

InterQual® Managing Criteria

You can manage InterQual® and custom content in the Administration module, which you access with your administrator's account. You can manage content (enable and disable products and subsets) for one facility at a time or for multiple facilities at once.

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InterQual Content Setting

InterQual Criteria are available in the system immediately with each new release of the content.

The Automatically Enable New Content Updates setting controls whether each new release of InterQual content, which may include new products, new subsets and/or updates to previously released subsets, is automatically enabled or disabled for reviewers. Values are:

- **True** (default)—new releases of content are automatically enabled so they are immediately available to reviewers.
- **False**—new releases of content are disabled. You can enable the content in the Administration module when your organization is ready. See [Enabling and Disabling Products and Subsets](#) below.

① **Note:** You can request a change to the setting by contacting Product Support or Services. Additionally, production and non-production environments can be set up independently.

Enabling and Disabling Products and Subsets for a Single Facility

As you enable and disable subsets, you can choose which release(s) of a subset to make available for reviewers to select. For example, suppose a subset is released in the 2021 April release and updated in the 2021 July release, and you want to make only the July update available for reviewers. You can enable the July release and then disable the April release of that subset (if you previously enabled it). When a reviewer selects that subset, only the July release will be available.

Select a Release

1. Click ADMINISTRATION to open the Administration module.
2. Click the CRITERIA MANAGEMENT tab if it's not already selected.

3. Select a version and product.

The product and subsets appear.

- Enabled (active) products and subsets appear with a green background and disabled (inactive) products and subsets appear with a white background.
- The *facility name* column shows a check mark to indicate enabled subsets.
- The Release column shows the releases available for each subset. By default, all releases that are available for a subset are displayed.

From here, you can enable and disable subsets, as appropriate, for each release, (for example, you might want to enable the July release of a subset and disable the April release of a subset.) However, to see the information more clearly and work with the subsets in a specific release, you can filter the list.

4. To view the subsets in a specific release, select it (for example, Jul. 2021) from the Release list.

The screenshot shows the 'Administration' section of the software. At the top, there is a 'MENU' button and a '1 ADMINISTRATION' tab. Below this, there are several filter buttons: 'FACILITIES(1)', '2021', '3 CP:DURABLE MEDICA...', 'ACTIVE & DISABLED', 'INTERQUAL & CLIENT DEFINED', and 'IMPORT'. A 'MIGRATION' button is also present. The main area is a table with columns: 'Product and Subset', 'Release', 'Action', and 'Testing Physicians Office West Active (48 of 51)'. The 'Release' column has a dropdown menu open, showing '4 RELEASE' and 'JUL. 2021' selected. The table lists various medical equipment subsets like 'CP-Durable Medical Equipment', 'Prosthetics, Myoelectric, Upper Extremity', 'Seat Lift Mechanism', 'Secretion Clearance Devices', 'Speech Generating Devices (SGD)', 'Standing Frames', and 'Support Surfaces'. Each row has an 'EXPORT' button and a status indicator (checkmark or circle).

The list filters to show any new or updated subsets in that release.

Note: You can clear the filter by clicking the x next to release name.

This screenshot is similar to the previous one but shows the 'RELEASE' dropdown menu expanded. The menu lists 'JUL. 2021' with an 'x' next to it, indicating it can be cleared. Below the menu, the table shows only the subsets for the selected release: 'Standing Frames' and 'Therapeutic Shoes and Inserts for Persons with Diabetes'. At the bottom of the interface, there are 'SAVE' and 'REVERT' buttons, and a message: 'All filtered and unfiltered pending changes will be saved or reverted'.

Enable products and subsets

1. Enable subsets:

- **To enable all subsets**—Select the product name. The status of all disabled subsets in the selected release (for example, Jul. 2021) changes to Pending. Note that when you select a specific release, only the subsets in the filtered list are enabled.
- **To enable individual subsets**—Select the individual subsets you want to enable. The status of the selected subsets changes to Pending.

① **Note:** Clicking REVERT will undo all your changes and allow you to start over at any time before you click Save.

2. Click Save.

In the example shown here, we enabled the July release of the CP: Durable Medical Equipment, Standing Frames subset.

Product and Subset ↑	Release ▾	Action	Testing Physicians Office West Active (49 of 51) (Pending)
CP:Durable Medical Equipment	JUL. 2021 × ▾		○ (Pending)
Standing Frames ①	Jul. 2021	EXPORT	● (Pending)
Therapeutic Shoes and Inserts for Persons with Diabetes	Jul. 2021	EXPORT	○

② SAVE REVERT *All filtered and unfiltered pending changes will be saved or reverted*

Disable products and subsets

You can disable subset releases that you no longer want to be available to reviewers. For example, suppose you want to disable the April release of the subset CP: Durable Medical Equipment, Standing Frame. First, you select the April release from the Release list and then disable the subset(s) as follows:

1. Disable products and subsets:

- **To disable all subsets**—Select the product name. The status of all enabled (Active) subsets changes to Pending. Note that when you select a specific release, only the subsets in the filtered list are disabled.
- **To disable individual subsets**—Select the individual subsets you want to disable. The status of the selected subset(s) changes to Pending.

2. Click Save.

In example shown below, we disabled the April release of the CP: Durable Medical Equipment, Standing Frames subset.

Product and Subset	Release	Action	Testing Physicians Office West Active (48 of 51) (Pending)
CP-Durable Medical Equipment	APR. 2021		(Pending)
Power Operated Vehicles (POV)	Apr. 2021	EXPORT	✓
Prosthetics, Lower Extremity	Apr. 2021	EXPORT	✓
Prosthetics, Myoelectric, Upper Extremity	Apr. 2021	EXPORT	✓
Seat Lift Mechanism	Apr. 2021	EXPORT	✓
Secretion Clearance Devices	Apr. 2021	EXPORT	✓
Speech Generating Devices (SGD)	Apr. 2021	EXPORT	✓
Standing Frames 1	Apr. 2021	EXPORT	(Pending)
Support Surfaces	Apr. 2021	EXPORT	✓

2 SAVE REVERT All filtered and unfiltered pending changes will be saved or reverted

You can enable and disable additional subsets by selecting a different product and release and repeating the steps to enable/disable subsets. Enabled subsets are available for selection in the review workflow. Disabled subsets are not available for selection in the review workflow.

Enabling and Disabling Products and Subsets for Multiple Facilities

① **Note:** The directions below describe how to manage content for multiple facilities. If you are managing content for a single facility, refer to [Enabling and Disabling Products for a Single Facility](#).

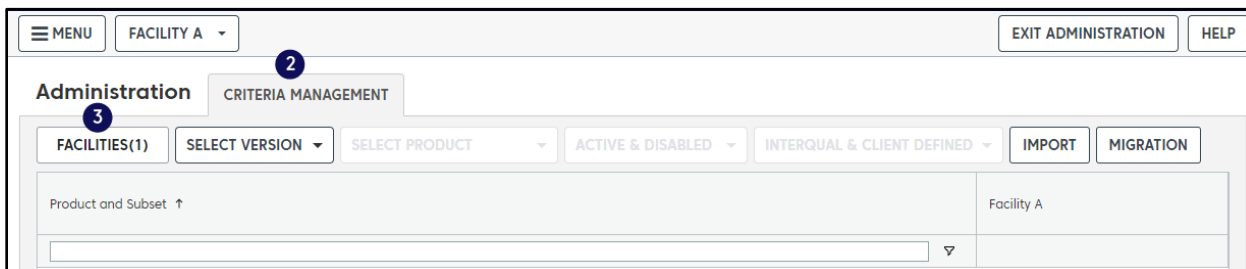
When managing content for multiple facilities, keep the following in mind:

- The facility you log in to displays only products that are licensed for that specific facility, so you may need to log in to different facilities as you manage content for multiple facilities.
- If you have custom content and want to manage it for multiple facilities, you must log in to the facility with custom content so you can share it with other facilities.
- You can manage content for as many as 20 facilities at a time.

To enable and disable products and subsets:

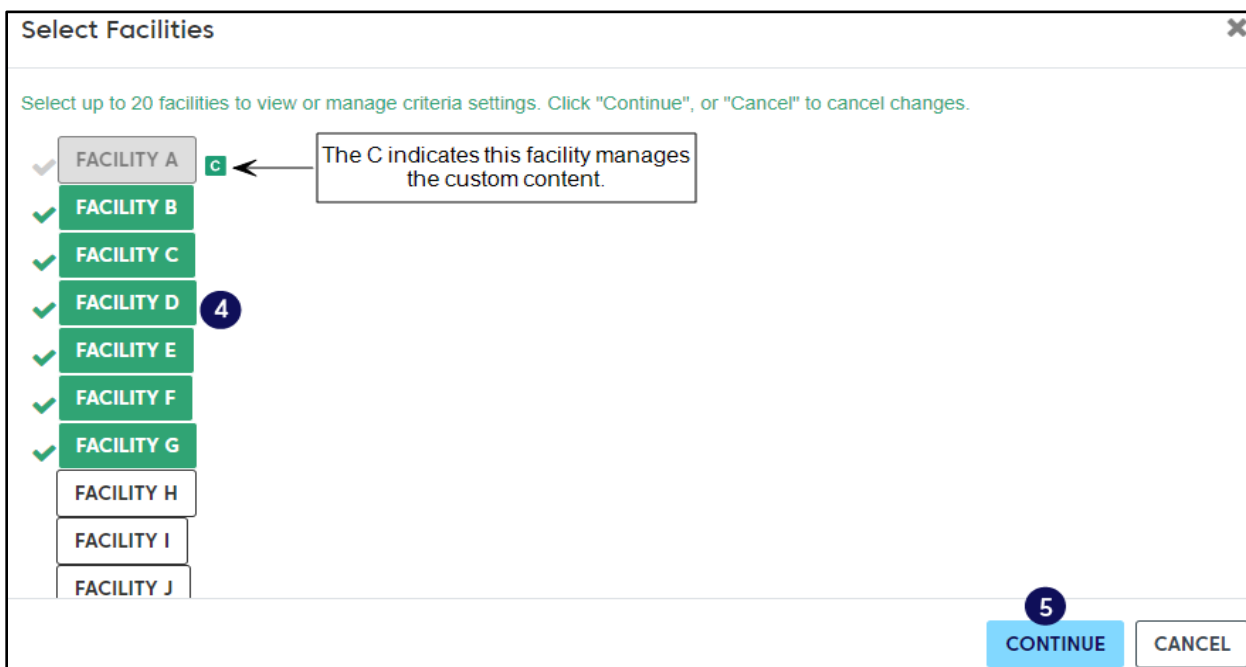
1. Click ADMINISTRATION to open the Administration module.
2. Click the CRITERIA MANAGEMENT tab if it's not already selected.
3. Click FACILITIES to select the facilities for which you want to enable or disable content.

MENU ADMINISTRATION 1 LOCK SCREEN HELP



The Select Facilities window appears with the facility you logged in to selected by default.

4. Click a facility to select it. You can select as many as 20 facilities. If you exceed 20 facilities, a warning message appears and the CONTINUE button is disabled.
5. Click CONTINUE when you finish selecting facilities.



The FACILITIES button on the Criteria Management screen shows the number of facilities you selected.

6. Select a version and product.

The selected facilities appear and show whether the selected product is licensed for the facility. Subsets appear as follows for facilities that have the licensed product:

- **Dark green background** indicates subsets that are enabled (active) for all the selected facilities.
- **Light green background** indicates subsets that are enabled for only some of the selected facilities.
- **White background** indicates subsets that are disabled (inactive) for all the selected facilities.
- **Facility name** column shows a check mark to indicate an enabled subset.

- **Release** column shows the releases available for each subset. By default, all releases available for each subset are displayed.

7. To view the subsets included in a specific release, select it (for example, Jul. 2021) from the Release list.

Product and Subset ↑	Release	Action	Facility A Active (69 of ...)	Facility B Active (68 of ...)	Facility C Active (68 of ...)
CP-Durable Medical Equipment	RELEASE 7		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prosthetics, Lower Extremity	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Prosthetics, Myoelectric, Upper Extremity	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Seat Lift Mechanism	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Secretion Clearance Devices	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Speech Generating Devices (SGD)	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Standing Frames	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Standing Frames	Jul. 2021	EXPORT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support Surfaces	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

The list filters to show any new or updated subsets in that release.

Product and Subset ↑	Release	Action	Facility A Active (69 of ...)	Facility B Active (68 of ...)	Facility C Active (68 of ...)
CP-Durable Medical Equipment	JUL 2021		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Standing Frames	Jul. 2021	EXPORT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Therapeutic Shoes and Inserts for Persons...	Jul. 2021	EXPORT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Tip: To view the information on the screen more clearly, you can:

- o Move the pointer over a facility name to display the full name.
- o Adjust the width of a column by pointing to the divider between two columns until it changes to a double arrow and then dragging it to the left or right.
- o Use the horizontal scroll bar at the bottom of the screen to view any facilities that are not visible.

Enable products and subsets

1. Enable subsets as follows:

- **To enable all subsets for all selected facilities**—Select the product name. The status of all disabled subsets changes to Pending. Note that when you select a specific release, only the subsets in the filtered list are enabled.
- **To enable individual subsets for all selected facilities**—Select the individual subsets you want to enable. The status of the selected subset(s) changes to Pending.

- **To enable subsets for specific facilities**—Select the circle in the facility column for the subset.

2. Click Save.

In example shown below, for the CP: Durable Medical Equipment, Standing Frames subset, 2021, July release, we enabled the subset for Facility A and Facility C, but not for Facility B.

The image displays two screenshots of a software interface for managing criteria. The top screenshot shows a table with columns for Product and Subset, Release, Action, and three Facility columns (A, B, C). The 'Standing Frames' subset for July 2021 is selected, and its status for Facility A and C is 'Pending' (indicated by a checked circle), while Facility B is 'Pending' (indicated by an empty circle). The bottom screenshot shows the same table after saving, with the 'Standing Frames' subset now enabled for all three facilities (A, B, and C), indicated by checked circles in all three facility columns. A 'SAVE' button and a 'REVERT' button are visible at the bottom of the interface.

Disable products and subsets

You can disable subset releases that you no longer want to be available to reviewers. For example, suppose you want to disable the April release of the subset CP: Durable Medical Equipment, Standing Frame. First, you would select the April release from the Release list and then disable the subset.

1. Disable products and subsets:

- **To disable all subsets for all selected facilities**—Select the product name. The status of all enabled (Active) subsets changes to Pending. Note that when you select a specific release, only the subsets in the filtered list are disabled.
- **To disable individual subsets for all selected facilities**—Select the individual subsets you want to disable. The status of the selected subset(s) changes to Pending.
- **To disable subsets for specific facilities**—Select the check mark in the circle in the facility column of the subset.

2. Click Save.

In example shown below, for the CP: Durable Medical Equipment, Standing Frames subset, 2021, April release, we disabled the subset for Facility A and Facility C.

FACILITIES(3)		2021	CP:DURABLE MEDICA...	ACTIVE & DISABLED	INTERQUAL & CLIENT DEFINED	IMPORT	MIGRATION
Product and Subset ↑	Release ▾	Action	Facility A Active (48 of 51) (Pending)	Facility B Active (68 of ...)	Facility C Active (43 of 51) (Pending)		
CP Durable Medical Equipment	APR. 2021		<input type="radio"/> (Pending)	<input type="radio"/>	<input type="radio"/> (Pending)		
Power Operated Vehicles (POV)	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Prosthetics, Lower Extremity	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Prosthetics, Myoelectric, Upper Extremity	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Seat Lift Mechanism	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Secretion Clearance Devices	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Speech Generating Devices (SGD)	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Standing Frames	Apr. 2021	EXPORT	<input type="radio"/> (Pending)	<input type="radio"/>	<input type="radio"/> (Pending)		
Support Surfaces	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		

SAVE **REVERT** All filtered and unfiltered pending changes will be saved or reverted

FACILITIES(3)		2021	CP:DURABLE MEDICA...	ACTIVE & DISABLED	INTERQUAL & CLIENT DEFINED	IMPORT	MIGRATION
Product and Subset ↑	Release ▾	Action	Facility A Active (69 of ...)	Facility B Active (68 of ...)	Facility C Active (68 of ...)		
CP Durable Medical Equipment	APR. 2021		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Power Operated Vehicles (POV)	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Prosthetics, Lower Extremity	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Prosthetics, Myoelectric, Upper Extremity	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Seat Lift Mechanism	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Secretion Clearance Devices	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Speech Generating Devices (SGD)	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Standing Frames	Apr. 2021	EXPORT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Support Surfaces	Apr. 2021	EXPORT	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		

✓ Saved

You can enable and disable subsets for additional products by selecting a different product and repeating the steps to enable/disable subsets. Enabled subsets are available for selection in the review workflow. Disabled subsets are not available for selection in the review workflow.

Click EXIT ADMINISTRATION to close the Administration module when you are done.

MENU **EXIT ADMINISTRATION** **HELP**