

## Wisconsin Functional Screen Information System

### Adult Long Term Care Functional Screen

### Screen Liaison Toolkit

Issue Date: October 28, 2022

#### Topic: Eligibility Summary Report

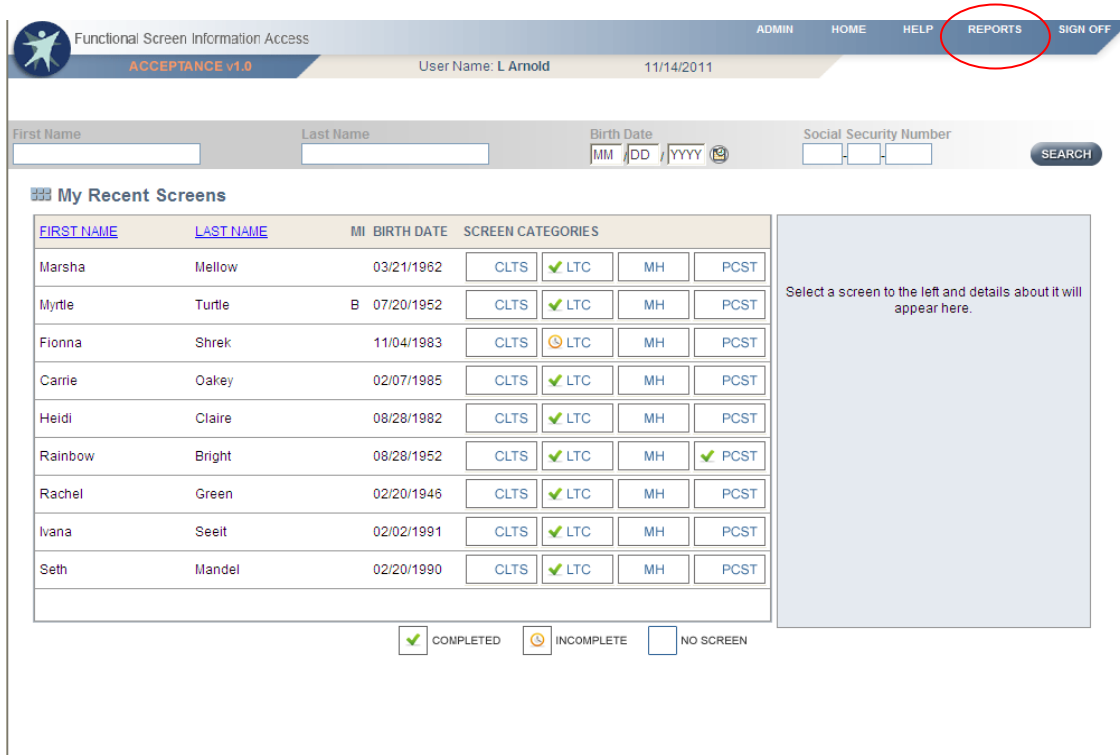
**Purpose:** This document explains how to run an Eligibility Summary Report in Functional Screen Information Access (FSIA). This report allows the user to use customized sort options and criteria to view applicant-level eligibility summary information, based on agency type.

**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.”



Functional Screen Information Access

ACCEPTANCE v1.0 User Name: L Arnold 11/14/2011

ADMIN HOME HELP **REPORTS** SIGN OFF

First Name Last Name Birth Date Social Security Number

MM / DD / YYYY

SEARCH

#### My Recent Screens

FIRST NAME	LAST NAME	MI	BIRTH DATE	SCREEN CATEGORIES
Marsha	Mellow		03/21/1962	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Myrtle	Turtle	B	07/20/1952	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Fionna	Shrek		11/04/1983	CLTS <input type="checkbox"/> LTC MH PCST
Carrie	Oakey		02/07/1985	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Heidi	Claire		08/28/1982	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Rainbow	Bright		08/28/1952	CLTS <input checked="" type="checkbox"/> LTC MH <input checked="" type="checkbox"/> PCST
Rachel	Green		02/20/1946	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Ivana	Seeit		02/02/1991	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Seth	Mandel		02/20/1990	CLTS <input checked="" type="checkbox"/> LTC MH PCST

COMPLETED 
  INCOMPLETE 
  NO SCREEN

Select a screen to the left and details about it will appear here.

# Eligibility Summary Report

## Step 2:

Select “Adult Long Term Care Reports.”

### Forms and Summary Report

#### Forms

View and print copies of the blank functional screens.

#### Administrative Reports

View and print reports for agency details. Report provides information about agency name, type and privileges. Report provides different options for filtering and sorting agency information.

#### Adult Long Term Care Reports

View and print summary reports for Adult Long Term Care functional screens. Reports provide information by eligibility, time reporting, target group, etc. and provide different options for filtering and sorting functional screen data.

#### Children's Long Term Supports Reports

View and print summary reports for Children's Long Term Supports functional screens. Reports provide information by eligibility, time reporting, and other summary information. The reports provide different options for filtering and sorting functional screen data.

#### Mental Health / AODA Reports

View and print summary reports for Mental Health / AODA functional screens. Reports provide information by eligibility, time reporting, and other summary information. The reports provide different options for filtering and sorting functional screen data.

#### Personal Care Reports

View and print summary reports for Personal Care Screening Tool. Reports provide information by allocation, time reporting, and other summary information. The reports provide different options for filtering and sorting functional screen data.

## Step 3:

Select “Eligibility Summary Report.”

### Adult Long Term Care Reports

#### Screen Summary at Agency Level

View screen summary information by specifying any combination of criteria from screener name, status, county of responsibility, and screen completion date range.

#### Screen Time Report

View screen summary information including total screen time by specifying any combination of criteria from screener name, status, agency and screen completion date range. This report also computes total screen time for an agency and for each screener within an agency.

#### Target Group Summary at Agency Level

View target group summary information by specifying any combination of criteria from screener name, agency, target groups and screen completion date range.

#### Eligibility Summary Report

View applicant-level eligibility summary information for an agency. Customized sort options and criteria, such as screener name and eligibility results, are presented based on the agency type.

#### Screener Summary at Agency Level

View and print summary reports for all screeners in different agencies. Reports provide information for each screener in a selected agency with begin date, end date and screener profile. The reports provide different options for filtering and sorting screeners information.

#### SSN Status Report

View applicant information by specifying any combination of criteria from agency, screener name, and FSIA SSN status. This report is available so that screeners can view applicants who do not have a verified SSN.

#### Level of Care Transfer Summary Report

View applicant-level level of care transfer summary information for an agency. The reports provide different options for filtering and sorting the transfer summary information.

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

### Eligibility Summary Report: Criteria 1 of 2

#### County & Agency Selection

Select County to filter Eligibility Calculation Agency dropdown (optional):

County: All

Filter By: Calculated By

Agency:

PREVIOUS

SUBMIT

## Eligibility Summary Report

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### Step 4:

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

Eligibility Summary Report: Criteria 1 of 2

County & Agency Selection

Select County to filter Eligibility Calculation Agency dropdown (optional):

County: All

Filter By: Calculated By

Agency:

PREVIOUS SUBMIT

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.

Eligibility Summary Report: Criteria 1 of 2

County & Agency Selection

Select County to filter Eligibility Calculation Agency dropdown (optional):

County: 13 Dane

Filter By: Calculated By

Agency:

PREVIOUS SUBMIT

## Step 6:

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

The screenshot shows a web form titled "Eligibility Summary Report: Criteria 2 of 2". The form is divided into three main sections: "Screen Criteria", "Date Type and Range", and "Output Format".

- Screen Criteria:** This section includes a note "(Note: A blank report will be opened if there are no records found matching the specified criteria.)" and several dropdown menus. The "Eligibility Calculation Agency" is set to "UAT State TG Auto Test Agency". Other dropdowns include "Screener" (All), "Nursing Home LOC" (All), "Developmental Disability LOC" (All), "Family Care Eligibility" (All), "Family Care Waiver Eligibility" (All), "IRIS Waiver Eligibility" (All), "NAT Eligibility" (All), and "Screen Archive Status" (All).
- Date Type and Range:** This section has a "Date Type" dropdown set to "Eligibility Calculated Date". It also includes "From" and "To" date pickers, with "From" set to "01/01/2020" and "To" set to "03/04/2021".
- Output Format:** This section includes "Primary Sort Order" (Applicant Name) and "Secondary Sort Order" (- None -). Both have radio buttons for "Ascending" (selected) and "Descending". The "Report Format" is set to "PDF".

At the bottom right of the form, there are two buttons: "PREVIOUS" and "SUBMIT".

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.

## Eligibility Summary Report

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### 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](mailto:DHSLTCFSTeam@dhs.wisconsin.gov).