Wisconsin Functional Screen Information System

Adult Long-Term Care Functional Screen

Issue Date: April 2025

Topic: Basic Information for Screeners

Purpose: This document provides basic information and answers to frequently asked questions (FAQs) posed by screeners and agency screen liaisons to the Wisconsin Department of Health Services (DHS) regarding the Adult Long-Term Care Functional Screen (LTCFS).

Frequently Used Resources
Functional Screen Information Application (FSIA)
Screen Website
Blank Screen Form, F-00366
Screen Instructions, P-00946
Glossary of Acronyms, P-01010
Diagnoses Cue Sheet, P-00814
Guide for Intellectual/Developmental Disability (I/DD) per Federal Definition, P-00935
CST (Continuing Skills Test) Allowable Resources, Quizzes, Trainings

Who to Contact for Help
Contact DHSSOSHelp@dhs.wisconsin.gov or 608-266-9188 for issues getting into FSIA, trouble updating an incorrect Social Security number (SSN), problems with MCI (Master Client Index), or if finding duplicate screens.
Contact regstaff@uwosh.edu for technical assistance for LTCFS course and CST.
Screeners should contact their screen liaison for all other LTCFS related questions.

Table of Contents:

Screener Training and Resources

1. **What is the difference between the Adult LTCFS certification course and the Adult LTCFS audit course?**

   The certification course is for staff who need to complete the LTCFS as part of their job role at an approved screening agency. The audit course is for staff at an approved screening agency who need basic knowledge about the LTCFS as part of their job role but do **not** need to complete the LTCFS.

2. **How does a staff member at a screening agency register for the Adult LTCFS course?**

   Find information in the Registration tab at University of Wisconsin-Oshkosh (UW-Oshkosh)'s Functional Screener Learning Center. Select the Course Registration Instructions.

3. **What is an Agency ID and how does a liaison register for one?**

   All screen liaisons need to register for an Agency ID to register staff for the Adult LTCFS Certification and Audit courses. Each screening agency can have one Agency ID. If a liaison needs sign-up instructions or misplaces their Agency ID, they should contact DHSLTCFSTeam@dhs.wisconsin.gov.

4. **Who should be contacted for technical support for the Adult LTCFS course?**

   Contact regstaff@uwosh.edu.

5. **Where can trainings, quizzes, and Continuing Skills Test (CST) prep resources be found?**

   See UW-Oshkosh's Functional Screener Learning Center's CST/Adult LTCFS Trainings page.

6. **What is the listserv and how do screeners sign up for email updates?**

   The DHS LTCFS Team uses listserv emails to communicate to screeners. Liaisons should ensure their screeners are signed up to receive these emails. If a screener has switched agencies, they will need to sign up with their new email address.

Functional Screen Information Access (FSIA)

7. **What is FSIA?**

   FSIA is the web-based application where screens are entered, stored, and can be viewed. It also contains logic that interprets information entered by screeners to determine an adult's eligibility for long-term care programs.

   FSIA is accessed on the Human Services System Gateway page by selecting the FSIA-Production link. This is also the page used to create user IDs (Web Access

Management System IDs, also known as WAMS IDs), request or delete access to the application, and update user contact information.

8. How is access to FSIA added for a screener?

Only an authorized submitter can request access to FSIA. Information is located in Adding Access for the Long Term Care Functional Screen (LTCFS) in Functional Screen Information Access (FSIA), P-02783A.

9. Who is an authorized submitter and how does an agency sign up?

The authorized submitter is an individual a screening agency designates to submit access requests. Form F-02118 must be submitted to DHS to designate an authorized submitter.

10. What is a Web Access Management System (WAMS) ID and how does a staff member obtain one?

Staff must have a WAMS ID to access FSIA. Adding Access for the Long Term Care Functional Screen (LTCFS) in Functional Screen Information Access (FSIA), P-02783A has instructions for obtaining a WAMS ID. Staff should save their WAMS ID, even if they move to a different agency, as this is used for all state web applications.

Contact DHSSOSHelp@dhs.wisconsin.gov for help getting a WAMS ID.

See information about account recovery on the WAMS Wisconsin User ID Account Recovery page for instructions to retrieve a password.

11. Is the process to request access to FSIA different if a screener used to have access at another agency?

The process to request access is the same. However, the screener should use the same WAMS ID they used at their previous agency. They should also review their contact information and update it if it has changed.

12. How can a staff member at a screening agency who is *not* a certified screener but has a business need to view, archive, or transfer screens be granted access to FSIA?

Adding Access for the Long Term Care Functional Screen (LTCFS) in Functional Screen Information Access (FSIA), P-02783A contains instructions for how to request access.

13. What is an ICA Profile and how can staff request access?

An ICA profile allows staff at an IRIS consultant agency (ICA) to view screens or IRIS budgets in FSIA to plan for potential enrollment during an individual's IRIS referral period. Adding Access for the Long Term Care Functional Screen (LTCFS) in Functional Screen Information Access (FSIA), P-02783A contains instructions for how to request access to the ICA Profile.

14. How is access to FSIA ended for a screener or staff member when a staff member leaves an agency, needs to change their access type, or no longer needs access as part of their job role?

Find information in Ending Access for the Long Term Care Functional Screen (LTCFS) in Functional Screen Information Access (FSIA), P-02783B.

15. How does a user change their name, email address, or other contact information in FSIA?

1. Go to FSIA and click on the **WAMS** link.
2. Click on the **Profile Management** link and log in.
3. Update any outdated information and click **Submit**.
4. If you changed something other than a phone number or address, notify the DHS SOS Help Desk of name and email address updates by emailing DHSSOSHelp@dhs.wisconsin.gov to finish the process. The information will **not** be updated unless this step is completed. Changes to phone number or address do **not** need to be reported.

16. How can a screening agency update their contact information in FSIA? Who should add or modify this information?

Refer to Modifying Agency Contact Information in Functional Screen Information Access (FSIA), P-02783C.

17. How can a user find an individual in FSIA?

Once logged in to FSIA, there are boxes near the top of the page for First Name, Last Name, Birth Date, Master Client Index (MCI) ID, and Social Security number (SSN). Enter at least two of these values and select the **Search** button. First and last name are considered one value. Users can enter the first few letters of a name instead of the whole name.

18. How does a screener decide whether to complete an Initial Screen or Rescreen for an individual who has had a screen completed in the past?

Information is located in Module 2.8 of the LTCFS Instructions. Aging and disability resource center (ADRC) and Tribal aging and disability specialist (ADRS) screeners should also refer to the Rescreening Guidelines section of the ADRC Operations Manual.

19. How does a screener at an ADRC or Tribal ADRS determine whether an applicant already exists in FSIA or if a new applicant needs to be created when starting an initial screen?

The screener should enter the individual's name and select the **Search** button. FSIA searches multiple systems using identifying data including first and last name, SSN, date of birth, and gender to see if an applicant already exists in FSIA. If there is an exact or close match, the screener will have to determine if this is the correct individual. For example, if the name, date of birth, and gender are the same, but the SSN is off by one digit, it is the same person. If there is a match, the screener should use this record, and select the LTC box to begin the initial screen. If there is not an exact or close match, the screener should create a new record, by selecting **Create New**. This creates an MCI ID, which is used to identify each unique person between different computer systems. Contact the DHS SOS Help Desk at DHSSOSHelp@dhs.wisconsin.gov for assistance.

20. How can a user tell if a screen has been calculated or is incomplete?

Once logged in to FSIA, My Recent Screens will display the last 10 screens viewed. The green check mark next to LTC indicates the screen for that individual has been completed or calculated. The clock symbol means the screen has not been calculated and is incomplete. Some agencies refer to incomplete screens as open screens.

21. How can a user view an individual's current screen reports?

1. Once logged in to FSIA, find the individual, and select the **LTC** button.

2. Select the **View** button on the right-hand side of the page to see an individual's current screen.

The report defaults to the TG Audit Info, which shows all information entered on an individual's current screen.

If an error message appears, no primary or secondary diagnoses have been selected on the screen and the TG Audit Info report cannot be generated. If this occurs, press the **Current Screen Reports** drop-down menu to view additional reports that are available. Select **Full FS** from the list and then the **View** button to see the individual's current screen.

22. How can a user view an individual's eligibility information?

1. Once logged in to FSIA, find the individual and select the **LTC** button.
2. Select the drop-down menu under **Current Screen Reports**.
3. Select **Full Eligibility** from the list and then the **View** button to generate a report.

This information can also be viewed on the last page of an individual's Current Screen Report.

23. How can a user view an individual's historical screens?

1. Once logged in to FSIA, find the individual, and select the **LTC** button.
2. Select **View History** to navigate to the history page that displays previous screens.
3. From the history page, select **View** to see specific screens.

If a screen was calculated prior to January 2017, the TG Audit Info report will not be available.

24. Is a release of information required to provide a copy of the screen?

A release of information is not required to share a copy of the screen with the individual who was screened or their legal guardian. Information about releases of information for other individuals is located in Module 2.2 of the LTCFS Instructions. Screeners should refer to their agency's policies for more information.

25. How can a user transfer an individual's screen?

1. Once logged in to FSIA, find the individual, and select the **LTC** button.
2. Select the **Transfer** button on the right-hand side of the page.
3. Select the county where the screening agency is located from the first drop-down menu.
4. Select the screening agency for the screen to be transferred to from the second drop-down menu.
5. Check the **Adult LTC checkbox**, select **Transfer**, and select **Confirm**. If the screening agency is unable to transfer the screen, the liaison should contact DHSLTCFSTeam@dhs.wisconsin.gov.

26. When and how should screens be archived?

In general, screens may be archived for individuals who have passed away and incomplete screens that are more than a year old. If the agency has different guidelines, they should follow those. To archive a screen:

1. Once logged in to FSIA, find the individual, and select the **LTC** button.
2. Select the **Archive** button on the right-hand side of the page.
3. Select **Archived** under the Screen Status drop-down menu.
4. Check the **Adult LTC checkbox**, select **Update**, and select **Confirm**.

If needed, a screen can be unarchived. To unarchive a screen:

1. Once logged in to FSIA, find the individual, and select the **LTC** button.
2. Select the **Archive** button on the right-hand side of the page.
3. Select **Active** under the Screen Status drop-down menu.
4. Check the **Adult LTC checkbox**, select **Update**, and select **Confirm**.

27. What should be done if a screener accidentally opens a screen (puts it in clock status)?

In general, if a screen is accidentally opened and the screen is owned by the screener's agency, it is okay to let the screen sit open in clock status until another rescreen needs to be completed. However, the screen may need to be recalculated sooner, for example, if the screen needs to be transferred or if an ICA needs to view a budget for a potential enrollee. If the screener's agency has different guidelines, they should follow those.

If the screen is owned by another agency, the agency that accidentally opened the screen should not recalculate it. Instead, the liaison at the agency who owns the screen should be notified that the screen was accidentally opened. The agency that owns the screen may decide when to recalculate it.

If the screen is recalculated, the screener should add a note about why the recalculation occurred.

28. What should a screener do if they create a screen in error?

The screener should contact DHSSOSHelp@dhs.wisconsin.gov to determine how to proceed.

29. What should a screener do if the date of birth, SSN, or name of an individual needs to be corrected in FSIA?

The screener should confirm that they entered the information correctly. They may need to review the individual's birth certificate, driver's license, Social Security card, or state ID. The screener should update the screen and if they are still unable to resolve the problem, they should contact DHSSOSHelpDesk@dhs.wisconsin.gov. If the SSN status in FSIA is appearing as anything besides verified but the SSN has been verified by the screener and is correct to their knowledge, they do **not** need to contact the DHS SOS Help Desk.

30. What is the CARES checkbox and when should it be used?

After a screen is calculated, the results are transferred to CARES (Client Assistance for Re-employment and Economic Support System). The results can be immediately transferred by selecting the checkbox, otherwise they will transfer automatically 11 days after calculation. Screeners should follow their agency policy regarding the transfer of results to CARES.

31. Should a screener recalculate a screen multiple times in the same day?

If a screener feels that they need to recalculate a screen multiple times, they are encouraged to reach out to their liaison for guidance. If the screen needs to be recalculated, they should add notes to the screen explaining why. The DHS LTCFS Team receives notifications for screens that are calculated multiple times in one day. When this occurs, the screener's screen liaison will be notified and the screener will need to provide an explanation.

32. Where can information about running reports in FSIA be found?

Find information in [Reports in FSIA, P-02783].

33. What is the DHS SOS Help Desk and how can they be contacted?

Staff at the DHS SOS Help Desk assist users with technical problems in FSIA and with processing access requests. Contact the DHS SOS Help Desk at DHSSOSHelp@wisconsin.gov or 608-266-9188. The DHS webmaster or the Wisconsin Help Desk should **not** be contacted unless directed to do so by the DHS SOS Help Desk.

34. When should the SOS Help Desk be contacted?

The SOS Desk should be contacted about:

- Trouble accessing FSIA.
- Trouble updating an incorrect Social Security number.
- Problems with an MCI ID, including MCI mismatches between FSIA and other systems such as CARES and ForwardHealth interChange.
- Resolving issues with duplicate screens.
- Account recovery and passwords.
- Issues with WAMS accounts.
- Processing access requests.
- Determining who an authorized submitter is at an agency.
- Processing requests to update authorized submitters.

Liaison Specific Information

35. Who is a screen liaison?

The screen liaison is a certified screener delegated by a screening agency to be a lead staff and liaison to DHS for the Adult LTCFS. Find more information about their role and responsibilities in the Role of the Adult Long Term Care Functional Screen Liaison, P-02783.

36. What is the Adult Functional Screen Liaison Toolkit?

The Liaison Toolkit is a portion of the Functional Screen homepage that contains resources and information for screen liaisons.

37. What is the Adult LTCFS SharePoint website and what is it used for?

The Adult LTCFS SharePoint website is used for sharing information between the DHS LTCFS Team and liaisons, such as desk reviews and documents that contain protected health information (PHI). If a liaison needs instructions for using SharePoint, they should contact DHSLTCFSTeam@dhs.wisconsin.gov.

38. How does a liaison request access for the Adult LTCFS SharePoint website?

Liaisons need a WILMS ID to access the LTCFS SharePoint website. If a liaison needs sign-up instructions, they should contact DHSLTCFSTeam@dhs.wisconsin.gov.

39. When and how should access to the Adult LTCFS SharePoint website be ended?

SharePoint access should be ended whenever an individual no longer has a business need for it or when they leave the agency where they were granted access. Access should be ended:

- Within one business day if the individual is terminated.
- Within three business days if they resign.

Adult LTCFS SharePoint access should be ended by emailing DHSLTCFSTeam@dhs.wisconsin.gov with the subject "End Access" and include the individual's name.

40. What is a desk review?

This is a periodic quality review of completed screens from each certified screener. The DHS LTCFS Team performs desk reviews. A desk review tool is completed and submitted to the screen liaison when there are questions regarding screen selections. The screener and liaison should work together to complete any required follow-up.

41. Who should screen liaisons reach out to if they need help?

Diagnoses, memory loss, and IQ questions should be sent to DHSLTCFSDiagnosis@dhs.wisconsin.gov.

CST questions should be sent to DHSLTCFSCST@dhs.wisconsin.gov.

All other questions should be sent to DHSLTCFSTeam@dhs.wisconsin.gov.

Emails should be encrypted and the subject line of the email should **not** contain PHI. Documents that contain PHI should **not** be attached to emails and should be uploaded to the LTCFS SharePoint website to keep the documents secure.

Other FAQs

42. What should a screener do if an individual needs to have a screen completed but cannot be seen for an in-person visit?

Find guidance in Module 2.3 of the LTCFS Instructions. Additional information about how a liaison can request an in-person visit waiver for MCOs and ICAs can be found in In-Person Interview Waiver Requests for IRIS Consultant Agencies (ICAs) and Managed Care Organizations (MCOs), P-02783M.

43. **What should a screener do if they complete a screen and the individual has a level of care change? For example, the individual had a Nursing Home Level of Care and changed (sometimes referred to as flipped) to a Non-Nursing Home Level of Care.**

    The screener should contact their screen liaison for guidance, who can contact the DHS Team if needed. Additional information is located in Module 11.6 of the LTCFS Instructions.

44. **What should a screener do if an individual wants to file an appeal for an LTCFS?**

    The screener should contact their screen liaison for guidance, who can contact the DHS LTCFS Team if needed.

45. **What should be entered for the Name and Gender field in the Basic Information section in FSIA if an individual uses a name or has a gender identity that does not match what is on file with the Social Security Administration (SSA)?**

    Information is located in Module 3.2 of the LTCFS Instructions.

46. **Can screeners complete a screen for an individual who is not a citizen?**

    Yes. The screener may need to use a Pseudo SSN when entering the individual's screen in FSIA. ADRC and Tribal ADRS screeners should contact their regional quality specialist (RQS) regarding additional steps that need to be completed.

47. **Where can information about the enrollment and disenrollment process be found?**

    Information is located in the Enrollment and Disenrollment Process Desk Aid for Publicly Funded Long-Term Care Programs, P-02915.

48. **Who provides read only access to an ICA for individuals who are interested in enrolling in IRIS?**

    Only ADRCs and Tribal ADRS should provide read only access to ICAs. Once the access has been granted, staff with an ICA Profile can view screens and budgets for an individual who is interested in enrolling in IRIS. Additional information is located in Module 3.3 of the LTCFS Instructions and in Granting an IRIS Consultant Agency (ICA) Access to View the LTCFS for a Potential Enrollee, P-02783N. A screen should not be transferred to another agency to provide read only access.

49. **A screener recently completed an in-person interview for a screen and is out unexpectedly (for example, on medical leave). The agency has the screener's**

paper copy with notes. Can another screener enter the screen on their behalf?

Another certified screener may enter the information into FSIA using the other screener's notes. If there are questions, the screener should reach out to the individual to clarify.

50. **What should a screener do if they are contacted by an agency who has completed a Personal Care Screening Tool (PCST) screen for an individual and there are cross-validation errors due to discrepancies between the LTCFS and PCST screens?**

    The agencies involved should work together to try to resolve the discrepancies. If edits are made to the Adult LTCFS, they must align with the LTCFS instructions. If the agencies are unable to resolve the discrepancies, the liaison should contact DHSLTCFSTeam@dhs.wisconsin.gov.

51. **An individual is interested in enrolling in IRIS but the eligibility page shows they are not eligible for IRIS, even though they have a Nursing Home Level of Care (LOC) and eligible for Family Care. How should the screener proceed?**

    The most common reason this may occur is because an individual is not functionally eligible for IRIS when they only have a State Intellectual/Developmental Disability (I/DD) Target Group. The screener should review the entire screen for accuracy and edit the screen if needed. Screeners should ensure accuracy of selections made for age of onset (if applicable) and the expected duration questions under Additional Supports. If the person is still not eligible and the screener believes they should be, the screener should reach out to their screen liaison who may reach out to DHSLTCFSTeam@dhs.wisconsin.gov as needed.

52. **Who can answer questions about IRIS Budgets?**

    If staff have questions that are unable to be resolved by their agency, they should contact DHSIRISBudgetsandAppeals@dhs.wisconsin.gov and CC (carbon copy) IRIS Oversight at DHSIRISQuality@dhs.wisconsin.gov.

53. **Who can answer questions about WISITS?**

    Questions should be directed to DHSWISITSSystemAdmin@dhs.wisconsin.gov and copy DHSIRISQuality@dhs.wisconsin.gov.