CIRTS
(Client Information & Registration Tracking System)
User Guide

Florida Department of Elder Affairs
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Welcome to CIrts (Client Information & Registration Tracking System)!

Double-click the CIrts icon on the Desktop.

Or, select the CIrts link from the Department of Elder Affairs Intranet site.
The Enterprise Application Services screen will appear.

1) Enter your **CIRTS** User Name.
2) Enter your **CIRTS** Password. This password is case-sensitive. If an error occurs, check to see if the Caps Lock is on.
3) Click the Login button or press the Enter key.
4) The Applications screen will appear.
Click the CIRTS link.

A window will appear with RED writing. This window must remain open while you are using CIRTS. If this window is closed, CIRTS will close.
Wait a few moments for the CIRTS splash screen to appear.

The CIRTS application depends on this window remaining open. Only close this window after exiting CIRTS.
To access client data, click Menu in the top left-hand corner of the screen.

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When the CIRTS splash screen appears, you should see three items in the Start bar.

1) This item will take you back to the Applications Screen.
2) This item will take you to the window with RED writing.
3) This item will take you to the CIRTS screen.
From Menu, select Aging Provider Network.

From Aging Provider Network, select Client menu.
From the Client Menu, you can – search for an existing client, add a new client, or access various screens to display client data.

To search for a client, select the Add Client/Search Client option. The search screen will appear.
NOTE: It is very important for users to perform a thorough search before adding a new client. CIRTS is now shared by all area agencies on aging, lead agencies, and CARES (Comprehensive Assessment and Review for Long Term Care Services) offices in Florida. Another office could have added the same client with a different Social Security number, or a different variation of the client’s name. After searching on the known information, try searching on partial Social Security numbers or partial names to make sure the client does not exist. If a search on the client’s Social Security number reveals that it currently belongs to another client in CIRTS, notify your LAN (Local Area Network) Administrator, and steps will be taken to verify and/or correct the Social Security number.
Search Screen

Enter the client’s Social Security number (SSN), last name, and first name. Click on the Search button.

If the client does not exist, a message will appear indicating no matching records were found. Click the OK button.

You can now click the Clear button and search for the client again or click the Add New Client button.
From the previous screen, this is a search with a partial SSN, last name, and first name. No clients in the system met the specified criteria. Click the OK button.

The client does not exist in CIRTS. Click the Add New Client button.
Demographics Screen – Add New Client

The cursor will start in the SSN field. **Fields with a pink background are required.** CIRTS will generate an error message when the user tries to save a blank pink field. Enter the client’s SSN, and then press the Tab or Enter key to move to the next field. List fields: County, Sex, Race, Ethnicity, Primary Language, and Marital Status can be accessed with the mouse, arrow keys, or type the first letter of the desired value. For example, to enter a Marital Status of Single, you can use the mouse to access the list and select Single, or use the “up” arrow key to find Single in the list, or type the letter “S.” Typing the letter “S” will take the user to Separated, which is the first “S” alphabetically in the list. Typing “S” again will take the user to Single, the next value alphabetically in the list.

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**Search Button** – Takes you to the Search Screen.

**LOC Button** – Takes you to the CARES (Comprehensive Assessment and Review for Long Term Care Services) Level of Care screen.

**Referrals Button** – Takes you to a list of referrals CARES has made to the Aging Network.

**NHD Button** – Takes you to the Nursing Home Diversion screen.
**Assessments Button** – Takes you to a list of all Assessments related to the client. The Assessment list contains assessments from the user’s Planning and Service Area (PSA) as well as PSAs throughout the state and assessments conducted by the CARES offices throughout the state.
After you answer the question – Registered with County Special Needs Registry? – you can press the F10 key or click the Save button (yellow disk). The message above will appear.

***The client’s demographic information has not saved at this point.*** You must click OK with the mouse or press the Enter key to acknowledge this message. When the message clears, you should then press the Tab or Enter key to enter the client’s Assessment.
All Assessments begin with only the **ASSM** tab. The cursor will start in the Owner Id field. To access the list of available Owner Ids, press the F9 key.
Press the Tab or Enter key to move to the other fields, using the F9 key to access the code list if needed.

When a non-owner user (user who does not work for the owner) enters an Update Assessment or a new Assessment, the Owner Id and Owner Assessor Id fields should be disabled. The non-owner user is required to select their provider from the Provider Id list or enter their Provider Id. The non-owner user is also required to select their Provider Assessor Id from the list or enter the Provider Assessor Id in the Provider Assessor Id field. The Assessment Site field is an alphabetical list, meaning the user can: 1) click the field with mouse and select the appropriate site; 2) use the up/down arrow keys to scroll through the list; or 3) type the first letter alphabetically of the Assessment Site. For example, if the client’s Assessment Site was an Assisted Living Facility, the user would type “A” and Assisted Living Facility would appear in the field. ***Notice – more tabs have appeared next to the ASSM Tab. The type of Assessment selected will determine how many tabs appear. Appendices A – F identify each Assessment type and the corresponding tabs.
Press the Tab or Enter key to move to the Consumer Type field.

You can select the Consumer Type with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type “C” for Caregiver or “E” for Elder Recipient. Press the Tab or Enter key.

Are you the caregiver of a grandchild? – Enter a Y or N. Press the Tab or Enter key.
Is this Public Housing? – Enter a Y or N. Press the Tab or Enter key.
You can select the Referral Source with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value. Press the Tab or Enter key.

**Referral Sources:**
A – Abuse/Neglect  
C – CARES  
D – DCF CCDA  
D (pressed twice) – DCF HCDA  
H – Hospital
L – Lead Agency
O – Other
S – Self
U – Upstreaming/CARES

You can select the Risk Level with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value.

**Risk Levels:**
H – High
I – Imminent Risk
L – Low
M – Moderate
N – None
T – Transition from ALF to Nursing Home
T (pressed twice) – Transition from NH to Hospital FY 05-06

Enter the Referral Date – format: MMDDYYYY or MMDDYY. The dashes will be added automatically. Press the Tab or Enter key.

You can select Primary Caregiver with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value.

**Primary Caregiver:**
N – No Caregiver
U – Unknown
Y – Yes
If you select No Caregiver, the Assessment tabs do not change.
If you select Yes for Primary Caregiver, two new tabs are added to the Assessment. The CAR and CAR2 screen gather information about the client’s caregiver.

Press the Tab or Enter key. You can select the Living Situation with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value.

**Living Situation:**
A – Alone
N – Not Required
U – Unknown
W – With Caregiver
W (pressed twice) – With Other

Press the Tab or Enter key to move to the INC (Income) screen of the Assessment.
The cursor will start in the Individual Monthly Income field on the INC (Income) tab. Enter the client’s monthly income. Press the Tab or Enter key.

You can select the Individual Assets with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the alphabetic code to select a value.

**Individual Assets:**
- M – $0 - $2000
- N – $2001 - $5000
- P – Over $5000
- U – Unknown

Follow the same format for the Couple Monthly Income and Couple Assets when the information is required. Press the Tab or Enter key.

***For the OAA, Congregate Meals, and OA3E Assessments, the client’s income can be left blank. If the income amount is left blank, the user will be required to enter a Y or N in the “Refused?” fields.***

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Receiving Food Stamps? – Enter a Y or N. Press the Tab or Enter key.
You can select who is answering the questions with the arrow keys, or by clicking the list and
selecting the value with the mouse, or you can type the first letter alphabetically to select a value.

C – Client
O – Other

The cursor will automatically move to the next field. You can select the satisfaction with life
with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can
type the numeric code to select a value.

1 – Excellent
2 – Good
3 – Fair
4 – Poor

The cursor will automatically move to the next field. You can select the attitude on life with the
arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the
numeric code to select a value.

1 – Much Better
2 – Better
3 – About the same
4 – Worse

The cursor will automatically move to the next field.
Are behavior problems present? – Enter a Y or N. The cursor will automatically move to the
next field.
Does behavior indicate a need for supervision? – Enter a Y or N. If you enter an N and press the
Enter key, all of the fields below will populate with an N and the cursor will move to the next
screen. To enter a Y for the individual behaviors, enter Y to “Does behavior indicate a need for
supervision?” then Y or N for the individual behaviors. Press the Tab or Enter key to move to
the MEN (Mental Health) screen.
Enter a Y or N to indicate whether the client answered the date questions correctly or incorrectly. Use the same procedure for the place questions.
Enter how many numbers the client missed while counting backward from 20 to 1. Ten (10) incorrect responses are the maximum allowed. Press the Tab or Enter key.
Are cognitive problems present? – Enter a Y or N.
Currently receiving mental health services? – Enter a Y or N.
Need for mental health referral? – Enter a Y or N.
You can select the formal and/or informal resources with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.

1 – Always Available
2 – Sometimes Available
3 – Rarely Available
4 – Unavailable
5 – Not Needed

You can select the orientation to time with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.

1 – Always
2 – Sometimes
3 – Rarely
4 – Never
You can select the orientation to place with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.

1 – Always
2 – Sometimes
3 – Rarely
4 – Never

The cursor will automatically move to the PHY (Physical Health) screen.

You can select the overall health with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.
1 – Excellent
2 – Good
3 – Fair  
4 – Poor  
0 – Unknown

You can select the health rating with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.
1 – Much better  
2 – Better  
3 – About the same  
4 – Worse

You can select the physical limitations with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.
1 – Not at all  
2 – Occasionally  
3 – Often  
4 – All the time

You can select the medical availability with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.
4 – Always  
3 – Sometimes  
2 – Rarely  
1 – Never

You can select the transportation availability with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.
4 – Always  
3 – Sometimes  
2 – Rarely  
1 – Never

You can select the access to healthcare with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.
4 – Always  
3 – Sometimes  
2 – Rarely  
1 – Never

The cursor will automatically move to the ADL (Activities of Daily Living) screen.
On the ADL (Activities of Daily Living) screen, you will answer the questions in this order: ADLS, Resource ADLS, IADLS (Independent Activities of Daily Living), Resource IADLS. The cursor will start in the ADLS section in the Bathe field. You can select the code with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.

**ADLS and IADLS:**

0 – No Help
1 – No Help, but relies on assistive device
2 – Supervision/Coaching
3 – Some Help
4 – Total Help – can’t do

**Resource ADLS and Resource IADLS:**

0 – Never/No Help needed
1 – Rarely
2 – Sometimes
3 – Always

Need for Assistive Device? – Enter a Y or N.

The cursor will automatically move to the NUT (Nutrition Status) screen.

All of the NUT (Nutrition Status) questions require a Y or N. The cursor will move from field to field automatically.

When you enter a Y or N for “Do you live with others who smoke?” the cursor will automatically move to the HEA (Primary Diagnosis and Health Conditions) screen.
The cursor will begin in the Arthritis field. Enter a Y or N for all Primary Diagnosis and Health Conditions. In the Cancer field, if you enter an N and press the Tab or Enter key the fields below Cancer – Lung, Skin, Oral, Other – will automatically populate with an N and the cursor will move to the Dementia field. To select one of the specific Cancer types, you should answer Y to Cancer and the cursor will move through the Lung, Skin, Oral, and Other fields.

When selecting a health condition from the Other list in the Primary Diagnosis and Health Conditions section, you should select the most problematic health condition for the client. You can select the other health condition with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value.

A – Allergies
A (pressed twice) – Amputation
A (pressed three times) – Anemia
A (pressed four times) – Asthma
B – Bladder or Kidney Problems
B (pressed twice) – Blood Pressure – High
B (pressed three times) – Blood Pressure – Low
B (pressed four times) – Broken Bones
D – Dehydration
D (pressed twice) – Dialysis
D (pressed three times) – Dizziness
F – Falls
G – Gallbladder Problems
H – Hearing Problems
H (pressed twice) – HIV/ARC/AIDS
N – No
O – Osteoporosis
O (pressed twice) – Ostomy Care
O (pressed three times) – Others
P – Pacemaker
P (pressed twice) – Paralysis
P (pressed three times) – Parkinson’s Disease
P (pressed four times) – Potassium/Sodium Imbalance
S – Seizure Disorders
S (pressed twice) – Shingles
S (pressed three times) – Sleep Problems
T – Thyroid Problems
T (pressed twice) – Tuberculosis
U – Ulcers
U (pressed twice) – Unknown
U (pressed three times) – Urinary Incontinence
V – Vision Problems

The cursor will move to the Other Health Conditions section for you to enter any other health conditions affecting the client. If there aren’t any other health conditions affecting the client, other than what is listed in the Primary Diagnosis and Health Conditions section, select No from the Other list. Selecting No from the Other list will automatically populate the Other Health Conditions section with N and move to the SPS (Special Services) screen.
The cursor will begin in the Physical Therapy field. Enter a Y or N for all questions on the SPS (Special Services) screen.

When selecting a special service from the Other list in the Special Services section, you should select the most significant Special Service need for the client. You can select the special service with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value.

A – Aseptic Dressing
B – Bedsores Treatment
B (pressed twice) – Bowel Impaction Therapy
B (pressed three times) – Bowel/Bladder Rehabilitation
C – Catheter Care
D – Dialysis
I – Insulin Therapy
I (pressed twice) – IV Fluids
I (pressed three times) – IV Medicines
L – Lesion Irrigation
N – No
O – Ostomy Care
O (pressed twice) – Others
O (pressed three times) – Oxygen Therapy
O (pressed four times) – Oxygen Treatment
R – Respiratory Treatment
S – Skilled Nursing
S (pressed twice) – Speech Therapy
S (pressed three times) – Suctioning
T – Tube Feeding
U – Unknown
W – Wound Care

The cursor will move to the Other Special Conditions section for you to enter any other special conditions needed by the client. If there aren’t any other special conditions needed by the client, other than what is listed in the Special Services section, select No from the Other list. Selecting No from the Other list will automatically populate the Other Special Conditions section with N and move to the SOC (Social Resources) screen.
Does the client live alone? – is answered automatically based on your response to Living Situation on the ASSM screen.

Does the client care for grandchildren on a permanent basis? – Enter a Y or N.

If needed, could you stay with someone, or they stay with you? – Enter a Y or N.

Do you have someone you can talk to when you have a problem (other than caregiver)? – Enter a Y or N.

You can select the telephone and personal contact with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the alphabetic or numeric code to select a value.

D – One a day or more
2 – 2 - 6 times a week
W – Once a week
N – Not at all
N (pressed twice) – No phone (Only applies to how many times the client talks on the telephone.)

You can select the environmental score with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value.

0 – No Risk
5 – Low Risk
15 – Moderate Risk
25 – High Risk

Press the F10 key or click the Save button (yellow disk) to save the Assessment.

***If the client has a caregiver, you must press the Tab or Enter key to move the cursor to the CAR (Caregiver) screen. Or, you can click the CAR (Caregiver) Tab and click the “HCE Caregiver?” field to move the cursor.

HCE Caregiver? – Enter a Y or N.
Caregiver’s Social Security number (SSN) – enter the Caregiver’s actual SSN or a pseudo SSN. Enter the Caregiver’s name and select the Caregiver’s relationship to the client. You can select the Caregiver’s relationship to the client with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value.
C – Child
F – Friend/Neighbor
G – Grandchild
O – Other
O (pressed twice) – Other Relative
P – Parent
S – Spouse

Enter the Caregiver’s Address then press the Tab or Enter key to move to City/State/Zip. Press the Tab or Enter key.
You can select the Caregiver’s county with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically of the desired county. For instance, you would press the “L” key four times for Leon County. Press the Tab or Enter key.
Enter the Caregiver’s telephone number. Press the Tab or Enter key.
You can select the Caregiver’s race with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value. Press the Tab or Enter key.

A – Asian or Pacific Islander
B – Black
N – Native American
N – Not Required
O – Other Minority
U – Unknown
W – White

You can select the Caregiver’s ethnicity with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value. Press the Tab or Enter key.

H – Hispanic
N – Not Required
O – Other
U – Unknown

You can select the Caregiver’s primary language with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value. For example, you would press the “E” key once for English or the “S” key three times for Spanish. Press the Tab or Enter key.
Enter the Caregiver’s date of birth in the format – MMDDYYYY. Dashes will be added automatically. Press the Tab or Enter key.
You can select the Caregiver’s sex with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value. Press the Tab or Enter key.
F – Female
M – Male
U – Unknown

You can select the Caregiver’s employment status with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the first letter alphabetically to select a value. The cursor will automatically move to the next field.

F – Full-Time
P – Part-Time
N – N/A

You can select the Caregiver’s health with the arrow keys, or by clicking the list and selecting the value, or you can type the numeric code to select a value. The cursor will automatically move to the next field.

1 – Excellent
2 – Good
3 – Fair
4 – Poor

You can select the Length Providing Care with the arrow keys, or by clicking the list and select the value, or you can type the alphabetic or numeric code to select a value. The cursor will automatically move to the next field.

L – Less than 6 months
6 – 6 months – 1 year
1 – 1 – 2 years
O – Over 2 years

You can select the Continue Providing Care value with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value. The cursor will automatically move to the next field.

1 – Very Likely
2 – Somewhat Likely
3 – Unlikely

You can select the Ability to Continue Providing Care with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value. The cursor will automatically move to the next field.

1 – Very Likely
2 – Somewhat Likely
3 – Unlikely
You can select “Who Would Provide Care?” with the arrow keys, or by clicking the list and selecting the value, or you can type the alphabetic code to select a value. The cursor will automatically move to the next field.

N – No One
F – Friend/Neighbor
C – Close Relative
O – Other

You can select the Assessment type with the arrow keys, or by clicking the list and selecting the value, or you can type the alphabetic code to select a value.

I – Initial
R – Reassessment

The cursor will automatically move to the CAR2 (Caregiver, page 2) screen.
You can select the Relationship with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value. The cursor will automatically move to the Relationship with Other Family field.

1 – Better
2 – Same
3 – Worse

You can select the Relationship with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value. The cursor will automatically move to the Relationship with Friends field.

1 – Better
2 – Same
3 – Worse

You can select the Relationship with the arrow keys, or by clicking the list and selecting the value with the mouse, or you can type the numeric code to select a value. The cursor will automatically move to the Your Work field.

1 – Better
2 – Same
3 – Worse

You can select the Work value with the arrow keys, or by clicking on the list and selecting the value with the mouse, or you can type the numeric code to select a value. The cursor will automatically move to the Emotional Well-being field.

1 – Better
2 – Same
3 – Worse

You can select the Well-being with the arrow keys, or by clicking on the list and selecting the value with the mouse, or you can type the numeric code to select a value. The cursor will automatically move to the Caregiver in Crisis field.

1 – Better
2 – Same
3 – Worse

Is the caregiver in crisis? – Enter a Y or N. If you enter N, the remaining fields (Financial, Emotional, Physical) will automatically populate with N.

Press the F10 key or click the Save button (yellow disk) to save.
**Title Guardian**

When the Assessment Type is Grandparent/Guardian, the Consumer Type is Caregiver, and “Are you the caregiver of a grandchild?” is Y, the TIG (Title Guardian) screen will appear.
Enter the child/grandchild’s name, date of birth (Format: MMDDYYYY – dashes will appear automatically), and whether the child is developmentally disabled.

Press the F10 key or the Save button (yellow disk) to save.
Click the Assessments button on the Demographic screen. A new screen with a list of the client’s Assessments will appear.
All of the client’s Assessments, statewide, will appear in the List of Assessments. To view an Assessment, click the Assessment in the list then click the Details button or double-click the Assessment in the list. To add a new Assessment, click the Add Assessment button. Click the Demographics button to go back to the Demographics screen. The Close button will also take you back to the Demographics screen. The Print Turnaround button generates the Assessment Report.

The following buttons are available on the Assessment screen:
Add Assessment
Update Assessment
Demographics
Assessment List
Search
Print Turnaround
Click the LOC button to view the CARES Level of Care for the client.
If the Level of Care (LOC) does not exist, you will receive the message seen above.
If the client has a Level of Care (LOC), you will see a screen with the levels listed. Click the Demographics button to return to the Demographics screen.
Click the Referrals button to view referrals from the CARES office to the area agency on aging (AAA) or the lead agency.
If CARES hasn’t made a Referral to the area agency on aging (AAA) or the lead agency, you will receive the message seen above.
If the CARES office has made a referral to the area agency on aging (AAA) or the lead agency, you will see a screen with the referrals listed.

The Date Received should be entered, when the area agency on aging (AAA) or the lead agency receive the referral paperwork from the CARES office. After entering the Date Received, click the Save button. Then click the Demographics button to return to the Demographics screen.
Click the NHD button to view the client’s Nursing Home Diversion status.
This is a view-only screen. Click the Close button to return to Demographics.

CARES Office – Office processing the client’s referral to the Nursing Home Diversion Waiver.

Date Enter Pipeline – Date the client is determined to be interested and suitable in the NH Diversion Waiver.

Date Leave Pipeline – Date the client, who was previously determined to be interested and suitable for the NH Diversion Waiver, is no longer interested or suitable.

Date Referred to Provider – Date the client, whose financial eligibility status is Medicaid Pending, is referred to the NH Diversion provider.

Provider Referred To – NH Diversion provider to whom the client, whose financial eligibility status is Medicaid Pending, is referred.

Date Withdrawn from Med. Pending – Date the client determines they are no longer interested in the Medicaid Pending option after being referred to a NH Diversion provider, but prior to being officially enrolled.
To access Additional Client Information for: Incomes, Contacts, Comments, Languages, Handicaps, OAA, SSI, Medicaid Waiver, EHEAP, and PSA Codes, enter a Y in the respective field and press the Enter key. A separate window will appear and will allow you to enter the additional information. On the individual screens, use the F9 key to access the codes list if needed.
### Additional Client Information - Comments

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSA</td>
<td></td>
</tr>
<tr>
<td>SSN</td>
<td></td>
</tr>
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<td>Comments</td>
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<td>Ethnicity</td>
<td>O - OTHER</td>
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<td>Marital Status</td>
<td>S - SINGLE</td>
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<tr>
<td>Emerg Evac</td>
<td></td>
</tr>
<tr>
<td>Spcl Shtr</td>
<td>N</td>
</tr>
<tr>
<td>Spcl Rog</td>
<td>N</td>
</tr>
<tr>
<td>Incumos</td>
<td>N</td>
</tr>
<tr>
<td>Referral Site</td>
<td></td>
</tr>
<tr>
<td>Contacts</td>
<td>N</td>
</tr>
<tr>
<td>Comments</td>
<td>Y</td>
</tr>
<tr>
<td>Languages</td>
<td>N</td>
</tr>
<tr>
<td>Handicaps</td>
<td>N</td>
</tr>
<tr>
<td>OAA</td>
<td>N</td>
</tr>
<tr>
<td>SSI</td>
<td>N</td>
</tr>
<tr>
<td>Medicaid Waiver</td>
<td>N</td>
</tr>
<tr>
<td>EHEAP</td>
<td>N</td>
</tr>
<tr>
<td>Earliest Intake Date</td>
<td></td>
</tr>
<tr>
<td>FSA Codes</td>
<td>N</td>
</tr>
</tbody>
</table>

Enter <ALT+E> to enter comments (up to 256 characters) on full size comment screen.
### Additional Client Information – OAA (Older Americans Act)

![Image of CIRITS Client Display and Limited Update interface](image_url)

- **PSA**: 02
- **SSN**: 200511061
- **Intake Date**: [Date]
- **Medicaid #**: [Field]
- **First Name**: TEST
- **Middle Initial**: M
- **Last Name**: CLIENT

#### Addresses
- **Birth Date**: 01/08/1991
- **DOB**: [Field]
- **Sex**: [Field]
- **Race**: [Field]
- **Citizen**: [Field]
- **Marital Status**: [Field]
- **County of Residence is Urban/Rural**: [Field]
- **Below Poverty Level**: [Field]

#### Contacts
- **Handicap**: N
- **OAA**: Y
- **SSI**: N
- **Medicaid Waiver**: N
- **EHEAP**: N

#### Early Intake Date
- **FSA Codes**: N

---

Does Client Live in Urban/Rural Area? "U"= Urban, "R"=Rural - Optional

Record: 1/1 | ... | | <DEC>
# Additional Client Information – SSI (Supplemental Security Income)

<table>
<thead>
<tr>
<th>PSA</th>
<th>SSN</th>
<th>Intake Date</th>
<th>Medicaid #</th>
</tr>
</thead>
<tbody>
<tr>
<td>02</td>
<td>2901145555</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**SSI (Supplemental Security Income)**

- **Address?** N  
- **Sex** M  
- **Citizen**  
- **Hosp/Geriatric**  
- **Referral Source**  
- **Contacts?** N  
- **Handicap?** N  
- **OAA?** N  
- **SSI?** Y  
- **Medicaid Waiver?** N  
- **EHAP?** N  

**Program Referred To (Y/N)**

- VR  
- Substance Abuse  
- Food Stamps  
- Medicaid or Other Medical Assistance  

**Earliest Intake Date**  
**FSA Codes?** N  

Enter SSI Inquiry Date (MM/DD/YYYY) - Optional  
Record 1/1
## Medicaid Waiver

### Additional Client Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medicaid Number</td>
<td></td>
</tr>
<tr>
<td>Slot Number</td>
<td></td>
</tr>
<tr>
<td>Slot Status</td>
<td></td>
</tr>
<tr>
<td>Eligibility</td>
<td></td>
</tr>
<tr>
<td>Eligibility Date</td>
<td></td>
</tr>
<tr>
<td>MMN Re-Determination Date</td>
<td></td>
</tr>
<tr>
<td>CARES Re-Determination Date</td>
<td></td>
</tr>
<tr>
<td>Voter Registration Assistance</td>
<td></td>
</tr>
<tr>
<td>Handicap</td>
<td>N</td>
</tr>
<tr>
<td>OAA</td>
<td>N</td>
</tr>
<tr>
<td>SSI</td>
<td>N</td>
</tr>
<tr>
<td>Medicaid Waiver</td>
<td>Y</td>
</tr>
<tr>
<td>EHEAP</td>
<td>N</td>
</tr>
<tr>
<td>Earliest Intake Date</td>
<td></td>
</tr>
<tr>
<td>FSA Codes</td>
<td>N</td>
</tr>
</tbody>
</table>

Enter Client's Medicaid Slot # Optional (If Entered, Status must also be Entered.)

Record: 1/1...< OSC>
Additional Client Information – EHEAP
(Emergency Home Energy Assistance for the Elderly Program)
Additional Client Information – Planning and Service Area Codes
Adding a new Enrollment:
Click on a blank row or press the F6 key.
The cursor will begin in the Program Comp. field.
Type the three or four letter code for Program and Status, if known; if not, press the F9 key for a list of values.
Enter the Enrollment Start Date – format: MMDDYYYY or MMDDYY. The dashes will be added automatically.
Enter the three or four letter code for Eligibility, if known; if not, press the F9 key for a list of values.
Enter the Provider Number and Location, if known; if not, press the F9 key for a list of values.
Enter the Worker ID, if known; if not, press the F9 key for a list of values.

Editing an Enrollment:
Click the Enrollment in the list.
Update the Enrollment information, i.e., Enrollment Start or End Date.
Press the F10 key or click the Save button (yellow disk) to save.
Accessing the Waitlist screen:
Press [Ctrl][Page Down] to access the Waitlist screen.

Enter the client’s Waitlist information; press the F10 key to save the Waitlist information. The Waitlist screen will automatically disappear after the record is saved.
Enrollment Screen Examples

F9 key list of values for Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTV</td>
<td>ACTIVE CLIENT</td>
</tr>
<tr>
<td>APCL</td>
<td>ASSESSED PRIORITY CONSUMER LIST</td>
</tr>
<tr>
<td>APPL</td>
<td>APPLICANT</td>
</tr>
<tr>
<td>G0AH</td>
<td>GOAL ACHIEVED</td>
</tr>
</tbody>
</table>
Press the F10 key or click the yellow disk to save the new Enrollment record.
The Care Plan Data Entry screen will begin in the Services Needed section. Enter the Service, Units, and Frequency needed by the client, using the F9 key to access the code lists if needed.

Type will populate automatically. When finished adding Services Needed, press [Ctrl][Page Down] to enter Services Planned. Enter the Program, Units, Frequency, Start Date, and End Date (if known, or when services are terminated). Multiple entries for Services Planned can be entered for each Service Needed. Use the F9 key to access the code lists if needed.

Press the F10 key or click the Save button (yellow disk) to save.
Care Plan Date Entry Screen Examples

F9 key list of values for Services Planned Program
Press F10 or click the Save button (yellow disk) to save the Care Plan information.
The Care Plan Inquiry screen is view only. No information is entered or edited on this screen.
The Services by Client screen is used to enter services for individual clients.

**Adding new Services:**
The cursor will start in the Provider field. Enter all required information using the Tab or Enter key to move to the next field. Use the F9 key to access the code lists if needed. Press the F10 key or click the Save button (yellow disk) to save the services.

**Editing Services:**
Click on the service row to be edited. Update the client's service information. Press the F10 key or click the Save button (yellow disk) to save the services.
Services by Client Screen Examples

F9 key list of values for Program
Press the F10 key or the Save button (yellow disk) to save the Services information.
Query Services by Client

Enter the client’s SSN and press the Enter key or press the F7 key to move to the Last Name field.
Enter the client’s last name and press the F9 key to search. Select the client’s name from the list then click OK or press the Enter key.

Press the F8 key (twice) to retrieve the client’s information. Press the F7 key to activate Enter Query mode or click the first canister with a question mark (?) on the Tool Bar.
Enter some or all of the service information – PSA, Provider, Location, Worker, Program, Service, Service Date, Units, Unit Type, and Payment Amount. Press the F8 key to return the query or click the second canister with a question mark (?) and arrow on the Tool Bar.
The Services by Provider - Individual screen allows you to enter services performed by a single provider for individual clients.

The cursor will start in the Provider field. Use the Tab or Enter key to move to the other fields and enter the related service information. Use the F9 key to access the code lists if needed.

Service information entered in the fields at the top of the screen will be transferred to the service fields related to the individual client.
Services by Provider – Individual Screen Examples

F9 key list of values for Program
Changes can be made to the individual client service information if needed. For example, you enter services for one hour of case management. Four out of five clients entered received one hour of case management, but one client received two hours. On the service line for the one client, you can change the one-hour to two hours.
Press the F10 key or click the Save button (yellow disk) to save the service information.
The Services by Provider – Aggregate screen allows you to enter services performed by a single provider for many (AGGREGATE) clients. Clients are not identified individually on this screen.

The cursor will start in the Provider field. Use the Tab or Enter key to move to the other fields and enter the related service information.

Service information entered in the fields at the top of the screen will be transferred to the service fields related to the Aggregate SSN.
Services by Provider – Aggregate Screen Examples

F9 key list of values for Service
Press the F10 key or click the Save button (yellow disk) to save the service information.
Query Aggregate Services for a Provider

Enter the Provider Number and Location
Use the Tab or Enter key to move to the AGGREGATE SSN field, or click the field with the mouse.
Press the F7 key to activate Enter Query mode, or click the first canister with a question mark (?) on the Tool Bar.
Type AGGREGATE in the AGGREGATE SSN field.
Enter the Program, Service, Service Date, or Units.
Press the F8 key to return the query or click the second canister with a question mark (?) and arrow on the Tool Bar.
### Query Results

**CIRTS**

**RECEIVED SERVICES . AGGREGATE**

<table>
<thead>
<tr>
<th>PSA</th>
<th>Provider</th>
<th>Worker ID</th>
<th>Prop</th>
<th>Serv</th>
<th>Service Date</th>
<th>Units</th>
<th>Unit Type</th>
<th>Payment Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>02</td>
<td>AGOREDATE</td>
<td>03C1</td>
<td>CHML</td>
<td>12/20/2008</td>
<td>1911.00</td>
<td>MEL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>AGOREDATE</td>
<td>LSP</td>
<td>CHML</td>
<td>12/29/2008</td>
<td>551.00</td>
<td>MEL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>AGOREDATE</td>
<td>03C1</td>
<td>CHML</td>
<td>11/30/2008</td>
<td>2031.00</td>
<td>MEL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>AGOREDATE</td>
<td>LSP</td>
<td>CHML</td>
<td>11/30/2006</td>
<td>613.00</td>
<td>MEL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>AGOREDATE</td>
<td>LSP</td>
<td>CHML</td>
<td>10/31/2008</td>
<td>710.00</td>
<td>MEL</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Record: 1/7...<OSC>
Change Owner and Change Planning and Service Area (PSA)

When you try to add an Assessment for a client or update the Demographic record and receive a message that the client does not reside in your PSA or is owned by another provider, contact your LAN Administrator. The LAN Administrator has the ability to move the client’s record into your PSA and change the owner.

Examples of when to contact your LAN Administrator:
<table>
<thead>
<tr>
<th>PsaCares Office</th>
<th>Date</th>
<th>Assessor Name/ Caseworker</th>
<th>Assessment Site</th>
<th>Assessment Type</th>
<th>Priority Score</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>02</td>
<td>11/09/2006</td>
<td>CRTS ADMIN</td>
<td>OFFICE / MEDICAL CASE</td>
<td>CHANCE OWNER ASSESSMENT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>11/09/2006</td>
<td>TEST CASEWORKER</td>
<td>CLIENT/RELATIVES</td>
<td>OTHER</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>11/09/2006</td>
<td>SHANORA MOGLOHON</td>
<td></td>
<td>INITIAL ASSESSMENT</td>
<td>15</td>
<td>1</td>
</tr>
</tbody>
</table>

**Alert:** Add Assessment is not allowed. Client does not reside in your PSA.
Clear Screen

If you want to view a new client on any screen, you must clear the screen by:
- Going to “Action” on the Menu Bar and selecting “Clear All,” or
- Pressing [Shift][F7].

You can then enter a new SSN or client name to query. Once the client information has been retrieved, using F12 to move from screen to screen will keep the client’s information. You will need to clear the screen again to view a different client.

Clear Screen example:

You have added the client’s CCE enrollment and now need to add enrollment information for another client. Instead of going back to the Search screen, press [Shift][F7] or go to Action, Clear All on the Menu Bar.
The Enrollment Screen has been cleared. Now search for your next client – enter the client’s SSN or press the F7 key to search on the Last Name.

Press the F8 key to retrieve the client’s information, then add the new enrollment information and save [press the F10 key or click the Save button (yellow disk)].
Repeat the same process for your next client.
Click the CIRTS link.
Outcome Measurement Reports

To run Outcome Measurement Reports:
Click the Outcome Measurement Reports link.
Click the “Run” link for the appropriate report.

Enter the requested parameters (i.e., PSA, Provider, Begin Date, End Date, E-mail Address) for the report selected. **Parameters vary depending on the report selected.**

**Start Date** - The Start Date parameter for each outcome report should be the beginning of the Fiscal Year, i.e., 07/01/2006.
Click the Run Report button. The following screen will appear, indicating the report was successfully submitted.

You will receive an e-mail when the report is ready for viewing.
Go back to the Reports page and click the “View” link for the appropriate report. The following screen will appear.

Find the name of your report and your user name as the “Job Owner.” Click the report name to view the results.
**Documentation Tab Screen**

User manuals and enhancement documents will be posted on this screen.

---

**Enterprise Application Services**

To create an environment that provides choices, promotes independence and enables older Floridians to remain in their communities for a lifetime.

- DOE Mission Statement

- **ARTT** - Link to the APS Referral Tracking Tool manual, newsletters, MOA and model MOU
- **HMT Manual** - ADA Waiver Holistic Monitoring Tool manual
- **Long-Term Care Community Diversion Program Enrollment Management Document**

---

Start Discoverer Viewer  Fetch Report Output  Ad Hoc Query  Change SSO Password  Logout
In the event CIRTS stops working on your computer:

1) Start at Item 1 in the Download section and click the PC Setup Instructions link.
2) Follow all instructions for installing the Web site Certificate, JInitiator (close your Web browser after this step and re-open before running the JInitiator Certificate), and the JInitiator Certificate.
3) If CIRTS still does not run on your computer, contact your LAN Administrator.
Add CIRTS Icon to Your Desktop

Click the “Click here” link to add the CIRTS login screen to your Favorites.
Give your new Favorite a meaningful name, i.e., CIRTS, New CIRTS, etc. Click OK.
Click Favorites from the Menu Bar.
Find the Favorite icon for CIRTS.
Right-click the link and select, Send To -> Desktop (create shortcut).
Your icon should be visible on the Desktop.
Changing Your CIRTS Password

CIRTS will automatically prompt you to change your password every 120 days.

Change your password -
If you want to change your password at any other time, click the Change SSO Password link in the bottom right-hand corner of the screen.

Enterprise Application Services

To create an environment that provides choices, promotes independence and enables older Floridians to remain in their communities for a lifetime.
- DOEIA Mission Statement

- ACMS - Automated Contract Management System
- ADA and ALE Medicaid Waiver Paid Claims Query Tool
- Aging Network Providers
- ARTT - APS Referral Tracking Tool
- CIRTS - Client Information and Registration Tracking System
- Contracted Unit Rate
- HMT - ADA Waiver Holistic Monitoring Tool

The following screen will appear.
Type your current password in the Old Password field.
Type your new password in the New Password field (the password is case-sensitive).
Type your new password in the Confirm New Password field.
Click the Submit button.
Appendix A

Assessment Type: Annual, Initial, Update, Wait List
Tabs: ASSM, INC (Income), MEN (Mental Health), PHY (Physical Health), ADL (Activities of Daily Living), NUT (Nutrition), HEA (Health Conditions), SPS (Special Services), SOC (Social Resources)
Appendix B

Assessment Type: CARES Non_Com, EHEAP, Other
Tabs: ASSM, INC (Income), MEN (Mental Health), ADL (Activities of Daily Living), NUT (Nutrition), HEA (Health Conditions), SPS (Special Services)
Appendix C

Assessment Type: Change Owner, Demographic, Grandparent/Guardian
Tabs: ASSM
Appendix D

Assessment Type: Congregate Meals
Tabs: ASSM, INC (Income), NUT (Nutrition)
Appendix E

**Assessment Type:** OA3E, OAA  
**Tabs:** ASSM, INC (Income), MEN (Mental Health), PHY (Physical Health), ADL (Activities of Daily Living), NUT (Nutrition), HEA (Health Conditions), SPS (Special Services)
Appendix F

Assessment Type: Telephone, Wait List Screening
Tabs: ASSM, INC (Income), PHY (Physical Health), ADL (Activities of Daily Living), NUT (Nutrition)
Appendix G – Mini Menu

Press the F12 key to access the Mini Menu.

Type the number of the screen you would like to see and press the Enter key, or click the selection list, select the number with your mouse, and press the Enter key.

Click the “Return To Current Form” button to exit the Mini Menu.