

Wisconsin Functional Screen Information System

Adult Long Term Care Functional Screen

Screen Liaison Toolkit

Issue Date: March 6, 2024

Topic: Level of Care Transfer Summary Report

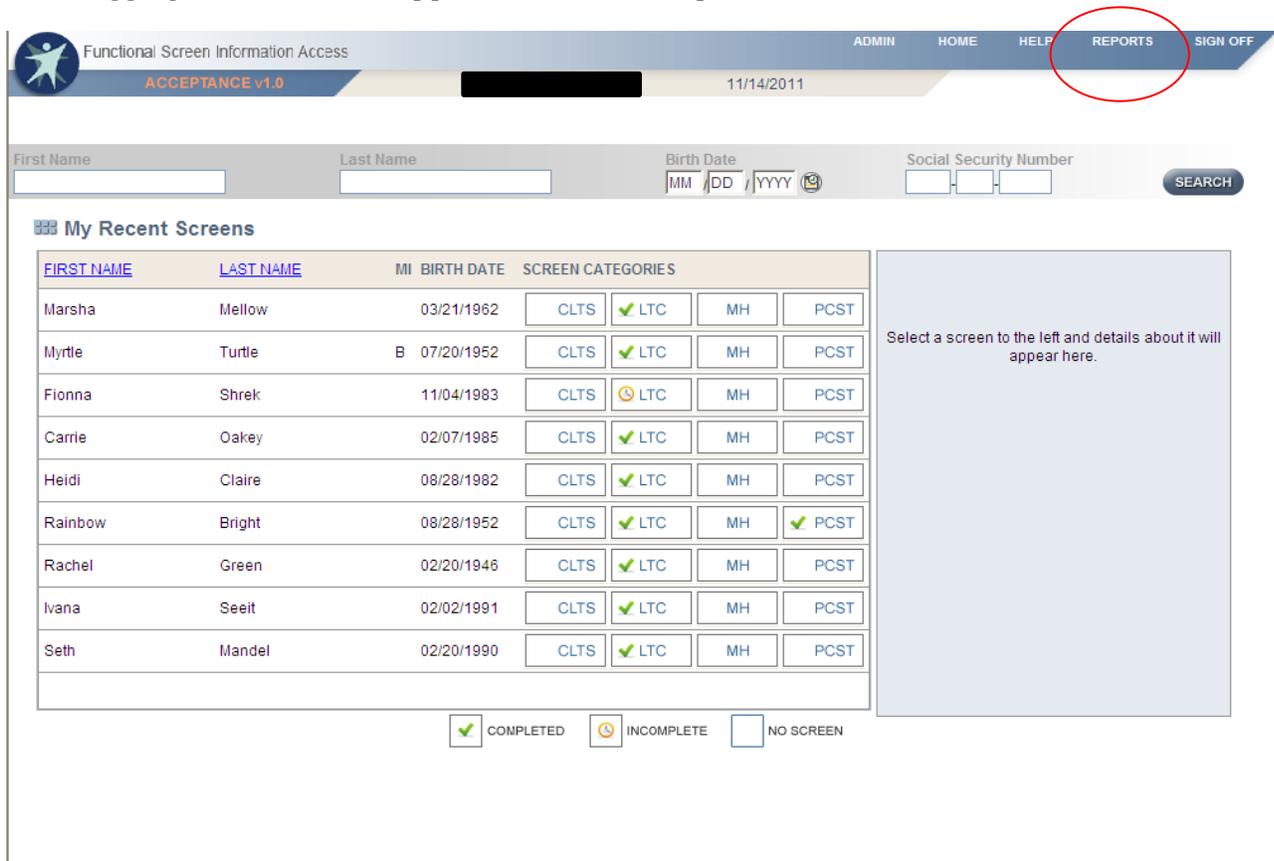
Purpose: This document explains how to run the Level of Care Transfer Summary Report in the Functional Screen Information Application (FSIA) in order to view a summary of the status of applicant-level level of care (LOC) transfer to Client Assistance for Re-employment and Economic Support System (CARES)/CARES Worker Web (CWW).

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 <input checked="" type="checkbox"/> LTC MH PCST
Myrtle	Turtle	B	07/20/1952	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Fionna	Shrek		11/04/1983	CLTS <input type="checkbox"/> LTC MH PCST
Carrie	Oakey		02/07/1985	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Heidi	Claire		08/28/1982	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Rainbow	Bright		08/28/1952	CLTS <input checked="" type="checkbox"/> LTC MH <input checked="" type="checkbox"/> PCST
Rachel	Green		02/20/1946	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Ivana	Seeit		02/02/1991	CLTS <input checked="" type="checkbox"/> LTC MH PCST
Seth	Mandel		02/20/1990	CLTS <input checked="" type="checkbox"/> LTC MH PCST

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

COMPLETED INCOMPLETE NO SCREEN

Level of Care Transfer Summary 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 “Level of Care Transfer Summary Report.”

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 PSIA 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.

Level of Care Transfer Summary Report

Step 4:

After selecting “Level of Care Transfer Summary Report,” a screen will appear that looks like this:

The screenshot shows a web form titled "CARES - LOC Transfer Summary Report: Criteria". The form is organized into several sections, each with a header and a light beige background:

- Agency and Screen Criteria:** Includes a note: "(Note: A blank report will be opened if there are no records found matching the specified criteria.)". It has a section for "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 "Assigned To Agency:" and "Screener:" dropdown menus, both set to "All".
- Screen Transfer Results:** Contains a "Transfer Result:" dropdown menu set to "All".
- Screen Date Type:** Contains a "Date Type:" dropdown menu.
- Screen Date Range:** Contains "From:" and "To:" date pickers in MM/DD/YYYY format.
- Output Format:** Contains "Primary Sort Order:" (dropdown set to "Applicant Name"), "Secondary Sort Order:" (dropdown set to "- None -"), and "Report Format:" (dropdown set to "PDF"). To the right of these are radio buttons for "Ascending" and "Descending" for both sort orders, with "Ascending" selected for both.

At the bottom right of the form are two buttons: "PREVIOUS" and "SUBMIT".

To filter the search criteria, select the information in the dropdown menus for Agency and Screen Criteria, Screen Transfer Results, Screen Date Type, Screen Date Range, and Output Format.

Helpful Hints:

- Screen Criteria:
 - County: Selecting a county may be helpful to narrow search results depending on the size and agency type.
 - Assigned To Agency: Selecting an appropriate agency or sub-agency from the agency dropdown may be helpful to narrow search results depending on the size and agency type.
 - Screener: This field will default to the user’s name. This can be changed as needed. Select “All” at the top of the Screener field dropdown to see all screeners that have screens that meet report criteria selected.

- Screen Transfer Result:
 - All: View the transfer status of all screens.
 - Success: View screens where the transfer was successful.
 - Failure: View screens where the transfer has failed.
 - Pending: View screens where the transfer is pending.
- 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. If the date range selected is too broad, the user may receive the following error message. If this occurs, the user should narrow the date range.



The following events have occurred:

✖ **FS441:** The search has resulted in more than the maximum of 2000 records. Please narrow your search criteria.

CLOSE

- Output Format:
 - Primary Sort Order and Secondary Sort Order: Used to sort how the data appears on the report.
 - The user may sort the data by applicant name, date, screener, transfer results, or screen type.
 - Data can be sorted in either ascending or descending order.
 - If sorting by date, descending will list screens completed most recently at the beginning of the report, and ascending will list the oldest screens at the beginning of the report.
 - Data can be sorted in either primary sort order or primary and secondary sort order.
- Report Format: Used to select whether 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
CARES - Level of Care Transfer Summary Report
 Eligibility Calculated By date from 01/01/2016 to 06/01/2016

2/10/22 - 10:03AM

Agency: State of Wisconsin						
Applicant Name	SSN	Screener Name	Batch Run Date	Eligibility Calculated Date	Screen Type	Transfer Results
Cramer, Ralph	xxx-xx-1177	Kreitzman, Lindsey	12/15/2016	03/14/2016	02 Rescreen	Failure
Failure Reason(s): 001 - Applicant does not have a matching MCI ID in CARES.						
Strebe, Cheryl	xxx-xx-1022	Rounds, Joyce	12/15/2016	03/14/2016	01 Initial screen	Failure
Failure Reason(s): 001 - Applicant does not have a matching MCI ID in CARES.						
Vpdtwo, Bostudenttwo	xxx-xx-6896	Zalucki, Michael		07/28/2021	01 Initial screen	Pending
Total Applicants: 3						

Helpful Hints:

- Transfer Results: Shows status of screen transfer to CARES.
 - Success: Results transferred to CARES.
 - Pending: Transfer to CARES is pending and should occur 10 days after date that the screen was calculated.
 - Failure: Results did not transfer to CARES. If transfer results indicate “Failure”, Failure Reason(s) will provide information regarding cause of the failure.
- Batch Run Date: Shows date that screen was scheduled to be transferred to CARES.
- Follow your agency guidelines regarding LOC transfers to CARES.
- Not all failure codes are related to the LTCFS. Failure codes may be related to a problem in a CARES record.

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.