Wisconsin Functional Screen Information System

Adult Long Term Care Functional Screen   **Screen Liaison Toolkit**

Issue Date: October 28, 2022

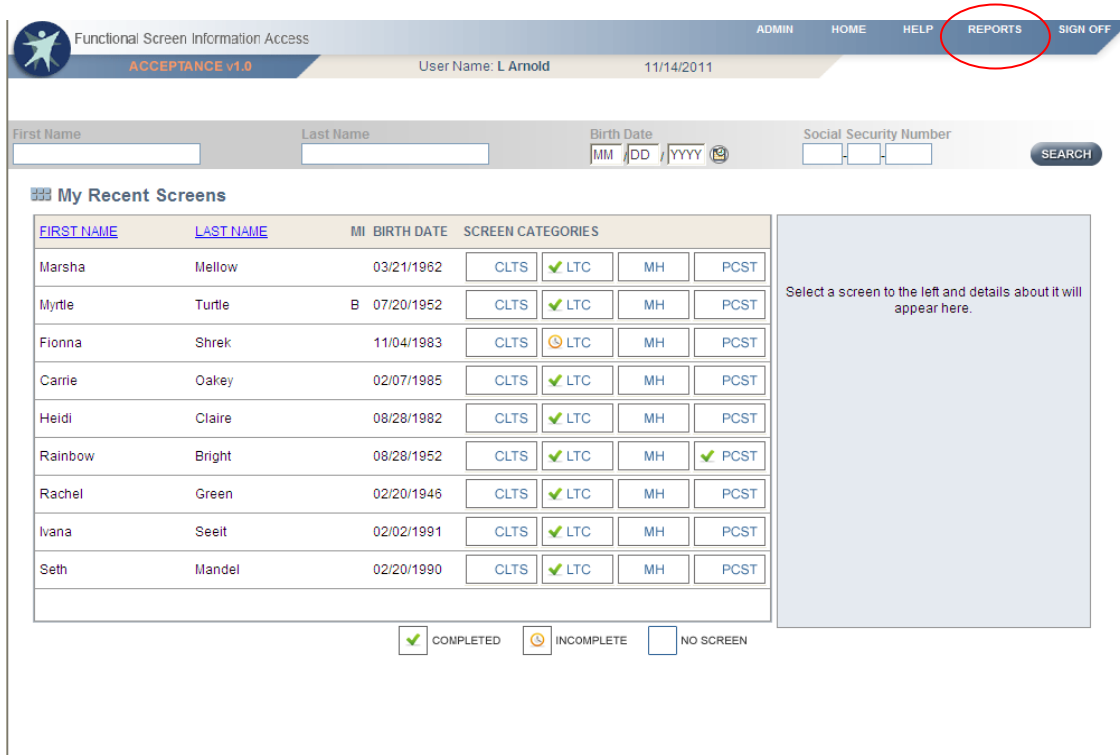**Topic:**   **Eligibility Summary Report**

Purpose: This document explains how to run an Eligibility Summary Report in Functional Screen Information Access (FSIA). This report allows the user to use customized sort options and criteria to view applicant-level eligibility summary information, based on agency type.

Definitions: Definitions are located in the Screen Liaison Toolkit Definitions document.

Uses and Limitations: Uses and limitations of this report are located in the Reports Summary document.

Step 1:

After logging into the screen application, select "Reports."

Step 2:

Select "Adult Long Term Care Reports."

Step 3:

Select "Eligibility Summary Report."

After selecting "Eligibility Summary Report", a screen will appear that looks like this:

Step 4:

Select the appropriate information in the drop down menus for: County, Filter By, and Agency.

Helpful hints for using "Filter By":

- Calculated By: used to view all screens calculated by the agency regardless of who they are assigned to. This is most beneficial for Aging and Disability Resource Centers and Tribal Aging and Disability Resource Specialists.
- Assigned To: used to view screens assigned to the user's agency.

Step 5:

Click on the "Submit" button.

Step 6:

After selecting "Submit," a screen will appear that looks like this.

To filter the search criteria, select the appropriate information in the dropdown menus in the Screen Criteria, Date Type and Range, and Output Format sections.

Helpful hints:

- This page could look slightly different depending on the agency type.

- Screen Criteria:
  - Screener: This field will default to the user's name; however, another screener may be selected or, if the user would like to see all screeners in the agency, the user may select "All" in the dropdown.
  - LOC dropdowns: Used to look at specific levels of care (LOC) or all levels of care.
  - Eligibility dropdowns: Used to look at specific eligibility or ineligibility.
  - Screen Archive Status: Used to filter by all, active, or archived screens.

- Date Type and Range:
  - Date Type: This is a required field. Use of Eligibility Calculated Date is most accurate as it is system generated. A date range is most useful.
- Output Format:
  - The Output Format dropdowns are used to sort how the data appears on the report and whether the report will display as a PDF or download as an Excel file.
  - If sorting by date, descending will list screens completed most recently at the beginning of the report, and ascending will list the oldest screens at the beginning of the report.

Step 7:

Click on the "Submit" button to generate and view the report with the specified criteria.

Applicant Name	Birth Date	SSN	Screener Name	Eligibility Calculated Date	Screen Type	NH LOC	DD LOC	FC Elig.	FC Wav. Elig.	IRIS Wav. Elig.	NAT Elig.
Chiodo, Lorraine	07/22/1947	000004308	Smith, Shannon	11/06/2020	01 Initial screen	ICF	NDD	NH	APD	ELG	IEL
Crack, Lung	05/18/1954	000004299	Smith, Shannon	09/25/2020	01 Initial screen	NNH	NDD	IEL	IEL	IEL	IEL
Dubs, Christian W	09/25/1980	698523906	Roybal, Abigail	10/14/2020	02 Rescreen	ICF	NDD	NH	APD	ELG	IEL
Elder, Lios	01/01/1929	000004034	Smith, Shannon	11/24/2020	02 Rescreen	ICF	NDD	NH	APD	IEL	IEL
Elmer, Lois	01/01/1929	000003931	Smith, Shannon	10/01/2020	02 Rescreen	ICF	NDD	NH	APD	ELG	IEL
Instructions, Update Tomatch	10/06/1975	000004302	Smith, Shannon	10/06/2020	01 Initial screen	NNH	NDD	IEL	IEL	IEL	IEL
Michaels, Sally	01/01/1945	000003923	Smith, Shannon	08/13/2020	02 Rescreen	NNH	NDD	NNH	IEL	IEL	IEL
Stephanie, Jane	05/16/1938	000003989	Smith, Shannon	09/24/2020	02 Rescreen	NNH	NDD	IEL	IEL	IEL	IEL
Test, Ceryl	01/01/1981	000003935	Smith, Shannon	11/06/2020	02 Rescreen	ICF	NDD	NH	APD	ELG	IEL
Test, Gina	08/14/1977	000004270	Bierman, Gina	06/05/2020	01 Initial screen	NNH	DD2	NH	MRD	ELG	IEL
Test, Sam	01/15/1988	000003936	Smith, Shannon	12/30/2020	02 Rescreen	NNH	NDD	NNH	IEL	IEL	ELG
Transp, Change	03/02/1958	000004259	Smith, Shannon	02/25/2021	02 Rescreen	SNF	D1B	NH	MRD	ELG	IEL

Note: FC Wav. Elig. column and abbreviations present in this column contain information that is no longer relevant. Information in this column should be disregarded.

Abbreviation Key:

D1A= Developmental Disability Level 1A
D1B= Developmental Disability Level 1B
DD2 = Developmental Disability Level 2
DD3= Developmental Disability Level 3
ELG = Eligible
ICF = Intermediate Care Facility
IEL = Ineligible
ISN = Intensive Skilled Nursing
NDD = No Developmental Disability
NH= Nursing Home
NNH = Non Nursing Home
SNF = Skilled Nursing Facility

Note: All screenshots came from the test environment and contain no protected health information.

DHS Contacts: If you have questions about running reports, please contact the LTCFS Team at DHSLTCFSTeam@dhs.wisconsin.gov.