

Wisconsin Functional Screen Information System

Adult Long Term Care Functional Screen

Screen Liaison Toolkit

Issue Date: October 12, 2020

Topic: Role of the Adult Long Term Care Functional Screen Liaison

Purpose: This document describes the role of the individual identified as the agency screen liaison to the Department of Health Services (DHS) regarding the Adult Long Term Care Functional Screen (LTCFS). The information in this document is technical assistance that DHS intends screen liaisons to use in conjunction with language in DHS contracts, guidelines, and instructions to screening agencies. Nothing in this document supersedes or replaces existing contracts, guidelines, or instructions.

Definitions

- Functional Screen Information Access (FSIA): The web-based computer application that screeners use to calculate and store functional screens.
- Profile: The level of access in FSIA granted to an individual. Each screener's access to FSIA is sponsored by a DHS-recognized screening agency.
 - Adult screener profile: This profile is used for a screener who meets all eligibility criteria to be a certified screener and has completed the online course for new screeners, or successfully passes the biennial continuing skills test (CST) for ongoing screeners. With this profile, a screener may enter, edit, update, and calculate the LTCFS, run screen reports, transfer screens to another screening agency, and modify agency contact information.
 - Adult screener view-only profile: This profile is used for an individual who has a business need to view screens or screen reports for the screening agency, but does not include the ability to enter, edit, update, or calculate the LTCFS. Certification is not required for this access.
- Administrative access: An individual DHS approves for "administrative access" has the adult screener profile; however, this individual is authorized **only** to transfer screens to other screening agencies, view completed screens and run reports, or perform data entry on behalf of and under the supervision of a certified screener. The screen liaison is responsible for ensuring that anyone with this access does not make or revise screen selections without the express direction of a certified screener.
- Screen liaison: The individual(s) a screening agency authorizes and recognizes as lead staff in performance of duties and responsibilities described in this document, program contracts, guidelines, and instructions. Screening agencies should also identify a qualified individual to provide backup for liaison duties in their absence.
- Screening agency: Screening agencies may be aging and disability resource centers (ADRCs), Include, Respect, I Self-Direct (IRIS) consultant agencies (ICAs), managed care organizations (MCOs), or tribal agencies. Screening agencies must have an established contract with DHS assuring compliance with all policies and quality requirements defined by DHS.

Liaison is Required at Each Screening Agency

Each screening agency must identify one individual staff member who is a certified screener and will function as liaison to DHS regarding all matters pertaining to the Adult LTCFS. An agency may identify two individuals if the agency has more than 25 screeners. However, the agency must identify one of these individuals as lead liaison.

Education and Experience Requirement for Liaisons

Liaisons must meet the qualifications specified by DHS for those performing functional screens. They must also hold DHS certification to perform screening. Individuals who DHS requires to complete a plan of correction after a CST may not serve in the liaison role until they have passed a subsequent CST with no plan of correction. Liaisons must understand the Adult LTCFS instructions and be able to mentor and train screeners in the use of these instructions. Best practice is for each liaison to be an active screener.

Duties and Responsibilities of the Screening Agency Liaison

1. Maintain screener access to FSIA. This can include:
 - Perform, or oversee the delegated support staff person who performs, all the duties in this section.
 - Ensure all screen users have appropriate training in confidentiality of personally identifiable records.
 - Ensure all screen users have appropriate training to use the FSIA application.
 - Maintain up-to-date listing of all individuals with FSIA access, by type of access, at the agency.
 - Maintain up-to-date information about the agency and each screener in the FSIA application.
 - Add a new screener in FSIA. (See the document titled **Adding an LTC Functional Screener, [P-02783A](#)**.)
 - Change or eliminate screener access to FSIA based on the status of the agency and each individual screener. The change must be requested within three business days of any change in status, except when the screener's employment is terminated; in that case, the change must be requested within one business day of the termination date. (See the document titled **Deleting an LTC Functional Screener, [P-02783B](#)**.)
2. Oversight of screener qualifications:
 - Ensure that each screener meets the screener qualifications specified in contracts between DHS and the agency.
 - Ensure that each screener successfully completes CST testing required by DHS.
 - With agency administration or management, develop, monitor, participate in, and report on plans of correction required by DHS for screeners who score below a passing rate on the CST.
 - In conjunction with DHS, proctor individual screener testing, if offered by DHS.
3. Oversight of screening activity:
 - Oversee all aspects of screening and use of FSIA by agency staff. This includes initial

and ongoing training, mentoring, reviewing screens performed by screeners, and performing ongoing quality improvement and quality assurance activities.

- Bring to the attention of the screener's supervisor any performance issues needing to be addressed through follow-up or quality improvement activities.
- Complete reports as required by DHS.

4. Communication activity:

- Serve as a conduit between DHS staff and agency screeners when technical assistance or consultation is needed.
- Serve as the contact person for other agencies when a screen needs to be transferred or when there are conflicting results or questions about a screen.
- Provide written response to findings of DHS LTCFS quality reviews.
- Ensure that all screeners and agency staff who utilize the LTCFS are individually receiving LTCFS Adult Screen email messages from DHS.
- Ensure that all screeners and agency staff who utilize the LTCFS receive copies of technical assistance or other informational bulletins from DHS.
- Participate in the DHS Screen Consultation Workgroup, as requested.
- Utilize screener quizzes that DHS provides as educational tools for agency screeners.
- Ensure that all agency screeners are aware of the internet address and contents of the DHS website for the LTCFS.

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