



Intake Call and After Inquiry Guidance Sheet

This document guides intake workers through intake calls for the Children’s Long-Term Support (CLTS) Program, Children’s Community Options Program (CCOP), and Katie Beckett Medicaid. This guidance is meant to create uniformity in how families experience their initial contact with counties across the state.

Intake Call	
Guiding principles for conversations with families seeking services	<ul style="list-style-type: none"> • Engagement—Listen while the family shares their concerns or challenges. Families are the experts in the child’s and their own life. • Acknowledgement—Acknowledge each family’s unique experience and validate any challenges in navigating systems. • Affirmation—Affirm for the family they are taking a positive step by reaching out and learning about what supports are available. • Cultural Awareness—Be mindful of different cultures and traditions, as well as experiences with health care inequity. • Gratitude—Thank the family for their time whether they continue the eligibility process or not.
Call structure	<ul style="list-style-type: none"> • Gather information from the caller to help you understand the reason for calling. Use open ended questions such as: <ul style="list-style-type: none"> ○ “Tell me about your child.” ○ “What led you to contact us?” ○ “Where did you learn about us?” ○ “Are you familiar with any of our services?” ○ “Has your child (or other family members) applied for services before?” • Provide an explanation of services (Refer to the Medicaid and Children’s Services Program Benefits Overview, P-02996, at www.dhs.wisconsin.gov/library/p-02996.htm for more detail about programs). <ul style="list-style-type: none"> ○ CLTS and CCOP cover services and supports, but differ from Medicaid in that they: <ul style="list-style-type: none"> ▪ Are based on the child’s income, not the parents’. ▪ Require a functional eligibility determination. ▪ Provide home and community-based benefits not otherwise covered by Medicaid. ○ Katie Beckett Medicaid is a form of Medicaid for children with exceptional needs that differs from other Medicaid in that: <ul style="list-style-type: none"> ▪ It is based on the child’s income, not the parents’. ▪ It does not include additional costs such as co-pays. ▪ It requires functional eligibility and a disability determination. ▪ It does not require a health management organization (HMO). • Provide an explanation of the Functional Screen/screen visit (refer to the Children’s Programs Eligibility and Functional Screen document, P-03061, at



	<p>www.dhs.wisconsin.gov/library/p-03061.htm for more detail about functional eligibility and the screen visit).</p> <ul style="list-style-type: none"> ○ It takes about an hour and a half. ○ The screen questions cover everything from the child’s daily routine to diagnoses to services used. ○ The screen determines functional eligibility for programs; the guardians can choose which ones to apply for later. ● Inform the family of other information reviewed during the screen visit. <ul style="list-style-type: none"> ○ Verification of the child’s identity ○ List of diagnoses and medications ○ List of providers
<p>Preparing the family for the screen visit</p>	<ul style="list-style-type: none"> ● Set up preferred form of communication with family. ● Inform the family they will receive a letter confirming their functional screen visit and encourage them to review the enclosures: <ul style="list-style-type: none"> ○ Children’s Programs Eligibility and Functional Screen document, P-03061 (www.dhs.wisconsin.gov/library/p-03061.htm) ○ Medicaid and Children’s Services Program Benefits Overview, P-02996 (www.dhs.wisconsin.gov/library/p-02996.htm) ● Give a brief overview of the types of questions screeners might ask the family. <ul style="list-style-type: none"> ○ The screener will ask about the child’s unique needs, daily routines, and services used.
<p>After Inquiry</p>	
<p>Communication</p>	<ul style="list-style-type: none"> ● Send the appropriate letter based on whether the family scheduled a home visit or not, following the family’s preferred method of communication, and with the following enclosures: <ul style="list-style-type: none"> ○ Children’s Programs Eligibility and Functional Screen document, P-03061 (www.dhs.wisconsin.gov/library/p-03061.htm) ○ Medicaid and Children’s Services Program Benefits Overview, P-02996 (www.dhs.wisconsin.gov/library/p-02996.htm) ○ Any other resources discussed or that may be helpful, including but not limited to materials about FoodShare, child care, Social Security disability benefits, and local resources or programs.
<p>Preparing yourself for the screen visit</p>	<ul style="list-style-type: none"> ● Review any old screens in Functional Screen Information Access (FSIA) system. ● Review information pertaining to the child’s diagnoses. ● Review resources on the DHS Wisconsin Functional Screen page (www.dhs.wisconsin.gov/functionalscreen/index.htm) under “Resources for Children’s Long-Term Support (CLTS) Screeners.” <ul style="list-style-type: none"> ○ CLTS FS Clinical Instructions (www.dhs.wisconsin.gov/functionalscreen/cltsfs/instructions.htm) ○ Diagnosis Cue Sheet, P-00920 (www.dhs.wisconsin.gov/publications/p00920.pdf) ○ Paper Form, F-00367 (www.dhs.wisconsin.gov/forms/f0/f00367.pdf)