



Health and Human Services

Operational Policy Title: Long-Term Care Functional Screen (LTCFS) Quality

Division: Aging & Disability Resource Center (ADRC)

Effective Date: 8/1/08

State Approval Date:

Updated: 10/10/18

I. Purpose:

It is the policy of the ADRC of St. Croix County to use the following procedures to ensure that quality functional screens are performed by ADRC staff.

II. Procedure:

A. The Information and Assistance Specialist position employment requirements:

1. Either a Bachelor's degree from an accredited college or university with a major in a social work, sociology, human services-related field, or other closely related field or be a Registered Nurse in Wisconsin, pursuant to Wis. Stats. §441.06.
2. Certified to administer the LTCFS.
3. One year of experience with administering the LTCFS.
4. One year of paid full-time experience working directly with elders, adults with disabilities, and adults with mental illness or substance use disorders.
5. Two years of previous supervisory experience.
6. Functions as a Lead Worker in regard to managed care functional eligibility determination processes:
 - a. Attends Lead Screen meetings with state staff and acts as a liaison between state and local staff in regard to the functional screen used to determine functional eligibility for publicly funded long-term care.
 - b. Plans and implements quality assurance activities related to the long-term care functional screen.

- c. Trains and mentors new staff who must be certified to complete functional assessments.
- d. Provides guidance to other staff when questions arise regarding the eligibility determination process.

B. The Options Counselor positions employment requirements:

1. Either a Bachelor's degree from an accredited college or university with a major in social work, sociology, human services-related field, or other closely related field or a Registered Nurse in Wisconsin, pursuant to Wis. Stats §441.06.
2. Must obtain certification for administering LTCFS within one month of hire and maintain certification thereafter.
3. One year of paid, full-time experience working directly with elders, adults with disabilities, and adults with mental illness or substance use disorders.
4. ADRC staff will attend LTCFS training offered by DHFS.
5. Resources and tools available on the Wisconsin Functional Screen Website will be used for ongoing training.

C. Information and Assistance (I&A) contacts will be documented and tracked through SAMS-IR. The documentation will assist in determining if follow-up contacts are needed. The AIRS Standards for Professional Information and Referral will be used as a foundation for providing follow-up contacts.

D. Prior to administering functional screens, a SWRC will take the Inter-Rater Reliability Test (IRRT). A screener's overall score must be greater than 75%. If the score is 75% or below, the SWRC must complete all corrective categorical tests.

E. The ADRC Lead Screen Social Worker will discuss correct LTCFS responses at a staff meeting so that everyone feels comfortable with the rationale behind those responses.

F. The ADRC Lead Screen Social Worker will review the written clinical instructions for problem areas and review those with staff individually and at staff meetings.

G. When assigned by the ADRC Administrator, SWRCs will attend Advanced Screen Training sessions offered periodically by State staff.

H. Resources and tools available on the Wisconsin Functional Screen Website will be used for ongoing training for SWRCs.

Approved by:

Fred Johnson, HHS Director

Date

Brad Beckman, ADRC Administrator

Date

Revised: April 13, 2018