

# Notice of Instruction

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West Central Florida  
Area Agency on Aging, Inc.



*Assistance. Advocacy. Answers on Aging.*

**Notice of Instruction Number: 061907- CIRTS-CARES Referrals-KP**

**TO:** All Lead Agency Providers  
**FROM:** Katie Parkinson, Senior Program Manager (Extension 225)  
**DATE:** June 19, 2007  
**SUBJECT:** CARES Referrals  
**cc:** Program Managers

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## **The purpose of this notice is as follows:**

- (1) Explain how referrals made by Comprehensive Assessment and Review for Long Term Care Services (CARES) staff to the area agency on aging (AAA) and lead agencies are recorded in the Client Information and Registration Tracking System (CIRTS),
- (2) Describe the AAA's CIRTS-related responsibilities for referrals received by CARES,
- (3) Describe the reassessment policy as it applies to CARES referrals, and
- (4) Provide information about CIRTS reports as they relate to CARES referrals.

## **1. How Referrals Made by CARES Are Tracked in CIRTS**

Referrals made by CARES to the AAA or lead agency requires CARES to hand-deliver, mail or fax a referral form and assessment. The assessment and referral information must be entered into CIRTS by CARES staff prior to the referral being made. If the CARES assessment and referral information have not been entered into CIRTS by CARES when the referral is received, the AAA or lead agency should contact the supervisor at the CARES office from which the referral was sent.

## **2. AAA's CIRTS-Related Responsibilities For Referrals Received by CARES**

### **Acknowledging Referrals in CIRTS**

In CIRTS, referrals made by CARES are tracked in the CARES Referral screen. The imminent risk designation is recorded in the CARES Referral screen along with the date the referral was made. Starting on the day your planning and service area converted to the new statewide CIRTS application, the AAA or lead agency is responsible for entering the date the hard-copy referral is received in the "Date Received" field in the CARES Referral Information screen for all referrals made to the AAA or to lead agencies. This is the only field in the CARES Referral Information screen that is editable by the AAA and lead agency (and not editable by CARES staff). **This field must be populated within one week of receiving the referral.** (See *Accessing the Referral Screen in CIRTS* below for instructions on how to access the CARES Referral Information screen.

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### Entering Enrollment Information in CIRTS

The CIRTS Enrollment Screen must be updated for the referred individual. An entry is needed for each program in which the referred individual is enrolled. An entry is also needed for each program for which the individual is waiting.

### **3. Reassessing CARES Referrals**

The CIRTS application allows assessments performed by CARES to be viewed by the AAA and lead agencies. This eliminates the need for the AAA and lead agencies to reassess or reenter assessments performed by CARES. As such, performing "updates" on assessments performed by CARES is not necessary for individuals referred by CARES unless a significant change has occurred to the functional or medical status of the individual since the assessment was performed.

### **4. CIRTS Reports**

#### New Reports

A new exception report is available that identifies referrals made by CARES that have not been updated in CIRTS by the AAA or lead agency with the date the referral was received. This report is titled "*CARES Referrals Not Acknowledged By The Aging Network*." It is available on the CIRTS Reports Page in the Miscellaneous section. This report is to be run by the 25<sup>th</sup> of each month to ensure all CARES referrals have been received and the imminent risk designation is known.

#### Current Reports

Current reports have been updated to include individuals identified as imminent risk by CARES.

### **Accessing the Referral Screen in CIRTS**

The new CARES Referral Information screen is accessible from the CIRTS Client Demographics screen via the "Referrals" button. The Client Demographics screen is shown on the following page.

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## Client Demographics Screen

99 CLIENT INFORMATION AND REGISTRATION TRACKING SYSTEM

Action Menu Edit Block Field Record Query Help

DEMOGRAPHICS\_1226      CIRTS      Date 05/18/2007  
 VERSION 100.1      User BOLLISCHM

PSA Owner SSN First Name Last Name      ☐ Demographic Complete  
 02 20001 200702081 TEST TEST      ☐ PAS Complete

**DEMOGRAPHIC INFORMATION**

SSN PSA First Name MI Last Name Medicaid Number  
 200702081 02 TEST A TEST 109333333

**Home Address**      **Date Address Changed**  
 Street Street cont' 02/09/2007  
 TEST

Zip City State County Phone Number:  
 33156 TEST FL OUT OF STATE

**Mailing Address**      **Extension**  
 Street Street cont'  
 Zip City State County Phone Number:  
 Extension

Date of Birth Date of Death Sex Race Ethnicity  
 03/04/2006 FEMALE NATIVE AMERICAN OTHER

Primary Language Marital Status Need outside assistance to evacuate? N  
 NATIVE NORTH AMERICA MARRIED Registered with County Special Needs Registry? N

Search LOC Referrals MID Assessments

↑ Access the CARES Referral Screen by selecting the Referrals button

After clicking on the "Referrals" button, the CARES Referral Information screen is displayed. The new CARES Referral Information screen is shown below:

## CARES Referral Information Screen

99 CARES REFERRALS

Action Menu Edit Block Field Record Query Help

**CARES Referral Information**

**Client Information**  
 TEST TEST 200-70-2081

PSA	Employee Name	Referral Date	Imminent Risk	Referred To	Date Received by AAA or LA
02B	CASEWORKER	02/09/2004	N	AREA AGENCY ON AGING	

Date the referral was made      Set to "Y" if Imminent Risk      Entity to which the referral was sent

Demographics Save

Record: 1/1      <ESC>

Enter the date the referral is received

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The date the referral was made is displayed along with the imminent risk designation (N= not imminent risk; Y= imminent risk). Only referrals made to the AAA or lead agency require the "Date Received by the AAA or LA" field be updated ("Referred To" is set to Area Agency on Aging or Lead Agency. The AAA or lead agency acknowledges receipt of the referral by clicking into the field "Date Received by AAA or LA" and typing in the date the hard-copy referral is received. Click the "Save" button to save all changes made. Click the "Demographics" button to return to the Client Demographics screen.

Should you require additional information, please contact Katie Parkinson, Senior Program Manager at ext. 225.

Thank you for your continued commitment and efforts on behalf of Florida's senior population.

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