# DOEA eCIRTS
# Module 1
# Create a Contact Record
# Handout

*Course Description*

This module is intended to familiarize end users, primarily Information and Referral Specialists, with the process of documenting contacts, such as phone calls, emails, and face-to-face conversations, with individuals seeking information and assistance. 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.

*Prerequisites*

- Layout and Navigation Video
- Searches Video
- Notes Video
- Ticklers Video
- Reports Video

*Suggested Resources, Materials, and Credentials*

- Training Manual
- The Vizio
- Reference Guide
- Cliff Notes
- Login credentials and training website link

***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 screening 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 screening referral to the ADRC for a new client
7. Document an anonymous contact
8. Document and route voicemail

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**This module is designed with the I&R specialists in mind.**

Scenario 1: Existing client calls for information only.

Specialist will locate existing client record, open the record, and add a contact record. The specialist will attach resources to the contact record. The resources saved on the contact record do not institute a referral to the resource, the save acts as documentation that the resources were provided. Resources can be any information that is provided to the client, such as an address for the local library, or the phone number for the health department.

Scenario 2: Existing client calls and needs a referral to community resources

The specialist will locate the existing client record, open the record, and add a contact record. The specialist will provide resources, but the resources documented on the contact record do not constitute a referral to the provider. Referrals to providers are documented on the Referral to Providers tab within the client's record.

Scenario 3: Existing client needs a referral to the ADRC for a 701S Screening

The specialist will locate existing client record, open the record, and add a contact record. The specialist can provide resources, but the resources do not constitute a referral to the ADRC. Referrals to the ADRC for a 701S Screening are documented on the Screening tab on the client's record.

Scenario 4: New client needs information

The specialist will look for client and discover the client has not been created within eCIRTS. The specialist will create a new client record. The specialist will then add a contact record and provide resources.

Scenario 5: New client needs a community referral

The specialist will look for client and discover that the client has not been created within eCIRTS. The specialist will create a new client, add a contact record, and create a referral to the community resource on the Referral to Providers tab.

Scenario 6: New client needs a referral to the ADRC for a 701S screening

The specialist will look for client and discover that the client has not been created within eCIRTS. The specialist will create a new client, add a contact record, and create a referral to the ADRC on the Screening tab.

Scenario 7: Documenting an anonymous contact

The specialist will use the Contacts chapter to document an anonymous contact. An anonymous contact will not be attached to a specific client.

Scenario 8: Document Voicemails

The specialist will document various types of voicemails. When a voicemail is received, the expectation is to attempt to contact the client, if enough identifiable information is provided. If the client is non-identifiable, then the voicemail will be documented as an anonymous call.

Scenario 9: Completing follow-up tasks

Follow-up reminders in eCIRTS are called Ticklers. The specialist will complete follow-up tasks by monitoring the Tickler queue on their My Work dashboard. The specialist will select the tickler and follow the prompt to complete the task.