

## **Roles and Responsibilities of the Adult Functional Screen Liaisons**

This document describes how the ADRC of Eagle Country will meet the requirements set forth in Technical Assistance Document: Vol.8 Issue 4, The Adult LTC Functional Screen Liaison which outlines the duties and responsibilities of the Regional Functional Screen Liaison, Back-up Regional Functional Screen Liaison Regional Manager; Office Managers; and Local Office Functional Screen Liaisons.

### **Definitions:**

- **FSIA**: Functional Screen Information Application, the web-based computer application that screeners use to calculate and store functional screens.
- **View-only access**: An individual who is authorized to view individual LTCFS, but who may not enter, edit, update or calculate the LTCFS. Certification is not required for this access.
- **Screen transfer access**: Access to FSIA that is allowed for agency administrative or support staff whose sole function is to transfer screens to other screening agencies. This access does not require certification.
- **Regional Screen Liaison**: An Information and Assistance Specialist, certified screener, authorized and recognized by the ADRC of Eagle Country to perform duties and responsibilities described in this document.
- **Back-up Regional Screen Liaison**: Office Manager or I & A Specialist, certified screener, authorized and recognized by the ADRC of Eagle Country to perform duties and responsibilities described in this document in the absence or in support of the Regional Screen Liaison.
- **Screen Liaisons**: Each office will have an assigned Information and Assistance Specialist, certified screener, to perform the duties and responsibilities described in this document.
- **Screener**: Information & Assistance Staff, certified screeners, in each office.
- **Official DHS Functional Screen Website**:  
[www.dhs.wisconsin.gov/lcicare/functionalscreen](http://www.dhs.wisconsin.gov/lcicare/functionalscreen)

### **Education and Experience Requirement for Regional Functional Screen Liaison**

Liaisons must meet the qualifications specified by DHS for those performing functional screens. They must hold DHS certification to perform screening. Individuals who fail LTCFS continuing skills testing or inter-rater reliability testing required by DHS may not serve in the liaison role. Liaisons must understand 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.

### **ADRC of Eagle Country Duties and Responsibilities of the Regional Screen Liaison, Screen Liaisons, Regional Manager, Office Manager,**

### **Access to FSIA for Agency**

1. Act as functional screen security officer for agency by performing or overseeing the delegated support office staff person who performs duties 3-6, immediately below: Screen Liaisons
2. Insure all screen users have appropriate training in confidentiality of personally identifiable records: Office Managers
3. Insure all screen users have appropriate training in use of the FSIA: Screen Liaisons
4. Maintain up-to-date listing of all individuals with FSIA access, by type of access, at the agency: Screen Liaisons
5. Maintain up-to-date information about the agency and each screener in the FSIA: Screen Liaisons
6. Change or eliminate screener access to FSIA based on the status of the agency and each individual screener. FSIA must be updated within three business days of any change. If the screener's employment is terminated, FSIA must be updated within one business day of the termination date Screen Liaisons

#### **Oversight of Screener Qualifications**

1. Insure that each screener meets the screener qualifications specified in contracts between DHS and the agency: Office Managers
2. Insure that each screener performs LTCFS continuing skills testing or inter-rater reliability testing required by DHS-Office Managers/ Screen Liaisons
3. With agency administration or management, develop, monitor, participate in and report on plans of correction for screeners who fail continuing skills testing or inter-rater reliability testing required by DHS: Regional Manager and Office Managers
4. In conjunction with DHS, proctor individual screener testing, when offered by DHS. Office Managers

#### **Oversight of Screening Activity**

1. Oversee all aspects of screening and use of FSIA by agency staff. This includes initial and ongoing training, mentoring, review of screens performed by screeners, performing ongoing quality improvement and quality assurance activities: ADRC of Eagle Country Policy 31-02; 31-03; 31-03a; 31-03b; 31-03c; 31-04;31-05 Screen Liaisons
2. Bring to the attention of the screener's supervisor any performance issues needing to be addressed through follow up or quality improvement activities. Screen Liaisons and Regional Screen Liaison

#### **Communication Activity**

1. Serve as conduit to and from DHS staff for agency screeners when technical assistance or consultation is needed. Regional Screen Liaison and Back-up Regional Screen Liaison

All technical assistance (TA) will be first directed to Screen Liaisons. When additional technical assistance is required, the Screen Liaison or the Screener will contact the Regional Screen Liaison for technical assistance. If contacting the Regional Screen Liaison by email, provide MCI #, customer's initials and DOB and the question to be answered or area of the screen to review. The Regional Screen Liaison will respond to TA assistance requested within 24 hours or by the end of the next business day. Staff will include the Back-up Regional Screen Liaison in all correspondence. The Back-up Regional Screen Liaison will provide support as needed to the Regional Screen Liaison to ensure this timeline is met. If further TA is required, the Screen Liaisons and the Regional Screen Liaison will decide who will contact ORCD based on the complexity of the situation. They will discuss how to keep the Regional Screen Liaison informed of the TA such as CC in e-mails or joint conference calls.

**Kim Schindler, ORCD, Quality Assurance Specialist (608) 266-1348 ;  
[Kimberly.Schindler@wisconsin.gov](mailto:Kimberly.Schindler@wisconsin.gov) .**

The Regional Screen Liaison will disseminate TA and quizzes out to the region as appropriate to enhance the quality of screens throughout the region. Regional Screen Liaison will maintain all TA documents and correspondence with DHS in an organized fashion such that information can be passed on to another Screener when positions/roles change in the region.

2. Provide written response to findings of DHS LTCFS Quality Reviews:  
Regional Screen Liaison
3. Insure that all screeners and agency staff who utilize the FSIA and LTCFS are individually receiving LTCFS Adult Screen Listserv messages from DHS and know how to access the listserv archive. Screen Liaisons
4. Insure that all screeners and agency staff who utilize the FSIA and LTCFS receive copies of technical assistance or other information bulletins from DHS.  
Screen Liaisons or Regional Screen Liaison if TA only sent to her/him
5. Participate in DHS Screen Consultation Workgroup, as requested:  
Regional Screen Liaison
6. Utilize bi-monthly screener quizzes provided by DHS as education tools for agency screeners. Each office will review quizzes and discuss between I & A for learning opportunities. State quizzes will be a standing agenda item at quarterly regional I & A meetings. The Regional Screen Liaison will lead the regional I & A team in discussion going through the most recent quiz.

Screen Liaisons/Regional Manager

7. Insure that all agency screeners are aware of the internet address and contents of the DHS website for the LTCFS Screen Liaisons

DHS Contact: Kathleen Luedtke Telephone: 608-264-9868  
[Kathleen.Luedtke@dhs.wisconsin.gov](mailto:Kathleen.Luedtke@dhs.wisconsin.gov)

**Forms Used in Functional Screen Activities**

- 31-01-a Functional Screen Quality Policy
- 31-01-b Addendum: ADRC of Eagle Country Contracts
- 31-02-a Functional Screen Training Plan and Checklist for New Screeners
- 31-02-b Functional Screen (LTC FS) Clinical Certification Course
- 31-02-c Functional Screen Training/Mentoring for Experienced Staff
- 31-03-a Functional Screen Quality Reviewer's Guide.doc
- 31-03-b Functional Screen Quality Review Form
- 31-03-c Functional Screen Quarterly Quality Assurance
- 31-04 Notice of Eligibility for Long Term Care Programs
- 31-05 Notice of Complaint/ Appeal Process
- 31-06 Complaint Form

History: New policy/procedure approved by Joint Regional Management Team 6/12/09. Approved by North Governing Board 7/31/09. Updates to policy/procedure made on 9/13/2011 approved by North Governing Board on 11/4/2011. 10/2012 ADRC Name Change: ADRC of Eagle Country  
Removed local office in name 1/2014  
11/30/2017 Added position of back-up screen liaison and role

Annual Review Dates:

Reviewed & revised by Functional Screen Quality Function team on October 11, 2010 approved and is ready to send to the Joint Management Team. Reviewed and updated by Function Screen Quality Function Team 6/13/2011 and 9/13/11. Joint Management Team reviewed and approved 9/13/11 updates.