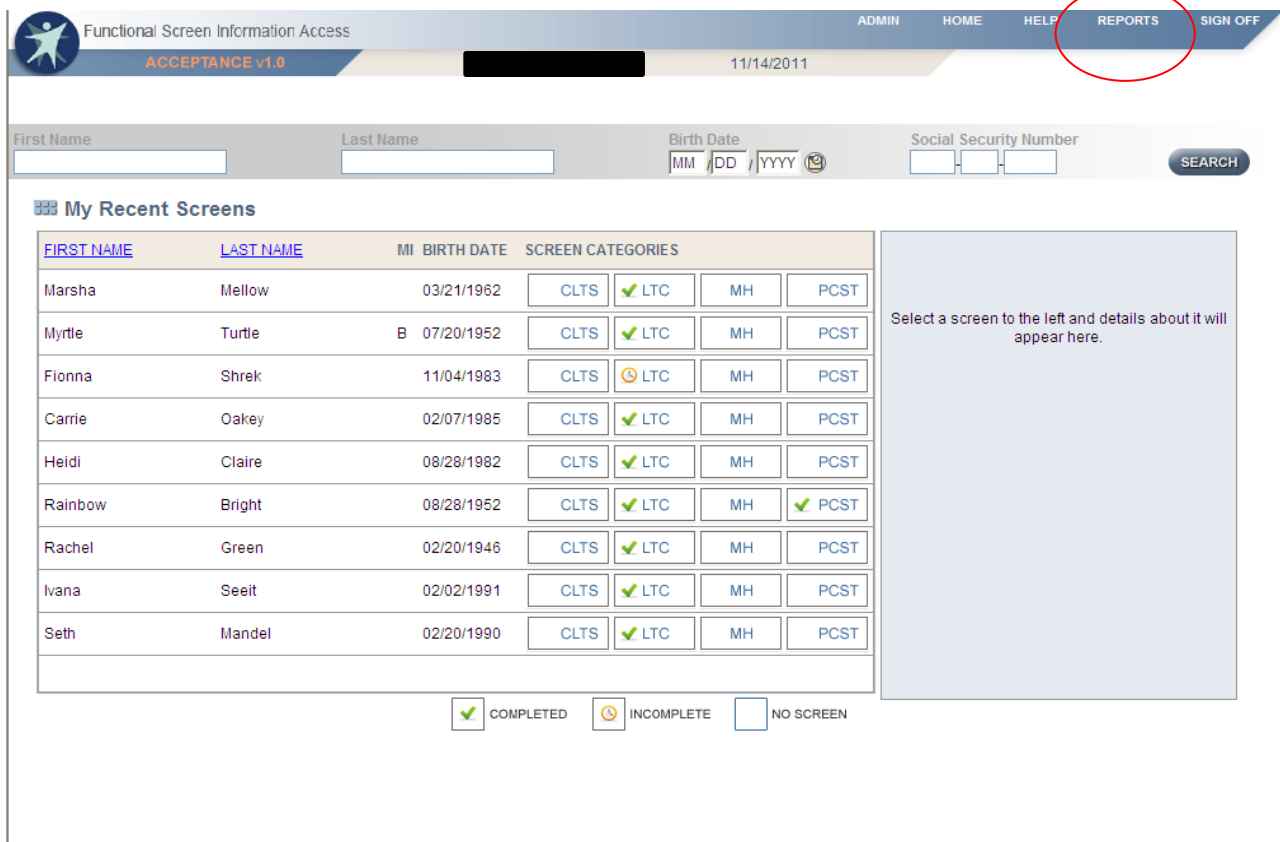**Topic: Target Group Summary at Agency Level Report**

Purpose: This document explains how to run the Target Group Summary at Agency Level Report in Functional Screener Information Application (FSIA). This report allows the user to view target group results of an agency's screens.

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 "Target Group Summary at Agency Level."

Step 4:
After selecting "Target Group Summary at Agency Level," a screen will appear that looks like this:

To filter the search criteria, select the information in the dropdown menus for Screen Criteria, Screen Date Type, Screen Date Range, Target Group Selection, 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.
  - 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.

- ➢ 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.
- ➢ Screen Archive Status: Used to filter the report based on screen archive status. The user can filter to view "All," "Active," or "Archived" screens.
- 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 Date Range: A date range should always be selected.
- Target Group Selection:
  - ➢ This report may be run with these fields blank to view all target group results.
  - ➢ These fields may be used to narrow search results by a specific target group or combination of target groups.
    - ▪ If multiple fields are selected, the report will generate results that contain individuals with target group results with the specific combination selected.
    - ▪ If only one field is selected, the report will generate results that contain a list of all individuals with the selected target group field as well as any other target group(s) that the individuals received.

- Output Format:
  - ➢ Primary Sort Order and Secondary Sort Order: Used to sort how the data appears on the report.
  - ➢ Data can be sorted by applicant name, date, or screener.
  - ➢ Data can be sorted in either ascending or descending order.
  - ➢ 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 5:
Select the "Submit" button to generate and view the report with the specified criteria.

Long Term Care Functional Screen   12/17/21 - 3:13PM
Target Group Summary Report
Screens Displayed: All
Eligibility Calculated By date from 09/01/2021 to 12/17/2021

Agency: ADRC Agency A

Applicant Name	Birth Date	SSN	Screener Name	Eligibility Calculated Date	Frail Elder	Phy. Dis.	Fed. DD	State DD	Alzh. Dis	Term. Cond.	Sev. Mntl	No Tgt Group
Geipel, Bowie	01/01/2000	xxx-xx-4342	Brandt, Kelly	11/18/2021			X					
Geipel, Lola	01/01/2000	xxx-xx-4341	Brandt, Kelly	12/15/2021				X				
Geipel, Lucy	01/01/1920	xxx-xx-4343	Brandt, Kelly	12/15/2021	X							
Lane, Penny	01/01/1960	xxx-xx-4354	Brandt, Kelly	12/15/2021		X					X	

Total Applicants: 4

Abbreviation Key:

Frail Elder = Frail elder target group
Phy. Dis. = Physical disability target group
Fed. DD = FEDERAL definition of developmental disability target group
State DD = STATE definition of developmental disability target group
Alzh. Dis = Alzheimer's disease or other irreversible dementia target group
Term. Cond. = Terminal condition target group
Sev. Mntl = Severe and persistent mental illness target group
No Tgt Group = No target group

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.