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Quarterly Newsletter: Assessment Best Practice Tips & Reminders | Review Helpful Resources on Tools & Resources Site

BEST PRACTICES: Assessment Tips & Reminders

1. Several Providers have asked how to establish themselves as Access Coordinators in AssessmentPro. [Click here to review instructions](#) for adding an Access Coordinator, available via the Iowa PASRR Provider Tools & Resource site.
2. **Assessors now have access to an electronic Release of Information (ROI).** Keep in mind that although you are likely to see this version more often in the coming months, Assessors may still provide a paper ROI if they are unable to send a digital copy to the Provider. **Both versions are still valid.**
3. Please **submit a recent psychiatric note whenever one is available**, especially if the individual has major mental illness.
4. Be on the lookout for information regarding **upcoming in-person spring training sessions**, coming soon to a town near you.

RESOURCES: Review Important Guides and Training Materials Available on the IA PASRR Provider Tools & Resources Site

Keep in mind that the Iowa PASRR Provider Tools & Resources site is full of **helpful guides, manuals, and training materials** that you can view or download 24/7. Be sure to review a few of these helpful resource links also listed below:

- [Iowa PASRR Glossary of Terms - UPDATED](#)
- [Iowa PASRR Provider FAQs](#)
- [Training Video - PASRR 101](#)
- [PASRR Quick Tips](#)
- [Care Planning Tool](#)
- [Transition Guide](#)

SUPPORT: Your Iowa PASRR Help Desk Contacts

- Phone: **833.907.2777**
- Email: IowaPASRR@maximus.com

5/1/2023

Learning Opportunities: Register for Upcoming Iowa Provider Webinar Series | June – October 2023

Are you brand-new to PASRR? Would you like a refresher on certain aspects of the process? This new webinar series has you covered!

The Iowa PASRR support team at Maximus and Program Managers, **Lila Starr** of Iowa HHS and **Brad Goodin** of Maximus, have developed a comprehensive series of informative webinars designed to walk providers through many key aspects of the PASRR process and maximize their use of Iowa's assessment management system, AssessmentPro.

For the PASRR newcomer:

The sessions listed below are paced in an order that we hope will be most beneficial for someone who is new and needs to attend them all. It is designed to help you understand the process, from most basic to more advanced concepts, including an invaluable overview of many aspects of PASRR.

For the PASRR veteran:

Even an experienced provider who's accustomed to the Level I submission process is likely to have many questions and can learn a great deal more by attending these sessions. We hope you gain skills for using the assessment management system, AssessmentPro, as well as deepening your overall understanding of PASRR and how it relates to many other issues.

What are next steps? Be sure to scroll through the series descriptions, register for the sessions you need, and be sure to add those dates/times (shown below) to your calendar. Individual webinar reminders will also be sent out before each event.

PathTracker+ for Nursing Facility Social Workers, Administrators, & Business Office Staff

Please join us on **Tuesday, June 6, 2023 at 2:00 pm CST**, for an Iowa PASRR Technical Assistance webinar, as part of our continuing education series.

This Iowa PASRR Webinar is specifically designed for the staff in your NF who are involved in entering admission, transfer, and discharge information into PathTracker Plus, which is a feature of the Iowa PASRR database.

The webinar will include an overview of several critical functionalities of PathTracker Plus, including the when, where, why, and how to submit admissions, transfer, discharge, and corrected notices, as well as level of care and payment source changes. The use of PathTracker Plus has been mandatory since February 1, 2016, for all nursing facilities in Iowa. It is critical that appropriate nursing facility staff are trained and prepared to make necessary entries into the system in a timely manner. It is also critical that the NF stop all use of paper Case Activity Reports, also known as CAR forms, and that ALL changes that would have been submitted using a CAR form prior to 2016, must now be made only in the electronic PathTracker Plus system.

Register in advance for this webinar:

- [Click to register | 2:00 p.m. CST on Tuesday, June 6, 2023](#)

How to Successfully Complete a Level I PASRR Screening

Please join us on **Tuesday, June 20, 2023 at 2:00 p.m. CST** for up to 90 minutes, as part of our continuing education series. This very important Iowa PASRR webinar will get into the weeds and address your questions about exactly how to successfully complete a Level I PASRR screen and what documents are needed at the point of submission, and how to upload them. This webinar will provide information on:

- Who gets a Level I PASRR screening?
- What information is required in a Level I screen?
- Which documents to provide for the process to work as quickly and efficiently as possible
- What are the best practices for completing thorough and timely Level I screens?
- Turnaround times for Level I outcomes in Iowa
- The various outcomes that can be given at the conclusion of a Level I screen

If you are a hospital submitter, social worker, discharge planner, nursing facility DON or social worker, or any other person in any organization who may submit clinical information for a Level I screen, then this webinar is for you. If you work with other community-based service providers such as in-home health care, community mental health centers, group homes, hospice providers, or others who may have a need to learn how to submit Level I PASRR screens, please help us reach out and invite them as well.

Register in advance for this webinar:

- [Click to register | 2:00 p.m. CST on Tuesday, June 20, 2023](#)

PASRR Abbreviated Level II Outcomes: Exemptions & Categorical Outcomes

Please join us on **Tuesday, July 11, 2023, at 2:00 p.m. CST** for an Iowa PASRR Technical Assistance webinar for up to 90 minutes, as part of our continuing education series. This very important Iowa PASRR webinar will take a deep dive and address your questions about how and when it may be useful to complete a Level I PASRR screen with a requested or expected outcome of a 30-day Exempted Hospital Discharge (EHD) or any other of several Categorical Outcomes. This webinar will provide information on:

When is it appropriate to request a hospital exemption (EHD) from the full Level II process?
When is it appropriate or not appropriate to request the various kinds of abbreviated outcomes?
What are the pros and cons of using any of the abbreviated Level II outcomes?
Which documents to provide up front for the process to work as quickly and efficiently as possible
What are the best practices for completing thorough and timely Level I screens?

If you are a hospital submitter or nursing facility administrator, hospital discharge planner, nursing facility DON or social worker, or anyone who currently submits Level I screens, then this webinar is for you. If

you work with other community-based service organizations such as in-home health care providers, community mental health centers, group homes, or hospice agencies who may need to learn about the appropriate times to request any of the Categorical Outcomes and what they mean, then please invite them to attend.

Register in advance for this webinar:

- [Click to register | 2:00 p.m. CST on Tuesday, July 11, 2023](#)

Understanding PASRR Level II Summaries of Findings, PASRR Identified Services, and Implementation

Please join us on **Tuesday, July 25, 2023, at 2:00 pm CST**, for up to 90 minutes, as part of our continuing education.

This webinar will demonstrate how to review and understand a PASRR Level II outcome, known as a Summary of Findings, where an individual in the PASRR population is approved for a level of care and services are identified to optimize care and recovery for the individual. There are three types of services that can be identified; including Specialized Services that focus on the PASRR Condition/Disability, Rehabilitative Services that are typically provided as a part of the individual's care in a nursing facility, and Community Placement Supports that help to optimize an individual's potential for successful transition to a lower level of care once they leave a nursing facility for life in the community.

This webinar will provide you specific information on how to:

- Review the Level II Summary of Findings (SOF) prior to admission
- Understand the various areas of focus/information within the SOF
- Understand the role of the accepting nursing facility regarding the SOF
- Ensure delivery of all PASRR Identified Services
- Find PASRR identified services within the SOF
- Find Care Planning tools to facilitate compliance with service delivery
- Document that PASRR identified Services are being delivered

Register in advance for this webinar:

- [Click to register | 2:00 p.m. CST on Tuesday, July 25, 2023](#)

How to Achieve Compliance during PASRR ServiceMatters Reviews

Please join us on **Tuesday, August 8, 2023, at 2:00 pm CST**, for an Iowa PASRR Technical Assistance webinar of up to 90 minutes, as part of our continuing education series. A function of Iowa's PASRR process is that for every PASRR Level II where one or more "Specialized Services" are identified for an individual in the PASRR population, a ServiceMatters compliance review will be triggered.

Ascend/Maximus will monitor whether the NF has developed a PASRR compliant care plan that includes all PASRR identified services and specific proof that any specialized services are being delivered. This

webinar will offer specific guidance on how to successfully complete a PASRR Service Matters Review. The webinar will cover the following:

- How to find the Iowa PASRR NF Level II Care Planning Tool, and how to use it write a PASRR Compliant Care plan
- How to ensure that PASRR identified services are being delivered
- What information is needed to document that PASRR identified Specialized Services (SS) are being delivered
- How to complete the Service Matters Form
- Common issues that arise during Service Matters reviews

Register in advance for this webinar:

- [Click to register | 2:00 p.m. CST on Tuesday, August 8, 2023](#)

Community Placement Supports / Discharge Planning / PASRR Compliant Care Planning

Please join us on **Tuesday, August 22, 2023, at 2:00 p.m. CST** for a webinar in the Iowa training series where we'll address Community Placement Supports / Discharge Planning and Care Planning. A function of Iowa's PASRR process is that for every PASRR Level II Summary of Findings; there are three types of services identified. These include Community Placement Supports (CPS) that can, when appropriate and implemented as part of a well-orchestrated discharge plan, help an individual successfully transition to a lower level of care and thrive once they leave the nursing facility. This webinar will provide you specific information on:

- Reviewing and understanding the PASRR Identified Services: SS, RS, and CPS
- The role of the Olmstead Decision in PASRR
- Review why and how these Services are Identified
- Review where to find these services in the PASRR Summary of Findings (SOF)
- Tips and best practices on when to start discharge planning (Hint, it's usually best at admission!)
- Knowing when to include Community Placement Supports (CPS) in the Care Plan (Hint; every SOF tells you exactly when!)

Register in advance for this webinar:

- [Click to register | 2:00 p.m. CST on Tuesday, August 22, 2023](#)

PASRR Status Changes & When to Complete Them

Please join us on **Tuesday, September 5, 2023, at 2:00 p.m. CST** for an Iowa PASRR 90-minute webinar, as part of our continuing education series. The webinar will take a deep dive into the issues surrounding when to submit a new PASRR based upon Significant Changes in Status.

The Iowa Help Desk and the Iowa PASRR program receive more questions about Status Changes/Resident Reviews in PASRR and when to submit them, than any other single issue in PASRR.

This webinar is truly important for anyone and everyone who needs to understand a bit about when, why, and how to submit new PASRRs and the correlations to overall compliance. This webinar will offer guidance on:

- What might trigger a need for a Status Change for someone with a previous Negative Level I PASRR?
- What might trigger a need for a Status Change for someone who has previously been identified to be in the PASRR Level II population?
- Ways to ensure you are compliant with Status Changes in PASRR
- What we mean when we say – “When in doubt, submit a new PASRR”

Register in advance for this webinar:

- [Click to register | 2:00 p.m. CST on Tuesday, September 5, 2023](#)

PASRR & Individuals with History of Child or Dependent Adult Abuse

Please join us on **Tuesday, September 19, 2023, at 2:00 p.m. CST** for a webinar that offers an overview of Preadmission Screening and Resident Review - PASRR - and considerations when PASRR is being conducted for someone with a history of Child or Dependent Adult Abuse. PASRR is utilized to identify individuals with serious mental illness, intellectual or developmental disabilities, and related conditions, and identifies services that will be required for them if they enter an Iowa nursing facility.

Within the past several years, we have seen a significant increase in the number of PASRR assessments involving individuals with some criminal or child abuse history, or assessments that are conducted while individuals have also been identified as dependent adults by HHS, and where Dependent Adult Abuse assessments are co-occurring with PASRR or have recently been undertaken. In such cases, it is beneficial for the individual and their support network if/when those involved in PASRR can collaborate more effectively with those involved in child or dependent adult abuse assessment, and the service delivery that may follow.

This webinar will offer guidance on:

- Who/What/When/Why/and How of PASRR
- What information is needed to complete a thorough Level II evaluation and Summary of Findings?
- When PASRR requests Abuse information, what happens with it?
- How and when facilities and those who deliver services may benefit from requesting abuse information
- Why court orders and legal/criminal history become important matters in many cases
- How Dependent Adult Abuse Assessments impact PASRR and service delivery within the nursing facility
- The benefits of a collaborative process between PASRR and HHS staff engaged in Child or Dependent Adult Abuse Assessments.

Register in advance for this webinar:

- [Click to register | 2:00 p.m. CST on Tuesday, September 19, 2023](#)

PASRR 101: An In-depth Look into the Basics of Preadmission Screening and Resident Review

Please join us on **Tuesday, October 3, 2023, at 2:00 p.m. CST** for an Iowa PASRR 90-minute webinar, as part of our continuing education series. This webinar is for anyone who will do work related to PASRR including those who work in nursing facilities, hospitals, in-home healthcare, community mental health, hospice, and PACE provider organizations, MCO care managers, long term care ombudsman staff, community-based service provider organizations, and interested parties, to attend and learn with us. This webinar should be viewed as a pre-requisite to other PASRR training offered by HHS and Maximus about PASRR in Iowa and can also serve as a useful refresher to those who haven't been involved in PASRR for some time.

This PASRR 101 discussion will provide guidance on:

- History and purpose of the federally mandated PASRR program
- Links between PASRR and the Supreme Court Olmstead Decision
- Who receives a PASRR?
- The basics of PASRR Level I and Level II
- Information needed to complete a thorough Level II evaluation and Summary of Findings
- PASRR in Iowa - unique features
- What is PASRR compliance and why is it important?

Register in advance for this webinar:

- [Click to register | 2:00 p.m. CST on Tuesday, October 3, 2023](#)

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Quarterly Newsletter: Register for Upcoming Provider Webinars | Best Practice Assessment Tips & Reminders

EVENT REMINDER: Powers of Attorney, Legal Guardians and Conservators; Office of the Public Guardian – Two Part Series (Part One) | 2:00 p.m. CST on Tuesday, November 14 and 2:00 p.m. CST on Tuesday, November 28

Please join us for this popular two-part webinar in our Iowa PASRR Technical Assistance series. We'll discuss issues surrounding designations of Powers of Attorney for Healthcare and Financial Matters, and when it may be necessary to seek court ordered Legal Guardians and Conservators, how determinations are impacted by the cognitive capacity and the mental health status of the individuals we serve, and many questions that arise as we try to understand the differences, similarities, and implementation issues involved with each type of substitute decision maker.

Information presented in this webinar is expected to be useful to anyone and everyone who works with older adults, dependent adult, persons who may seek placement in any community setting including a

nursing facility and will not just be of interest to those who work with PASRR. We'll be joined by Jennifer Donovan of the Iowa Office of the Public Guardian, who will share her knowledge with us and facilitate better understanding of some of the many issues that frequently arise.

Part 1, which will be held on November 14, will address the important legal differences between Powers of Attorney for Healthcare and Financial matters, Guardianships, Conservatorships, and when each of these may be appropriate for an individual.

Part 2 will review questions that arise in Part 1, and go deeper into issues pertaining to Powers of Attorney, Guardianships and Conservatorships, offering tools and resources that will be very useful to staff who work in hospitals, nursing facilities, adult protective services, and other arenas who may have occasion to help individuals designate Substitute Decision Makers, have a payee, give end of life/care instructions, or may be in need of court appointed guardians and/or conservators.

We hope it will further empower you to help individuals in Iowa enhance their quality of life! The webinar will be moderated by Maximus PASRR Program Manager, Brad Goodin, and Lila Starr, Iowa PASRR Program Manager with HHS.

Register in advance for these webinars:

[Click to register | 2:00 p.m. CST on Tuesday, November 14, 2023](#)

[Click to register | 2:00 p.m. CST on Tuesday, November 28, 2023](#)

If you have yet to do so, be sure to review and register for the many other great webinars in our current Iowa PASRR Provider Webinar Series. Descriptions and Registration links are available on the Iowa PASRR Provider website under Announcements.

BEST PRACTICES: Assessment Tips & Reminders

1. When submitting a potential status change regarding a new serious mental illness, or other possible changes in PASRR condition(s), you must **include documentation such as the initial or most recent psychiatric evaluation and/or medical notes** with information that includes any new diagnosis and descriptions of current symptoms or issues that led you to believe a significant change in status may have occurred.
2. When emailing the [Iowa PASRR Help Desk](#), contacting Maximus or Iowa HHS Program Manager, **Lila Starr** regarding a particular individual, please **include the individual's PASRR Individual ID (IID) in the email, if known**. This allows us to research the issue and provide a timely resolution in a confidential manner without the need to share identifying information.
3. If you are submitting a Level I screen for an individual with any history of court involvement, such as 1) an involuntary mental health commitment for outpatient or inpatient treatment, 2) any type of protective court orders that may arise as a result of adult protective issues, 3) court orders related to Guardianship of Conservatorship, and/or 4) any potential that the individual have a known history of sexual acting out/aggression, or be a registered sex offender, **make certain to note legal involvement on the Level I screen, using the additional text boxes if needed, and submit a copy of all relevant court orders, as part of the Level I submission.**
4. **Mental health conditions** can only be verified by a provider note, psychiatric evaluation, psychiatric progress note, or other medical record signed by a practitioner/physician.

SUPPORT: Your Iowa PASRR Help Desk Contacts

- Phone: **833.907.2777**
- Email: iowaPASRR@maximus.com