

Wisconsin Functional Screen Information System

Adult Long-Term Care Functional Screen

Screen Liaison Toolkit

Issue Date: April 2025

Topic: Granting an IRIS Consultant Agency (ICA) Access to View the Long-Term Care Functional Screen (LTCFS) for a Potential Enrollee

Purpose: This document explains the process aging and disability resource centers (ADRCs) and Tribal aging and disability resource specialists (ADRSs) should follow to grant an ICA access to view the LTCFS for an individual who is interested in enrolling with the ICA. This allows that specific ICA to view the LTCFS for that person in order to assess their needs and plan for their potential enrollment with the ICA. The information below does not apply to managed care organizations (MCOs).

Definitions: Definitions are located in the [Screen Liaison Toolkit Definitions, P 02783D](#) document.

Granting View-Only Access

Only an ADRC or Tribal ADRS should grant view-only access to an ICA. The LTCFS should **not** be transferred to an ICA to allow the ICA to view the budget.

If the ADRC or Tribal ADRS cannot access a screen, the ADRC or Tribal ADRS liaison should contact the Wisconsin Department of Health Services (DHS) LTCFS Team at DHSLTCFSTeam@dhs.wisconsin.gov, not the MCO or ICA.

Step 1:

Select the **Edit Screen** button in Functional Screen Information Access (FSIA) for the applicable individual.

FIRST NAME ↑↓	LAST NAME ↑↓	M I	BIRTH DATE	SCREEN CATEGORIES
Lucy	Geipel		01/01/1920	<input type="checkbox"/> CLTS <input checked="" type="checkbox"/> LTC <input type="checkbox"/> MH <input type="checkbox"/> PCST

COMPLETED
 INCOMPLETE
 NO SCREEN

Lucy Geipel

Adult LTC Screen ▾

Assigned To:
ADRC Agency A

Screener Name:
Brandt, Kelly
kelly.brandt@dhs.wisconsin.gov

Determined On:
07/27/2022

Screen Status:
Active

Work with the existing screen:

EDIT SCREEN

Granting an IRIS Consultant Agency (ICA) Access to View the LTCFS for a Potential Enrollee

Step 2:

Select the **Edit** button, located on the right-hand side of the Screen Information section.

You Are Working On Lucy Geipel	Birth Date 01/01/1920	Calculated Age 104 Years and 1 Month	SEARCH FOR ANOTHER APPLICANT
			MY RECENT SCREENS

Adult LTC Screen Status

 Basic Information	The basic information page is where a user will need to update all of the applicant's high level information, such as their name and address. There are additional fields for the user to enter the screener's details and any relevant notes.	EDIT
 Screen Information	The Screen Information page is where a user enters details about the screening, such as where the interview was conducted, who the referral source was and the HCBW waiver group of the individual.	EDIT

Step 3:

On the Screen Information page, select the ICA that the individual selected from the **ICA Requested** drop-down menu.

Source of Information

Referral Source:

Other:

*Primary Source for Information:

Other:

Indicate Name(s):

* Location Where Screen Interview was Conducted:

Other:

ICA Read Only

ICA Requested:

[PREVIOUS](#) [NEXT](#)

Granting an IRIS Consultant Agency (ICA) Access to View the LTCFS for a Potential Enrollee

Step 4:

Select the **Next** button at the bottom of the page. This will take you to the Demographics page.

Source of Information

Referral Source: Family/Significant Other

Other:

*Primary Source for Information: Self

Other:

Indicate Name(s):

*Location Where Screen Interview was Conducted: Person's Current Residence

Other:

ICA Read Only

ICA Requested: Advocates4U

◀ PREVIOUS **NEXT** ▶

Step 5:

While on the Demographics page, select **Home** from the top menu bar.

Functional Screen Information Access ADMIN **HOME** HELP REPORTS SIGN OFF

ACCEPTANCE v1.0 User Name: K Brandt 02/20/2024

You Are Working On	Birth Date	Calculated Age	
Lucy Geipel	01/01/1920	104 Years and 1 Month	<input type="button" value="SEARCH FOR ANOTHER APPLICANT"/>
			<input type="button" value="MY RECENT SCREENS"/>

Navigation Menu

Demographics Cancel Reset

Medical Insurance Information

*Medical Insurance (Check all that apply):

Medicare #

Medicaid # 2207974626 (The identification number does not ...)

Helpful hint:

To verify that the selection is accurate, run a "Current Screen Report." The ICA requested will be listed in the section titled Screen Information.

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Long Term Care

09/05/2024 - 8:23AM

Target Group Audit Information Report of Lucy Geipel

Screen Number: Current Screen , Version Number: Current Version

Basic Information			
Assigned To: ADRC Agency A			
Screener's Name: Brandt, Kelly		Referral Date: 09/05/2024	Screen Type: 01 Initial screen
Title:	Applicant's Name: Geipel, Lucy	Gender: Female	Birth Date: 01/01/1920
SSN: xxx-xx-4343	SSN Status: Pseudo SSN		MCI ID: 2207974626
Address: 111 Sunshine Rd Waukesha, WI 53222			
County/Tribe of Residence: 67 Waukesha		County/Tribe of Responsibility: 67 Waukesha	

Screen Information	
Referral Source: Family/Significant Other	
Primary Source For Information: Self	Location Where Screen Interview was Conducted: Person's Current Residence
ICA Requested: Advocates4U	

DHS Contacts: If you have questions or comments about this document, please contact the LTCFS Screen Team at DHSLTCFSTeam@dhs.wisconsin.gov.