

**Wisconsin Functional Screen Information System**

**Adult Long Term Care Functional Screen**

**Screen Liaison Toolkit**

**Issue Date:** October 28, 2022

**Topic: Screener Summary Report**

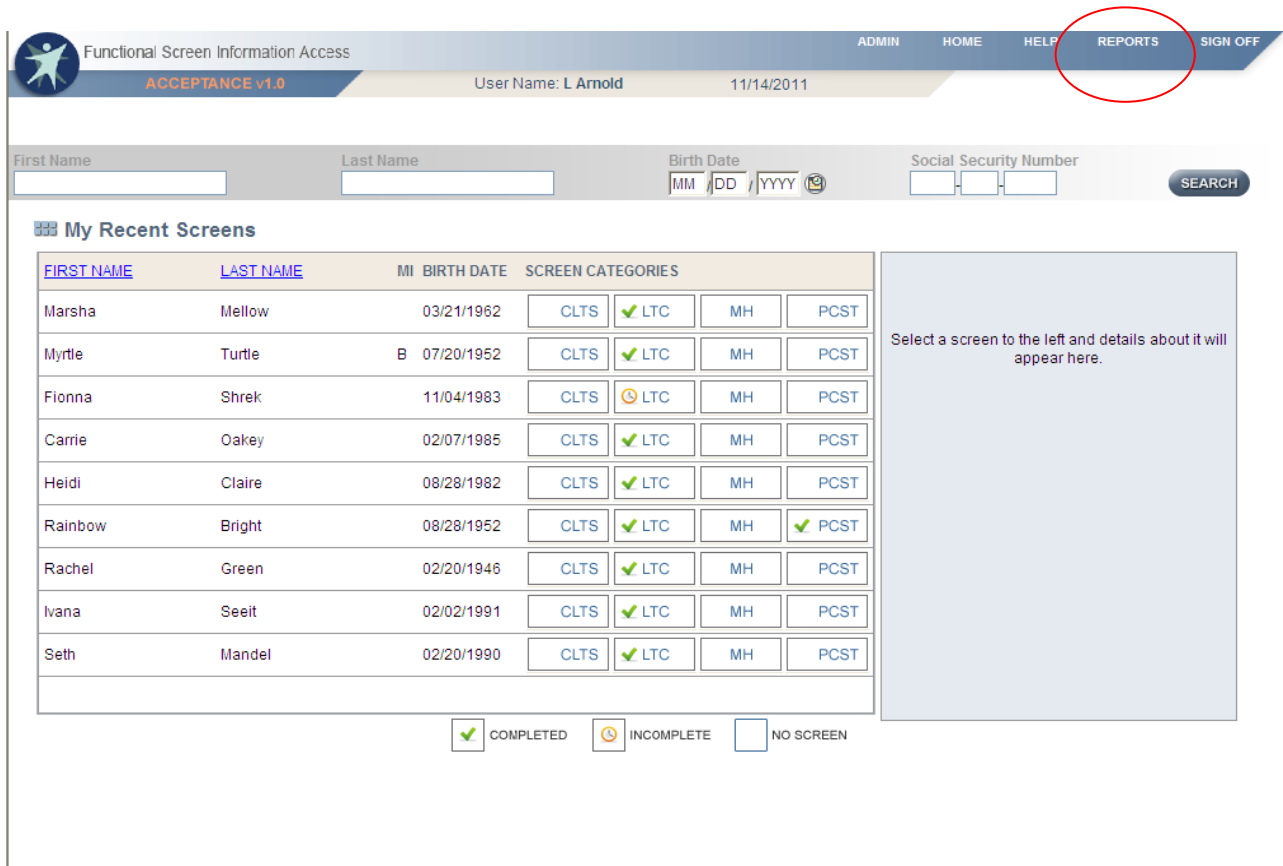
**Purpose:** This document explains how to run a Screener Summary Report in Functional Screener Information Access (FSIA). This report allows the user to view summary reports for all screeners at an agency.

**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	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

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

COMPLETED  INCOMPLETE  NO SCREEN

# Screener Summary Report

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## 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 “Screener Summary at Agency Level.”

### 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.

## Step 4:

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

Functional Screen Information Access  
ADMIN HOME HELP REPORTS SIGN OFF  
User Name: G Bierman 03/19/2021

### Screeener Summary Report: Criteria

Screen Criteria

Select County to filter Assigned to Agency dropdown (optional):  
County: All

Select desired screen criteria:  
Agency: All  
Status: All Screeners  
Profile: All

Screeener Date Range

From: MM/DD/YYYY  
To: MM/DD/YYYY

Output Format

Primary Sort Order: -None-  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, Screeener Date Range, and Output Format.

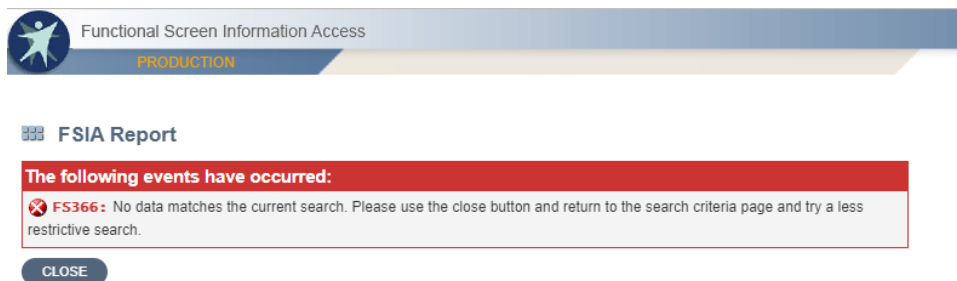
## Helpful Hints:

- **Screen Criteria:**
  - **County:** Used to narrow the search results by selecting a specific county. This may be helpful depending on the size and agency type.
  - **Agency:** Used to narrow the search results by selecting an appropriate agency or sub-agency. This may be helpful to depending on the size and agency type.
  - **Status:**
    - Selecting “All Screeners” generates a report that displays screeners with both active and inactive FSIA access.
    - Selecting “Active Screeners” generates a report that displays screeners that have current FSIA access.
    - Selecting “Inactive Screeners” generates a report that displays screeners that no longer have FSIA access.
    - FSIA users whose access has changed may have multiple lines of active or inactive profiles.
  - **Profile:**
    - Selecting “Adult LTC Functional Screen” generates a report that displays the agency’s screeners with full FSIA access.
    - Selecting “Adult LTC Functional Screen- View Only” generates a report that displays the agency’s employees who have view only FSIA access.

## Screener Summary Report

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- Selecting “Adult Screen Archive Profile” generates a report that displays the agency’s employees who have the add on profile to archive screens with their view only FSIA access.
  - Selecting “Adult Screen Transfer Profile” generates a report that displays the agency’s employees who have the add on profile to transfer screens with their view only FSIA access.
  - Selecting “ICA Profile” generates a report that shows agency employees who have IRIS Consulting Agency (ICA) profile access. This is only applicable for ICAs.
  - Other profile types in dropdown list are not applicable.
- Screener Date Range:
    - This report may be run with these fields blank.
    - If a date range is selected, the user may receive the following error message if the begin and end date of the screener(s) do not fall completely within that range. If this occurs, the user may broaden their date range or opt to run the report these fields blank.



- Output Format:
  - Primary Sort Order and Secondary Sort Order: Used to sort how the data appears on the report.
  - Data can be sorted by screener last name, begin date or end date.
  - Data can be sorted in either ascending or descending order.
  - If sorting by date, descending will list screeners granted FSIA access most recently at the beginning of the report, and ascending will list screeners granted FSIA access the earliest 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 report 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.

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**Long Term Care Functional Screen**      3/19/21 - 1:27PM  
**Agency Summary Report**

<b>Agency:AMR- Adult NEW1</b>				
<b>Screener Name</b>	<b>Begin Date</b>	<b>End Date</b>	<b>Screener Profile</b>	<b>Status</b>
Shoulder, Sunshine	06/28/2017	6/28/17	ADULT SCREENER PROFILE	Inactive
Bardhan, Amrita	07/15/2014	9/7/14	ADULT SCREENER PROFILE	Inactive

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