DOEA eCIRTS
Module 2
Conduct a Screening
Handout

Course Description

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.

Prerequisites

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

Suggested Resources, Materials, and Credentials

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

Learning Outcomes

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

DOEA eCIRTS
Module 2
Conduct a Screening
Handout

This module is designed for intake specialists and screeners who will conduct the 701S screening and create program enrollment records.

Scenario 1: The client was assigned to a generic worker instead of an identified screener.

Whomever has the responsibility of identifying and assigning a specific screener to a client will access a report, identify clients in need of assigning, and distribute the clients among the screeners. This process is PSA specific as some will assign the screeners within eCIRTS, while others may notify the screeners and then the screeners must assign themselves.

Scenario 2: The screening record populates on My Work dashboard

The client's screening record will populate on the Screeners dashboard in the Screening queue. The screener can access the client record by selecting the client from the queue. Client records can populate in different statuses in the screening queue, such as "Screening Referral I&R to ADRC" and "Screening Scheduled".

Scenario 3: Documenting contact attempts

The screener will contact the client to schedule or conduct the 701S screening. The contact attempts will be documented on the Notes tab on the client's record. The status of the Screening record will need to be updated to reflect the current state of the screening. Examples include Contact Attempt 1, Contact Attempt 2, and Screening Scheduled.

Scenario 4: Schedule the screening

The screener will continue to use whatever scheduling software that is currently in place within their ADRC. The screener should document the scheduled day and time on the Appointments tab. The screener will also need to document via a note on the Notes tab and update the screening status to reflect Screening Scheduled.

Scenario 5: Documenting unsuccessful third contact

After three failed attempts to contact a client, the screener will generate a No Contact Letter to send to the client. The letter will be saved as a note on the Notes tab. The screener will update the status of the screening as Screening Not Completed.

DOEA eCIRTS
Module 2
Conduct a Screening
Handout

Scenario 6: Conduct a Screening

The screener will conduct the screening within eCIRTS. The screening will be documented on the Forms tab and stored within eCIRTS. The screening will provide guidelines for eligibility for various programs that are dependent on the answers provided by the client. The screener can use the eligibility section as a guideline for program enrollment records.

Scenario 7: Creating Program enrollment records

The screener will create program enrollment records based on the eligibility guidelines found at the bottom of the 701S form. The program enrollment records will be created on the Programs tab. Each program enrollment will have its own Program record. Clients can be released for waitlisted programs at different times based on availability.

Scenario 8: Billing for Intake units

The screener can account for his or her time spent conducting contact attempts and completing the screening within eCIRTS. The screener will create an Activity record, which is essentially a invoice, to document the number of units that the screener accumulated while working with a specific client.