



# RESOURCE CENTERED



*Technical Assistance for Wisconsin Aging and Disability Resource Centers (ADRC)  
Department of Health Services, Office for Resource Center Development (ORCD)*

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## Topic: Pre-Admission Consultation (PAC)

Pre-admission consultations (PAC) are an important service of Aging and Disability Resource Centers. PACs are available to people seeking admission to an assisted living or nursing facility. This document provides information, technical assistance, and policies and procedures related to implementing statutory, contractual, and administrative rule requirements for PAC.

### INSIDE THIS BULLETIN

[Introduction to Pre-Admission Consultation Authority/References](#)  
[Definition](#)  
[The Pre-Admission Consultation Process](#)  
[Activity Reporting Requirements](#)  
[Monitoring PAC Activities](#)  
[Outreach to AFHs and Hospitals](#)  
  
[Attachment: PAC Process Chart](#)  
[Webpage to access PAC brochures](#)

## Introduction to Pre-Admission Consultation (PAC)

Pre-admission consultation (PAC) is a service provided by ADRCs to individuals who are in the process of considering or making a decision about residential care. The consultation includes the provision of information and assistance, options counseling, and a functional eligibility determination for long-term care programs as appropriate or requested. ADRCs offer pre-admission consultations to people considering a move into an assisted living or institutional setting, such as a nursing home, in Wisconsin. The consultation allows people to plan their care, think about how to pay for it, consider how long personal resources will last, and allow him or her to make informed decisions about their future.

## Authority/References

Pre-admission consultation requirements can be found in Wisconsin Statutes, Administrative Rules, and the ADRC Contract. Readers can access these references by visiting the links below.

1. [Wisconsin Statutes](#). Requirements for ADRCs are found under Chapter 46 and under Chapter 50 for CBRF, RCAC and nursing home providers.
2. [Administrative Codes](#). HFS 83 for CBRFs, 89 for RCACs, 132 for Nursing Homes, and 10 for ADRCs.
3. [ADRC Contract](#). Requirements for pre-admission consultation are found within the ADRC contract.

# Definition

As outlined in the ADRC contract, a pre-admission consultation (PAC) includes the following:

- ✚ Long-term care options counseling; including topics such as:
  - The range of care settings and options available to meet the person's long-term care needs;
  - Financial implications of the various options;
  - Ways to evaluate facility quality and appropriateness;
  - Funding programs which may be available to help pay for the person's care, including managed long-term care and IRIS and the eligibility requirements and procedures;
- ✚ An offer to perform the long-term care functional screen;
- ✚ Assistance with the financial eligibility and cost share determinations and enrollment process for publicly-funded long-term care when appropriate.

## The Pre-Admission Consultation Process

The process begins with an individual contacting or visiting a long-term care residential facility such as a Nursing Home, Community Based Residential Facility (CBRF), or Residential Care Apartment Complex (RCAC).

### I. Requirements of Providers

Where there is an Aging and Disability Resource Center, CBRFs, RCACs, and nursing homes are required to provide prospective residents with copies of the [brochure](#) "*Considering Assisted Living or a Nursing Home?*" The brochure provides information about ADRC services and refers the person to the ADRC for a pre-admission consultation. There is a brochure for each county with individual ADRC contact information.

The brochure is required to be provided to prospective residents at the time the facility first provides written information about itself to people inquiring about the facility. If contact with the prospective resident is limited to a telephone call, and the information about the facility is sent via postal or electronic mail, the facility is required to also send a copy or provide a link to the brochure. Providers are required to provide information (in the form of the brochure) to all prospective residents.

Provision of the PAC brochure at the same time the facility first provides written information about itself to the prospective resident or his/her representative constitutes the information and referral required by Chapter 50 of the Wisconsin Statutes. Brochures provided to prospective residents are printed by the facility. The [brochure](#) is available on-line.

The Division of Quality Assurance (DQA) informs providers of pre-admission consultation requirements via DQA memos for [CBRFs](#), [RCACs](#), and [nursing homes](#).

**Note:** In areas where there is not an ADRC available, provider requirements can be found under [DLTC Numbered Memo Series 2009-07](#) regarding the use of COP/COP-W/CIP-II in CBRFs.

## II. Requirements of Aging and Disability Resource Centers (ADRCs)

Resource Centers will receive requests for pre-admission consultation, information and assistance, or options counseling from prospective nursing home and assisted living residents. When a customer contacts the ADRC inquiring about assisted living or nursing homes, the Resource Center offers a pre-admission consultation. If the individual accepts the offer, the ADRC then makes arrangements to meet with the individual and his/her family at a location preferred and at a time that is convenient to the individual. This should be done prior to admission to the facility when possible and no later than 15 business days of the date on which the individual accepts the offer. This timeline may be extended if the individual requests a delay, has an unstable medical condition or, provided the consultation takes place prior to the individual's admission, at the request of the ADRC.

**Attachment 1** shows the pre-admission consultation process from the time the individual contacts or visits the facility to the administration of a pre-admission consultation.

## Activity Reporting

Pre-admission consultation is not reported as a separate activity in the ADRC activity report. Instead, ADRCs should report each of the component activities -- options counseling, administration of the long term care functional screen, and provision of enrollment counseling -- that it provides to individuals who contact the ADRC for pre-admission consultation. [Activity reporting definitions](#) are available on-line.

# Monitoring PAC Activities

## I. Provider Compliance

- A. **DQA.** The Division of Quality Assurance (DQA) within the Department of Health Services is responsible for monitoring facility compliance with PAC requirements. As a part of DQA's survey activities, staff will determine whether facilities are providing information about the services offered by the ADRC and whether facilities are providing the brochure to prospective residents in a timely fashion.
- B. **ADRCs.** Resource Centers are NOT required to monitor provider compliance with the requirement to provide prospective residents with copies of the PAC brochure. However, ADRCs may wish to track how often people request pre-admission consultation after receiving the PAC brochure from facilities in their area. If no requests are being received from a people considering a particular facility, the ADRC may wish to target some of their outreach activities to that facility to ensure that customers residing or intending to reside in the facility have access to the services of the Resource Center. If an ADRC notes uncorrected or intentional avoidance of a provider's PAC responsibilities, the ADRC may wish to contact DQA.
- C. **MCOs/County Human or Social Service Agencies.** Managed Care Organizations (MCOs) or county human/social service agencies that have contracts with residential providers, may add contract provisions requiring compliance with PAC information and referral requirements as a condition of the contract. While this is not required, this has been a mechanism used by these agencies to strengthen provider compliance.

## II. ADRC Compliance

The Office for Resource Center Development (ORCD) within the Department of Health Services is responsible for monitoring Resource Center compliance with contract requirements. As a part of ORCD's quality assurance activities, staff will determine whether ADRCs are meeting their contract obligations and will evaluate the effectiveness of the service in achieving PAC objectives.

# Outreach to Adult Family Homes and Hospitals

As a result of 2007 Wisconsin Act 20, PAC requirements for adult family homes (AFHs) and hospitals were repealed. Yet, individuals who are looking to reside in AFHs or that face discharge from a hospital could greatly benefit from being connected with the Resource Center prior to admission or discharge irregardless of statutory requirements. The ADRC may wish to target outreach activities and/or formally discuss with these providers how to coordinate efforts in order to best meet prospective resident and patient needs.

# Contact Information

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REGIONAL CONTACT: Regional Quality Assurance Specialist  
Office for Resource Center Development

# Attachment

Pre-Admission Consultation Process Chart

*Long-Term Care Facility*  
**PRE-ADMISSION CONSULTATION (PAC) PROCESS**

