Hospital Case Management
Concurrent Review Integration with InterQual Criteria

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Midas+ Solutions

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Sr. Product Consultant
McKesson Health

22nd Annual Midas+ User Symposium
Agenda

**Midas+**
- Midas+ & InterQual Integration Implementation
- Midas+ v2012 Integration Enhancements
- Reporting

**McKesson**
- InterQual Clinical Enhancements For 2013
- Level of Care (LOC) and Care Planning 2013 Enhancements
- New Horizons For Hospital Providers

**Integrated Product Demo**
Implementation

• Contract directly with McKesson
  • Provide education & implementation services

• Install InterQual CareEnhance Review Manager Enterprise (CERMe)

• Address Site Parameters

• Associated Fees
  • Contact your Account Manager
## Site Parameters

<table>
<thead>
<tr>
<th>Site Parameter</th>
<th>Option</th>
<th>Default</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTERQUAL?</td>
<td>Y or N</td>
<td>N</td>
<td>Choose Y to enable an InterQual product and display the InterQual tab in HCM Concurrent Review. Choose N to disable an InterQual product and hide the InterQual tab in HCM Concurrent Review.</td>
</tr>
<tr>
<td>INTERQUAL URL</td>
<td>URL</td>
<td>blank</td>
<td>Enter the URL of the CERMe server, including port. This is a pointer to the location of the CERMe server. Configure with server name: <a href="http://servername:nn/rm">http://servername:nn/rm</a> or IP address: <a href="http://10.123.45.56:nn/rm">http://10.123.45.56:nn/rm</a> (where nn is the optional port number)</td>
</tr>
</tbody>
</table>
Review Criteria Assignment

Multiple-facility Single-server Organizations

For those organizations that have multiple facilities that use a single server, a special function lets you customize which criteria sets (Milliman, MCAP, and InterQual) are displayed. Use the Review Criteria Assignment function to display or hide the criteria set tabs on the HCM Concurrent Review form for each facility.

Note: The Review Criteria Assignment function only appears in the Function menu if you have a multiple-facility, single-server organization. This Function is controlled in your Site Parameter setup.
Validation

CareEnhance Review Manager Enterprise (CERMe)

• Clients are notified by McKesson when the annual update is ready for release containing the following
  • *For those customers utilizing CERMe in an integrated manner, please confer with your Alliance Partner or host application manager prior to applying the update.*

• Midas+ performs validation on the new version

• Clients are notified when validation is completed & it is OK to proceed with updating InterQual

• Validation process takes no longer than 1-2 weeks
InterQual® 2012 & Midas+ v2011 Integration

InterQual Results - Thomas, Becky 4/22/2012

InterQual Version: InterQual® 2012
Review date: 05-12-2012
Review Status: In Primary
Criteria set: A1SD - Acute Adult
Criteria subset: COPD
Criteria status: Critical Met

Select Day, One:
Episode Day 1, One:
CRITICAL, Both:

- Impending or actual respiratory failure, = One:
  Arterial Po2 ≤ 39 mmHg (5.2 kPa)
  pH ≤ 7.24
  Confusion, lethargy, or coma and change from baseline
- Corticosteroid, = One:
  Bronchodilator (includes MDI with spacer) q1-2h
  or continuous

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Concurrent Review InterQual Integration

- InterQual Tab modifications
  - Limited discrete field display to Criteria Subset & Criteria Status
  - Entire text of the InterQual review is displayed
  - Eliminated Display Review Results Button

- Maintained current discrete fields for reporting

- Changed label for ‘Criteria Set’ to ‘Product’

- Added 4 new discrete fields for reporting
  - InterQual Criteria Subset (dictionary)
  - InterQual Priority (dictionary)
  - InterQual Review Status (dictionary)
  - InterQual Outcome (dictionary)
InterQual Launch Default Parameters

Products – LOC: Acute Adult

Content Versions – Current

Categories – All Categories

<table>
<thead>
<tr>
<th>InterQual® Products</th>
<th>Content Versions</th>
<th>Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOC: Acute Adult</td>
<td>InterQual 2013</td>
<td>All Categories</td>
</tr>
<tr>
<td>LOC: Acute Pediatric</td>
<td>InterQual 2012</td>
<td>Medical</td>
</tr>
<tr>
<td>LOC: Long-Term Acute Care</td>
<td>InterQual 2011</td>
<td>Surgical</td>
</tr>
<tr>
<td>LOC: Rehabilitation</td>
<td>InterQual 2010</td>
<td>Quality Indicator Checklist</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Transition Plan</td>
</tr>
</tbody>
</table>
Concurrent Review – v2012
Concurrent Review – Discrete Fields

InterQual Version: InterQual® 2012
Review date: 10-26-2012
Review Status: In Primary
Product: LOC:Acute Adult
Criteria subset: COPD
Criteria status: Acute Met
Select Day, One:

Episodeday 1, One:

ACUTE, Both:
- Persistent dyspnea, >= One:
  - Following short-acting beta-agonist >= 3 doses
  - over <= 3h, >= One:
  - Arterial Po2 40-55 mmHg (5.3-7.3 kPa) and pH 7.45-7.49
- Treatment, All:
  - Bronchodilator (includes MDI with spacer) >= 6x/24h
  - Corticosteroid (includes PO)
- Oxygen to maintain O2 sat >= 92%
  - (0.92) or arterial Po2 >= 60mmHg (8.0 kPa) (or baseline)
- Oximetry or blood gas

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Worksheet Template Definition

**Detailed = Entire Review**

<table>
<thead>
<tr>
<th>Date</th>
<th>Reviewer ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/26/2012</td>
<td>Gebremariam,Cin</td>
</tr>
</tbody>
</table>

Criteria Subsets: COPD
Criteria Status: Acute Med

InterQual Version: InterQual® 2012
Review date: 10-26-2012
Review Status: In Primary
Product: LOC:Acute Adult
Criteria subset: COPD
Criteria status: Acute Med
Select Day, One:
Episode Day 1, One:
ACUTE, Both:
- Persistent dyspnea, >= One:
  - Following short-acting beta-agonist >= 3 doses
  - over < 4 hr, => One:
  - Arterial Po2 45-55 mmHg (3.6-7.3 kPa) and pH 7.48-7.49
Treatment, All:
- Bronchodilator (includes MDI with spacer) =>
  - 6x/24h
- Corticosteroid (includes PO) => 924
  - (0.92) or arterial Po2 => 60mmHg (0.9 kPa) (or baseline)
  - O2 therapy or blood gas

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**Brief = Product; Criteria Subset and Criteria Status**

<table>
<thead>
<tr>
<th>Date</th>
<th>Reviewer ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/26/2012</td>
<td>Gebremariam,Cin</td>
</tr>
</tbody>
</table>

Product: LOC:Acute Adult
Criteria Subset: COPD
Criteria Status: Acute Med
Worklist Display Options

The image shows a screenshot of the SmarTrack Worklist Column Display interface. The display options are for sorting and filtering the worklist columns. The columns available include:

- CR-IQ Priority
- CR-IQ Criteria Status
- CR-IQ Criteria Subset
- CR-IQ Outcome
- CR-IQ Priority
- CR-IQ Review Status
- CR-Last Review Date
- CR-LOC

The interface allows sorting by these columns in ascending or descending order. The figure also demonstrates the worklist with columns for Patient, Location, Type, Status, and Next Review. The highlighted columns include CR-IQ Criteria Status, CR-IQ Criteria Subset, and CR-IQ Review Status.
Authorization

Worksheet Template Definition for Authorization offers the same Brief and Detailed options as seen in Concurrent Review.
**HCM Concurrent Review History**

**Comments**

<table>
<thead>
<tr>
<th>Date</th>
<th>Reviewed By</th>
<th>Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/16/2011</td>
<td>Bradford, Martha</td>
<td>Y</td>
</tr>
<tr>
<td>1/13/2011</td>
<td>Bradford, Martha</td>
<td></td>
</tr>
</tbody>
</table>

**Details for 1/13/2011 Bradford, Martha**

**General**

- **Severity**
- **Intensity**

**InterQual**

- **InterQual Version:** InterQual® 2011
- **Criteria set:** AISD - Acute Adult
- **Review type:** ADMISSION  
  **Review date:** 12-23-2011
- **Criteria subset:** Gastrointestinal / Biliary / Pancreatic (Acute)
- **Criteria status:** Met
- **Severity of Illness:** Met

**Comments:**

Elective admit for bowel resection. Routine post-op course expected.
## Reporting

### SmarTrack - Qualifying Variables

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual CERMe Version</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Criteria Status</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Criteria Subset</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Discharge Status</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Intensity Status</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Outcome</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Priority</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Product</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Review Status</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Severity Status</td>
</tr>
<tr>
<td>HCM CONCURRENT REVIEWS:InterQual Type of Review</td>
</tr>
</tbody>
</table>
## Hospital Case Management Data

<table>
<thead>
<tr>
<th></th>
<th>Jan 2013</th>
<th>Feb 2013</th>
<th>Mar 2013</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Discharges</td>
<td>265</td>
<td>330</td>
<td>312</td>
<td>907</td>
</tr>
<tr>
<td>Total Reviews Completed</td>
<td>300</td>
<td>385</td>
<td>340</td>
<td>1025</td>
</tr>
<tr>
<td>Reviews with Criteria Status = Met</td>
<td>212</td>
<td>260</td>
<td>198</td>
<td>670</td>
</tr>
<tr>
<td><strong>Acute Met</strong></td>
<td>63</td>
<td>102</td>
<td>74</td>
<td>239</td>
</tr>
<tr>
<td><strong>Intermediate Met</strong></td>
<td>35</td>
<td>41</td>
<td>29</td>
<td>105</td>
</tr>
<tr>
<td><strong>Critical Met</strong></td>
<td>46</td>
<td>50</td>
<td>35</td>
<td>131</td>
</tr>
<tr>
<td><strong>Observation Met</strong></td>
<td>52</td>
<td>47</td>
<td>42</td>
<td>141</td>
</tr>
<tr>
<td><strong>Newborn Level I Met</strong></td>
<td>16</td>
<td>20</td>
<td>18</td>
<td>54</td>
</tr>
<tr>
<td>Reviews with Criteria Status = Not Met</td>
<td>8</td>
<td>10</td>
<td>5</td>
<td>23</td>
</tr>
<tr>
<td><strong>Commercial</strong></td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>5</td>
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<tr>
<td><strong>Medicare</strong></td>
<td>5</td>
<td>9</td>
<td>2</td>
<td>16</td>
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<tr>
<td><strong>Medicaid</strong></td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>2</td>
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</tbody>
</table>
Reporting

RepotrTrack Fields
<table>
<thead>
<tr>
<th>Reviewer</th>
<th>Rev. Loc.</th>
<th>Patient</th>
<th>Principal Payer Type</th>
<th>Admit Date</th>
<th>Review Date</th>
<th>Criteria Status</th>
<th>Days to 1st Rev</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barnes,Jennifer</td>
<td>35E</td>
<td>Medicare</td>
<td>3/1/2013</td>
<td>3/1/2013</td>
<td>Acute Met</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Barnes,Jennifer</td>
<td>35E</td>
<td>Commercial</td>
<td>3/6/2013</td>
<td>3/6/2013</td>
<td>Critical Met</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Barnes,Jennifer</td>
<td>35E</td>
<td>Commercial</td>
<td>1/15/2013</td>
<td>1/15/2013</td>
<td>Observation Met</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Barnes,Jennifer</td>
<td>41E</td>
<td>Commercial</td>
<td>2/2/2013</td>
<td>2/3/2013</td>
<td>Observation Met</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Barnes,Jennifer</td>
<td>39W</td>
<td>Medicare</td>
<td>2/11/2013</td>
<td>2/12/2013</td>
<td>Acute Met</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Barnes,Jennifer</td>
<td>41W</td>
<td>Medicare</td>
<td>1/3/2013</td>
<td>1/5/2013</td>
<td>Acute Met</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Barnes,Jennifer</td>
<td>41W</td>
<td>Commercial</td>
<td>1/5/2013</td>
<td>1/7/2013</td>
<td>Acute Met</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Bradford,Martha</td>
<td>33W</td>
<td>Medicare</td>
<td>1/15/2013</td>
<td>1/15/2013</td>
<td>Intermediate Met</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Bradford,Martha</td>
<td>33E</td>
<td>Medicare</td>
<td>1/15/2013</td>
<td>1/15/2013</td>
<td>Intermediate Met</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Bradford,Martha</td>
<td>39E</td>
<td>Commercial</td>
<td>1/11/2013</td>
<td>1/11/2013</td>
<td>Intermediate Met</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Bradford,Martha</td>
<td>39E</td>
<td>Medicare</td>
<td>1/13/2013</td>
<td>1/13/2013</td>
<td>Acute Met</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Bradford,Martha</td>
<td>NBN</td>
<td>Commercial</td>
<td>2/20/2013</td>
<td>2/20/2013</td>
<td>Newborn Level I Met</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>
### InterQual Results

**Patient Name:**

DOB: 06/03/1942
Admit Date: 01/13/2011
Account Number: 240075117
Attending Physician: Dr. Patrick Xeri
Principal Payer: Medicare
Secondary Payer: Blue Cross

**Date of Review:** 04/30/2013
Level of Care: Intermediate/Telemetry
Working Diagnosis: Rectal CA
Procedure: Bowel Resection

**INTERQUAL RESULTS:**

InterQual Version: InterQual® 2013
Review date: 04-30-2013
Review Status: In Primary
Product: LOC:Acute Adult
Criteria subset: Open Small Bowel Resection (with or without Enterostomy)
Criteria status: Intermediate Met
(Symptoms or findings within 24h)
(Excludes PO medications unless noted)
Select Day, One:
Operative Day, One:
ACUTE, One:
Expected post-op course, All:
DVT prophylaxis or patient ambulatory
Hydration or nutrition, One:
Advancing diet as tolerated or nutritional route established
Mobility advancing as tolerated
Post-op day 1, One:
ACUTE, One:
Expected post-op course, All:
NPO and IV fluid, One:
>= 75 mL/h, >= One:
Weight < 60 kg
Age >= 65
Renal insufficiency
Hx HF
INTERMEDIATE, >= One:
Bleeding and blood product transfusion, >= One:
Chest pain

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Resources – On-line Help

InterQual Tab

The InterQual tab is displayed only if your facility has a contract for the InterQual® CareEnhance™ Review Manager Enterprise (CERMe) product.

Caution: To avoid data loss, never install any new version of InterQual CERMe without first calling your Midas+ Service Manager.

The buttons on the InterQual tab are described as follows:

• Click Generate Review to launch the InterQual CERMe software and create an InterQual review for this case. To return to Care Management, click the Save button in the CERMe application. Your InterQual review automatically populates the Criteria Subset and Criteria Status fields on the top of the Interqual tab.

• Click Edit Review to launch the InterQual CERMe software and display an existing review. To return to Care Management, click the Save button in the CERMe application.

• Click InterQual Book View to access the criteria without opening a review. To return to Care Management, click the Close button (×) in the upper-right corner of the title bar.
2013 InterQual Clinical Content
2013 InterQual
Acute Level of Care (LOC) Enhancements
Criteria Subsets:

- Acetaminophen Overdose
- Acute Cholecystitis
- Acute Coronary Syndrome
- Anemia / Bleeding
- Antepartum / Postpartum
- Arrhythmia
- Asthma
- Carbon Monoxide Poisoning
- COPD
- Cystic Fibrosis
- Deep Vein Thrombosis
- Diabetes Mellitus
- Diabetic Ketoacidosis
- Epilepsy
- Extended Stay

- Gastrointestinal surgery
- General Medical
- General Surgical
- General Transplant
- General Trauma
- Heart Failure
- Hyperglycemic Hyperosmolar State
- Hypoglycemia
- Infection: CNS, Endocarditis, GI/GU/GYN, Musculoskeletal, Skin, Pneumonia
- Inflammatory Bowel Disease
- Pancreatitis
- Pulmonary Embolism
- Sickle Cell Crisis
- Stroke / TIA
Acute Pediatric – LOC New Content

Criteria Subsets:

- Acetaminophen Overdose
- Acute Cholecystitis
- Anemia / Bleeding
- Antepartum / Postpartum
- Asthma
- Bronchiolitis
- Carbon Monoxide Poisoning
- Cellulitus
- Croup
- Cystic Fibrosis
- Diabetes Mellitus
- Diabetic Ketoacidosis
- Epilepsy
- Extended Stay
- Failure to Thrive
- Gastroenteritis
- Gastrointestinal surgery
- General Medical
- General Surgical
- General Transplant
- General Trauma
- Hyperbilirubinemia
- Hypoglycemia
- Meningitis
- Nursery
- Pancreatitis
- Pneumonia
- Pyelonephritis
- Sickle Cell Crisis
Acute LOC Highlights

- Tuberculosis (TB)
- *CRITERIA POINT: “Unconscious and DNR”
- Pancreatitis
- Syncope
- Renal Insufficiency / Renal Failure
- Responder Enhancements to encompass Complications & Comorbidities
- Software Redirection & Benchmarking
Post-Acute LOC:
Accountable Care Organization (ACO) & Medical Home Management Considerations

- Long Term Acute Care (LTAC)
- Acute Rehab
- Sub-acute & Skilled Nursing
- Home Care
- Outpatient Rehab & Chiropractic
- Behavioral Health
InterQual
The Most Comprehensive Content Portfolio

InterQual Clinical Content

Care Planning Criteria
- Procedures
- Imaging
- Molecular Diagnostics
- Specialty Referral
- Durable Medical Equipment
- Specialty Rx

Level of Care Criteria
- Acute Adult
- Acute Pediatric
- Long-Term Acute Care
- Rehabilitation
- Subacute & SNF
- Home Care
- Outpatient Rehab & Chiropractic

Behavioral Health Criteria
- Psychiatry: Child, Adolescent, Adult, Geriatric
- Substance Use Disorders & Dual Diagnosis
- Residential & Community-Based Treatment

SIM plus™ Retrospective Monitoring Criteria

Clinical Evidence Summaries

Coordinated Care Content
Care Planning Enhancements

Procedures Content
Surgery Medical Necessity Documentation Protection
– Checklist now in Q & A format

Imaging Content
Diagnostic Trending (Now in Q & A Format)
Coordinated Care Content

Complex Case Management

Assessment in Q & A format

- Content includes:
  - Base module (focused on barriers and common questions)
  - Condition focused modules
  - Case management module

- Modules “blend” together to create one streamlined, member-specific assessment

- Assessment results in a member-specific care plan with:
  - Goals (prioritized)
  - Barriers (problems)
  - Interventions
  - Instructions
  - Educational material to guide the care manager

2013 Midas+ User Symposium
Condition-focused modules

Anxiety  Hepatitis/Cirrhosis
Asthma   Heart Failure
Bipolar Disorder High Risk Pregnancy
Bone Marrow/Stem Cell Transplant HIV/AIDS
Cancer   Hypertension
Chronic Kidney Disease Inflammatory Bowel Disease
Chronic Pain   Low Back Pain
Chronic Wound Lupus
Coronary Artery Disease Multiple Sclerosis
COPD Obesity
CVA/TIA Rheumatoid Arthritis
Depression Schizophrenia
Diabetes   Solid Organ Transplant
End of Life Substance Use
Progressing from Medical Necessity to Outcomes

Content Customization with InterQual Content Customization Tool (ICCT)
Automating InterQual Reviews Through Midas+ Integration

Product Demo

http://symsrv1/MidasWeb/Launch/Midas+.html
Thank you for attending.

Questions?

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