

Wisconsin Functional Screen Information System

Adult Long Term Care Functional Screen

Screen Liaison Toolkit

Issue Date: March 6, 2024

Topic: Target Group Summary at Agency Level Report

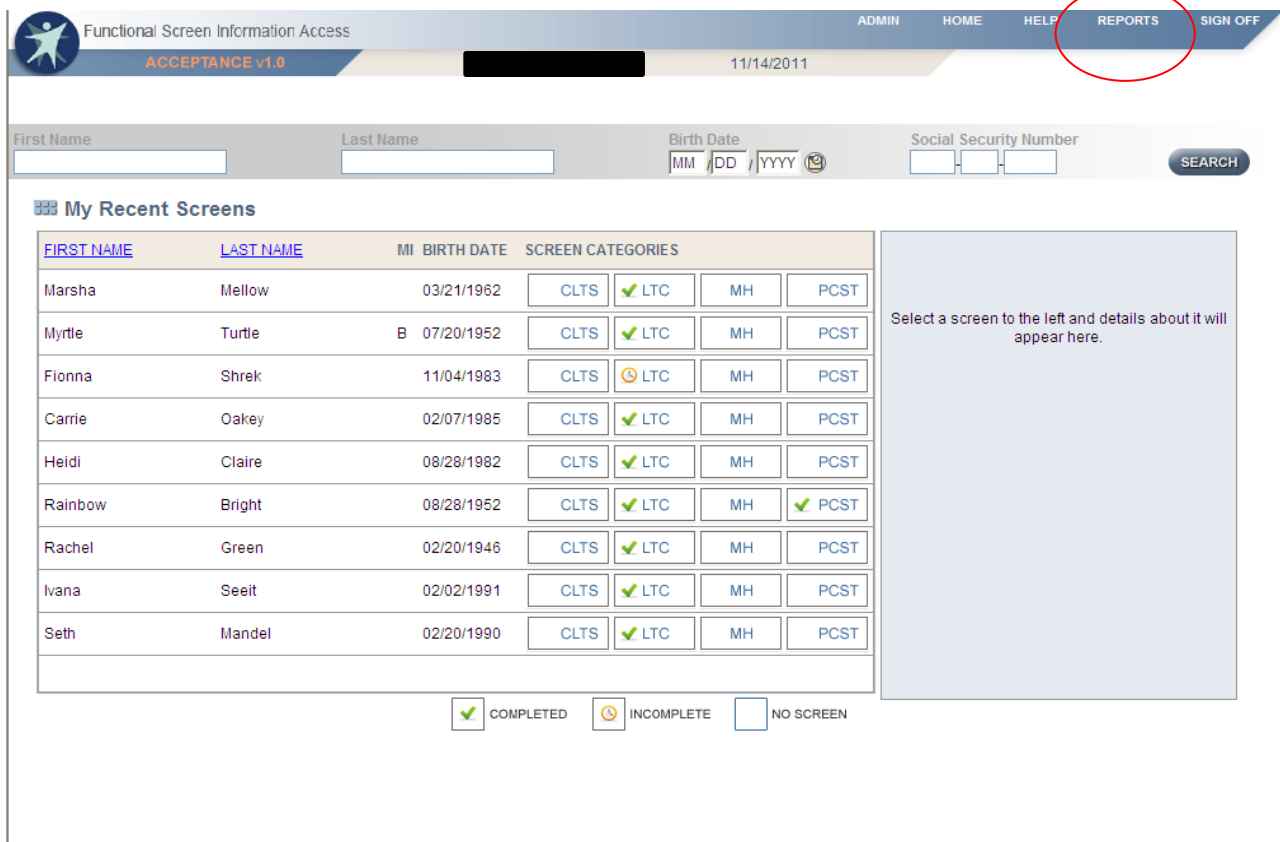
Purpose: This document explains how to run the Target Group Summary at Agency Level Report in Functional Screener Information Application (FSIA). This report allows the user to view target group results of an agency's screens.

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."



Functional Screen Information Access

ADMIN HOME HELP **REPORTS** SIGN OFF

ACCEPTANCE v1.0 [REDACTED] 11/14/2011

First Name [] Last Name [] Birth Date MM / DD / YYYY [] Social Security Number [] [] [] SEARCH

My Recent Screens

FIRST NAME	LAST NAME	MI	BIRTH DATE	SCREEN CATEGORIES			
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

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

COMPLETED
 INCOMPLETE
 NO SCREEN

Target Group Summary at Agency Level 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 “Target Group 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.

Target Group Summary at Agency Level Report

Step 4:

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

The screenshot shows a web form titled "Target Group Summary Report: Criteria". The form is divided into several sections:

- Screen Criteria:** Includes a note "(Note: A blank report will be opened if there are no records found matching the specified criteria.)" and a "Select County to filter Assigned to Agency dropdown (optional):" with a "County:" dropdown menu set to "All". Below this is "Select desired screen criteria:" with "Screener:" (dropdown set to "All"), "Assigned To Agency:" (dropdown set to "All"), and "Screen Archive Status:" (dropdown set to "All").
- Screen Date Type:** A "Date Type:" dropdown menu.
- Screen Date Range:** "From:" and "To:" date pickers, both set to MM/DD/YYYY.
- Target Group Selection:** A note: "If nothing is selected then all applicants meeting the other criteria will be included in the report. If multiple target groups are selected, then only applicants in all of the selected target groups will be displayed." Below are checkboxes for: Frail Elder, Physical Disability, Developmental Disability per FEDERAL definition, Developmental disability per STATE definition but NOT Federal definition, Alzheimer's disease or other irreversible dementia (onset of any age), A terminal condition with death expected within one year from the date of this screening, Severe and persistent mental illness, and None of the above (No Target Group).
- Output Format:** "Primary Sort Order:" (dropdown set to "Applicant Name"), "Secondary Sort Order:" (dropdown set to "- None -"), and "Report Format:" (dropdown set to "PDF"). Radio buttons for "Ascending" and "Descending" are present for both sort orders, with "Ascending" selected for both.

At the bottom right, there are "PREVIOUS" and "SUBMIT" buttons.

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.

Target Group Summary at Agency Level Report

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.