



Add Functional Eligibility to Long Term Care Enrollment

IMAC Presentation

January 2025

Overview - Background

Functional Screen information is required for determining a member's eligibility under Waivers Medicaid.

FSIA (Functional Screen Information Access) is the system used by the Aging & Disability Resource Centers (ADRC), Managed Care Organizations (MCO), IRIS Consultant Agencies (ICA), and County Waiver Agencies (CWA) to determine functional eligibility for adult and children long-term care services.

IM workers currently use a manual process to gather FSIA information to determine eligibility for Adult Long Term Care (LTC) programs. This process is tedious which can lead to errors that negatively impact the continuity of members' care.

Overview – Community Waivers Processing

Currently, FSIA data is only collected and stored in CWW in specific situations for members who already have Waiver Medicaid eligibility.

- For long-term care program enrollees who are Group A, workers must email a DHS LTC Functional Screen Team staff member for the information and wait for their response.
- Workers must manually fill out the Community Waivers page in CWW with the information and re-run eligibility. These activities are prompted when the system sets alert 600 (RUN ELIGIBILITY FOR WAIVER MEDICAID).
 - The follow-up actions aren't required in the system.
- Members may never receive notification of their eligibility results.
- Members losing group A may not be explored for Group B eligibility.

Overview – Purpose

Effective February 22, 2025, workers will have access to new and enhanced Cares Worker Web (CWW) pages designed to improve the collection and display of FSIA data and LTC program enrollment data from ForwardHealth interchange (iC).

These enhancements aim to:

- Promote worker efficiency in determining Waiver Medicaid eligibility for adults.
- Support members who are losing Group A eligibility to transition to Group B and receive the necessary coverage to maintain their LTC program enrollment.

Changes to CWW

Changes to CWW

Several pages in CWW will be enhanced to collect and display FSIA and iC data when determining Waiver Medicaid eligibility for adults:

- Community Waivers page
- Case Summary page
- Long Term Care Enrollment Information – Tracked Outside of CARES page.

One new page in CWW will display FSIA details for adult Waiver Medicaid eligibility:

- Functional Screen Details page

Community Waivers Page

The Community Waivers page will be enhanced to include the following:

- Retrieve LTC Data button.
- Most Recent Functional Eligibility Calculation Date field and Verification field.
- “Long Term Care Enrollment Details” section
- “View Functional Screen Details” section.

Community Waivers

Community Waivers Information

Effective Period
Begin Month: MM / YYYY End Month: MM / YYYY Last Updated:
Delete Reason: [dropdown]

Details Retrieve LTC Data

Individual: [dropdown]
Do you want Community Waivers services? [dropdown] Date of Initial Functional Eligibility: 11/10/2022
Functionally Eligible? Y - Yes [dropdown] Developmental Disability? Y - Yes [dropdown]

Most Recent Functional Eligibility Calculation Date: 10 / 01 / 2024 [calendar] Verification: D1 - INITIAL SCREEN FOR LTC [dropdown] View

Program Type: [dropdown] Verification: [dropdown] View

Program Start Date: MM / DD / YYYY [calendar] Verification: [dropdown] View

Slot Available: [dropdown]

Involuntarily disenrolled from long term care program? No [dropdown] Is Disability Determination Required? [dropdown]

Are you meeting your cost share obligation? Yes [dropdown]

Long Term Care Enrollment Details

LTC Program Code	LTC Program Name	MCO/Waiver Agency Name	Enrollment Begin Date	Enrollment End Date
IRIS	[blacked out]	[blacked out]	11/01/2024	
PACPB	F [blacked out]	[blacked out]	08/01/2022	10/01/2024

View Functional Screen Details View

Obsolete Information

PACE or Partnership Level of Care? [dropdown] PACE or Partnership: MM / DD / YYYY [calendar]

FSIA → Community Waivers Page

The following fields on the Community Waivers page will be auto-populated with information from FSIA.

- Date of Initial Functional Eligibility
- Developmental Disability?
- Functionally Eligible?
- Most Recent Functional Eligibility Calculation Date
 - Verification

The screenshot shows the 'Community Waivers Information' form. A red box labeled 'Fields auto-populated from FSIA' points to several fields: 'Date of Initial Functional Eligibility' (11/10/2022), 'Developmental Disability?' (Y - Yes), 'Functionally Eligible?' (Y - Yes), 'Most Recent Functional Eligibility Calculation Date' (10/01/2024), and its 'Verification' (D1 - INITIAL SCREEN FOR LTC). Other fields include 'Effective Period' (Begin/End Month), 'Delete Reason', 'Individual', 'Do you want Community Waivers services?', 'Program Type', 'Program Start Date', 'Slot Available', 'Involuntarily disenrolled from long term care program?', 'Are you meeting your cost share obligation?', 'Is Disability Determination Required?', and 'Obsolete Information' (PACE or Partnership Level of Care).

LTC Program Code	LTC Program Name	MCO/Waiver Agency Name	Enrollment Begin Date	Enrollment End Date
IRIS			11/01/2024	
PACPB	F		08/01/2022	10/01/2024

iC → Community Waivers Page

The following fields on the Community Waivers page will be auto-populated with LTC enrollment information from iC.

- Program Type
 - Verification
- Program Start Date
 - Verification
- LTC Program Code
- LTC Program Name
- MCO/Waiver Agency Name
- Enrollment Begin Date
- Enrollment End Date

The screenshot shows the 'Community Waivers Information' page. A red box highlights several fields: 'Program Type', 'Program Start Date', 'LTC Program Code', 'LTC Program Name', 'MCO/Waiver Agency Name', 'Enrollment Begin Date', and 'Enrollment End Date'. A callout box with a red border and the text 'Fields auto-populated from iC' points to these fields. The page also includes sections for 'Effective Period', 'Details', 'Long Term Care Enrollment Details', and 'Obsolete Information'.

LTC Program Code	LTC Program Name	MCO/Waiver Agency Name	Enrollment Begin Date	Enrollment End Date
IRIS			11/01/2024	
PACPB	F		08/01/2022	10/01/2024

Community Waivers Page Processing

The Community Waivers page will be scheduled after the Eligibility Run Results page when both conditions are met in CARES:

- The individual has a current or future enrollment in an LTC program.
- The individual is losing full-benefit Medicaid, including:
 - SSI-Related Medicaid, including met deductibles (NS, NP, MP, MS)
 - BadgerCare Plus (MAG)
 - Medicaid Purchase Plan (MAPP)
 - Institutional Medicaid (MI)
 - Katie Beckett Medicaid (KBM)
 - Wisconsin Well Woman Medicaid

Note: Since Foster Care Medicaid (FSTMA) and SSI Medicaid are tracked outside of CARES, this program will not be included.
- The LTC program enrollment data will be kept on this page for 3 months past the disenrollment date.

Community Waivers – Retrieve LTC Data

The following fields on the Community Waivers page will be auto-populated with LTC enrollment information from iC.

- Program Type
 - Verification
- Program Start Date
 - Verification
- LTC Program Code
- LTC Program Name
- MCO/Waiver Agency Name
- Enrollment Begin Date
- Enrollment End Date

The screenshot shows the 'Community Waivers Information' form. A red box highlights the 'Individual:' dropdown menu, and another red box highlights the 'Retrieve LTC Data' button. A red callout box with arrows pointing to these elements contains the text: 'Select the individual from the dropdown menu, then click the Retrieve LTC Data button. This will autopopulate available data.'

Community Waivers Information

Effective Period
Begin Month: MM / YYYY End Month: MM / YYYY Last Updated:

Delete Reason: [dropdown]

Details

Individual: [dropdown] **Retrieve LTC Data**

Do you want Community Waivers services? [dropdown] Date of Initial Functional Eligibility: MM / DD / YYYY

Functionally Eligible? Y - Yes [dropdown] Developmental Disability? Y - Yes [dropdown]

Most Recent Functional Eligibility Calculation Date: MM / DD / YYYY Verification: D1 - INITIAL SCREEN

Program Type: [dropdown] Verification: [dropdown]

Program Start Date: MM / DD / YYYY Verification: [dropdown]

Slot Available: [dropdown]

Involuntarily disenrolled from long term care program? No [dropdown] Is Disability Determination Required? [dropdown]

Are you meeting your cost share obligation? Yes [dropdown]

Long Term Care Enrollment Details

LTC Program Code	LTC Program Name	MCO/Waiver Agency Name	Enrollment Begin Date	Enrollment End Date
IRIS	[redacted]	[redacted]	11/01/2024	
PACPB	F [redacted]	[redacted]	08/01/2022	10/01/2024

View Functional Screen Details [magnifying glass icon]

Obsolete Information

PACE or Partnership Level of Care? [dropdown] PACE or Partnership MM / DD / YYYY

Community Waivers – Functionally Eligible

- The Functionally Eligible? field will update to No when the functional screen date is expired.
- Expiration is when the date is more than one year in the past from the recurring month.

Community Waivers Cancel Reset

The following events have occurred:

- ⚠️ **CW009:** Individual's Adult LOC Details from FSIA were successfully transferred. The 'Most Recent Functional Eligibility Calculation Date' is more than a year in the past. The 'Functionally Eligible?' field has been updated to 'N'.
- 🔄 **CW003:** Updated information was received from FSIA and interChange.

Community Waivers Information

Effective Period

*Begin Month: / End Month: / Last Updated:

Delete Reason:

Details Retrieve LTC Data

*Individual:

*Do you want Community Waivers services?

Date of Initial Functional Eligibility: 11/10/2022

Developmental Disability?

Functionally Eligible?

Verification:

Most Recent Functional Eligibility Calculation Date: / /

Program type:

Verification:

Program Start Date: / /

Verification:

Slot Available:

*Involuntarily disenrolled from long term care program?

Is Disability Determination Required?

*Are you meeting your cost share obligation?

Long Term Care Enrollment Details

LTC Program Code	LTC Program Name	MCO/Waiver Agency Name	Enrollment Begin Date	Enrollment End Date
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Community Waivers – Functional Screen Details

- Workers may view FSIA historical functional screen details for the information currently displayed on the Community Waivers page.
- When the worker clicks on the View Functional Screen Details magnifying glass on an individual's page, the Functional Screen Details page will open in a pop-up for that individual.
- The magnifying glass is enabled if the individual's FSIA data was transferred and now available in CWW.

The screenshot displays the 'Community Waivers Information' page. At the top, there is a section for 'Effective Period' with fields for 'Begin Month' (MM/YY) and 'End Month' (MM/YY), and a 'Last Updated' field. Below this is a 'Delete Reason' dropdown menu. The 'Details' section contains several fields: 'Individual' (dropdown), 'Do you want Community Waivers services?' (checkbox), 'Functionally Eligible?' (dropdown), 'Date of Initial Functional Eligibility' (11/10/2022), 'Developmental Disability?' (dropdown), 'Most Recent Functional Eligibility Calculation Date' (10/01/2024), 'Program Type' (dropdown), 'Program Start Date' (MM/DD/YYYY), 'Slot Available' (dropdown), 'Verification' (dropdown), 'Involuntarily disenrolled from long term care program?' (checkbox), 'Is Disability Determination Required?' (checkbox), and 'Are you meeting your cost share obligation?' (checkbox). A 'Retrieve LTC Data' button is located on the right. Below the details is a table titled 'Long Term Care Enrollment Details' with columns for 'LTC Program Code', 'LTC Program Name', 'MCO/Waiver Agency Name', 'Enrollment Begin Date', and 'Enrollment End Date'. The table contains two rows: one for 'IRIS' with an enrollment begin date of 11/01/2024, and one for 'PACPB' with an enrollment begin date of 08/01/2022 and an enrollment end date of 10/01/2024. A red box highlights a magnifying glass icon next to the text 'View Functional Screen Details'. At the bottom, there is an 'Obsolete Information' section with a 'PACE or Partnership Level of Care?' dropdown and a 'PACE or Partnership' date field (MM/DD/YYYY).

LTC Program Code	LTC Program Name	MCO/Waiver Agency Name	Enrollment Begin Date	Enrollment End Date
IRIS			11/01/2024	
PACPB	F		08/01/2022	10/01/2024

Functional Screen Details Page

- Clicking the magnifying glass on the Community Waivers page will display the Functional Screen Details page.
- This pop-up window is read-only and will display a list view of the FSIA data for the individual who is selected on the Community Waivers page.
- After 7 years, data will be archived and no longer display on the page and the magnifying glass icon will disable.

Functional Screen Details

Member's Functional Screen Details					
Date FSIA Web Service is Invoked from Community Waivers Page	Individual	MCI	Eligibility Calculated Date	Community Waivers Program Start Verification Code	Nursing Home LOC
12/09/2024			11/21/2024	Initial Screen	Y

Close

Community Waivers – Program Start Date

If there is only one active LTC enrollment the program type and program start date fields will be auto-populated from LTC data.

- Workers will no longer need to pend for this information, if retrieved systematically.

If there are two LTC program enrollments, the worker must manually enter the Program Start Date and Program Type.

- Two LTC programs will display if a member is moving from one program (FC, PACE, Partnership, IRIS) to another program or from one organization to another (MCW, CCI, iCare, LCI).

Community Waivers Information

Effective Period
Begin Month: MM / YYYY End Month: MM / YYYY Last Updated:
Delete Reason: [dropdown]

Details [Retrieve LTC Data]

Individual: [dropdown]
Do you want Community Waivers services? [dropdown] Date of Initial Functional Eligibility: 11/10/2022
Functionally Eligible? Y - Yes [dropdown] Developmental Disability? Y - Yes [dropdown]
Most Recent Functional Eligibility Calculation Date: 10 / 01 / 2024 [calendar] Verification: D1 - INITIAL SCREEN FOR LTC [dropdown]
Program Type: [dropdown] Verification: [dropdown]
Program Start Date: MM / DD / YYYY [calendar] Verification: [dropdown]
Slot Available: [dropdown]
Involuntarily disenrolled from long term care program? No [dropdown] Is Disability Determination Required? [dropdown]
Are you meeting your cost share obligation? Yes [dropdown]

Long Term Care Enrollment Details

LTC Program Code	LTC Program Name	MCO/Waiver Agency Name	Enrollment Begin Date	Enrollment End Date
IRIS	Include, Respect, I Self-Direct		11/01/2024	
PACPB	Partnership		08/01/2022	10/01/2024

View Functional Screen Details [magnifying glass]

Community Waivers – Conversion

During project go-live (February 2025), CARES will perform a one-time data conversion for members with existing Community Waivers pages.

- The conversion will take the Program Start Date on the most recent sequence of the Community Waivers page and populate that date in the Most Recent Functional Eligibility Calculated Date field.
- CV – Conversion will auto-populate in the Most Recent Functional Eligibility's Verification field.

Most Recent Functional Eligibility Calculation Date: 11 / 01 / 2024

Program Type: OP - COP-W / CIP II

Program Start Date: 11 / 01 / 2024

Slot Available: No

* Involuntarily disenrolled from long term care program? No

* Are you meeting your cost share obligation? Yes

Verification: CV - CONVERSION

Verification: D1 - INITIAL SCREEN FOR LTC

Verification: D1 - INITIAL SCREEN FOR LTC

Is Disability Determination Required? No

Community Waivers – Verification Codes

The Most Recent Functional Eligibility Calculation Date will use systematic verification codes:

- D1 – Initial Screen for LTC
- D2 – Annual Re-Screen for LTC

All other systematic verification code updates will be replaced by the verification code:

- DE – Data Exchange

The screenshot displays the 'Community Waivers Information' form. The 'Effective Period' section shows 'Begin Month' as 09/2024 and 'End Month' as MM/YYYY. The 'Details' section includes a 'Retrieve LTC Data' button and a 'Do you want Community Waivers services?' dropdown set to 'No'. It also shows 'Date of Initial Functional Eligibility' as 11/21/2024 and 'Functionally Eligible?' as 'Y - Yes'. A red box highlights the 'Most Recent Functional Eligibility Calculation Date' section, which includes 'Program Start Date' (02/01/2020) and three rows of 'Verification' codes: 'D1 - INITIAL SCREEN FOR LTC', 'DE - DATA EXCHANGE', and 'DE - DATA EXCHANGE'. Other fields include 'Slot Available' (No), 'Involuntarily disenrolled from long term care program?' (No), and 'Are you meeting your cost share obligation?' (Yes).

Field	Value
Effective Period - Begin Month	09 / 2024
Effective Period - End Month	MM / YYYY
Last Updated	12/09/2024
Do you want Community Waivers services?	No
Date of Initial Functional Eligibility	11/21/2024
Functionally Eligible?	Y - Yes
Developmental Disability?	Y - Yes
Most Recent Functional Eligibility Calculation Date	11 / 21 / 2024
Program Type	OP - COP-W / CIP II
Program Start Date	02 / 01 / 2020
Verification (Most Recent)	D1 - INITIAL SCREEN FOR LTC
Verification (Program Type)	DE - DATA EXCHANGE
Verification (Program Start Date)	DE - DATA EXCHANGE
Slot Available	No
Involuntarily disenrolled from long term care program?	No
Is Disability Determination Required?	
Are you meeting your cost share obligation?	Yes

Community Waivers – Event Panels

The following informational event panels will display on the page for workers when the data successfully updates:

- Updated information was received from FSIA.
- Updated information was received from iC.
- Updated information was received from FSIA and iC.

The screenshot displays the 'Community Waivers' application interface. At the top, there is a title bar with 'Community Waivers' and 'Cancel' and 'Reset' buttons. Below this, a green notification bar states: 'The following events have occurred:'. A red box highlights a specific event: 'CW003: Updated information was received from FSIA and InterChange.' Below the notification is the 'Community Waivers Information' section, which includes fields for 'Effective Period' (Begin Month, End Month, Last Updated), 'Delete Reason', and a 'Retrieve LTC Data' button. The 'Details' section contains various fields for individual information, including 'Do you want Community Waivers services?', 'Functionally Eligible?', 'Date of Initial Functional Eligibility', 'Developmental Disability?', 'Most Recent Functional Eligibility Calculation Date', 'Program Type', 'Program Start Date', 'Slot Available', 'Involuntarily disenrolled from long term care program?', and 'Are you meeting your cost share obligation?'. The 'Long Term Care Enrollment Details' section is partially visible at the bottom.

Community Waivers – Event Panels

Warning event panels will display on the page for workers when:

- Individual is not found in FSIA.
- Individual is found in FSIA, but functional screen eligibility isn't yet calculated.
- FSIA Information is received with MCI ID mismatch.
- FSIA information is received with SSN mismatch.
- Adult LOC details are scheduled to transfer on a future date.
- Adult LOC details were transferred, but the Functionally Eligible field has auto-populated No because the Most Recent Functional Eligibility Calculation Date is more than a year old.

The screenshot displays the 'Community Waivers' application interface. At the top, there is a title bar with 'Community Waivers' and 'Cancel' and 'Reset' buttons. Below the title bar, a yellow warning banner states: 'The following events have occurred: CW006: Individual not found in FSIA.' The main content area is titled 'Community Waivers Information' and contains several sections: 'Effective Period' with fields for 'Begin Month' (MM/YYYY), 'End Month' (MM/YYYY), and 'Last Updated'; 'Delete Reason' with a dropdown menu; 'Details' with a 'Retrieve LTC Data' button; and a list of questions with dropdown menus for answers. The questions include: 'Do you want Community Waivers services?', 'Functionally Eligible?', 'Date of Initial Functional Eligibility', 'Developmental Disability?', 'Most Recent Functional Eligibility Calculation Date', 'Program Type', 'Program Start Date', 'Slot Available', 'Involuntarily disenrolled from long term care program?', 'Are you meeting your cost share obligation?', 'Verification' (three instances), and 'Is Disability Determination Required?'. The bottom section is titled 'Long Term Care Enrollment Details'.

Case Summary Page

A new field will be added to the Case Summary page to identify if at least one individual on the case has an active LTC program enrollment.

- If at least one individual on the case has an active enrollment this will display as “Enrolled.”
- If none of the individuals on the case have an active enrollment this will display as blank.
- Workers will be able to select a magnifying glass by the “Enrolled” text to navigate to the Long Term Care Enrollment Details – Tracked Outside CARES page.

The screenshot displays the 'Case Summary' page with the following sections and fields:

- Summary Information:** Primary Person, W-2 Placed Participant.
- Contact Information:** County of Residence, Household Address, Alternate Address, Phone, Safe at Home Program (No), Safe at Home Program PIN.
- Office / Worker Information:** Eligibility Office (MILWAUKEE EMPLOYMENT SERVICES (5400)), County / Tribe, IM Consortium, Assigned Worker, Caseload, W-2 Work Program Office, W-2 Geographical Area, FEP, KBM Worker.
- Case Information:** Language (E - ENGLISH), W-2 Placement, Last Renewal / Review Date, Next Renewal / Review Date, Diary Date, Case Closed Date, Case Web Status (WEB), Case Archival Status, BRITS, and LTC Enrollment Status (Enrolled, highlighted with a red box).
- Associated RFA Information / ACCESS Application / SeniorCare Application Information:** A table with columns: Number, Agency, Contact Method, RFA Status, Contact Date, ACCESS/SC App, ACP Status, Summary.
- What would you like to do?:** Workflow Options (Continue with Driver / Navigate Through Completed Pages, Add Person, Process Renewal / Review, Record New Group Level Program Request, Process Group Level Program Request, Process Six-Month Report Form, Process linked ACCESS application) and Case Maintenance (Reactivate Case, Transition Mainframe Case to Web Case, Initiate, Resume, or Terminate Simulation, Change Primary Person, Make Case Confidential, Transfer Case, Begin Intake Interview for Asset Assessment Case).
- Footer:** Add Case Comment, Enter Begin Month for New Data (MM / YYYY), Next button.

Long Term Care Enrollment Information – Tracked Outside CARES Page

- Information for an individual's LTC program will be displayed on this page for 3 months past the Enrollment End date.
- After the 3 months have passed, the information will continue to be retained in CARES for historical purposes but will no longer display on the page.

Long Term Care Enrollment Information - Tracked Outside CARES

Member's LTC Enrollment Details				
Individual: [REDACTED]		MCI: 9	PIN: [REDACTED]	
LTC Program Code	LTC program Name	MCO/Waiver Agency Name	Enrollment Begin date	Enrollment End date
FAMCR	Family Care	[REDACTED]	02/01/2020	
PACPB	Partnership	[REDACTED]	09/01/2019	11/27/2024

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Questions?