

Wisconsin Functional Screen Information System

Adult Long Term Care Functional Screen

Screen Liaison Toolkit

Issue Date: October 28, 2022

Topic: Screen Summary at Agency Level Report

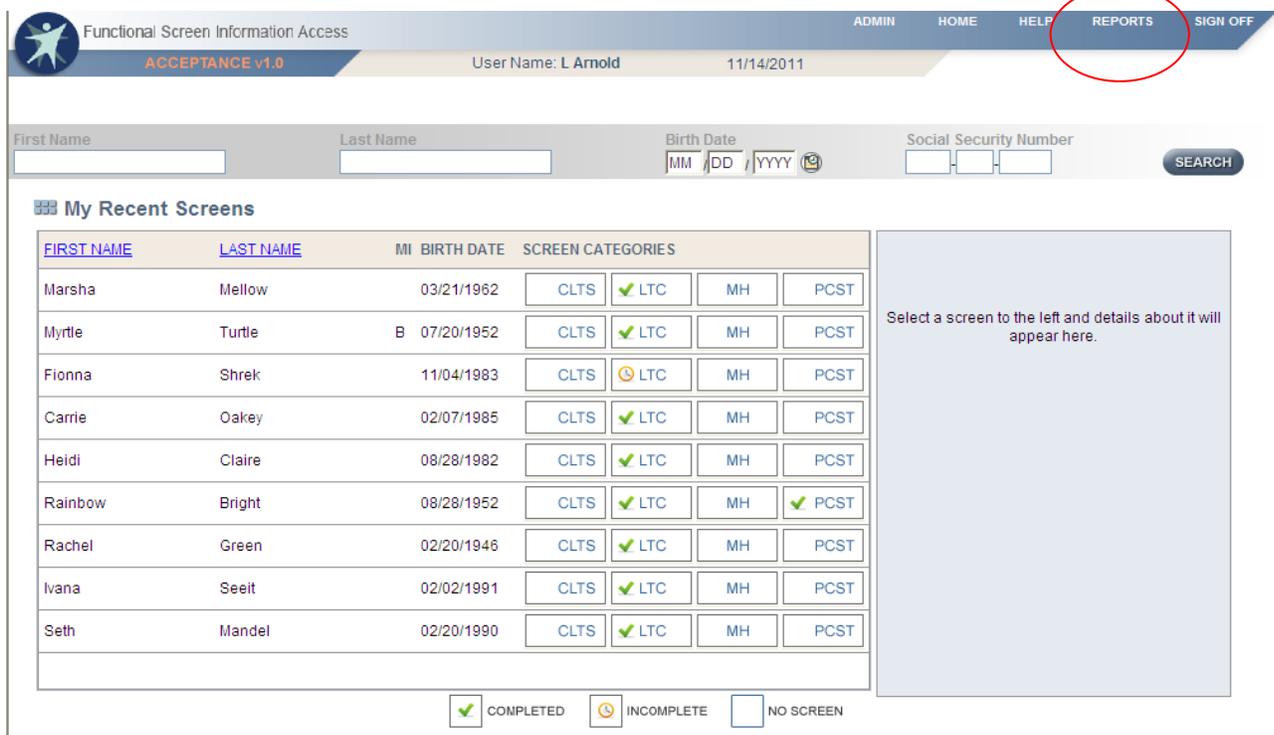
Purpose: This report explains how to run the Screen Summary at Agency Level Report in Functional Screen Information Access (FSIA). This report allows the user to specify many combinations of criteria to view screen summary information.

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 SEARCH

My Recent Screens

FIRST NAME	LAST NAME	MI	BIRTH DATE	CLTS	LTC	MH	PCST
Marsha	Mellow		03/21/1962	CLTS	✓ LTC	MH	PCST
Myrtle	Turtle	B	07/20/1952	CLTS	✓ LTC	MH	PCST
Fionna	Shrek		11/04/1983	CLTS	⊙ LTC	MH	PCST
Carrie	Oakey		02/07/1985	CLTS	✓ LTC	MH	PCST
Heidi	Claire		08/28/1982	CLTS	✓ LTC	MH	PCST
Rainbow	Bright		08/28/1952	CLTS	✓ LTC	MH	✓ PCST
Rachel	Green		02/20/1946	CLTS	✓ LTC	MH	PCST
Ivana	Seeit		02/02/1991	CLTS	✓ LTC	MH	PCST
Seth	Mandel		02/20/1990	CLTS	✓ LTC	MH	PCST

COMPLETED
 INCOMPLETE
 NO SCREEN

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

Screen 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 “Screen Summary at Agency Level.”

Functional Screen Information Access ADMIN HOME HELP REPORTS SIGN OFF
04/09/2021
User Name: G Bierman

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.

Screen Summary Report

Step 4:

After selecting “Screen Summary at Agency Level,” a screen will appear that looks like this:

Screen Summary Report: Criteria

Screen Criteria
(Note: A blank report will be opened if there are no records found matching the specified criteria.)
Select County to filter Assigned to Agency dropdown (optional):
County: All

Select desired screen criteria:
Assigned To Agency: All
Screener: Bierman, Gina
Status: All
Screen Archive Status: Active
County of Responsibility: All
Display Sub Agencies:

Screen Date Type
Date Type: [Rectangle Sign](#)

Screen Date Range
From: MM/DD/YYYY
To: MM/DD/YYYY

Output Format
Primary Sort Order: Applicant Name Ascending Descending
Secondary Sort Order: - None - Ascending Descending
Report Format: PDF

[PREVIOUS](#) [SUBMIT](#)

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

Helpful hints:

- **Screen Criteria:**
 - **County:** Used to narrow search results to a specific county, this may be helpful depending on the size and agency type.
 - **Assigned to Agency:** Used to select the appropriate agency or sub-agency from the dropdown, this may be helpful to narrow search results depending on the size and agency type.
 - **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.
 - **Status:** Used to filter the report based on screen completion status. The user can filter to view “All,” “Incomplete,” or “Complete” screens.
 - **Screen Archive Status:** Used to filter the report based on screen archive status. The user can filter to view “All,” “Active,” or “Archived” screens.
 - **County of Responsibility:** Used to filter the report based on county of responsibility. The user can filter to view all counties or a specific county.
 - **Display Sub Agencies:** Checking this box will sort the report by sub agency. This is useful for larger agencies that have sub agencies assigned in FSIA.
- **Screen Date Type:** This field is required. Used to filter the report based on screen completion date or eligibility calculated date. Eligibility calculated date is most accurate as it is system generated.

Screen Summary Report

- Screen Date Range: A date range should always be selected.
- Output Format:
 - Primary Sort Order and Secondary Sort Order: Used to sort how the data appears on the report.
 - The user may sort the data by applicant name, county of responsibility, county of residence, date, screener or status.
 - Data can be sorted in either ascending or descending order.
 - 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.
 - Data can be sorted in either primary sort order or primary and secondary sort order.
 - Report Format: Used to select whether the report will display as a PDF file or download as an Excel file.

Step 6:

Select the “Submit” button to generate and view the report with the specified criteria.

Long Term Care Functional Screen
Screen Summary Report
Screens Displayed: Active

4/9/21 - 11:20AM
Print Mode : Landscape

Agency: Dane Aging DRC

Applicant Name	Birth Date	SSN	Screener Name	County of Responsibility	County of Residence	Referral Date	Eligibility Calculated Date	Screen Type	Status/Incomplete Screens
Jones, Jenna M	01/01/1954	xxx-xx-3444	sigamala, viswanath	13 Dane	13 Dane	03/02/2015		02 Rescreen	Activities of Daily Living, COP Level 3, Eligibility

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

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