Wisconsin Functional Screen

Technical Assistance Document

For additional technical assistance, refer to the Screener Application Training webpage at http://dhs.wisconsin.gov/ltcare/FunctionalScreen/training.htm

REVISED: 6/18/2009

APPLICABILITY:
- ☒ **Adult Long Term Care**
- ☐ **Children's Long Term Support**
- ☐ **Mental Health/AODA**

TOPIC: LTC Frequently Encountered Issues

Performing an Edit vs. Creating a New Screen

The 'Edit' button is one of the major enhancements in version 4 of the Long Term Care Information Access (LTCIA) Application. However, it may be confusing as to when you should edit a screen instead of creating a new one.

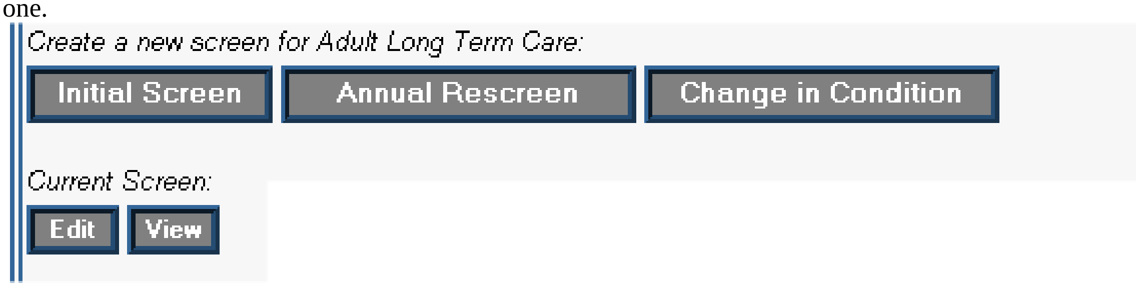

Image 1.1 – Screen Type and Edit Buttons

The intent of the 'Edit' button is to allow a screener to correct data entry errors and/or update an applicant's information. The following matrix should help to clarify exactly when the 'Edit' button should be used.

	Edit Button	View Button	Initial Screen Button	Annual Rescreen Button	Change in Condition Button
The applicant is being screened for the first time.			X		
The applicant requires an annual rescreen.				X	
The applicant's medical condition has changed.					X
Incorrect information was entered for the applicant and needs to be corrected.	X				
Non-medical condition information for the applicant has changed (i.e. home address, medical insurance, living situation, etc.)	X				
A transferred applicant's non-medical condition information has changed.	X				
A transferred applicant requires an annual rescreen.				X	
A transferred applicant's medical condition has changed.					X
The applicant's screen needs to be viewed, but no changes are necessary		X			

What to do if you accidentally pressed one button instead of the other…

If you pressed the 'Edit' button when you should have pressed a screen type button…

If you've already made a change and left the page, causing the system to update the information and the screen is now incomplete (the check mark is no longer next to the eligibility page name), then recalculate eligibility as needed. Next, search for the applicant again and click on their name in the results to return to the Applicant Information Main Page. Now press the applicable screen type button and proceed normally.

If you have not already confirmed the change by leaving the page and the check mark still appears next to the eligibility page name, then close your browser without going to another page in the application. Reopen your browser and log back into the application. Search for the applicant again and click their name in the results to return to the Applicant Information Main Page. Press the applicable screen type button and proceed normally.

If you pressed a screen type button when you should have pressed the 'Edit' button…

On the confirmation page, click the 'Previous Page' button to return to the Applicant Main Information Page. Then click the 'Edit' button and proceed. However, if you already pressed the 'Next Page' button, go through the screen normally and make the edit(s) you intended. On the 'Notes' page, add a note explaining that you intended to just edit the screen but clicked the wrong button by mistake. Then calculate eligibility.

Viewing and Printing Reports

The first thing you'll need is the Adobe Acrobat plug-in for your browser. A plug-in is a small utility that increases the functionality of your Internet browser. Checking to see if you have the plug-in is easy. First, navigate to a report page. If you do not have the plug-in installed, a small window will appear asking you if you'd like to download and install it. Click the button labeled 'OK'. The plug-in will install itself. Once it's finished, the report will display.

If you do have the plug-in installed, the report will display when you navigate to a report page. In this case, you do not need to do anything.

Once the report displays, look at the upper right-hand corner. You will see "Print Mode:" in red letters followed by either "Portrait" or "Landscape". This corresponds to how you should set the page orientation for your printer. "Portrait" means that the page will print vertically, the typical page orientation. "Landscape" means that it will print lengthwise. It's important to pay attention to this, because if the printer is not set the correct way, you may end up with an incomplete or poorly formatted report.

To print the report, click the printer button on the report toolbar (shown below). Alternatively, you can also use the print button on the Internet Explorer toolbar or the print command in the 'File' menu.

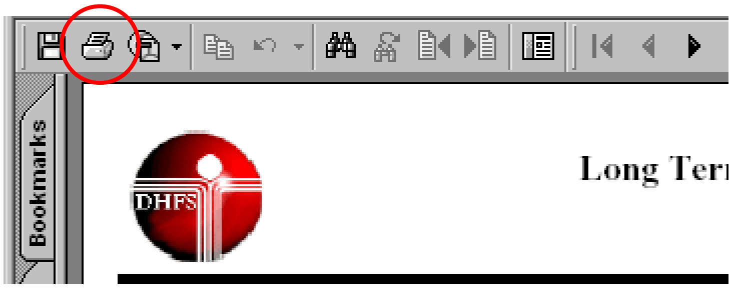

Image 2.1 – Report Toolbar

This will open the ‘Print Dialog’ window (shown below.) **Please note that the window displayed on your screen may not look exactly like this one.** Click the ‘OK’ button in this window.

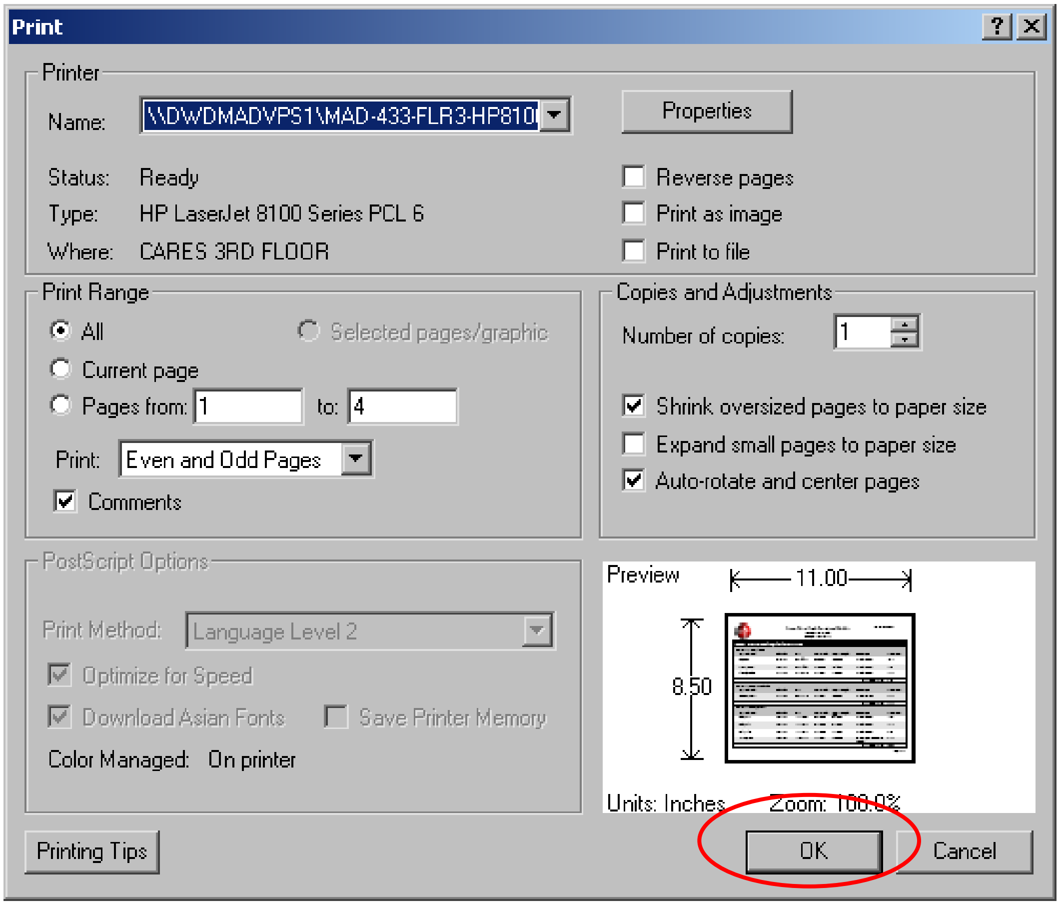

Image 2.2 – Print Dialog Window

You don’t need to worry about setting the page layout to ‘Portrait’ or ‘Landscape’ when printing reports. The reports will automatically orient themselves.

Transferring an Applicant

Be Advised:

This section describes the general process for transferring screens. Screeners should consult their supervisor or security officers regarding their agency's specific requirements for HIPAA compliance when transferring screens to other agencies.

Transferring an applicant is a relatively simple process. But, you must keep a few things in mind when doing so. First, you can only transfer an applicant who has had eligibility calculated for their current screen. Past complete screens are not considered by the application when verifying whether an applicant can be transferred (this is because screens can be saved to history as incomplete.)

Once you've calculated eligibility for the applicant, navigate back to the Applicant Information Main Page and click the 'Transfer' link on the left-hand side of the page. This will take you into the Transfer Utility.

Once inside the Transfer Utility, you will see a listing of the agencies that currently have access to the applicant. Be sure you check this listing to be sure that agency you intend transfer the applicant to doesn't already have the access they need. The gray rows are the agencies to which the applicant is assigned; the other rows are agencies that have access to at least one of those agencies (check the FS Category field to see exactly what type of access they have.) If you find the agency you intend to transfer to in the listing, then you may not need to initiate a transfer depending on the reason for transfer.

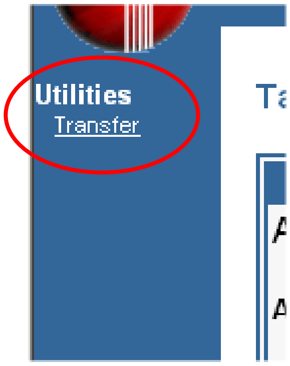

Image 3.1 – Link to Transfer Utility

If you don't see the agency to which you plan to transfer to in the list, then select that agency from the dropdown below the listing. Next, check the box(es) of the screen type(s) you wish to transfer to that agency. Keep in mind that there is no restriction on what screen types an agency can receive through transfer (i.e. an agency that can only do Children's screen can accept Adult screens through transfer.) However, if the agency does not access to perform a screen type it receives, then it will only have read-only access to that screen. Once you've selected the receiving agency and screen types, click the 'Transfer' button.

You will now be on the Transfer Confirmation screen. Below the applicant's name, you'll see the receiving agency and selected screen types listed. Be sure that these are correct. If they are not, click the 'Previous' button to return to the Transfer page and verify your selections. If they are correct, then look at the "post-transfer" agency access listing. This listing displays which agencies will have access to the applicant after the transfer is confirmed (if you agency is not listed, then you will lose access to the applicant following transfer.) If the listing is acceptable, click the 'Confirm' button to initiate the transfer. Once the transfer is processed, you will be returned to the Applicant Main Information Page. <u>Be aware that you may not have access to the applicant now.</u>

What happens to the applicant's information after transfer?

The applicant's 'Assigned To' agency is updated to the receiving agency following a transfer. All other information remains completely unchanged until the receiving agency edits the screen or creates a new one.

What do I do if a transfer an applicant to an agency in error?

If you accidentally transfer an applicant to the wrong agency, contact that agency and have them transfer it back to your agency.

Social Security Numbers

Within the application, a Social Security Number (SSN) can only be assigned to one applicant at a time. If you attempt to create a new applicant using a SSN that is already assigned to another applicant, you will receive message communicating the fact. On that page, you can view the already existing applicant to check if he or she is in fact the applicant you're attempting to create. If you discover that he or she is not the applicant you're attempting to create, then you should follow the process below:

SSN Resolution Process

1. Verify that the applicant you're creating has given you correct information.
2. If the applicant insists that the SSN provided is correct, contact the screening agency of the existing applicant and request that the applicant's SSN be confirmed.
3. If the existing applicant's SSN appears correct, then have the new applicant contact the Social Security Administration (SSA) to confirm their SSN.
4. If the SSA confirms the new applicant's SSN as being the number assigned to the existing applicant, have the screening agency inform the existing applicant that he or she will need to contact the SSA and receive their correct number so that the application can be updated.

[Note: The Social Security Administration of Wisconsin has confirmed that under no circumstances are two living individuals assigned the same SSN, nor has any case of duplicate SSNs ever been reported and found true.]

How do I correct an existing applicant's Social Security Number?

If you discover an existing applicant's SSN to be in error, use the 'Edit' button on the Applicant Information Main Page to enter his or her current screen. The SSN field is on the first page of the applicant's current screen ("Basic" for Adult screens, "Individual Info" for Children's screens.) Replace the existing value with the correct value, then re-calculate eligibility. Be sure you add a note explaining the reason for the change.

Keep in mind that all past screens will still have the old SSN. This is to maintain accurate history records and will not prevent a new applicant from being created with the old SSN. Only the SSN assigned to the most current screen for existing applicants is considered when determining if a SSN is already in use.

Whom to Contact in the Event of a Problem…

When using the LTCIA application, you may encounter issues of functionality, access, or policy. There are specific agencies you should contact depending on what type of problem you are having. The matrix below should help you determine which agency you should contact.

Issue	Agency to Contact
• Problems logging into the LTCIA application	Department of Health Services Security Desk (608) 266-9198 Monday - Friday, 8:00-11:30am / 12:30-4:00pm
• Need to obtain access to the LTCIA application • Need to alter access to the LTCIA application • Need to revoke access to the LTCIA application	See form and its instructions at: https://www.dwd.state.wi.us/desltc/PrivilegedContent.asp
• Technical or functionality related problems with the application	Department of Workforce Development (DWD) (608) 266-7252 Monday – Friday, 6am - 6pm
• Clinical Policy Questions – Children's LTS Functional Screen – Adult Long Term Care Functional Screen – Mental Health/AODA Functional Screen – Personal Care Screening Tool	Contact information can be found at: http://dhs.wisconsin.gov/ltcare/functionalscreen/contact.htm

Contacting the appropriate resources when you experience problems assists us in accurately tracking problems and identifying potential issues with the application that should be modified.