

# **Preadmission Screening Resident Review (PASRR) Training for Nursing Facilities**

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# Learning Objectives

- Understand the history and regulatory requirements of PASRR.
- Recognize the purpose and importance of PASRR.
- Recognize roles and responsibilities regarding PASRR.
- Learn the component parts of the Level I PASRR process.
- Review Level I PASRR completion.
- Understand Level II PASRR and referral process.

# PASRR Acronym Breakdown

- **PAS:** Preadmission Screening
- **R:** Resident
- **R:** Review

# PASRR History and Regulations

- Screening tool used to identify individuals who may have a serious mental illness or intellectual disability.
- Part of the Omnibus Budget Reconciliation Act of 1987 which introduced a comprehensive set of regulations to elevate the quality of care and life for residents in long-term care facilities which receive Medicare or Medicaid funding.
- Act included preadmission screening and annual resident reviews to prevent the inappropriate placement of mentally ill individuals into nursing homes.
- Governs the state's responsibility for PASRR of individuals with mental illness, intellectual disability or a related condition.

# PASRR History and Regulations *(cont.)*

- Federal regulations (42 CFR §483.100 – 138) require that all individuals applying for or residing in a Medicaid-certified nursing facility be screened to determine whether they:
  - Have serious mental illness or an intellectual disability or related condition; and if so,
  - Require the level of services provided by a nursing facility; and if so
  - Require specialized services beyond what the nursing facility may provide.

# Four Purposes of PASRR

- To prevent the inappropriate placement of individuals with a serious mental illness or intellectual or related disability in nursing facilities.
- To ensure individuals are evaluated for evidence of possible serious mental illness, intellectual disability or a related condition.
- To determine the individual requires the level of services that can be provided by a nursing facility.
- To determine whether the individual requires specialized services for the mental illness, intellectual disability or related condition wherever they are placed.

# Two Levels of PASRR

- **Level I PASRR**

- Identifies all individuals who are suspected of having mental illness, intellectual disability or a related disability, such as Down syndrome, prior to admission to the nursing facility.
- **Screening tool** used to determine if further action is needed.

- **Level II PASRR**

- Further assesses those who are identified or suspected of having a serious mental illness, intellectual disability or related disability and may be a danger to themselves or others as found in the Level I screening.

# PASRR: Who Needs One?

# Who Needs a Level I PASRR?

- All individuals who apply to or reside in a Title XIX certified nursing facility (facility that accepts Medicaid) regardless of the payment source for the nursing facility services AND regardless of the individual's known diagnosis.
- Anyone who is being admitted to a nursing facility that accepts Medicaid **MUST** have a PASRR.
- All existing nursing facility residents who have a significant change.

# Who Needs a Level I PASRR? *(cont.)*

- Prior to readmission from a hospital for inpatient treatment of a psychiatric condition, if the applicant has exceeded the 10-day bed hold.
- All out-of-state transfers.
- Respite care admissions to a nursing facility for up to fourteen days or less.
  - Respite care admissions to a hospital are not subject to a Level I screening.

# When is a PASRR Not Required?

- Interfacility transfers, from one Medicaid nursing facility to another Medicaid nursing facility, are NOT considered new admissions and are not subject to Level I screening.
  - The transferring nursing facility is responsible for sending all PASRR information to the receiving facility.
- Admissions to facilities that are not certified for Medicaid participation.
- Intra-facility conversions from one pay source to another

# When is a PASRR Not Required? *(cont.)*

- Readmission to a Medicaid-certified nursing facility from a hospital, including hospitalization for an inpatient psychiatric care if within the 10-day bed hold
- Patients admitted to a nursing facility from a hospital for acute inpatient treatment of the same condition for which they were hospitalized
  - Stay must be anticipated to be less than 30 days as certified by a physician
- Swing bed or administrative day admissions

# **PASRR Roles and Responsibilities: Community Long Term Care (CLTC)**

# CLTC Responsibilities for Level II PASRR

- Once the electronic referral is received in the area office
  - Nurse reviews the Level I PASRR for accuracy and completeness and determines the appropriateness for the Level II PASRR
  - Makes a face-to-face visit to gather necessary documents
  - If appropriate, sends the information to the state authority (Office of Intellectual and Developmental Disabilities or Office of Mental Health) for determination.
- Once the state authority returns the determination, CLTC will immediately share the decision with the hospital or nursing facility.

# CLTC Responsibilities for Level II PASRR *(cont.)*

- CLTC shall designate a contact person(s) in each area office to serve as the liaison with the nursing facility or hospital.
- Each nursing facility or hospital should have a CLTC nurse assigned.
- CLTC provides all necessary training and technical assistance to nursing facility staff concerning PASRR guidelines, policies and procedures.
- CLTC will maintain a log of trainees for reference.

# **PASRR Responsibilities: Nursing Facilities**

# Nursing Home Responsibilities

- Designate a contact person to work with the CLTC area office.
  - If the nursing facility designated contact person changes, the nursing facility shall notify the CLTC area office administrator or designee.
- Abide by the policies and procedures as outlined in the [Nursing Facilities Provider Manual](#) located in the providers section of the agency website.
- Attend training sessions on the PASRR process, conducted by the South Carolina Department of Health and Human Services (SCDHHS).
- Order all necessary forms required for participation from the appropriate vendor at not charge or duplicating the forms at its own expense.

# Nursing Home Responsibilities *(cont.)*

- Contact your CLTC representative with questions concerning residents who you suspect may require a Level II PASRR.
- If there is a significant change the nursing facility should **first, complete a Level I PASRR** to reflect the change.
- **Next** complete an **electronic referral to SCDHHS Centralized Intake** (<https://phoenix.scdhhs.gov/eref/>) for “Nursing Home Placement” and enter “Level II PASRR Only” in the comment section **and** upload the Level I PASRR screening.
- Retain the original PASRR Level I form in the facility upon the patient’s admission.

# Nursing Home Responsibilities *(cont.)*

- Batch and forward copies of all Level I screenings completed by the nursing facility to the CLTC area office weekly for review.
- Make certain the Level I PASRR and certification letter are reviewed and in hand for those entering the facility under the Medicaid pay source prior to accepting them as a new resident.
- Understand sanctions which can be imposed by the Centers for Medicare and Medicaid Services for noncompliance to PASRR requirements.
- Ensure all **non-Medicaid** patients who are seeking admission to a Title XIX certified nursing facility will be screened in accordance with the policies and procedures outlined in the Nursing Facilities Provider Manual.

# Significant Change

- Per 1919(e)(7)(B)(iii) of the Social Security Act, resident reviews are required for nursing facility residents experiencing a “significant change in condition.”
  - This provision replaced the requirement that PASRR resident reviews must be performed annually.
- A significant change in condition is outlined as:
  - A resident who exhibits behavioral, psychiatric or mood-related symptoms suggesting the presence of a diagnosis of mental illness as defined in the CFR at 42 CFR 483.102(b)(1) (where dementia is not the primary diagnosis)
  - A resident whose intellectual disability, as defined under 42 CFR 483.102(b)(3) or whose related condition as defined under 42 CFR 435.1010 “Persons with related conditions,” was not previously identified and evaluated through PASRR

# Significant Change *(cont.)*

- Significant change is a major decline or improvement in a resident's status that:
  - Will not normally resolve itself without intervention by staff or by implementing standard disease-related clinical interventions, the decline is not considered “self-limiting;”
  - Impacts more than one area of the resident's health status; and
  - Requires interdisciplinary review and/or revision of the care plan.

# Questions?

# Level I PASRR Form Updates

# PASRR Form Enhancements and Updates

- Completely revamped in 2025
- Includes more detailed sections and questions regarding mental illness and intellectual disability
- Significant Change and Dementia section added
- More probing questions regarding mental health treatments and history
- More detailed recommendations and explanations
- Added detailed questions regarding the screener's information

# Components of the Level I PASRR

- Identifies mental illness diagnosis and indicators such as:
  - Behaviors
  - Hospitalizations
  - Mental health treatments (past and current)
- Intellectual disability or related disability
- Dementia diagnosis
- Recommendation
- Advanced categorical determination

# Level II PASRR

- 483.102(a): Level II PASRR evaluation must be completed for all such applicants in a community or hospital setting who:
  - Meet nursing facility level of care requirements; and,
  - Have been identified as having suspected mental illness and/or intellectual disability by the Level I preadmission screening process.
- Level II PASRR evaluations must also be **referred** and/or conducted on nursing facility residents with mental illness and/or intellectual disability:
  - Any time there is a significant change in condition (Section 1919(e)(7)(B)(iii) of the Social Security Act);
  - A significant change may require referral for a Level II PASRR evaluation if a mental illness, intellectual disability or related condition is present or is suspected to be present; or,
  - When the timeline for exempted hospital discharge or categorical determinations conclude.

# Level II PASRR *(cont.)*

- The Level I PASRR determines the need for the Level II PASRR.

# PASRR Form Review

# Section One: Mental Illness

- Additional diagnosis to include post-traumatic stress disorder, substance abuse, delusional disorder, dissociative disorder, obsessive compulsive disorder
- Includes detailed descriptions of behaviors
- Includes questions about past, current or ongoing mental health treatments.
- Significant change

## Section Two:

# Intellectual Disability or Related Disability

- Anyone with a diagnosis of intellectual disability or suspected intellectual disability must be referred for Level II PASRR evaluation.
- Those with related disabilities must have at least three or more limitations with major life activities to be referred for Level II PASRR.

# Section Two:

## Intellectual Disability or Related Disability *(cont.)*

- Added examples of related disabilities
  - Autism
  - Cerebral palsy
  - Down syndrome
  - Epilepsy
  - Fetal alcohol syndrome
  - Muscular dystrophy
  - Prader-Willi syndrome
  - Spina bifida
  - Traumatic brain injury
  - Other (must specify)

# Section Two:

## Intellectual Disability or Related Disability *(cont.)*

- Related disability was updated with functional criteria.
  - Likely to continue indefinitely
  - Capacity for independent living
  - Learning
  - Mobility
  - Self-care
  - Self-direction
  - Understanding and use of language
- Contact your CLTC representative for more information.

# Related Disability Example

- If someone with a diagnosis of cerebral palsy is unable to live alone, cannot understand and is unable to complete activities of daily living, then this person should be referred for a Level II PASRR.

# Section Three:

## Other Indications for PASRR Screen Decision Making

- Primary diagnosis of dementia
- Secondary diagnosis of dementia
- Validating documentation to support the diagnosis

# Section Four: Recommendations

- Four options:
  - Proceed to Level II PASRR evaluation based on mental illness indicators.
  - Proceed to Level II PASRR evaluation based on intellectual disability indicators.
  - No further evaluation recommended, but indicators present.
  - No further evaluation recommended.
- Making the correct recommendation is extremely important! Contact your CLTC representative if you are unsure.

# Section Five: Advanced Categorical Determination

- Categorical decisions and exemptions apply to people with Level II conditions to expedite decisions regarding a person's needs when a full Level II PASRR assessment is not necessary or can be delayed.
- **This is reserved for CLTC staff only.**

# Screener's Information

- Updated to include:
  - Screener's credentials
  - Date
  - Phone
  - Facility or place of employment
  - Fax number
  - Email address

# Level I PASRR: Important Facts

- The Level I PASRR is the indicator for the Level II PASRR.
- Documentation of attempted suicide within the last two years and intellectual disability and related disability that has three or more functional limitations are **automatic** referrals for the Level II PASRR.
- CLTC completes all Level II PASRR screenings and sends the information to the proper state authority for determination.

# Frequently Asked Questions

# Is a Level II PASRR Mandatory With a Mental Health Diagnosis as the Primary Reason?

*\* Mental health diagnosis examples include bipolar disorder, schizophrenia and/or schizoaffective disorder.*

- As defined in **42 CFR 483.102**, it is clear the Level I screener would be looking for any indication of the individual meeting the criteria for a serious mental illness as defined at 42 CFR 483.102(b)(1) or an intellectual disability as defined at **42 CFR 483.102(b)(3)**.
- Any approved Level I screener must understand all the qualifying conditions that warrant a positive finding and advancement to the Level II evaluation.
- In addition, the reviewer would be looking for behaviors and possibly hospitalizations related to the diagnosis.
- If someone has a mental health diagnosis but has no behaviors or documented hospitalizations related to the psychiatric diagnosis and is well controlled on medication, there is no indication that the person should advance to the Level II PASRR process.

# Should a Level II PASRR Be Repeated if a Person is Hospitalized and Exceeded Their 10-day Bed Hold?

- If the patient already had a Level II determination for intellectual disability and there have been no changes, then there is not a need to obtain a new one.
- If the patient is hospitalized for a psychiatric condition and exceeded their 10-day bed hold, then a review should take place to determine if there is a need for further review for Level II.

# Is a PASRR Level II Mandatory For a Significant Change?

- The nursing facility should complete the Level I PASRR and consult with CLTC if it is suspected that a PASRR condition exists.
- The nursing facility is required to notify the mental health or intellectual disability authority when there is a significant change in condition that has, or may have, an impact on the PASRR condition.
- The nursing facility must also notify the appropriate authority if a resident who had not been initially identified as having a PASRR condition, is now suspected of having a PASRR condition **(Per 42 CFR 483.20(e)(2))**.

# Is a Level II PASRR Mandatory For Those Released From the Department of Corrections?

- Every applicant, no matter where they come from, to a Medicaid-certified nursing facility is subject to PASRR.
- At a minimum there must be a Level I screening, and, if indicated, a Level II evaluation.

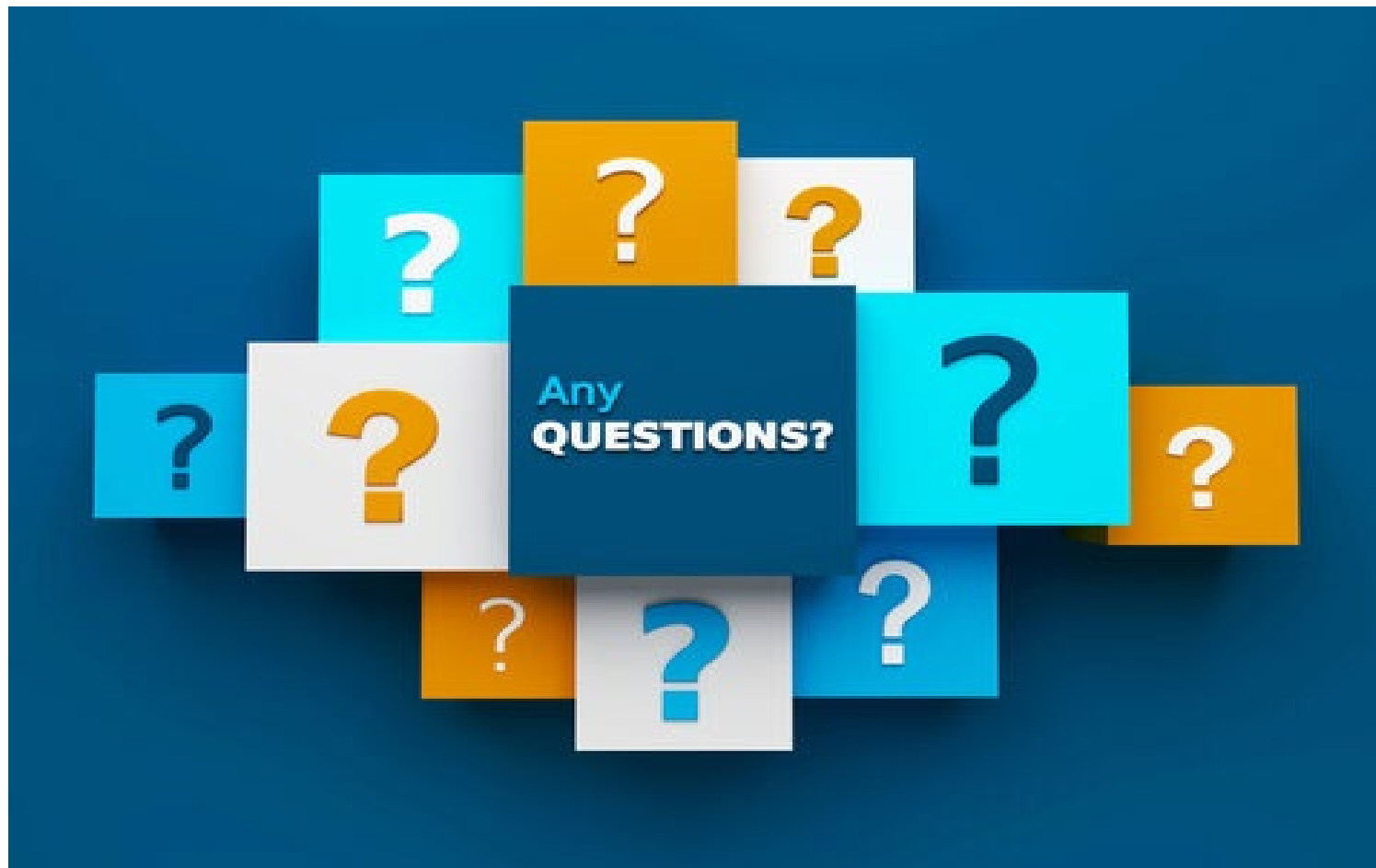
# Does a Diagnosis of Substance Abuse Require a Level II PASRR?

- A diagnosis of substance abuse *alone* is not a qualifying diagnosis for a PASRR condition.
- The CFR requires that the person have a
  - Serious mental illness, per 42 CFR 483.102(b)(1)(i),
  - Intellectual disability, per 42CFR483.102(b)(3) or
  - A related disability, as defined at 42 CFR435.1010.
- A substance abuse diagnosis, accompanied by a suspected or known mental health diagnosis, should advance to the Level II evaluation to determine if the mental health condition meets the criteria at 42 CFR483.102(b)(1)(i)(A).

# Does Having a Diagnosis of Suicidal Ideations Without Any Suicide Attempt Require a Level II PASRR?

- The evaluator should complete a Level II PASRR screening.
- The suicidal ideation may result from a qualifying PASRR mental illness at 42 CFR 483.102(b)(1)(i)(A), such as a schizophrenic, mood, paranoid, panic or other severe anxiety disorder; somatoform disorder; personality disorder; other psychotic disorder; or another mental disorder that may lead to a chronic disability.

# Questions



# Office Contact Information

- Area administrator: \_\_\_\_\_
- Lead team nurse: \_\_\_\_\_
- Office phone: \_\_\_\_\_
- Office fax: \_\_\_\_\_

