

Wisconsin Functional Screen Information System

Adult Long-Term Care Functional Screen

Screen Liaison Toolkit

Issue Date: September 15, 2025

Topic: Screener Training and Mentorship at the Agency Level

Purpose: This document provides an overview of recommended quality assurance and oversight activities screen liaisons should complete with screeners who administer the Adult Long-Term Care Functional Screen (LTCFS). The Wisconsin Department of Health Services (DHS) requires screen liaisons to use the technical assistance in this document in conjunction with language in DHS contracts, guidelines, and instructions to screening agencies. Find additional information about training and in the [Role of the Adult Long-Term Care Functional Screen Liaison, P-02783](#) and [Basic Information for Screeners, P-01604](#) documents. Nothing in this document supersedes or replaces existing contracts, guidelines, or instructions.

Definitions: Find definitions in the [Screen Liaison Toolkit Definitions, P-02783d](#) document.

Oversight when onboarding screeners

The liaison or their designee should meet with all new screeners to complete the following activities before they become an independent screener:

- Help uncertified screeners sign up for the certification course.
 - Use the [registration instructions](#).
 - Provide the screener with the Agency ID. If the liaison does not know the Agency ID, contact DHSLTCFSTeam@dhs.wisconsin.gov.
 - **Note:** If the new staff member is already certified, they should update their contact information in the [UW-Oshkosh Learning Center](#).
- Help new screeners get access to Functional Screen Information Access (FSIA).
 - Use the [Adding Access for the LTCFS in FSIA, P-02783a \(PDF\)](#) instructions.
 - **Note:** If the new staff member was previously a certified screener, they should also update their contact information in FSIA.
- Instruct screeners to [sign up for the Adult Long-Term Care Functional Screen email list](#).
- Review and provide links to the following screening resources:
 - [LTCFS Instructions](#)
 - [FSIA](#)
 - [Diagnoses Cue Sheet, P-00814 \(Excel\)](#)
 - [Functional Screen website](#)
 - [Basic Information for Screeners, P-01604 \(PDF\)](#)
 - [Continuing Skills Test \(CST\)/Adult LTCFS Trainings](#)
 - [LTCFS Fillable Form, F-00366 \(Word\)](#)

- [Glossary of Acronyms, P-01010 \(PDF\)](#)
- Any other LTCFS documents provided by DHS that are not posted on the CST/Adult LTCFS Trainings page.
- Any agency-specific LTCFS documents or resources.
- Review the screener's role and expectations. Some examples of topics to discuss may include:
 - Activities that will occur during and following onboarding.
 - When to contact the agency liaison for assistance. For example, reviewing unexpected outcomes.
 - DHS contract requirements and agency screening policies regarding the LTCFS. For example:
 - ◆ Policies about when to complete and calculate screens.
 - ◆ Release of information requirements.
 - ◆ In-person visit requirements.
 - ◆ Participation in quality reviews and trainings.
 - ◆ Expectations regarding the screen instructions and staying up to date when changes occur.
- Complete in-person observation visits with the screener.
 - Screeners should have the opportunity to observe the liaison or experienced screener(s) complete in-person interviews and enter screens, as well as have the opportunity to be observed.
 - It may be helpful to have the screener complete the [LTCFS Fillable Form, F-00366 \(Word\)](#) during these visits and compare their findings with the experienced screener following the visit.
 - When feasible, complete visits for individuals who have different target groups.
 - The number of visits may vary. Some screeners may require additional supervision depending on their individual training needs.
- Provide an overview of how to navigate and enter a screen in FSIA. This may be done while completing screen entry following observation visits or during separate meetings. The liaison should tell the screener they can find information about navigating FSIA in [Basic Information for Screeners, P-01604 \(PDF\)](#). Information that may be helpful to review includes:
 - How to find an individual in FSIA.
 - How to create an applicant if the individual is not in FSIA for screeners who are employed at an aging and disability resource center (ADRC) or as a Tribal aging and disability resource specialist (ADRS).
 - When to choose the Initial vs Rescreen vs Edit buttons.
 - Navigation buttons used to enter and calculate screens.
 - How to generate screen reports and what types of reports are available, if applicable.
 - How to determine if a screen is open or complete.
 - How and when to transfer and archive screens.
 - Expectations for entering notes.
 - Demonstrate using [LTCFS Instructions](#) and [Diagnoses Cue Sheet, P-00814 \(Excel\)](#).

- o Demonstrate how to generate a screen report before calculating a screen and encourage reviewing for accuracy before calculation.
- o Information found on the Functional Eligibility Results page and how to determine if there is an unexpected outcome.
- o When to use the Transfer to CARES button.
- o Who to contact if there are technical problems.

Following completion of the activities described above, screeners may begin to conduct interviews and enter screens independently.

- Screen liaisons or their designee should review screens that the screener has entered, preferably before calculation, and discuss outcomes of the reviews with the screener as needed. Screens should be reviewed for accuracy, timeliness, and completeness.
- The number of screens reviewed is at the discretion of the liaison or their designee. Some screeners may require additional supervision depending on their individual training needs and whether there are quality concerns.

Note: If the newly hired staff person is an experienced functional screener, the training plan may be modified as appropriate.

Ongoing oversight for screeners

All screeners are required to participate in ongoing monitoring. Some examples of activities the liaison should do with screeners include:

- Consulting with screeners on an as-needed basis, such as:
 - o Explaining how to properly complete the LTCFS.
 - o Explaining how to interpret instructions or any related tools.
 - o Helping with questions needing DHS consult, such as diagnosis coding, IQ scores, and unexpected outcomes.
- Reviewing technical assistance documents, trainings, quizzes, LTCFS instruction changes, or other updates from DHS.
- Overseeing continuing skills testing preparation and any required remediation following the exam.
- At least once per year, review a random sample of completed screens for each screener to determine whether they are accurate, complete, timely, and the results are reasonable in relation to the person's condition. The random sample may be determined by the screen liaison or their designee. The liaison or their designee should discuss outcomes of the reviews with the screener as needed.
- Discussing and resolving any screening problems that are identified as a result of continued skills testing or trends identified at the agency as a result of audits completed internally or by DHS.

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