Optum

InterQual®: Conducting a nested decision tree review

Follow the steps in the example below to conduct a nested decision tree (NDT) review. In this example we'll conduct a review using Acute Adult criteria, COPD subset. At any point, select the Help button in the application for information on all features and functions and to access tutorials that demonstrate how to conduct a medical review.

Selecting a subset

1. Select PRODUCT and then select LOC: Acute Adult.

   The InterQual content version is enabled. If you have access to criteria from multiple years, you can select a version. The most recent version is automatically selected.

2. Optionally, select a different content version. The steps for conducting a review are the same, regardless of the content version you use.

   Criteria products are organized by category. We'll select the Medical category.

3. Select CATEGORY and then select MEDICAL from the list.

   A list of subsets associated with the selected product, version, and category is displayed. The subset we will focus on is COPD.

   You could scroll down the list to find it; however, there are other ways to find subsets. You can find subsets by entering keywords or medical codes. You can search by the subset name. You can also bookmark your most frequently used subsets. We'll search by the keyword "COPD".

4. Enter the keyword COPD.

5. Select FIND SUBSETS.

6. Select COPD from the subset list.

7. View the subset note (with references and hyperlinks) to get details about the subset.

8. To view a clinical reference resource, select **CLINICAL REFERENCE** and then select a resource. The Clinical Reference is available at any time after you select a product and version and provides helpful resources to assist with conducting reviews.

Note: You can also access select Clinical Reference resources (for example, the Review Process) directly from the Subset Notes screen.

9. Select **SHOW CODES** to view medical codes (for example, ICD codes) that are mapped to the condition-specific subset.

   From here, you can perform the following tasks by selecting an option from the bottom toolbar:

   BEGIN MEDICAL REVIEW ⊙   Begin a medical review

   BOOK VIEW 📖   View criteria using Book View

   PRINT FULL SUBSET 🖨   Print the full subset

   BOOKMARK SUBSET   Bookmark the subset (if you expect to use it frequently)

   CHANGE SUBSET   Change the subset

   In this example, we'll begin a medical review with the COPD subset.

10. Select BEGIN MEDICAL REVIEW.

Subset Overview *Refine search with Product, Version, Category, Keywords or Medical Codes*

| LOC:ACUTE ADULT ▾ | 2024 ▾ | MEDICAL ▾ | CLINICAL REFERENCE ⑧ |
| COPD | Enter Medical Codes | FIND SUBSETS | CLEAR ALL | BOOKMARKS 🔖 |

Subset Notes

InterQual® 2024, Mar. 2024 Release, LOC:Acute Adult ⑦
COPD   ⑨ **SHOW CODES**

REVIEW PROCESS (PDF)

Introduction:

Chronic obstructive pulmonary disease (COPD) is a progressive condition characterized by persistent respiratory symptoms and chronic airflow limitation. The airflow limitation, determined by spirometric abnormality, is not fully reversible and is associated with an increased inflammatory response to noxious gases or particles.

When the patient is diagnosed with COPD, the severity of airflow limitation is classified into 4 stages based on the forced expiratory volume (FEV_1) measurement following bronchodilator administration as follows:

- GOLD 1 Mild: FEV_1 ≥ 80% predicted

⑩ **BEGIN MEDICAL REVIEW ⊙**   **BOOK VIEW 📖**   **PRINT FULL SUBSET 🖨**   **BOOKMARK SUBSET**   **CHANGE SUBSET**   Privacy Notice

Evaluating criteria

Acute Criteria are organized in a decision-tree format where top-level criteria have one or more levels of underlying criteria. You expand a section of the decision tree by selecting a plus (+) sign and collapse it by selecting a minus (-) sign.

Before you evaluate criteria, you can optionally select a utilization benchmark. Utilization benchmark information provides guidance around a typical length of stay for a condition and may show the percentage of patients ultimately paid for at the Observation status.

1. Select BENCHMARKS and then select the applicable benchmark for your organization, for example, COPD InterQual 3.6-day LOS.

2. Select EPISODE DAY 1 for admission.

   Next, we'll select a level of care based on the patient's current or proposed level of care.

3. Expand ACUTE, One:

   As you answer questions, you can do the following, as appropriate:

   – Read the notes 🗎. Notes provide clinical information, definitions, and citations.

   – Provide additional information by adding a reviewer comment 💬. To do this, you select the appropriate comments icon and enter comments in the Reviewer Comments dialog. The appearance of the icon changes to indicate the comment.

   – Return to the previous screen by selecting Previous. Your criteria selections are saved.

Medical Review *COPD* CHANGE SUBSET   CLINICAL REFERENCE

EPISODE DAY 1 2   CLEAR ALL   EXPAND ALL   COLLAPSE ALL   COMMENTS 0   BENCHMARKS 1

(Excludes PO medications unless noted)

⊟ Episode Day 1, One: 💬 🗎 2MN Trans

   (Symptom or finding within 24h)

   ⊞ OBSERVATION, All: 💬 🗎

   ⊞ ACUTE, One: 💬 🗎 3

   ⊞ INTERMEDIATE, One: 💬 🗎

   ⊞ CRITICAL, ≥ One: 💬 🗎

Utilization Benchmarks *Select a benchmark, which will appear in the Review Summary* ✕

Condition or Procedure ↑	% Pd Obs	LOS (days)	Type
190 CHRONIC OBSTRUCTIVE PULMONARY DISEASE WITH MCC	n/a	3.5	CMS GMLOS
191 CHRONIC OBSTRUCTIVE PULMONARY DISEASE WITH CC	n/a	2.7	CMS GMLOS
192 CHRONIC OBSTRUCTIVE PULMONARY DISEASE WITHOUT CC/MCC	n/a	2.2	CMS GMLOS
COPD 1	30	3.6	InterQual

4. Expand COPD exacerbation, **All** and then select Short-acting beta-agonist administered prior to admission by licensed medical professional ≥ 2 doses.

5. Expand Post initial treatment finding, **≥ One**.

   Let's assume that post treatment, the patient has an O_2 sat of 91%. Because of this, we can't select criteria point O_2 sat ≤ 89% (0.89) and < baseline. We have two options:

   – We can leave the criteria point as is and continue to evaluate the remaining criteria.

   – Or, to make it clear to a secondary reviewer that we evaluated this criteria point, we can explicitly indicate that the documentation does not satisfy the criteria by selecting the (X) on the criteria point.

6. Select the (X) on the O_2 sat ≤ 89% (0.89) and < baseline criteria point. The criteria point changes to red.

Note: Because the patient's documentation did not satisfy criteria, we could provide additional information by adding a comment on the criteria point to indicate the patient's O_2 sat. To do this, you select the comments icon on the criteria point and enter comments in the Reviewer Comments dialog.

We'll continue to select criteria.

7. Expand Intervention, **Both**: and select Bronchodilator ≥ 4x/24h (includes inhaled).

8. Select Corticosteroid (includes PO or inhaled).

9. View that the criteria status is still CRITERIA NOT MET. Medical necessity is not satisfied for Episode Day 1.

10. Open the Care Management Information notes.

    The Care Management notes show admission considerations, expected progress, and care facilitation or discharge planning and Social Determinants of Health.

11. Close the notes by selecting CARE MANAGEMENT when you finish viewing them.

View the Review Summary

Display the Review Summary by selecting MEDICAL REVIEW COMPLETED.

1. View who created the review and when as well as the facility.

2. View the criteria status, the product, subset, and version.

3. View utilization benchmark information.

4. View any reviewer comments.

5. View the criteria points selected as met (and not met) in the review. Criteria points you select that satisfy criteria are indicated with a check mark (✔), while criteria points you select that do not satisfy criteria are indicated with an (X).

6. Print the Review Summary in PDF format. The Configurations button has options that enable you to customize the review, such as including the InterQual notes in the PDF or hiding criteria you selected as not met.

7. Select COPY AS … to copy the review summary details and paste it to your system. You can, optionally, edit the text version of the review before you copy it to your system. See the Help for more information.

8. Select **CLOSE REVIEW/NEW REVIEW ⊕** to close the medical review. You will see a warning that starting a new review will clear the current medical review. Select START NEW REVIEW to close the current review and return to the Select Subset screen where you can, optionally, begin a new review.

Review Summary

Configurations ✿ ▾ | Print 🖶 | Copy As …   (7)

InterQual® Review Sur (6)

Created By: Barrister, karl
Created Date: 03/10/2025, 04:22 PM EDT (1)
Facility: InterQual Demo

Criteria Status: Criteria Not Met
Criteria Product: LOC:Acute Adult (2)
Criteria Subset: COPD
Criteria Version: InterQual® 2024, Dec. 2024 Release

Utilization Benchmarks

Level of Care: Episode Day 1
Length of Stay: 3.6 d
Length of Stay Type: InterQual
Condition/Procedure: COPD (3)
% Paid as Observation: 30%
Percent Paid as Observation indicates the final payment status as a percentage for patients hospitalized with the condition. It may not correspond to the status assigned at admission. Note that patients initially placed in Observation status who are converted to inpatient status (common) are included in the inpatient category, and that patients initially admitted to inpatient status who are converted to observation status (uncommon) are included in the Observation category.

Select Day, One:
  Episode Day 1, One:
    ACUTE, One:
      COPD exacerbation, All:
        ✔ Short-acting beta-agonist administered prior to admission by licensed medical professional ≥ 2 doses
        Post initial treatment finding, ≥ One: (5)
        ✖ O_2 sat ≤ 89%(0.89) and < baseline

Reviewer Comment: Walsh, Margaret on 03/10/2025, 05:37 PM EDT
O2 sat is 91% (4)

⊕ Previous | Close Review/New Review ⊕ (8)

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