editing this page. Once complete, return to the open Contact record.



Follow Up

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

Role: **eCIRTS Worker**

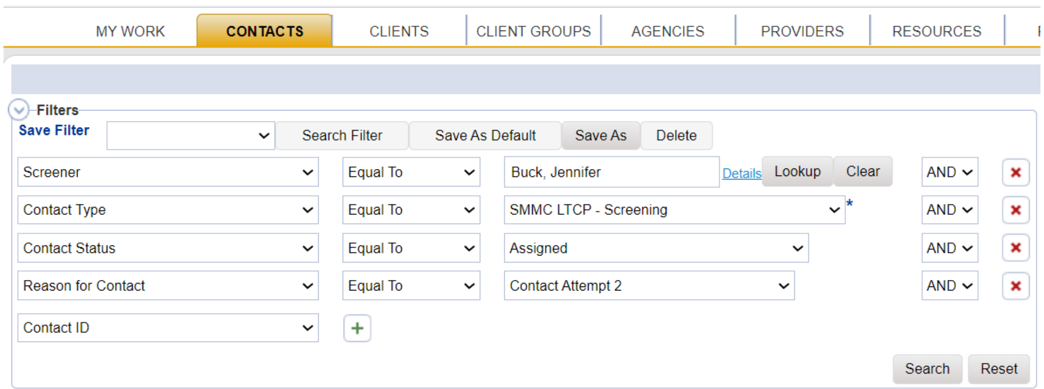
1. Select the **Contacts** tab. To view a list of contact attempt follow ups assigned to you, select the following search filters:

a. **Screener**: search for and select your name.
b. **Contact Type:** SMMC LTCP - Screening
c. **Contact Status**: Assigned
d. **Reason for Contact**:
   - Contact Attempt 1 (clients who have not been contacted yet)
   - Contact Attempt 2 (clients who had 1 contact attempt and need a second)
   - Contact Attempt 3 (clients who had 2 contact attempts and need a third)

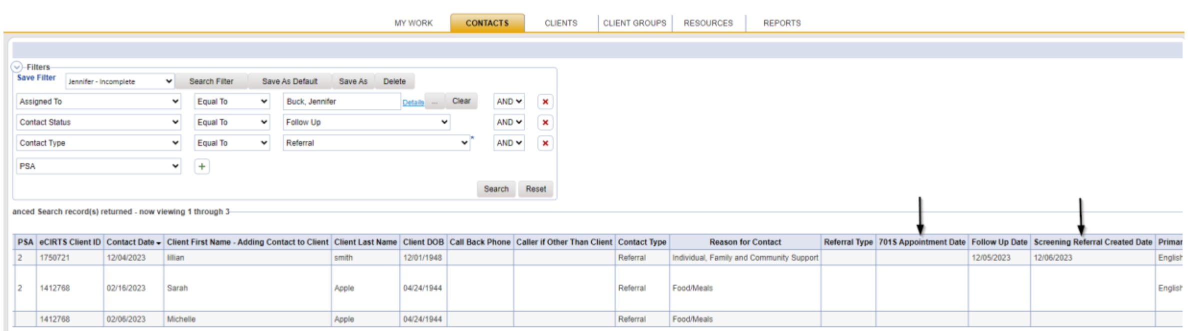
2. Select **Search**. Results are returned.

Note

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



“Screening Referral Created Date” is visible in the search results and can be used to sort your follow ups by oldest date. The Contacts queue also shows the 701S Appointment Date which can also be used to sort or filter the search results.



3. Select a record to open the contact details page.

4. Follow one of the scenarios:
   a. [Unsuccessful Contact 2]
   b. [Unsuccessful Contact 3]
   c. [Successful Contact – Client Did Not Pursue]
   d. [Successful Contact – 701S Scheduled]
   e. [Missed Appointment]
   f. [Start 701S but Not Finish]

g. [Successful Contact – 701S Completed]()

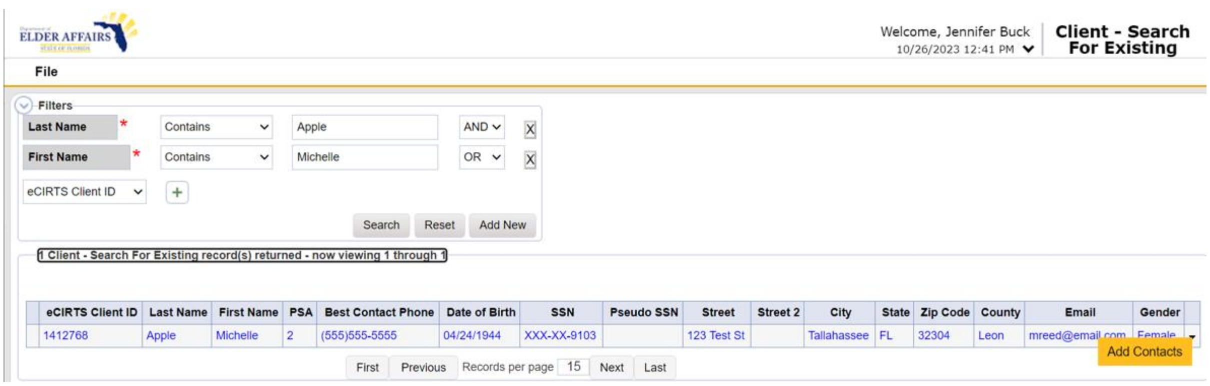
701S Completed

This section includes steps to document a successful contact where the screening is completed. This will be documented as a contact record and a form in eCIRTS. These steps assume the screener is calling the client for a scheduled appointment.

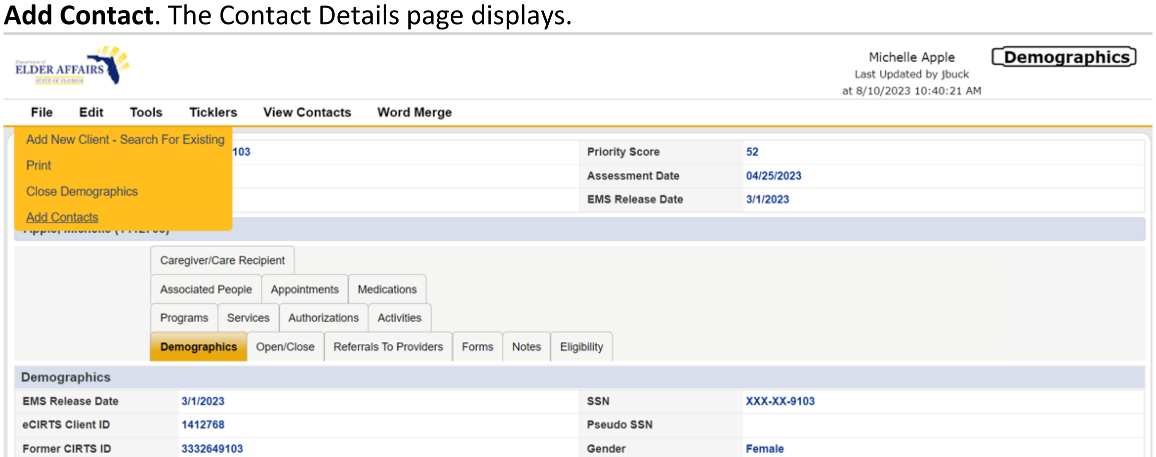
Role: **eCIRTS Worker**

1. The screener will first search for an existing client record or add a new client record if one doesn't already exist.

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



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



4. The Contact details page displays. Update the following fields:
   a. **Division**: Required. Defaults to AG as is read only.
   b. **Contact Date**: Required. defaults to today and is editable if needed.
   c. **Contact Time**: Required. defaults to now and is editable if needed.
   d. **Received By**: Required. defaults to the screener adding the contact record.
   e. **PSA**: Required. Select your PSA from the list or populated by Stored Procedure

f. **Current Task**: Select Screening
g. **Contact Method**: Required. defines how the contact was made.
h. **Anonymous:** Leave blank
i. **eCIRTS ID:** populates automatically and is read only.
j. **Client First Name:** populates automatically.
k. **Client Last Name:** populates automatically.
l. **Call Back Phone:** populates automatically – update if needed.
m. **Caller if other than Client:** leave blank.
n. **Relationship:** leave blank
o. **Contact Type**: select SMMC LTCP – Screening.
p. **Short Summary:** leave blank. Will update it later once the 701S form is started and the contact is completed.
q. **Notes:** leave blank. Will update it later once the 701S form is started and the contact is completed.
r. **Contact Marker**: leave blank.
s. **SNAP Submittal Date**: leave blank.
t. **Reason for Contact:** 701S Complete
u. **Referral Type:** select the applicable Referral Type from the table below. Referral types help workers manage their caseloads easier in the Contacts queue.

Referral Type	Description
Aging Out	Aging out referrals received from DCF
APS-High	Specific to PSA 11. Lead Agency sends APS-High referrals back to Screening to get on MLTC wait list.
APS-Intermediate	APS referral received from ARTT
APS-Low	APS referral received from ARTT
APS to ALF Referral	APS referral received via email from DCF Case Manager
Initial	Community referrals or referrals from Helpline
Rescreening	Annual re-screenings identified on the Assessment Due Report
Return to Pipeline	When a client may continue enrollment without being re-released following a termination per the EMS Procedures
Significant Change	When a client reports a significant change in their condition pursuant to Chapter 409.979 F.S.

v. **701S Appointment Date:** enter the appointment date of the screening.
w. **Unmet Needs Reason:** leave blank.
x. **Assigned To**: defaults to self. Can remove value or leave as is.
y. **Screener**: remains self
z. **Contact Status**: leave as Draft. Will update it later once the 701S is started and the contact is completed.
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:** leave blank.

5. From the **File** menu, select **Save Contact**. Do NOT select Save and Close Contact.

6. Keep the contact details page open and complete the 701S form. This is done from the client's **Forms** page. Proceed to the Complete 701S Form section.

7. Complete the Add APCL Enrollments section.

8. Complete the Print and Send Post 701S Letter section.

9. Complete the Close Contact Record section.

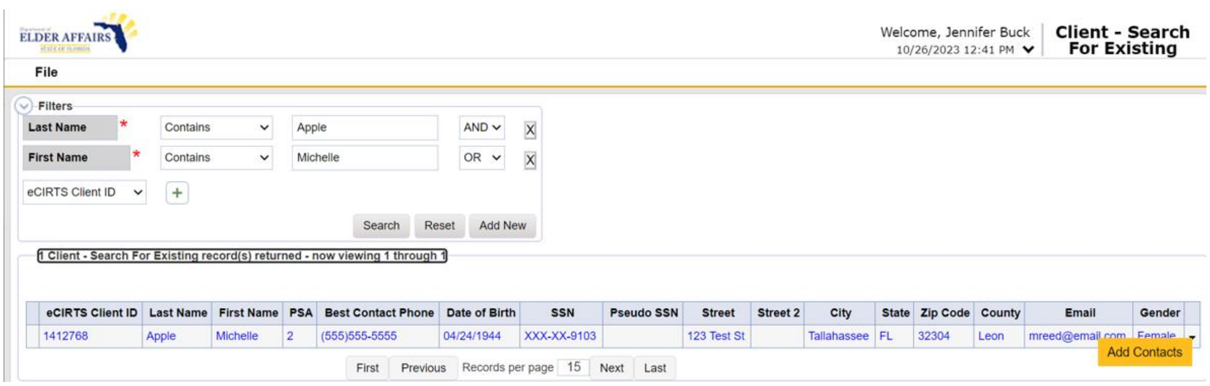
Additional Needs

Once the screening has been completed, the screener may identify additional needs for the client. The screener will complete a warm transfer of the phone call to the Helpline and the screener can notify Helpline in eCIRTS by creating a contact record that requires follow up.

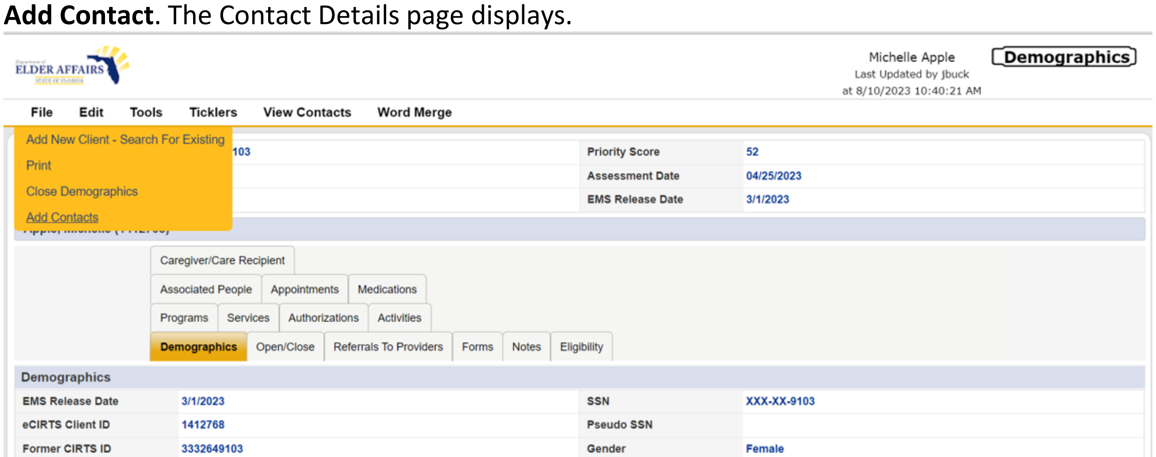
Role: **eCIRTS Worker**

1. The screener will first search for an existing client record or add a new client record if one doesn't already exist.

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



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



4. The Contact details page displays. Update the following fields:
    a. **Division**: Required. Defaults to AG as is read only.
    b. **Contact Date**: Required. defaults to today and is editable if needed.
    c. **Contact Time**: Required. defaults to now and is editable if needed.
    d. **Received By**: Required. defaults to the screener adding the contact record.
    e. **PSA**: Required. Select your PSA from the list or populated by Stored Procedure
    f. **Current Task**: Select Screening
    g. **Contact Method**: Required. defines how the contact was made.
    h. **Anonymous:** Leave blank
    i. **eCIRTS ID:** populates automatically and is read only.
    j. **Client First Name:** populates automatically.
    k. **Client Last Name:** populates automatically.
    l. **Call Back Phone:** populates automatically – update if needed.
    m. **Caller if other than Client:** leave blank.
    n. **Relationship:** leave blank
    o. **Contact Type**: select Send to Helpline.
    p. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
    q. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
    r. **Contact Marker**: leave blank.
    s. **SNAP Submittal Date**: leave blank.
    t. **Reason for Contact:** General Information
    u. **Referral Type:** select the applicable Referral Type from the table below. Referral types help workers manage their caseloads easier in the Contacts queue.

Referral Type	Description
Aging Out	Aging out referrals received from DCF
APS-High	Specific to PSA 11. Lead Agency sends APS-High referrals back to Screening to get on MLTC wait list.
APS-Intermediate	APS referral received from ARTT
APS-Low	APS referral received from ARTT
APS to ALF Referral	APS referral received via email from DCF Case Manager
Initial	Community referrals or referrals from Helpline
Rescreening	Annual re-screenings identified on the Assessment Due Report
Return to Pipeline	When a client may continue enrollment without being re-released following a termination per the EMS Procedures
Significant Change	When a client reports a significant change in their condition pursuant to Chapter 409.979 F.S.

    v. **701S Appointment Date:** leave blank.
    w. **Unmet Needs Reason:** leave blank.
    x. **Assigned To**: search for and select the name of the Helpline staff member or if not known, select the generic Default PSA Worker for your PSA.
    y. **Screener**: leave blank
    z. **Contact Status**: Follow Up

aa. **Duration**: will automatically populate after the record is saved.
bb. **Client Primary Language**: leave blank.
cc. **Other Language**: leave blank.
dd. **Follow Up Date:** leave blank.
ee. **Screening Referral Created Date:** leave blank.

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

6. Helpline staff will use the Contacts queue to view a list of screening referrals assigned to him/her. Select the **Contacts chapter**. Update the following search filters:
   a. **Contact Type**: Send to Helpline
   b. **Assigned To**: search for and select the Helpline staff's name or the generic Default PSA worker for your PSA.
   c. **Contact Status**: Follow Up

Note

Recommend creating a screener saved filter to list all new screening referrals received from the Helpline. The next time you use the Contact queue, you can select your saved Filter from the list and click **Search Filter**. This will populate the search filters, saving you time from looking them up again.

7. Select **Search**. Matching results are displayed. Select a record to display the Contact details page. Proceed to the Helpline Workflow Training Manual for next steps.

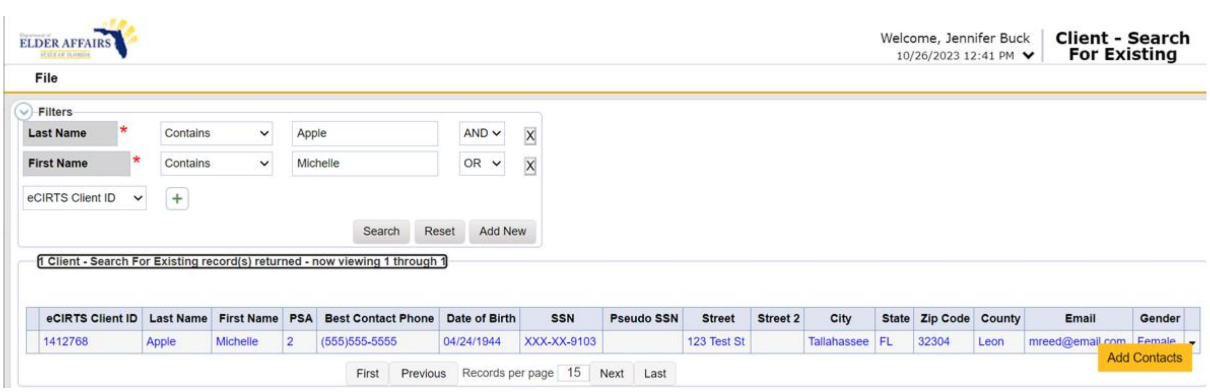
Missed Appointment

This section includes steps to document a scheduled but missed appointment by the client and sending of the No Contact Letter. The screener will manage his/her schedule outside of eCIRTS but document the results of those appointments as a contact record in eCIRTS.

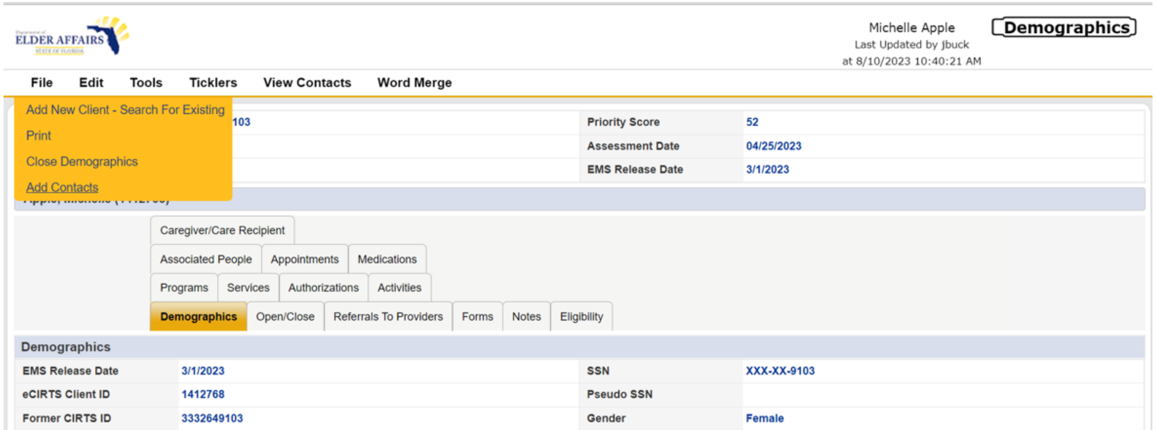
Role: **eCIRTS Worker**

1. The screener will first search for an existing client record or add a new client record if one doesn't already exist.

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



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



4. The Contact details page displays. Update the following fields:
   a. **Division**: Required. Defaults to AG as is read only.
   b. **Contact Date**: Required. defaults to today and is editable if needed.
   c. **Contact Time**: Required. defaults to now and is editable if needed.
   d. **Received By**: Required. defaults to the screener adding the contact record.
   e. **PSA**: Required. Select your PSA from the list or populated by Stored Procedure
   f. **Current Task**: Select Screening
   g. **Contact Method**: Required. defines how the contact was made.
   h. **Anonymous:** Leave blank
   i. **eCIRTS ID:** populates automatically and is read only.
   j. **Client First Name:** populates automatically.
   k. **Client Last Name:** populates automatically.
   l. **Call Back Phone:** populates automatically – update if needed.
   m. **Caller if other than Client:** leave blank.
   n. **Relationship:** leave blank
   o. **Contact Type**: select SMMC LTCP – Screening.
   p. **Short Summary:** Should be limited to 2-3 sentences. This field is visible on the Contact queue.
   q. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**.
   r. **Contact Marker**: leave blank.
   s. **SNAP Submittal Date**: leave blank.
   t. **Reason for Contact:** Missed Appointment
   u. **Referral Type:** select the applicable Referral Type from the table below. Referral types help workers manage their caseloads easier in the Contacts queue.

Referral Type	Description
Aging Out	Aging out referrals received from DCF
APS-High	Specific to PSA 11. Lead Agency sends APS-High referrals back to Screening to get on MLTC wait list.
APS-Intermediate	APS referral received from ARTT
APS-Low	APS referral received from ARTT
APS to ALF Referral	APS referral received via email from DCF Case Manager

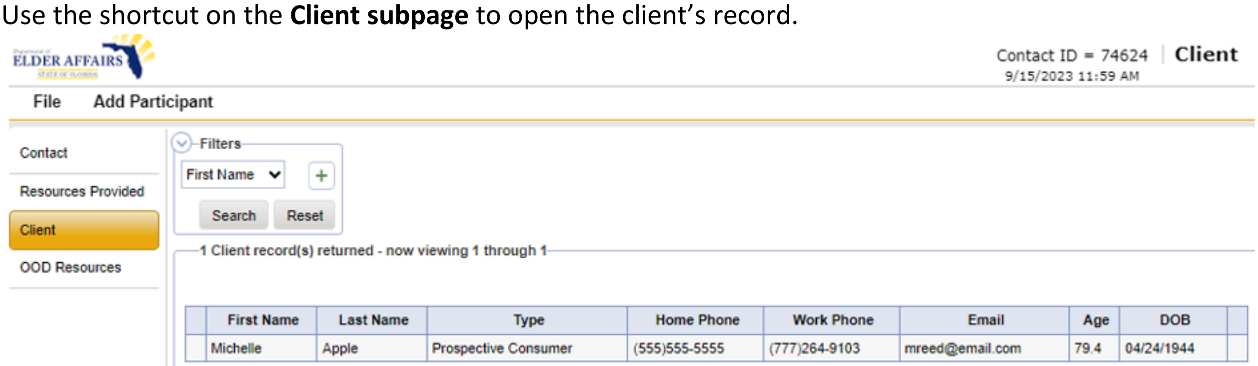
Referral Type	Description
Initial	Community referrals or referrals from Helpline
Rescreening	Annual re-screenings identified on the Assessment Due Report
Return to Pipeline	When a client may continue enrollment without being re-released following a termination per the EMS Procedures
Significant Change	When a client reports a significant change in their condition pursuant to Chapter 409.979 F.S.

v. **701S Appointment Date:** enter the appointment date of the screening.
w. **Unmet Needs Reason:** leave blank.
x. **Assigned To**: defaults to self. Can remove value or leave as is.
y. **Screener**: leave blank
z. **Contact Status**: leave as Draft. Will update it later once the NCL is sent and the contact is completed.
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.

5. From the **File** menu, select **Save Contact**. Do NOT select Save and Close Contact.

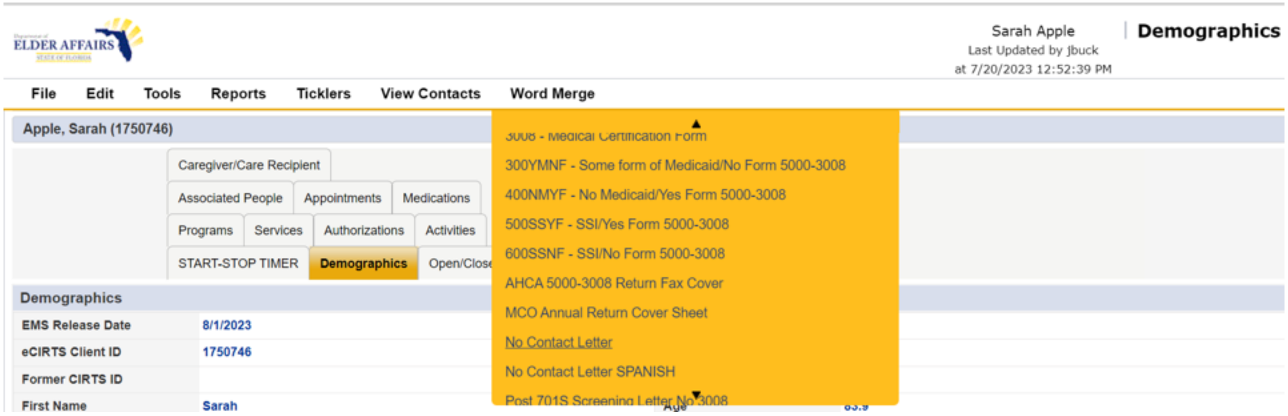
6. Keep the contact details page open and generate the **No Contact Letter**. This is done from the client's Demographics page.

7. Use the shortcut on the **Client subpage** to open the client's record.

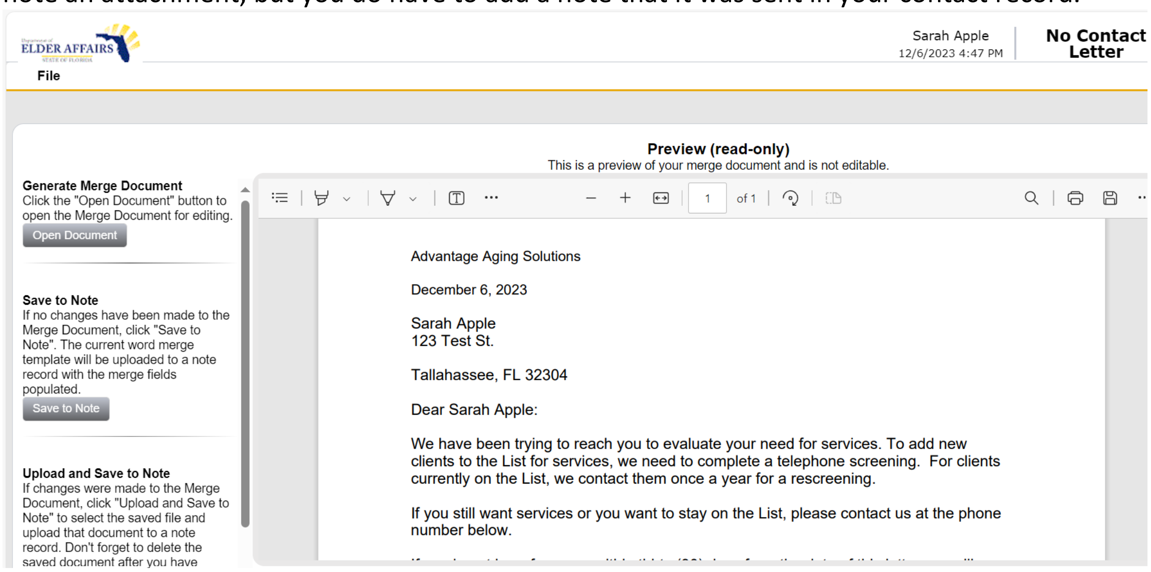


8. Click on the record to view additional demographic data. From the **Tools** menu, select **View Client.** The client record opens in a new window.

9. Select the **Demographics** tab. From the **Word Merge** menu at the top of the page, select **No Contact Letter**.



10. The Word Merge preview page displays the populated No Contact Letter. Print the letter or save it to a PDF. Send it to the client outside of eCIRTS. You do not have to save a copy of the letter to a note an attachment, but you do have to add a note that it was sent in your contact record.



11. Return to the open contact record on the **Contact details** page. Update the following fields to complete this contact record:
    a. **Short Summary:** State that the client missed the appointment, and the No Contact Letter was sent. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
    b. **Notes:** This field is unlimited and does not display on the Contact queue. Should be limited to 2-3 sentences. This field is visible on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
    c. **Contact Status**: update to Complete.
    d. **Duration**: will automatically populate after the record is saved.

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

13. The screener will Add an activity record for INSC units based on the duration of the missed appointment follow up on the client's Activity tab.

14. The screener will make up to three contact attempts to reschedule the appointment. Proceed to the Contact Attempts section.

Start 701S but Not Finish

This section includes steps to document an incomplete 701S for the client. The screener started the screening with the client but was unable to finish. This will be documented as a contact record and a form in eCIRTS. These steps assume the screener is calling the client for a scheduled appointment. If the screener reaches the client and is able to complete the screening then, begin with Step 4.

Role: **eCIRTS Worker**

1. If at any point the screener is unable to continue and the 701S form is incomplete. Update the following fields:
    a. In the Header, **Status**: Draft. This is the only status that can be used if there are unanswered required questions in the form.

2. From the **File** menu, select **Save and Close Forms**.

    Note

    Some PSAs will delete the incomplete 701S form instead of saving it as Draft.

3. Return to the open contact record on the **Contact details** page. Update the following fields to complete this contact record:
    a. **Short Summary:** State that the 701S was started but unable to be completed and why. Should be limited to 2-3 sentences. This field is visible on the Contact queue.
    b. **Notes:** This field is unlimited and does not display on the Contact queue. This field is optional and only needed if additional details are needed beyond the **Short Summary**
    c. **Contact Marker**: leave blank.
    d. **SNAP Submittal Date**: leave blank.
    e. **Contact Type**: remains SMMC LTCP - Screening
    f. **Reason for Contact:** 701S Incomplete
    g. **701S Appointment Date:** enter the appointment date of the screening.
    h. **Unmet Needs Reason:** leave blank.
    i. **Contact Status**: update to Complete.
    j. **Duration**: will automatically populate after the record is saved.
    k. **Follow Up Date:** leave blank.
    a. **Assigned To**: defaults to self. Can remove value or leave as is.
    b. **Screener**: remains self

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

5. The screener will Add an activity record for INSC units based on the duration of the contact attempt on the client's Activity tab.

6. When a contact record is saved with Contact Type = SMMC LTCP – Screening and Contact Status = Complete and Reason for Contact = 701S Incomplete, eCIRTS will automatically create another contact record to track the next attempt to complete the screening. The screener will filter the Contacts queue to view and manage contact attempts that require follow up. Proceed to the Assign the Screener section.