

FUNCTIONAL SCREEN TRAINING PLAN and CHECKLIST **FOR NEW SCREENERS**

- 1) Formal Training Activities for Newly Hired I&A Specialists.
 - a) Receive and review paper copies of the most recent LTCFS instructions and Functional Screen form, cue sheet, decision trees and instructions, and other pertinent material.
www.dhs.wisconsin.gov/lcicare/functionalscreen
 - b) Receive the “Preview Log-in Instructions & FAQ” document. Review information and use it to thoroughly work through the preview or practice area for the LTC Functional Screen Clinical Certification course.
 - c) Upon completion of preparatory activities, receive the “LTC FS Screener Certification Course” Access Packet, and use it to access, take and pass the on-line certification course.
<https://wss.ccdet.uwosh.edu/stc/dhsfunctscreen>
 - d) Once Certification is received, work with the Local Office Screen Liaison to obtain a Wisconsin Log-on ID and LTCFS Security Clearance.
 - e) Receive and review any current FAQ documents related to the Functional Screen.

Note: If a new I & A has been a screener in the past contact the Regional Screen Liaison to arrange for testing. The LTC FS Screen Certification Course is only used the 1st time a screener tests.

- 2) Mentoring Activities for Newly Hired I&A Specialists:
 - a) On at least two occasions, accompany and observe an experienced Screener complete a LTCFS.
 - b) On at least three additional occasions, accompany an experienced Screener to a LTCFS interview. While the experienced Screener conducts the interview and completes the screen, listen to the exchange and complete a separate screen. Upon return to the office, meet with the Screener and the Screen Liaison to review and compare the two screens; discuss and resolve any differences in the way the two screens were completed; and discuss any other related questions.
 - c) On at least three additional occasions, accompany an experienced Screener to a LTCFS interview. Conduct the interview and complete the screen. The experienced Screener will observe and will complete a separate screen. Upon return to the office, meet with the Screener and the Screen Liaison to review and compare the two screens; discuss and resolve any differences in the way the two screens were completed; and discuss any other related questions.
 - d) Obtain instruction from the Screen Liaison or an experienced Screener on procedures for:
 - obtaining verification of diagnosis and health-related services;
 - getting a completed screen input on the LTCFS website;
 - making changes/corrections on a Functional Screen; and other related procedures.
 - e) On an ongoing as-needed basis, consult with the Screen Liaison regarding any questions related to how to properly complete the Functional Screen, interpret directions, use the related tools, etc.

3) Monitoring Activities for Newly Hired I&A Specialists

- a) Following completion of training and mentoring activities described in 1) and 2) above, begin to conduct interviews and complete Functional Screens independently. Submit the first three Functional Screens that are completed independently to the Screen Liaison for quality review, prior to inputting the screen.
- b) Following quality review by the Screen Liaison, meet to discuss.
- c) If instructed to do so, submit additional screens for quality review.
- d) Once the screen quality has reached an acceptable level, continue to participate in periodic screen quality reviews along with the rest of the experienced staff.

4) Procedures in Completing Screens

- a) Screeners are to consult with their Screen Liaison when there are questions related to how to properly complete the Functional Screen, interpret directions, or use related tools. This includes consulting on cases where there are unexpected results, where the Screener is finding it difficult to complete the screen on an individual, or where the Screener needs assistance to interpret and apply the Functional Screen directions or related tools and supporting documents.
- b) The Screener will initiate and, when possible, complete the LTCFS within 14 working days of the time the consumer requested or accepted the offer of a screen.
- c) In order to verify the accuracy of diagnosis and the need for health-related services Screeners will, as appropriate, consult with an R.N., use available reference materials, contact the individual's doctor, review facility health and medical records, and/or contact schools, the Social Security office, or other agencies.
- d) Prior to contacting a doctor, hospital, clinic or other organization or facility to obtain confidential health and medical information, Screeners must obtain written authorization from the individual using the satellite office's official form and procedure for release of confidential information.
- e) When LTCFS results show a consumer to be either functionally ineligible, or eligible at the non-nursing home level of care, the ADRC Screener will send a standard notification letter and notice of appeal rights to the consumer within two working days, using the appropriate "*Notice About Your Application*" and enclosing the "*Notice of Complaint and Appeal/Grievance Process.*"

FUNCTIONAL SCREEN TRAINING CHECKLIST FOR NEW SCREENERS

Functional Screen Formal Training Activities:

- _____ Receive and discuss the Functional Screen Quality policy
- _____ Obtain and *review* current versions of the LTCFS form, directions, decision trees, etc.
- _____ Review the “*Preview Log-in Instructions & FAQ*” and access preview/practice area
- _____ Receive instructions for accessing the Clinical Certification Course. Take and pass the online Functional Screen Training Course. **Provide two copies of course certificate of completion to your manager**
- _____ Obtain a Wisconsin Log-on ID and LTCFS Security Clearance
- _____ Obtain website address for LTCFS. Review any current Q&A documents online

Functional Screen Mentoring Activities:

- _____ Accompany and observe an experienced Screener complete a LTCFS #1
- _____ Accompany and observe an experienced Screener complete a LTCFS #2
- _____ Accompany as experienced Screener conducts FS interview. Complete shadow screen #1
- _____ Meet with Screener and Screen Liaison to review and compare for shadow screen #1
- _____ Accompany as experienced Screener conducts FS interview. Complete shadow screen #2
- _____ Meet with Screener and Screen Liaison to review and compare for shadow screen #2
- _____ Accompany as experienced Screener conducts FS interview. Complete shadow screen #3
- _____ Meet with Screener and Screen Liaison to review and compare for shadow screen #3
- _____ Conduct interview and complete FS #1. Experienced Screener will shadow screen
- _____ Meet with Screener and Screen Liaison to review and compare #1
- _____ Conduct interview and complete FS #2. Experienced Screener will shadow screen
- _____ Meet with Screener and Screen Liaison to review and compare #2
- _____ Conduct interview and complete FS #3. Experienced Screener will shadow screen
- _____ Meet with Screener and Screen Liaison to review and compare #3

- _____ Complete Screen independently. Submit to Screen Liaison for review #1
- _____ Complete Screen independently. Submit to Screen Liaison for review #2
- _____ Complete Screen independently. Submit to Screen Liaison for review #3