User Guide

Preadmission Screening and Resident Review

December 16, 2024

WISCONSIN DEPARTMENT *of* **HEALTH SERVICES**

Table of Contents

1 Introduction

The Preadmission Screening and Resident Review (PASRR) Level I Wizard allows users to search for an existing PASRR, create a new PASRR, and submit a PASRR for review. The PASRR Level II Referral Wizard allows contractors to review the PASRR referrals and indicate whether the referral should be a partial, abbreviated, or full screen. The system will automatically issue reimbursement for nursing homes that will be seen on their Remittance Advices. Note that a Level I referral is required when submitting a nursing home level of care (LOC). For more information about the nursing home LOC process, refer to the [Nursing Home Level of Care Request User Guide](#).

2 Assign Role for Preadmission Screening and Resident Review Level I Wizard Access

The account administrator must initially establish clerk accounts and assign roles for the various functions the clerks will be performing. Administrators will need to assign the **PASRR** role for clerks to access the PASRR Level I Wizard to complete and send a new PASRR.

Administrators can refer to the Clerk Maintenance chapter of the [ForwardHealth Provider Portal Account User Guide](#) for detailed instructions on assigning roles and setting up clerk accounts.

3 Access Preadmission Screening and Resident Review Level I Wizard

1. Access the ForwardHealth Portal (the Portal) at www.forwardhealth.wi.gov/.
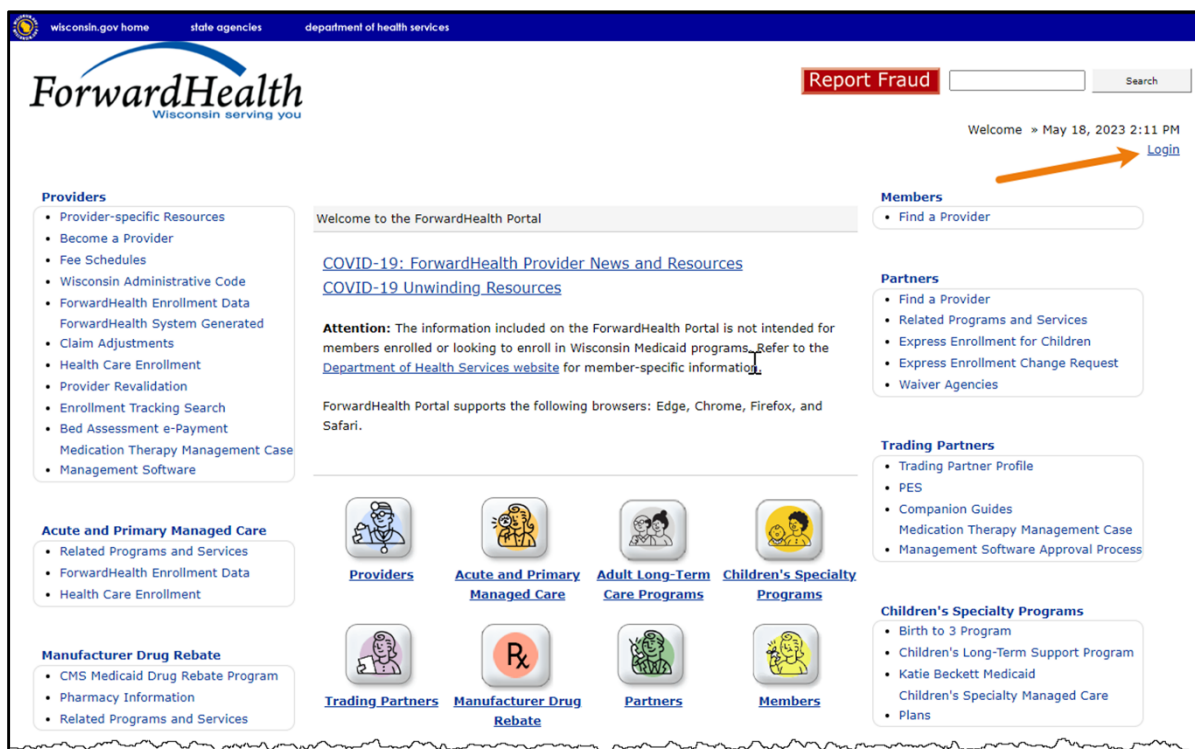
Figure 1 ForwardHealth Portal Homepage
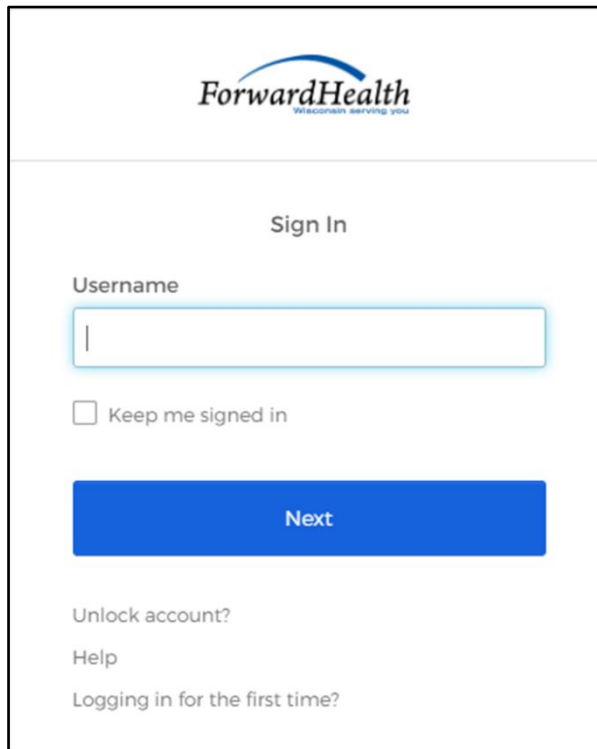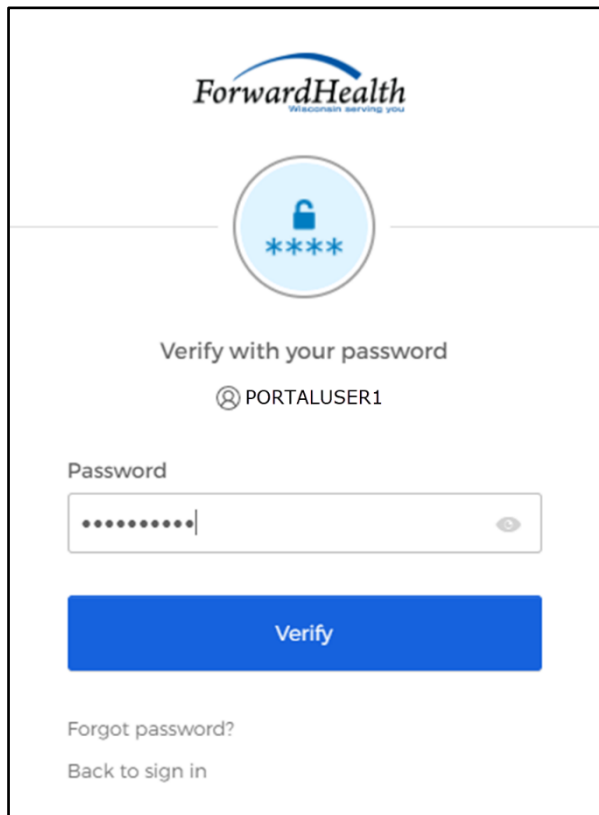
2. Click **Login**. A Sign In box will be displayed.

Figure 2 Sign In Box

3. Enter the user's username.

4. Click **Next**. A Verify with your password box will be displayed.

Figure 3 Verify With Your Password Box

5. Enter the user's password.

6. Click **Verify**. The secure Provider page will be displayed.

Figure 4 Secure Provider Page

7. Click **PASRR Level I Wizard** under Quick Links on the Providers page. The PASRR Screens panel will be displayed.

Figure 5 PASRR Screens Panel

4 Preadmission Screening and Resident Review Search

The PASRR search function allows the user to search for resident information.

1. Enter one of the following search criteria for the resident on the PASRR Screens panel:

    *   PASRR Level I ID—This is the ID the user receives if they have submitted the PASRR Level I to interChange.

    *   Level I Request Key—This is the saved ID the user receives if they save the PASRR prior to submitting to interChange.

    *   Member ID—This is the resident's 10-digit Medicaid member ID.

    *   Social Security Number and Date of Birth—This is the resident's nine-digit Social Security number (SSN) and date of birth in mm/dd/yyyy format.

    *   First/Last Name and Date of Birth—This is the resident's first and last name and date of birth in mm/dd/yyyy format.

2. Click **Search**. The search results will be displayed at the bottom of the panel.

Figure 6 PASRR Screens Panel—Search Results

The following information will be displayed under the search results:

• PASRR Level I ID—This column displays the ID the user receives if they have submitted the PASRR Level I to interChange. A hyphen (-) will be displayed if the Level I status indicates "In Progress."

• Level I Request Key—This column displays the saved ID the user receives if they save the PASRR prior to submitting to interChange. A hyphen (-) will be displayed if the Level I status indicates "Completed."

• Member ID—This column displays the resident's ID. A member ID will be present if the resident is a Medicaid member.

• First Name—This column displays the resident's first name.

• Last Name—This column displays the resident's last name.

• Social Security Number—This column displays the resident's nine-digit SSN.

• Date of Birth—This column displays the resident's date of birth in mm/dd/yyyy format.

- Level I Status—This column displays the Level I status. Values are "In Progress" or "Completed."

- Level I Submission Date—This column displays the Level I submission date. Note: The submission date will only be displayed if the Level I status indicates "Completed." A hyphen (-) will be displayed if the Level I status indicates "In Progress."

- Level II Required—This column displays whether a Level II review is required. Values are "Yes," "No," or a hyphen (-) if the Level I status indicates "In Progress."

- Level II Status—This column displays the Level II status. Values are "Requested," "Completed," or a hyphen (-) if the Level I status indicates "In Progress" or "No."

3. Click the **View PASRR Documentation** link to bring up the OnBase Document Viewer. All of the records documents associated to the selected PASRR record and any supporting documentation that had been loaded previously will be displayed. This button will not be available if the selected record has not been submitted and has a Level I status of "In Progress."

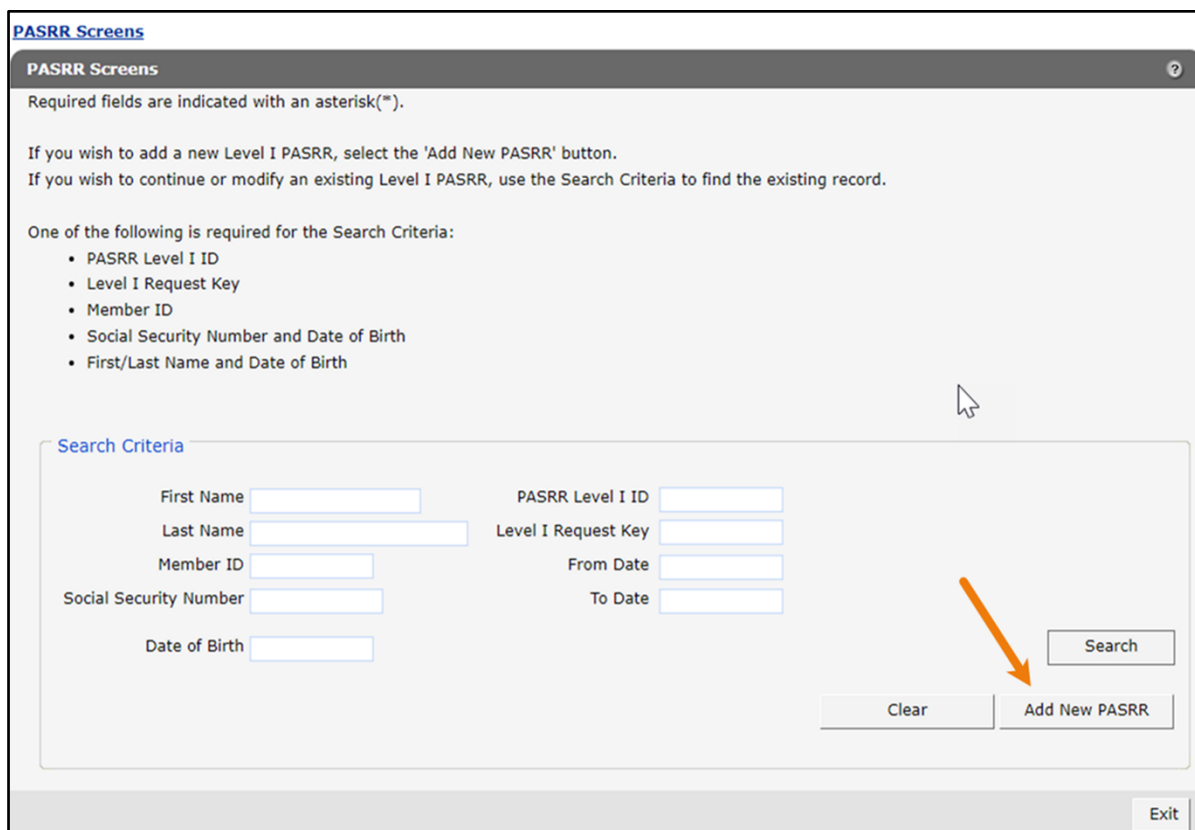4. Click the desired document and scroll down to view the screens.

Figure 7 OnBase Document Viewer

5. The user can click **Exit** to return to the Provider secure homepage. Clicking **Next** or **Add New PASRR** will take the user to the Resident Information panel.

5 Create a New Preadmission Screening and Resident Review

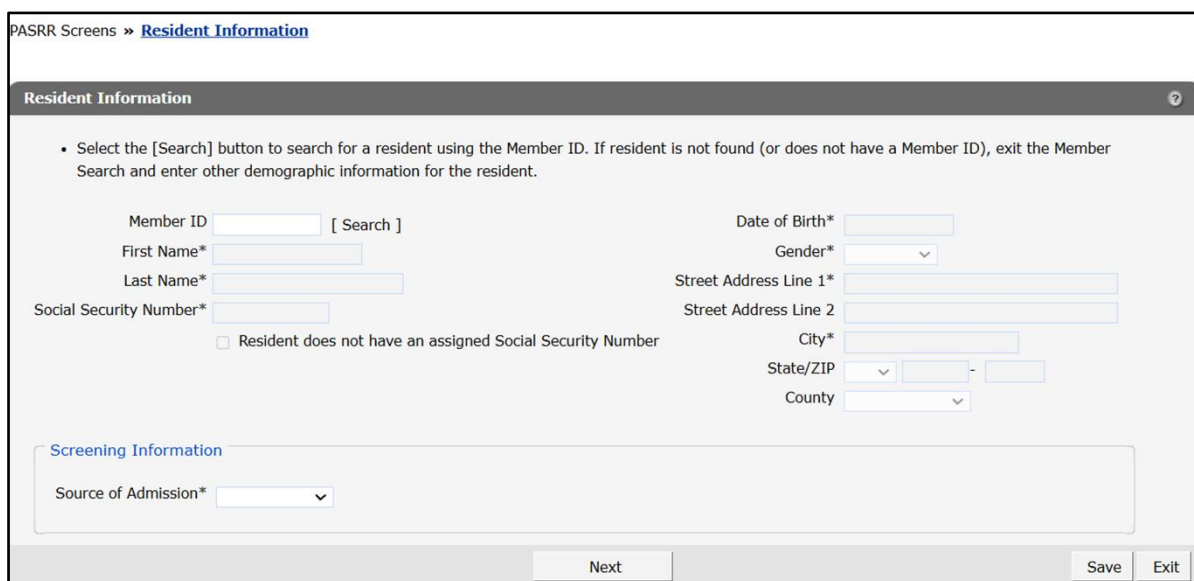This functionality allows the user to create a new Preadmission Screening and Resident Review.

1. Click the **Add New PASRR** button on the PASRR Screens panel.

Figure 8 PASRR Screens Panel—Add New PASRR

The Resident Information panel will be displayed.

Figure 9 Resident Information Panel

2. Click **[Search]**. A Member ID Search pop-up screen will be displayed.

Figure 10 Member ID Search Pop-up Screen

3. Enter the resident's member ID and click the **Search** button.

    - If the resident cannot be found, the search results will display "No rows found." An individual does not need a member ID to submit a Level I screen.
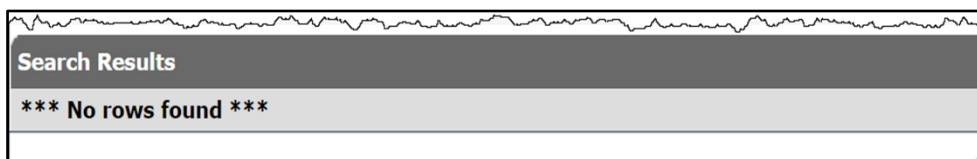
Figure 11 Member ID Search Pop-up Screen—No Rows Found

    Exit the search by clicking **Close**. The other fields on the panel will now be enabled and the user can enter all of the resident's demographic data. Note: If the resident does not have an SSN or the user does not have it, select the box indicating the resident does not have an assigned SSN.

    - If the member is found, the Resident Information panel will be populated with the resident's information. The user may only modify the street address, city, state, and zip code fields if necessary. Note: Any changes to the address information will not automatically update the member's information elsewhere.
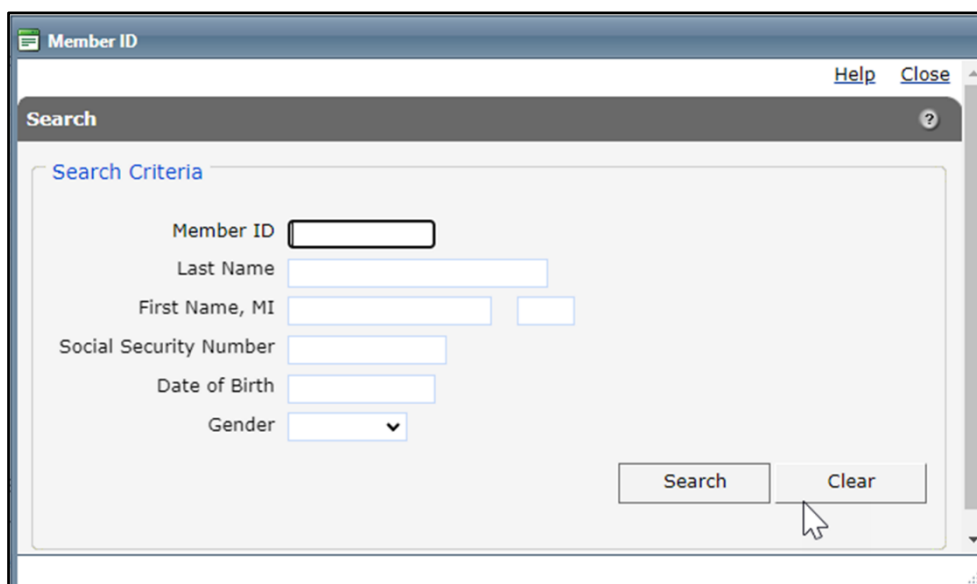
4. Select the appropriate information from the drop-down menus under the Screening Information section at the bottom of the panel.

Figure 12 Resident Information Panel—Populated

Note: The user can click the **Save** button to save their work at any time. This will generate a Level I Request Key that the user can use to search for the PASRR to continue working on later.

PASRR Screens » Resident Information » Nursing Facility Information » Level I Screen Data Saved

Level I Screen Data Saved   ❓

Level I Request Key: 29
Your Level I Screen data has been saved. You may return at a later time to complete the request.
Your data will be saved for 30 calendar days. If you do not return within 30 calendar days, you will have to start the Level I Screen process over.

Exit

Figure 13 Screen Data Saved Screen

5. Click **Next.** The Nursing Facility Information panel will be displayed. Unless the provider is a hospital, the fields will self-populate with information of the provider that logged in to their secure Portal. If known, hospitals should enter the information of the nursing facility the resident will be admitted to. If needed, nursing homes may enter another nursing home's information. Nursing homes also need to answer **Yes** or **No** to the question in the Nursing Facility Admission section at the bottom of the panel. If "Yes," the nursing home will need to enter the admission date in mm/dd/yyyy format. If "No," the nursing home should return to the PASRR Level I Wizard to enter the admission date once it is known and change their answer for the question to "Yes." Not entering an admit date may impact Level I reimbursement if applicable.

PASRR Screens » Resident Information » Nursing Facility Information

Nursing Facility Information   ❓

- **Note to Hospitals:** If you know the Nursing Facility the Resident is being admitted to, please enter it here.

NPI 1234567890   [Search]
Nursing Facility Name ABC HEALTHCARE
Street Address Line 1 123 MAIN ST
Street Address Line 2
City EAU CLAIRE
State/ZIP WI ∨ 54703 -

Nursing Facility Admission

Has the Resident been admitted to the Nursing Facility listed above?* ○ Yes ◉ No
Admission Date

Previous   Next   Save   Exit

Figure 14 Nursing Facility Information Panel

6. Click **Next**. The Guardian/HCPOA Information panel will be displayed.

Figure 15 Guardian/HCPOA Information Panel

7. Answer **Yes** or **No** to the questions asking if the resident has an activated health care power of attorney (HCPOA) and whether they have a guardian. If the user answers "Yes" to the first question, the HCPOA Information section will be displayed. If the user answers "Yes" to the second question, the Guardian Information section will be displayed. If the user answers "Yes" to both questions, the HCPOA and Guardian Information sections will be displayed. All fields are required in these sections. The corresponding information sections will remain closed if the user answers "No" to both questions.

Figure 16 Guardian/HCPOA Information Panel

8. Enter the required information if applicable.

9. Click **Next**. The Current Diagnosis panel will be displayed.

PASRR Screens » Resident Information » Nursing Facility Information » Guardian/HCPOA Information
Current Diagnosis

Current Diagnosis   ❓

- Does the person have a major mental disorder under the Diagnostic and Statistical Manual of Mental Disorders, 3rd edition, revised (DSM III-R) or DMS 5? Select the "Yes" option if the person's symptoms and behaviors could support an appropriate diagnosis of a major mental illness under DSM III-R or DSM 5. Select the "No" option if the person's mental illness symptoms/behaviors are directly cause by a medical condition (e.g., hypothyroidism can cause depressive symptoms; a stroke in the frontal lobe may cause decreased appetite and weight loss).*

○ Yes   ◉ No

| Previous | Next | | Save | Exit |

Figure 17 Current Diagnosis Panel

10. Answer **Yes** or **No** to the question asking if the person's symptoms support a diagnosis of a major mental illness. Answering "Yes" will result in a PASRR Level II Referral.

11. Click **Next**. The Medications panel will be displayed.

Figure 18 Medications Panel

12. Answer **Yes** or **No** to the question in the first bullet asking if the person received psychotropic medication(s) to treat symptoms or behaviors of a major mental disorder.

13. If "Yes," the user must select the appropriate medications from the list and/or specify the medication in the Other—Specify medication(s) received field using the free text box. Text is limited to 500 characters. Answering "Yes" will result in a PASRR Level II referral.

- Select a medication from the box listing the medications. To select more than one row, hold down the Ctrl key and click all applicable medications.

Figure 19 Medication Panel

- Click >. The selected medication(s) will be added to the box on the right side.

Figure 20 Medication Panel

14. Answer the question about what the medication is used for if not for mental illness under the Medication Explanation section using the free text box if applicable. Text is limited to 500 characters.

15. Click **Next**. The Symptomology panel will be displayed.

Figure 21 Symptomology Panel

16. Answer **Yes** or **No** to the question asking if the person has displayed any of the following symptoms. Answering "Yes" will result in a PASRR Level II referral.

17. Click **Next**. The Intellectual/Developmental Disabilities panel will be displayed.

Figure 22 Intellectual/Developmental Disabilities Panel

18. Answer **Yes** or **No** to the two diagnosis questions. Answering "Yes" to either or both questions will generate a PASRR Level II referral.

19. Click **Next**. The Screening Results panel will be displayed. The statements may vary based on the data that was entered by the user in the previous panels. They will either state that the resident is suspected or not suspected of having a serious intellectual/developmental disability and/or a serious mental illness.
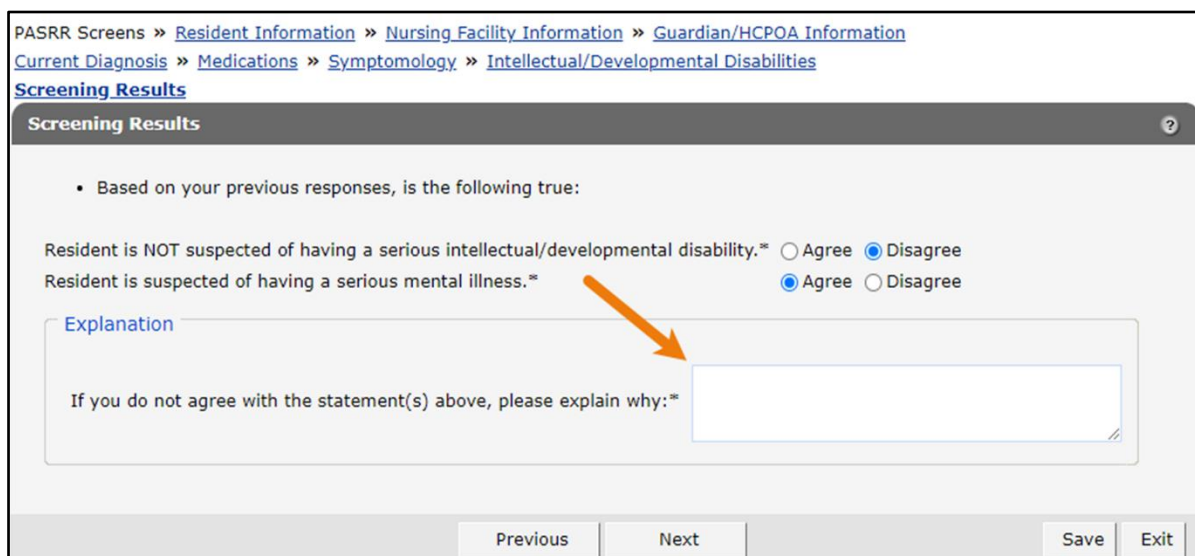
Figure 23 Screening Results Panel

20. Select **Agree** or **Disagree** to the two statements. If the user disagrees with a statement, an explanation free text box will be displayed for the user to explain why they disagree. Text is limited to 500 characters. Note: A PASRR Level II referral would typically be required if the resident is suspected of having a serious intellectual/developmental disability or mental illness.

Figure 24 Screening Results Panel—Explanation

21. Click **Next**. Note: If the user clicks **Next** and has disagreed to both statements, a warning message will be displayed at the top of the panel. To move to the next panel, the user can change their answers to agree or check the **Ignore** box and click **Continue**.

Figure 25 Screening Results Panel—Warning Message

The Short-Term Exemptions panel will be displayed.

Figure 26 Short-Term Exemptions Panel

22. Answer **Yes** or **No** to the short-term exemption questions. Only one short-term exemption is allowed. If all three questions are answered "No," click **Next** and proceed to Step 32.

If more than one question is answered "Yes," an error message will be displayed indicating only one short-term exemption can be selected. Select the short-term exemption that is the most applicable. If "Yes" is selected, the provider will receive a notification in their Message Center every day for five days prior to the expiration date of the short-term exemption.

Figure 27 Short-Term Exemptions Panel—Error Message

23. Click **Next**.

24. The Additional Directions panel will be displayed. If the user answered "Yes" to any of the questions, an F-20822 form is needed, and the user may upload it. Also, if the short-term stay changes to a longer period, the user can indicate it in the Exemption: Staying Long section. Note: If it has been determined the resident will be staying past the short-term exemptions period after the Level I has been submitted, the user should go back to the record then navigate to the Additional Directions panel and indicate "Yes" under the Exemption: Staying Long section instead of creating a new PASRR record.

Figure 28 Additional Directions Panel

25. To upload supporting documentation, click **Choose File** and select the desired file for uploading.

26. Click **Upload**. The file name will appear, and a confirmation message will be displayed at the top of the panel indicating the file has been successfully uploaded. Note: The user can click **Delete** to delete the uploaded file any time before they submit the Level I screen.

Figure 29 Additional Directions Panel

27. Answer **Yes** or **No** to the question under the Exemption: Staying Long section asking if the person is staying longer than the permitted exemption period.

28. If "No," click **Next** and proceed to Step 40.

29. If "Yes," click **Next** and a warning message will be displayed at the top of the panel.

Figure 30 Additional Directions Panel—Warning Message

30. Check the **Ignore** box and click **Continue**. The Severe Medical Condition panel will be displayed.

Figure 31 Severe Medical Condition Panel—Question 1

31. Answer **Yes** or **No** to the question asking if the person has a severe medical condition. If "Yes," Question 2 will be displayed. If "No," Question 2 will not be displayed.

Figure 32 Severe Medical Condition Panel—Question 2

32. Answer **Yes** or **No** to the question asking if the person's medical condition substantially limits their ability to participate activities.

33. Click **Next**. The Severe Cognitive Defects panel will be displayed.

Figure 33 Severe Cognitive Defects Panel

34. Answer **Yes** or **No** to the question asking if the person has cognitive deficits due to dementia, Alzheimer's disease, or a similar degenerative process that substantially interferes with their independent functioning.

35. Click **Next**. The Referral Documentation panel will be displayed.

Figure 34 Referral Documentation Panel

36. To upload supporting documentation, click **Choose File** and select the desired file for uploading.

37. Click **Upload**. The file name will appear, and a confirmation message will be displayed at the top of the panel indicating the file has been successfully uploaded. Note: The user can click **Delete** to delete the uploaded file any time before they submit the Level I screen.

Figure 35 Referral Documentation—File Uploaded

38. Click **Next**. The Level II Screening Referral will be displayed providing additional information.

Figure 36 Level II Screening Referral

39. Click **Next**. The Level I Screening Attestation panel will be displayed.

Figure 37 Level I Screening Attestation Panel

40. Fill in the required information and check the box under the Attestation section.

41. Click **Submit**. A Confirmation panel will be displayed.

Figure 38 Confirmation Panel

42. The user will be assigned a Level I PASRR ID and may print the Level I PASRR Summary by clicking **Print Level I PASRR Summary**. The first page of the Level I summary will be displayed. Scroll down to view the entire summary. The printed summary should go to the individual and responsible party (if applicable), 42 C.F.R. § 483.128(a).

Figure 39 Preadmission Screen and Resident Review Level I Screen Summary

43. Click **Exit**. The user will be returned to their secure Provider Portal homepage.

44. The user can then use their ID to search for and check the status of their submitted PASRR from the PASRR Screens panel. The user can continue to modify the PASRR until the Level II Status indicates "Completed" or Level II Required is "No" and it has been less than 90 days. Note: If the Level I is modified while the contactor is in the process of working on the Level II, the following error will be displayed when the contractor tries to submit: "The Level I Screen has been modified, please exit the wizard and start again once the Level I Status is completed."

Figure 40 PASRR Screens Panel—Search Results

Note: The user can click the **View PASRR Documentation** button to view the PASRR form and any supporting documentation that had been submitted previously.

6 Request Preadmission Screening and Resident Review Level II Referral Wizard Access

The PASRR Level II Referral Wizard is completed by a Wisconsin PASRR contractor. The wizard allows the contractor to review the PASRR referrals and indicate whether the referral should be a partial, abbreviated, or full screen. The PASRR Level II Referral is only completed by the contractor if the Level I responses result in a referral for the Level II screen.

To request access to the PASRR Level II Referral Wizard, complete the following steps:

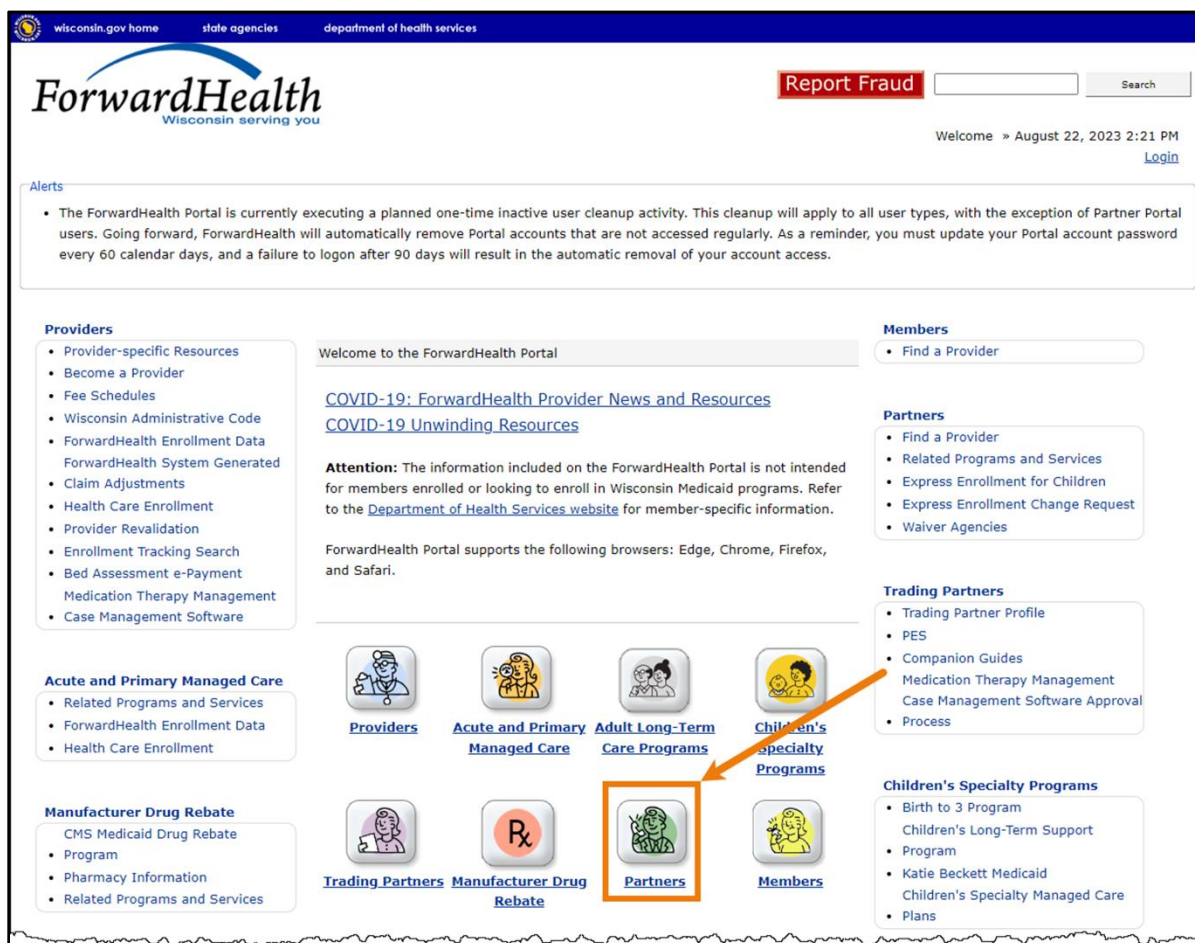1. Access the ForwardHealth Portal at www.forwardhealth.wi.gov/.

Figure 41 ForwardHealth Portal Homepage

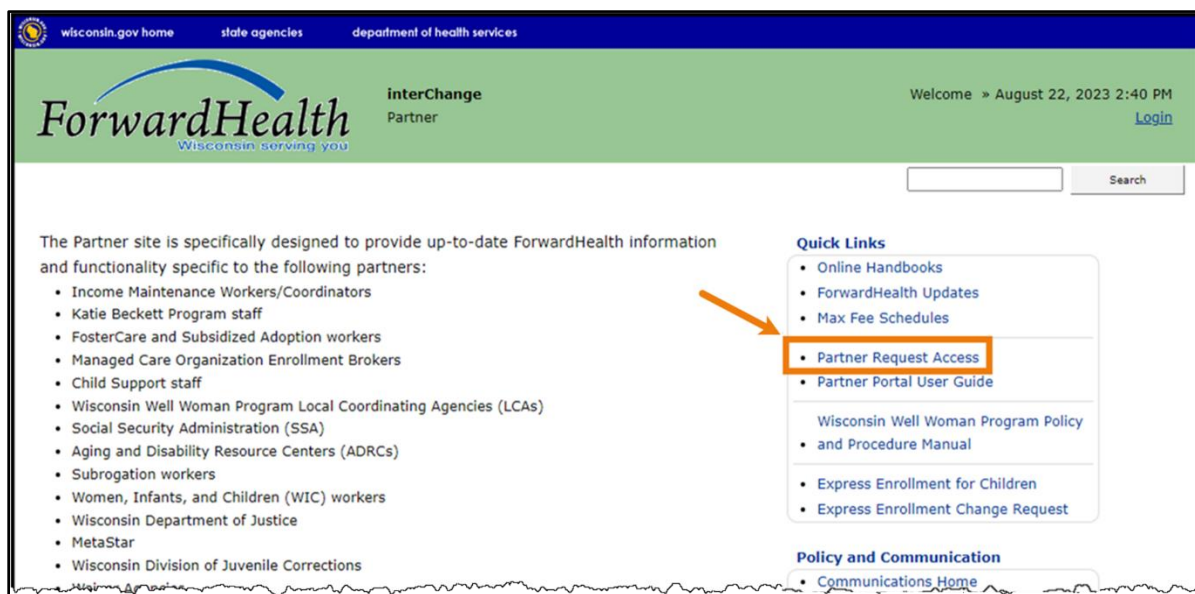2. Click **Partners**. The public Partner homepage will be displayed.

Figure 42 Public Partner Homepage

3. Click **Partner Request Access** in the Quick Links box. The Portal Access Request Type page will be displayed.

Figure 43 Portal Access Choose Request Type Panel—Request Partner Portal Access

4. Check the New User requesting Partner Portal Access checkbox.

5. Click **Next**. The Portal Access Request Information page will be displayed.

Figure 44 Portal Access Request Information Page

6. Enter the required information. Note that all fields are required. The Date Requested field defaults to the current date.

7. For the Role* field, select **PASRR Contractor** from the drop-down menu.

Figure 45 Portal Access Request Information Page

8. Read the Security Agreement and check the security agreement checkbox.

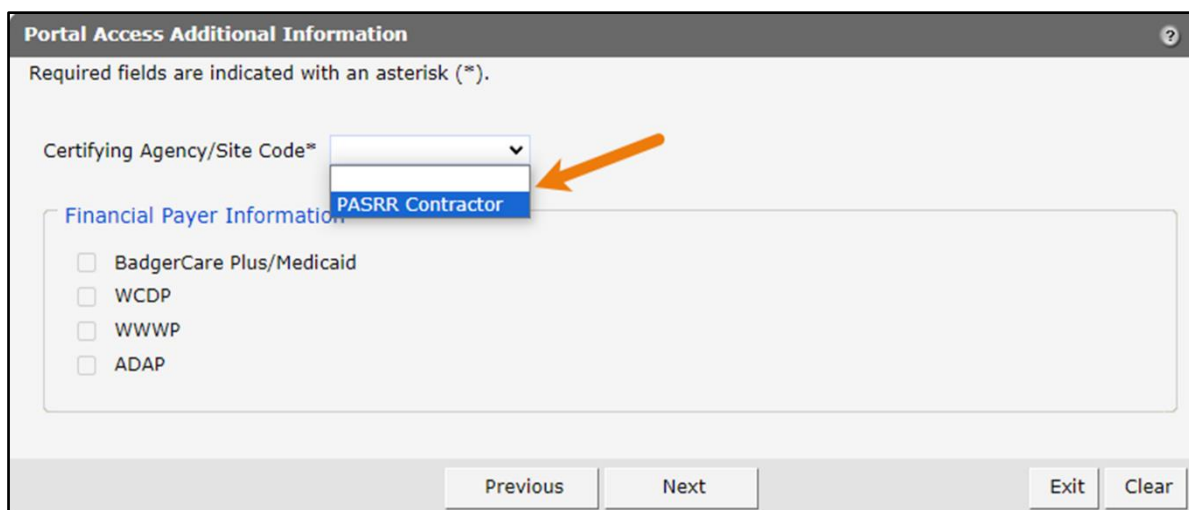9. Click **Next**. The Portal Access Additional Information panel will be displayed.

Figure 46 Portal Access Additional Information Panel

10. Select **PASRR Contractor** from the drop-down menu.

11. Click **Next**.

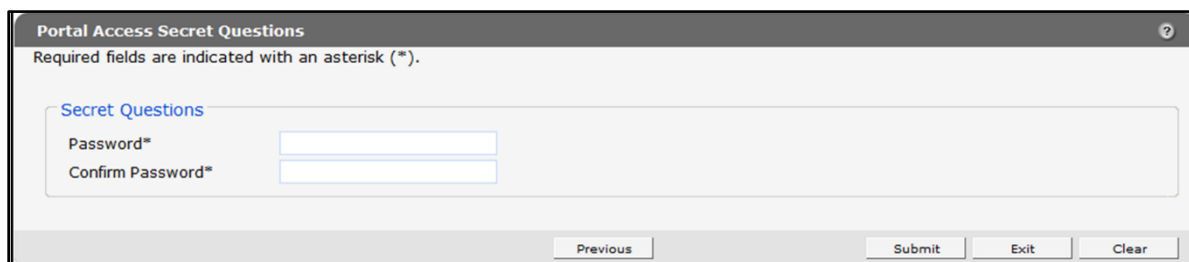12. The Portal Access Secret Questions panel will be displayed.

Figure 47 Portal Access Secret Questions Panel

13. Create a password and retype the password to confirm it is correct.

14. Click **Submit**. If the submission is successful, the following message will be displayed.
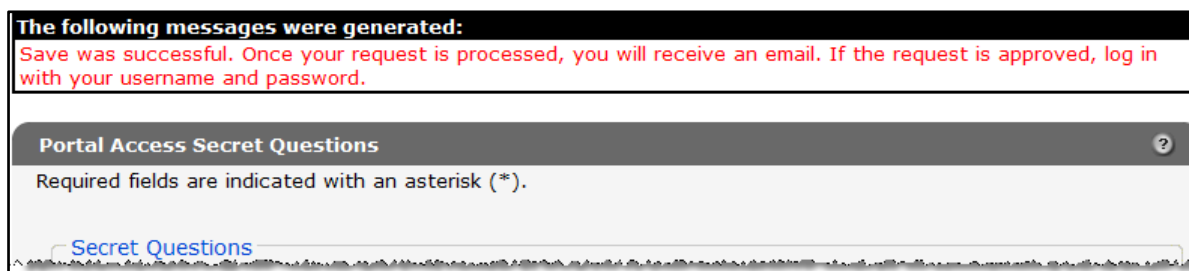

Figure 48 Submission Confirmation

If there is a problem with the submission, an error message will be displayed indicating what corrections need to be made.

7 Access Preadmission Screening and Resident Review Level II Referral Wizard

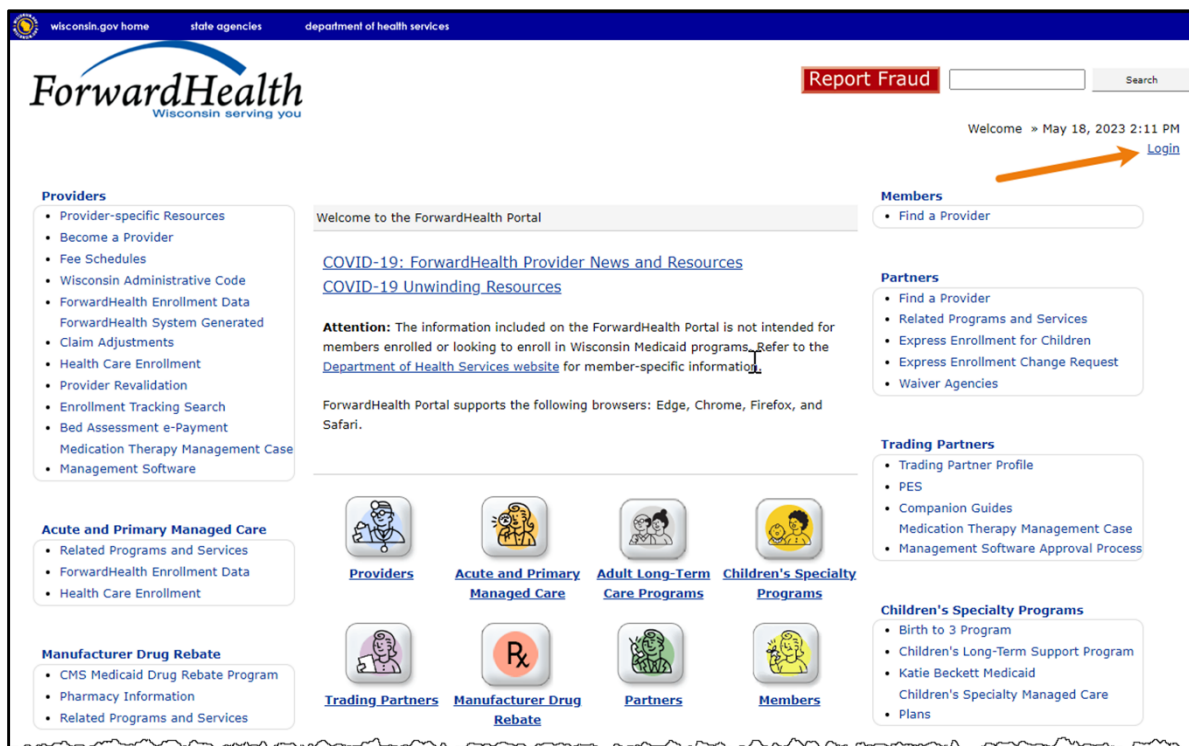1. Access the Portal at www.forwardhealth.wi.gov/.

Figure 49 ForwardHealth Portal Homepage
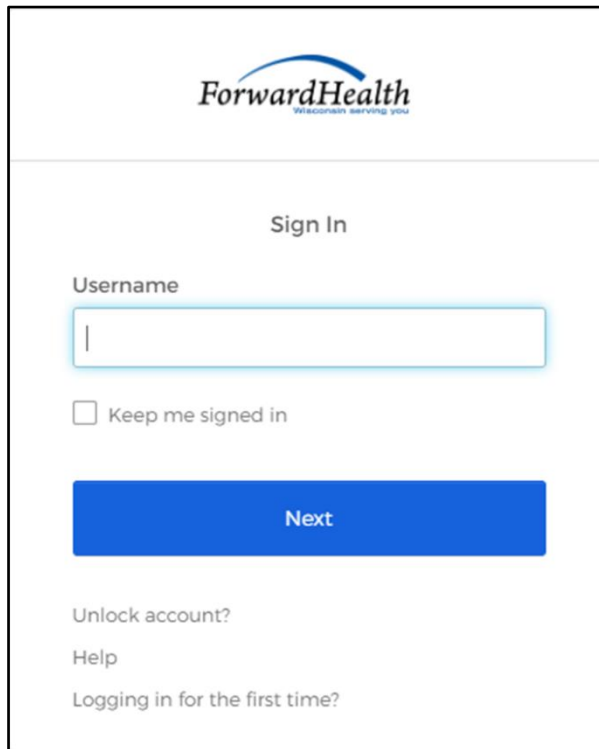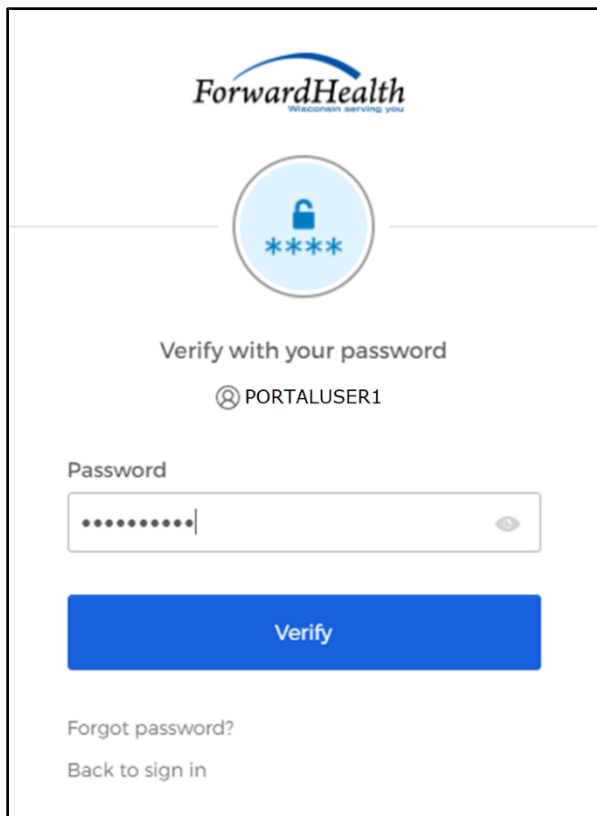
2. Click **Login**. A Sign In box will be displayed.

Figure 50 Sign In Box

3. Enter the user's username.

4. Click Next. A Verify with your password box will be displayed.

Figure 51 Verify With Your Password Box

5. Click **Verify**. The secure Partner page will be displayed.
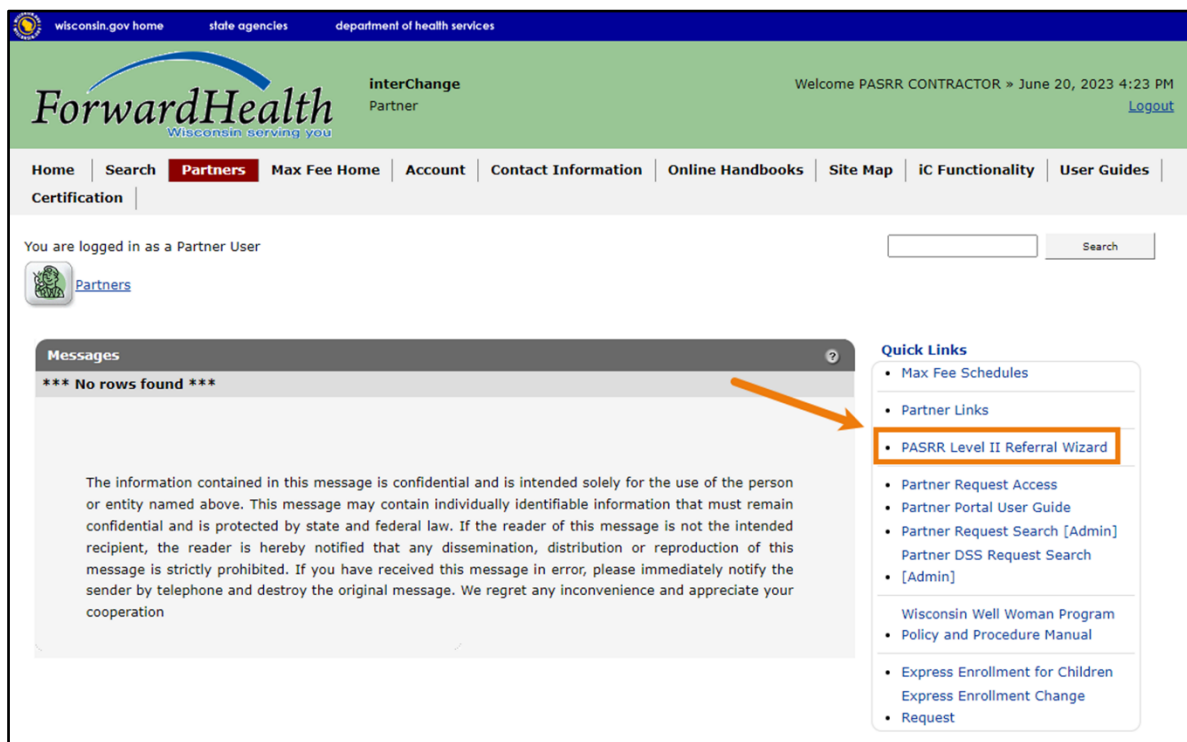
Figure 52 Secure Partner Page

6.   Click **PASRR Level II Referral Wizard** under Quick Links on the Partners page. The PASRR Referral Search panel will be displayed with search results. Note: Only cases that have been referred for a Level II screen will be displayed. The Level II Results column will have a hyphen (-) displayed if the referral has not been completed or "Completed" if the referral has been submitted. The Level I PASRR ID column will have a red flag displayed if the Level I screen has been updated since the first screen date.

Level I PASRR ID	Member ID	First Name	Last Name	Social Security Number	Date of Birth	Level I Status	Level I Screen Date	Level II Required	Referral Date	Level II Results	Date Last Updated
▶ 208		Larry	Test	333-44-4555	01/01/1980	Completed	11/22/2024	Y	11/25/2024	-	11/25/2024
209		Amy	test	444-55-6677	01/02/1980	Completed	11/22/2024	Y	11/22/2024	-	11/22/2024
210		Franky	test	666-77-8888	01/01/1980	Completed	11/22/2024	Y	11/22/2024	-	11/22/2024

Figure 53 PASRR Referral Search Panel

7. Select the desired row and click **Next**. The Referral Information panel will be displayed and populated with information from the PASRR Level I Wizard.

Figure 54 Referral Information Panel

8. Answer **Yes** or **No** to the question under the Cancel Screen section asking if the Level II Referral for the resident should be cancelled.

Figure 55 Referral Information Panel

9.   If "Yes," click **Next,** and proceed to Step 23.

10. If "No," click **Next,** and the Level II Information section will be displayed.

Figure 56 Referral Information Panel—Level II Information

11. Answer **Yes** or **No** to the question asking if the person was in the hospital at the time of the Level II Screen.

12. Select the appropriate information for the remaining questions from the drop-down menus. Depending on the type of Level I screen, an additional Type of Resident Review field may be displayed with a drop-down menu.

- The user can click the **View Level I Screening Documentation** link to bring up the OnBase Document Viewer. All of the documents that were uploaded in Level I in addition to the Level I summary document will be displayed.

- Click the desired document and scroll down to view the screens.

Figure 57 OnBase Document Viewer

13. Click **Next**. The Partial, Abbreviated, or Full Level II Screen panel will be displayed. Note: The contractor determines whether a partial, abbreviated, or full screen is appropriate on a case-by-case basis. The Partial Level II Screen will be displayed first.

Figure 58 Partial Level II Screen Panel

14. Answer **Yes** or **No** to the questions asking if the data about the person meets the federal definition of an "intellectual/developmental disability" or "serious mental illness." The Suspected ID/DD section will not be displayed if the resident has not been referred for intellectual and development disabilities. In addition, the Suspected MI section will not be displayed if the resident has not been referred for mental illness. Note: If the resident was referred for the wrong condition or an additional condition is determined in the Level II PASRR screen, the contractor will need to contact the provider who submitted the Level I PASRR to update and resubmit it.

15. Click **Next**. If "Yes" is answered for either or both questions, the Abbreviated Level II Screen panel will be displayed. If "No" is answered for both questions, proceed to .

Figure 59 Abbreviated Level II Screen Panel

16. Answer **Yes** or **No** to the question asking if an abbreviated Level II screen is appropriate. If "Yes," specify the medical condition affecting the person in the free text box. Text is limited to 500 characters.

17. Click **Next**.

18. Answering "Yes" on the Abbreviated Level II Screen panel will display the Appropriate of Placement Determination panel with the following values.

Figure 60 Appropriate of Placement Determination Panel

- Select any of the statements and any required additional information. More than one statement can be selected, depending on the selection.

- Click Next and proceed to Step 19.

19. Answering "No" on the Abbreviated Level II Screen panel will display the Appropriate of Placement Determination panel with the following values.

Figure 61 Appropriate of Placement Determination Panel

20. Select any of the available statements, and enter any required additional information.

21. Click **Next**. The Specialized Services Determination panel will be displayed. Depending on the answer(s) selected on the previous panel, the user will see various responses below. Up to four responses may be displayed.

Figure 62 Specialized Services Determination Panel

22. Select the appropriate response(s).

23. Click **Next**. The Level II Attestation panel will be displayed.

Figure 63 Level II Attestation Panel

24. To upload supporting documentation, click **Choose File** and select the desired file for uploading.

25. Click **Upload**. The file name will appear, and a confirmation message will be displayed at the top of the panel indicating the file has been successfully uploaded. Note: The user can click **Delete** to delete the uploaded file before they submit the Level II screen.

Figure 64 Level II Attestation Panel—Upload File

26. Complete the fields under the Contractor Information section and check the box under the Attestation section.

27. Click **Submit**.

The Confirmation panel will be displayed.

Figure 65 Confirmation Panel

28. The user may print the Level II Facesheet by clicking **Print Level II Facesheet** to view, download, or print a copy for their records.

Figure 66 Facesheet Level II Referral Summary

29. The user can search for a completed PASRR Level II referral by entering the PASRR ID and clicking **Search** from the PASRR Referral Search panel.

Figure 67 PASRR Referral Search Panel—Level II