



Executive Office of Elder Affairs

RESPECT INDEPENDENCE INCLUSION
Community Transition Liaison
Program (CTLP) Network Training
CTLP PASRR Portal
July 17, 2024

2:00 p.m. – 3:30 p.m.

For ASAP Utilization Only - Do Not Distribute



Agenda (90 minutes)

- Welcome (5 minutes)
- CTLP PASRR Portal Presentation (70 minutes)
 - Pre-Admission Screening & Resident Review (PASRR) Overview
 - PASRR Portal
 - CTLP PASRR Portal Reports
 - PASRR Portal Resources
- Questions (15 min)



Pre-Admission Screening & Resident Review (PASRR) Overview

What is PASRR?

Pre-Admission Screening & Resident Review (PASRR)

- Federal & State Requirement
- Screen completed for all individuals seeking admission to a Medicaid or Medicare certified nursing facility
- Designed to identify evidence of:
 - Serious Mental Illness (SMI)
 - Intellectual or Developmental Disabilities (ID/DD)



Why is PASRR Important?



Prevents individuals from being unnecessarily institutionalized



Identifies individuals with a potential PASRR related disability

- Serious Mental Illness (SMI)
- Intellectual Disability and/or Development Disability (ID/DD)



Ensures NF residents with SMI and/or ID/DD receive appropriate care which may include specialized services



Identifies NF residents with SMI and/or ID/DD whose nursing facility stay is no longer appropriate and who should be discharged to a less restrictive setting in a timely manner

Overview of PASRR Process for NF Admission

Level I screener completes Level I Preadmission Screen for an individual seeking admission to a NF to determine if the individual has, or may have, SMI and/or ID/DD

Level I screener **suspects screened individual has SMI and/or ID/DD (+ Level I)** & refers that individual to the appropriate PASRR authority for a Level II evaluation

Level I screener **does not suspect screened individual has SMI and/or ID/DD (- Level I)**

No further PASRR action required

Level II evaluator confirms whether the individual has SMI and/or ID/DD and, if so, whether the individual requires a NF level of care & specialized services

Nursing Facility Residents are evaluated prior to admission and re-evaluated on an ongoing basis

Potential PASRR Level 1 Outcomes

	If positive (+) for ID/DD...	If negative (-) for ID/DD...
If positive (+) for SMI...	<i>Level I Screener refers to both DMH PASRR & DDS for Level II evaluation</i>	<i>Level I Screener refers to DMH PASRR for level II Evaluation</i>
If negative (-) for SMI...	<i>Level I Screener refers to DDS for Level II evaluation</i>	<i>If negative (-) for both SMI & ID/DD, <u>no</u> further PASRR action required</i>

PASRR Portal

PASRR Portal

PASRR Portal

- Web-based portal released August 28, 2023
- Maintained by MassHealth
- Electronic submission of Level I Forms
- Level II Evaluations Completed by DMH PASRR for individuals suspected to have SMI*
- Utilized by healthcare organization to submit & review PASRR related documents
 - Nursing Facilities
 - Hospitals
 - Aging Services Access Points (ASAPs)
 - DMH PASRR Unit

*Level II Evaluations Completed by DDS for individuals suspected to have ID/DD follow a process outside of the portal



PASRR Portal & CTLP

Limit Access to PASRR Portal

- CTLP Program Manager/Supervisor
- Community Transition Liaison (CTL)
- CTLP Case Assistant

CTLP PASRR Portal Reports

- 2 Available Reports
 - Screening Level 1 Negative and No SMI History
 - Screening Completed Level 2 – No SMI
- Utilize to identify potential residents for CTLP

CTLTP PASRR Portal Report Requirements

Executive Office of Elder Affairs (EOEA) Community Transition Liaison Program (CTLTP) Preadmission Screening and Resident Review (PASRR) Portal Requirements Business Rule

- Pending Release

Requirements

- Run both CTLTP PASRR Reports Monthly
- Review both reports
- Crosscheck against monthly CTLTP Care Enrollment & Termination HAR Reports
- Identify potential NF residents for CTLTP engagement who are not currently PASRR involved or CTLTP enrolled
- Outreach to identified residents at the next onsite NF visit to provide information about the services and assistance CTLTP can provide

ASAPs must develop an internal business practice to track the use of these reports & demonstrate use as requested

Reminder

CTLP may become involved with residents who have PASRR involvement through the agencies below if assistance is requested by these entities or the resident for complex discharges

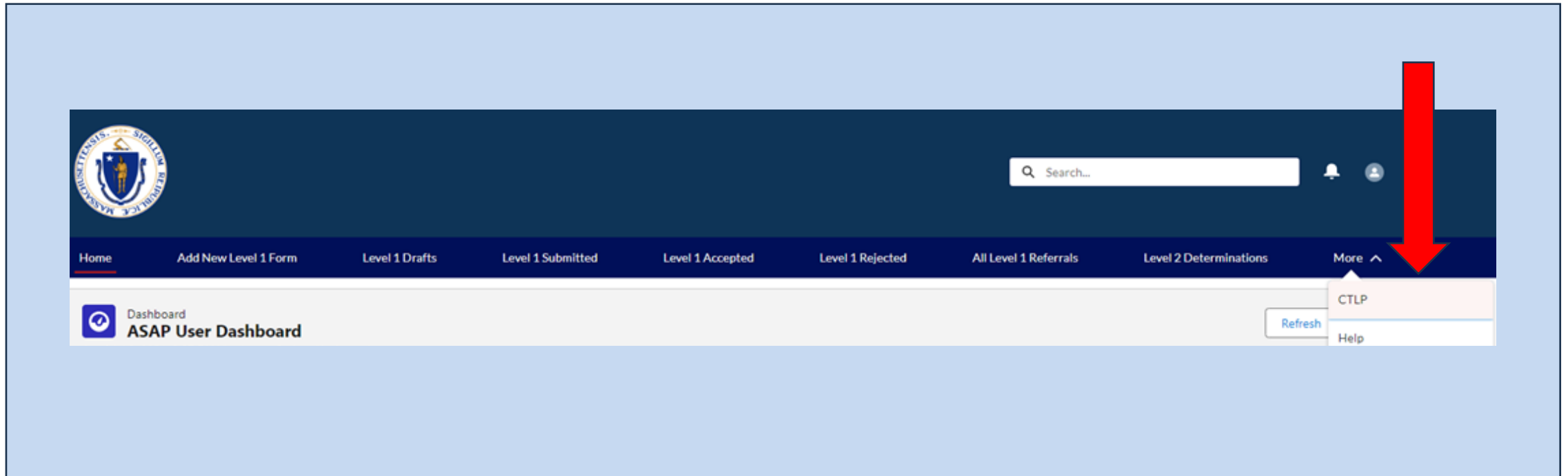
- Department of Developmental Services (DDS) Care Coordination
- Department of Mental Health (DMH) Transition Case Management
- Behavioral Health Community Partners (BH CP)



CTLP PASRR Portal Reports

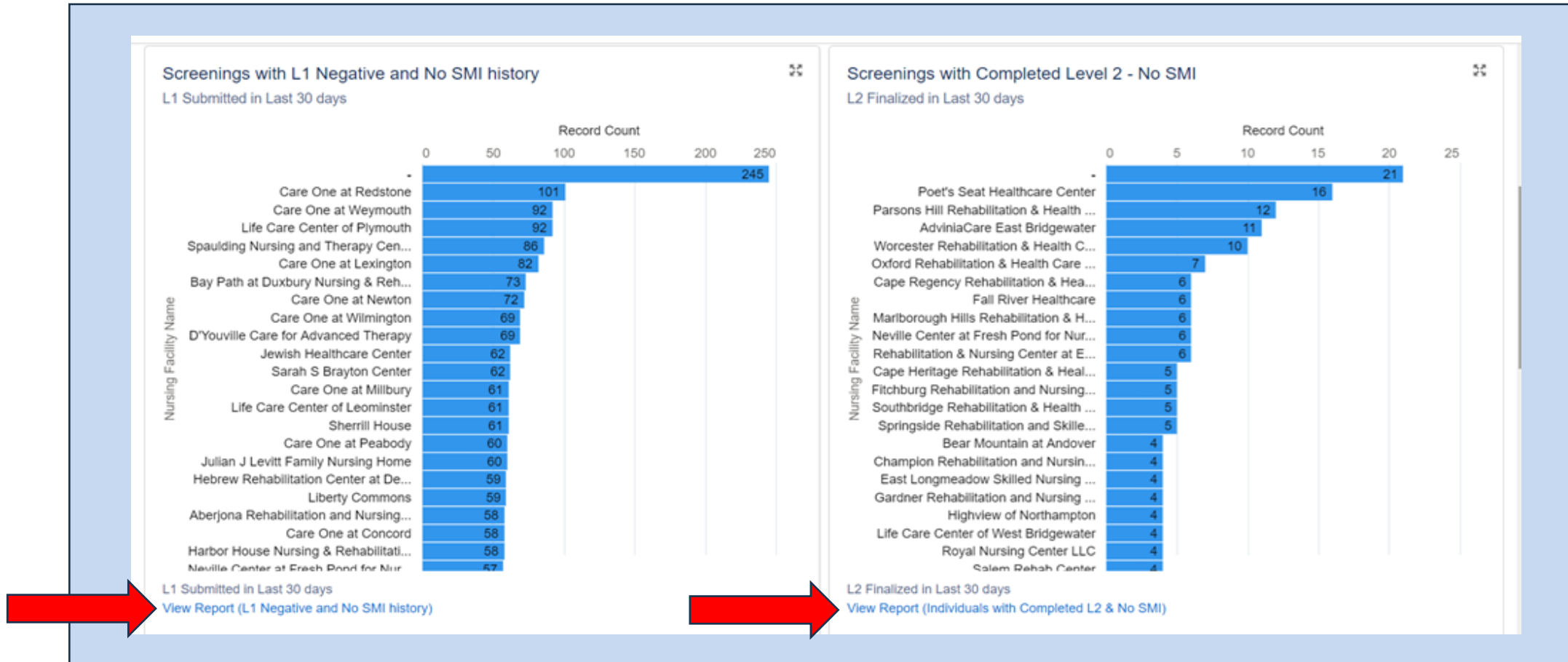
Accessing the CTLP Dashboard & Reports

- The **CTLP Tab** is located on the PASRR Portal Dashboard providing ASAP users the ability to run CTLP preloaded reports
- **CTLP Reports** can be found under the **More Tab** on the top ribbon of the User Dashboard.



CTLP Report Dashboard

- Reports appear with a breakdown of PASRR screens **per nursing facility in your agency's catchment area**
- To view each report, click on **View Report** at the bottom of each column



CTLP PASRR Portal Reports

Report 1: Screening Level 1 Negative and No SMI History

- Identifies individuals who are Dual Negatives on Level I Form
 - (-) SMI
 - (-) ID/DD

Report 2: Screening Completed Level 2 – No SMI

- Identifies individuals who are (+)SMI, (-) ID/DD on Level I Form **and** subsequently do not meet the criteria for SMI upon Level II Evaluation with no history of PASRR involvement

CTLP PASRR Portal Report Parameters

Report 1: Screening Level 1 Negative and No SMI History

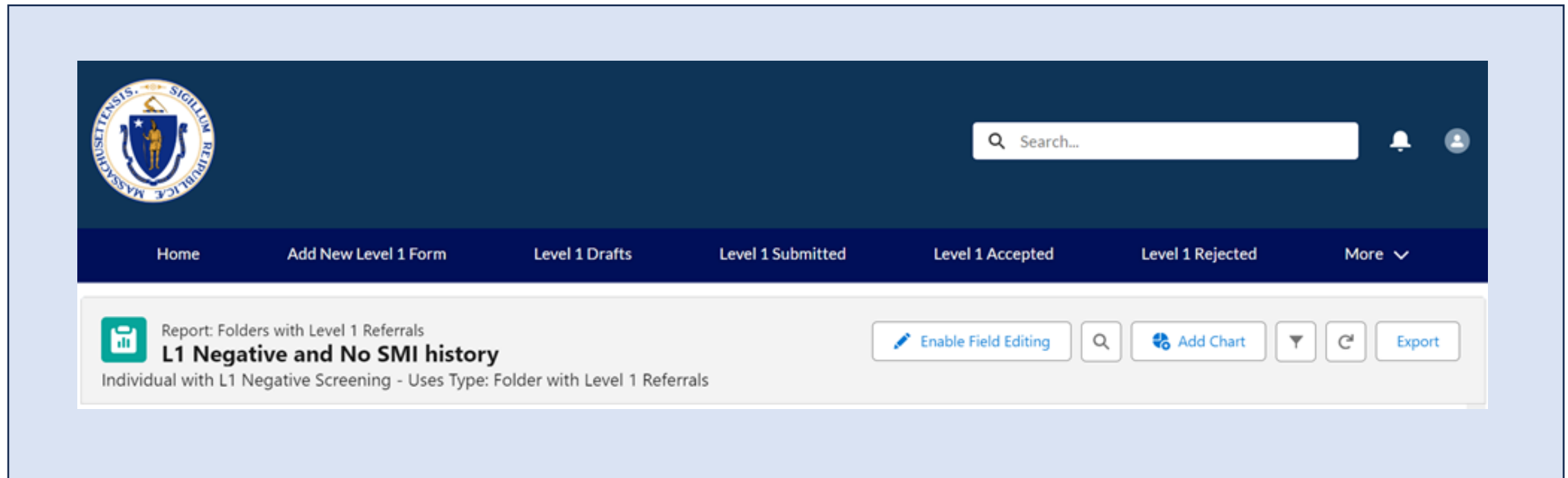
- **Applied Parameters**
 - ID/DD Screening Results: 'Negative'
 - SMI Screening Results: 'Negative'
 - PASRR History: 'Dual Negative – No PASRR History'
 - The Submitted Date Filter: Last 30 Days
 - Able to adjust time frame

Report 2: Screening Completed Level 2 – No SMI

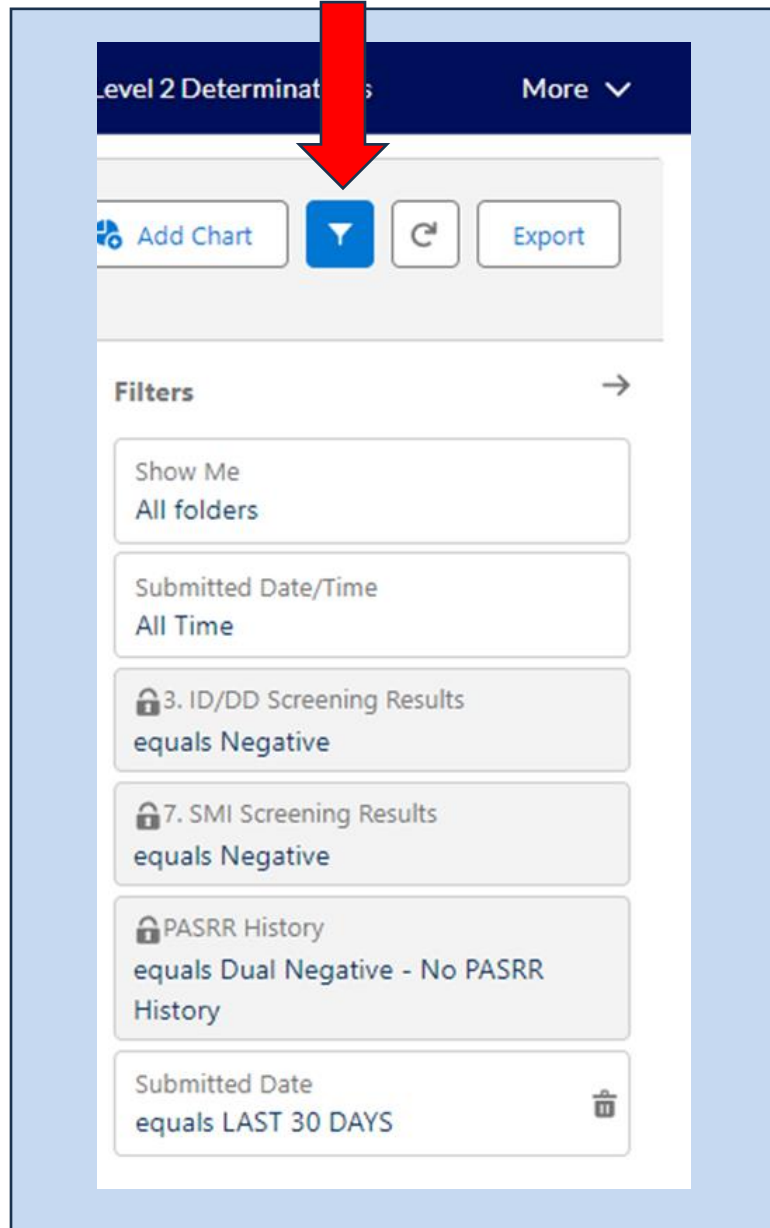
- **Applied Parameters**
 - Records with a 'Finalized' status
 - 'Disposition Status' = 'SMI Criteria Not Met - No Continued PASRR Involvement'
 - 'L2 Finalized Date': Last 30 days
 - Able to adjust time frame
 - 'Actual nursing facility admission': Last 1000 days
 - Able to adjust time frame
 - Includes records with blank field or admissions within the past 3 years

Run Report 1: L1 Negative and No SMI History

- Identifies individuals who are Dual Negatives on Level I Form
 - (-) SMI
 - (-) ID/DD



Filtering Report 1: L1 Negative and No SMI History



- Click on the **filter** icon for additional options to filter report data
- Only boxes that are not gray/locked can be changed

Filtering Report 1: L1 Negative and No SMI History

Anticipated Admission Date (Nursing) Actual

-	-
4/15/2024	-
-	-
4/22/2024	-

Filter By

Field: Submitted Date

Operator: equals

Type: Value

Relative Date: LAST 45 DAYS

Use calendar date

Enter a relative date, like YESTERDAY, LAST WEEK, or NEXT 30 DAYS. For a list of supported values, see the Salesforce help.

Cancel Apply

Show Me All folders

Submitted Date/Time All Time

3. ID/DD Screening Results equals Negative

7. SMI Screening Results equals Negative

PASRR History equals Dual Negative - No PASRR History

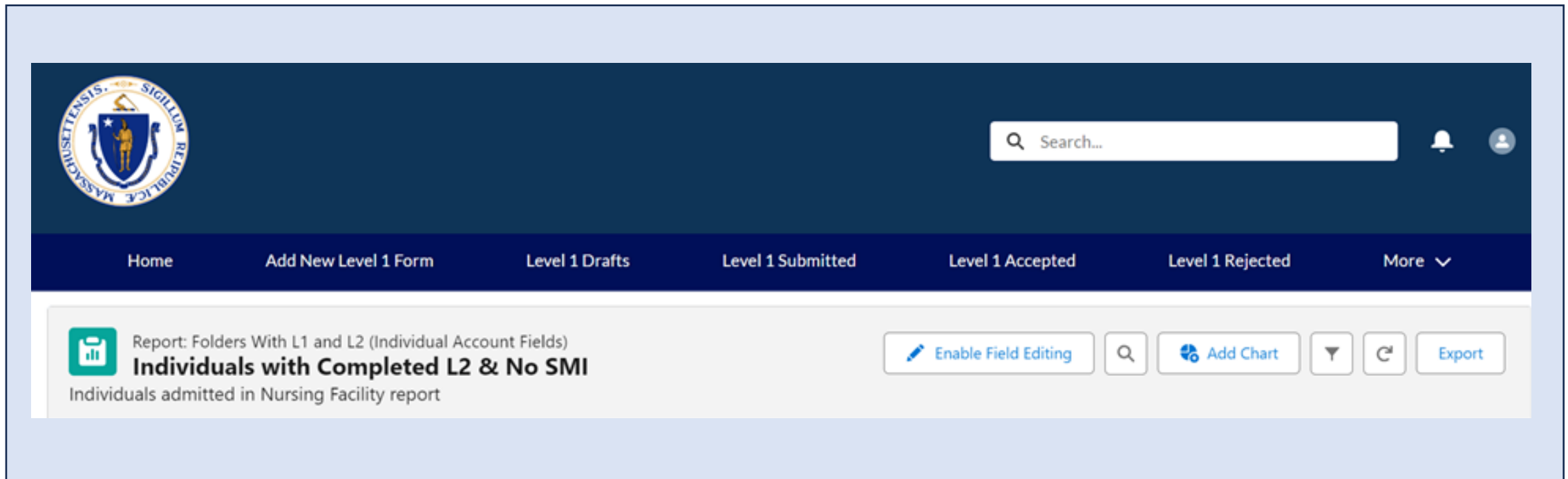
Submitted Date equals LAST 30 DAYS

To change the **Submitted Date Filter** from the 30-day default:

- Click on **Submitted Date**
- Change from **equals LAST 30 Days** to:
 - The chosen number of days
 - e.g. 2, 45, 90 days
 - Or choose a date from the calendar
- Click **Apply**

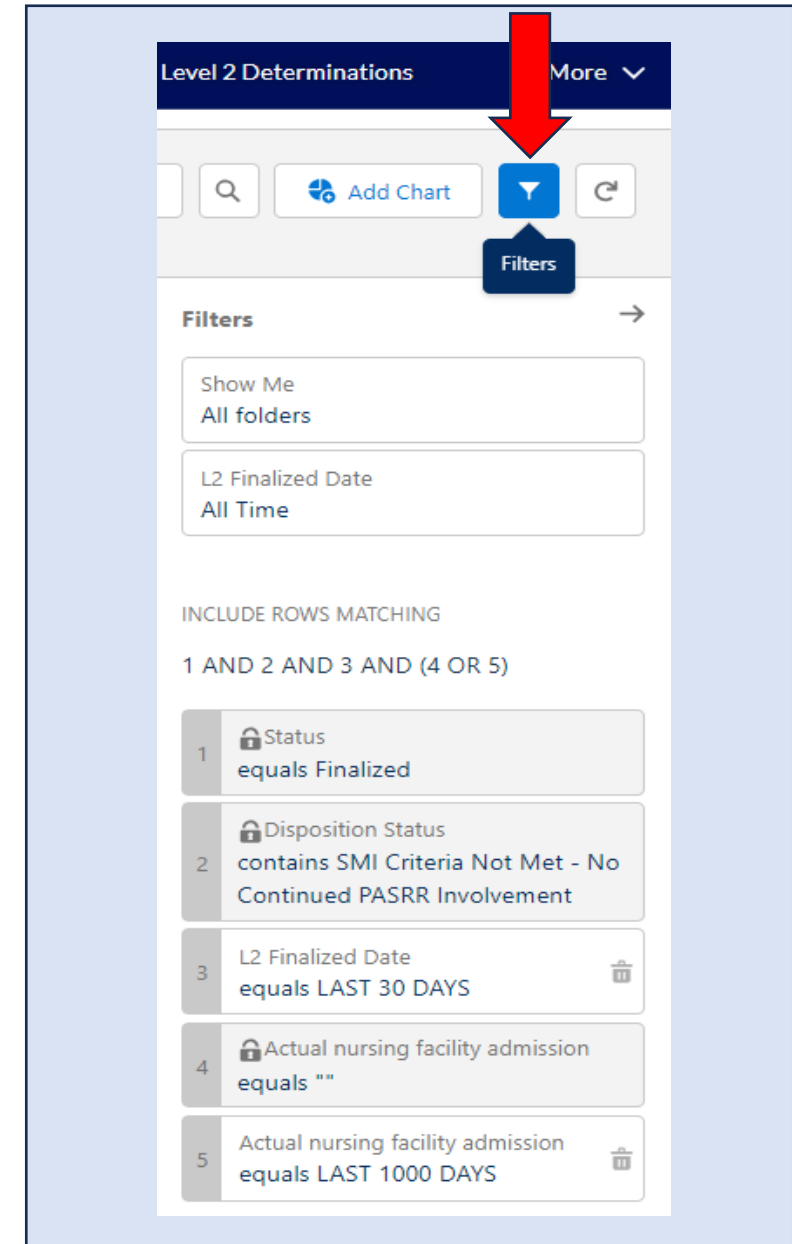
Run Report 2: Screening Completed Level 2 – No SMI

- Identifies individuals who are (+)SMI, (-) ID/DD on Level I Form **and** subsequently do not meet the criteria for SMI upon Level II Evaluation with no history of PASRR involvement



Filtering Report 2: Screening Completed Level 2 – No SMI

- Click on the **filter** icon for additional options to filter report data
- Only boxes that are not gray can be changed



Filtering Report 2: Screening Completed Level 2 – No SMI

To change the **L2 Finalized Date Filter** from the 30-day default:

- Click on **L2 Finalized Date**
- Change from **equals LAST 30 Days** to:
 - The chosen number of days or
 - e.g. 2, 45, 90 days
 - Or choose a date from the calendar.
- Click **Apply**

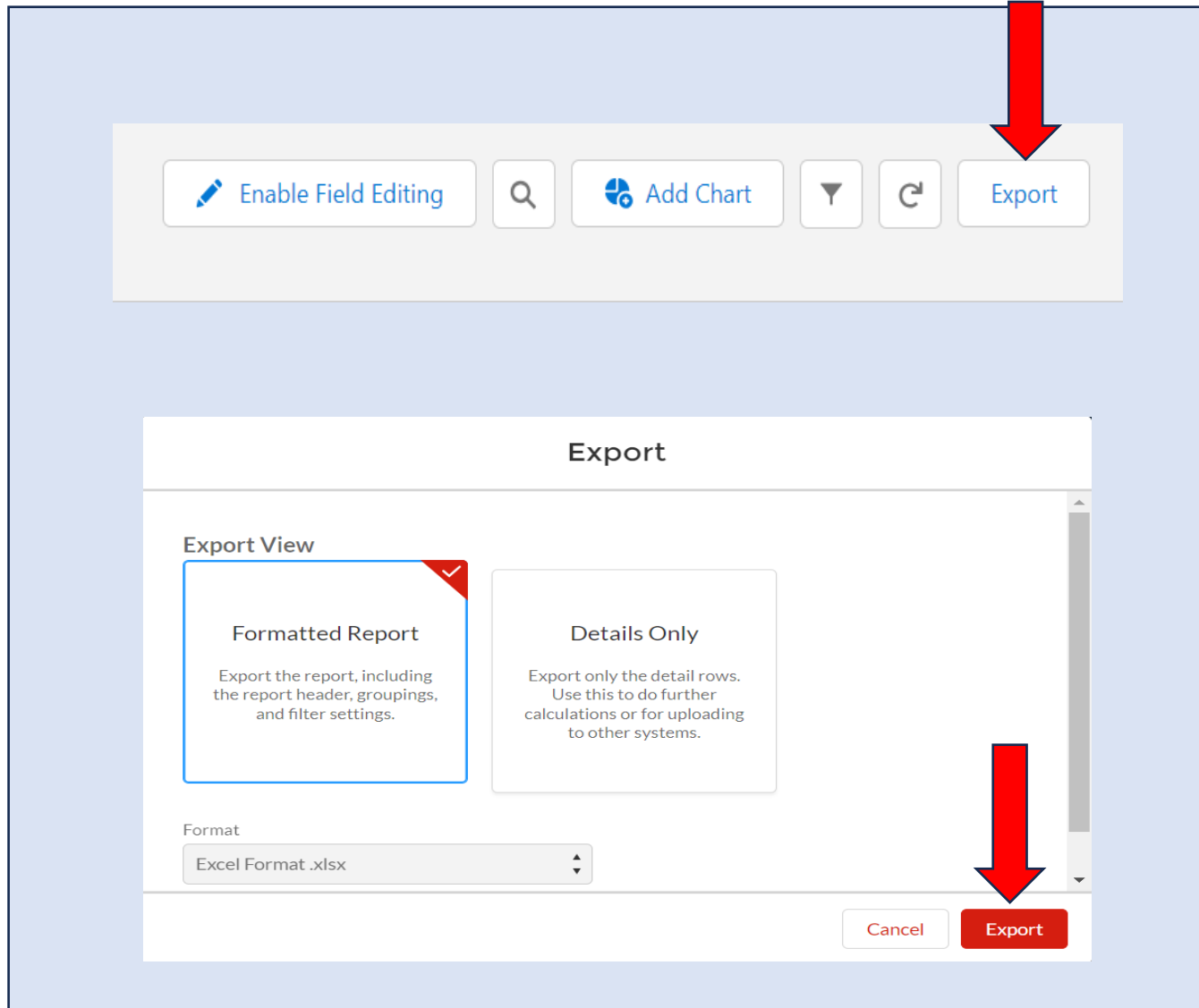
The screenshot displays the Salesforce filtering interface. A 'Filter By' dialog box is open, showing the following configuration:

- Field:** L2 Finalized Date
- Operator:** equals
- Type:** Value
- Relative Date:** LAST 45 DAYS

A red arrow points to the **Apply** button. The background shows a list of filters under the heading 'INCLUDE ROWS MATCHING 1 AND 2 AND 3 AND (4 OR 5)'. The filters are:

- 1 Status equals Finalized
- 2 Disposition Status contains SMI Criteria Not Met - No Continued PASRR Involvement
- 3 L2 Finalized Date equals LAST 30 DAYS
- 4 Actual nursing facility admission equals ""
- 5 Actual nursing facility admission equals LAST 1000 DAYS

Exporting Reports from PASRR Portal



- Click the **Export** button at the top of the report for Excel spreadsheet options
- Choose the appropriate **Export View**
 - **Formatted Report**- includes header, filters, groupings, and filter settings
 - **Details Only**- includes only the detail rows and may be used for further calculations or uploading to other systems
- Click **Export**

Excel Spreadsheet: Formatted View

Report 1: L1 Negative and No SMI history:

2	L1 Negative and No SMI history									
3	As of 2024-05-13 10:44:44 Eastern Standard Time/EST • Generated by Julianna Santiago									
6	Filtered By									
7	Show: All folders									
8	3. ID/DD Screening Results equals Negative									
9	7. SMI Screening Results equals Negative									
10	PASRR History equals Dual Negative - No PASRR History									
11	Submitted Date equals LAST 30 DAYS									
13	Nursing Facility Name ↑	Level 1 Referral: Level 1 Form ID	Individual First Name	Individual Last Name	DOB	Anticipated Admission Date (Nursing)	Actual Admission Date (Nursing Facility)	Submitted Date/Time		
14	xx	L1-069899	x	x	9/29/1942			4/19/2024, 2:15 PM		
15	xx	L1-075799	x	x	3/19/1951			5/9/2024, 3:23 PM		
16	xx	L1-070670	x	x	3/5/1918			4/23/2024, 11:04 AM		
17	xx	L1-068537	x	x	6/28/1928			4/16/2024, 10:10 AM		

Report 2: Screening Completed Level 2 – No SMI:

2	Individuals with Completed L2 & No SMI							
3	As of 2024-05-13 12:42:56 Eastern Standard Time/EST • Generated by Julianna Santiago							
6	Filtered By							
7	Show: All folders							
8	Status equals Finalized							
9	Disposition Status contains SMI Criteria Not Met - No Continued PASRR Involvement							
10	L2 Finalized Date equals LAST 30 DAYS							
11	Actual nursing facility admission equals							
12	Actual nursing facility admission equals LAST 1000 DAYS							
14	Nursing Facility Name ↑	Individual First Name	Individual Last Name	Individual DOB	Actual nursing facility admission	Anticipated nursing facility admission	L2 Finalized Date	Level 2 Form ID
15	xx	x	x	11/30/1949	4/29/2022		4/19/2024, 11:12 AM	L2-078318
16	xx	x	x	5/30/1950	12/30/2021		5/8/2024, 4:30 PM	L2-078861
17	xx	x	x	2/14/1955	2/15/2024		4/26/2024, 2:12 PM	L2-078189
18	xx	x	x	10/4/1987	2/22/2024		5/6/2024, 11:41 AM	L2-078699

Excel Spreadsheet: Details Only View

Report 1: L1 Negative and No SMI history:

H9								
	A	B	C	D	E	F	G	H
1	Level 1 Referral: Level 1 Form	Individual First Name	Individual Last Name	DOB	Anticipated Admission Date	Actual Admission Date (Nursing)	Submitted	Nursing Facility Name
2	L1-069899	x	x	9/29/1942			4/19/2024, 2:15 PM xx	
3	L1-075799	x	x	3/19/1951			5/9/2024, 3:23 PM xx	
4	L1-070670	x	x	3/5/1918			4/23/2024, 11:04 AM xx	
5	L1-068537	x	x	6/28/1928			4/16/2024, 10:10 AM xx	
6	L1-075911	x	x	5/9/1950		4/30/2024	5/10/2024, 9:17 AM xx	
7	L1-070913	x	x	7/30/1940			4/23/2024, 3:28 PM xx	

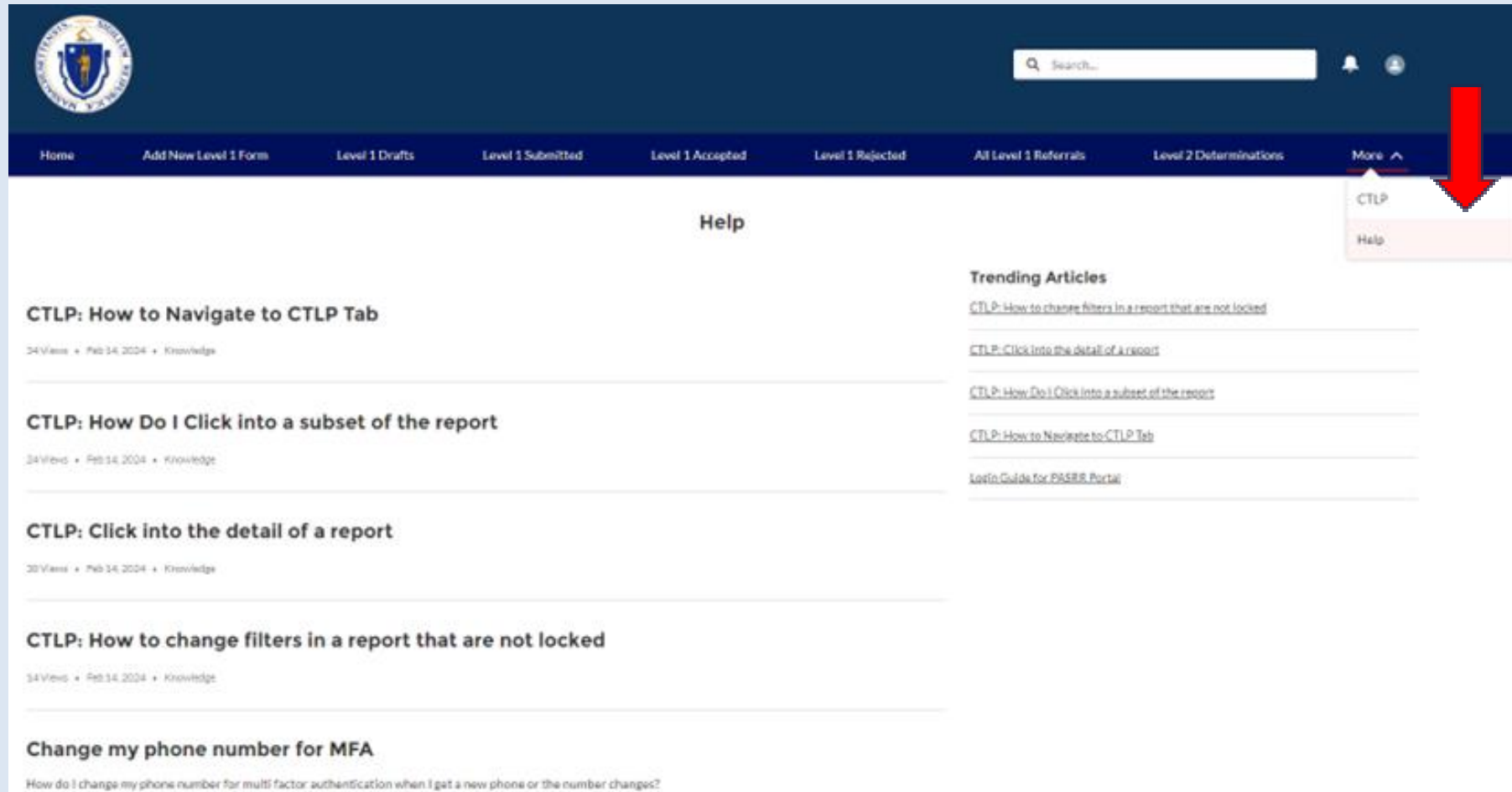
Report 2: Screening Completed Level 2 – No SMI:

H11								
	A	B	C	D	E	F	G	H
1	Individual First Name	Individual Last Name	Individual	Actual nursing facility	Anticipated nursing facility	L2 Finalized Date	Level 2 Form	Nursing Facility Name
2	x	x	11/30/1949	4/29/2022		4/19/2024, 11:12 AM	L2-078318 xx	
3	x	x	5/30/1950	12/30/2021		5/8/2024, 4:30 PM	L2-078861 xx	
4	x	x	2/14/1955	2/15/2024		4/26/2024, 2:12 PM	L2-078189 xx	
5	x	x	10/4/1987	2/22/2024		5/6/2024, 11:41 AM	L2-078699 xx	
6	x	x	7/11/1948			4/24/2024, 3:23 PM	L2-078564 xx	

PASRR Portal Resources

CTLP Knowledge Articles

CTLP PASRR Portal Knowledge Articles can be found under the **Help** Tab on the top ribbon providing initial user guidance.



Resources

Training & Document Resources

- CTLP Training PPT on PASRR (7/27/2023) can be found on 800AgeInfo:
<https://umassmed.typepad.com/files/ctlp-network-training-7.27.2023.pdf>
- The CTLP PASRR Portal Business Rule will be available on 800AgeInfo once released

PASRR Portal Access

- The CTLP Program Manager should request access for new users or for troubleshooting related to access by sending an email to DMHPASRR@umassmed.edu
 - Access requests to include name, title, and email address
 - Users will be required to maintain access by periodic verification via email

Questions?