DOEA eCIRTS
Modules Overview

Module 1

This module is intended to familiarize end users with the process of documenting contacts, such as phone calls, emails, and face-to-face conversations. The contact record is a documentation of the events that occurred during the contact. This module will demonstrate how to document an information contact, a referral to community resource(s) contact, and how to refer a client to the ADRC for a 701S screening.

Learning Outcomes:

1. Record an information only contact for an existing client
2. Record a referral to community resources contact for an existing client
3. Record a referral to the ADRC for an existing client
4. Record an information only contact for a new client
5. Record a referral to community resources for a new client
6. Record a referral to the ADRC for a new client
7. Create a Pre-Client record
8. Document an anonymous contact
9. Document and route voicemail

Module 2

This module is designed to familiarize end users with documenting the intake and screening process when conducting an initial 701S screening, a rescreening, or a significant change rescreening.

Learning Outcomes:

1. Assign Primary Worker
2. Navigate the My Work Dashboard
3. Document Contact Attempts
4. Schedule the Screening
5. Conduct the Screening
6. Add Program Record(s)

Module 3

This module is designed to demonstrate the process of releasing a client from a waitlist for General Revenue or Older Americans Act (OAA) programs. This module demonstrates tasks associated with releasing a client, updating Programs Enrollments, conducting assessments, and adding planned services. Lead Agencies and OAA Providers are encouraged to attend this module.

Learning Outcomes:

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1. Update Program Record
2. Schedule an Assessment
3. Conduct Assessment
4. Update Program Record
5. Add Planned Services
6. Create Authorizations
7. Create Referral to Provider Record
8. Edit Authorizations
9. Tickler Follow-ups

Module 4

This module will demonstrate the various billing methods that can be utilized in eCIRTS. Billing can be conducted in several different ways. Billing can be conducted client-by-client, by service for multiple clients, aggregately, or via an XML uploaded file.

Learning Outcomes:

1. Add Billable Service for One Client
2. Add Activities for Multiple Clients
3. Add Aggregate Services (Non-Client specific)
4. Import Activities for Multiple Clients

Module 5-A

This module is designed to demonstrate tasks associated with the Statewide Medicaid Managed Care Long-Term Care Wait List / Enrollment Management System Release process handled by ADRCs. This module will focus on documenting the tasks such as conducting client interest contact attempts, documenting the Pre-Release tasks, and creating the CARES referral.

Learning Outcomes

1. Locate assigned Client
2. Conduct contact(s) to confirm interest
3. Complete Pre-Release Research tasks
4. Update and Create Program Records

Module 5-B

This module is designed to demonstrate the tasks associated with Comprehensive Assessment and Review of Long-Term Care Services (CARES) mandated preadmission screening program for Medicaid long-term care applicants. CARES staff will utilize eCIRTS to maintain case information on level of care determinations, track client follow-ups, and produce reports for monitoring purposes.

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Learning Outcomes

1. Direct Referrals
   a. Create a Client Record
   b. Conduct Pre-Release Research tasks
   c. Create CARES Referral
2. Assign the CARES Assessor
3. Schedule CARES Assessment
4. Conduct the Assessment
5. Prepare for Staffing
6. Participate in Staffing
7. Sending and Saving the 603
8. Tickler Follow-ups

Module 6

This module supports activities of the Serving Health Insurance Needs of Elders (SHINE) Program that provides free, confidential, and unbiased Medicare counseling. Learning objectives of the SHINE session will include receiving the SHINE Contact and/or Referral, completing and/or reviewing the SHINE data form, assigning referrals to trained volunteers, and updating referral records.

Learning Outcomes

1. Locating SHINE referrals
2. Assigning counselors
3. SHINE Data Form
4. Updating Referral Records