Optum

InterQual®: Conducting a level of care review

This document includes the following topics:

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Conducting a review

When you conduct a Level of Care review, you use InterQual[®] Criteria that is organized in decision-tree format. InterQual products that use this format include the following:

- LOC: Acute Adult
- LOC: Acute Pediatric
- LOC: Long-Term Acute Care
- LOC: Inpatient Rehabilitation
- LOC: Subacute/SNF

- · BH: Adult and Geriatric Psychiatry
- · BH: Child and Adolescent Psychiatry
- BH: Substance Use Disorders
- CP: Specialty Referral
- · Retrospective Monitoring

Important: If you are conducting a review for LOC: Home Care Q&A, LOC: Outpatient Rehabilitation & Chiropractic or BH: Behavioral Health Services, use the InterQual® Conducting a Prior-Auth Review job aid.

- 1. Find and select a subset using one or a combination of these methods:
 - Select a product and category. If you have access to criteria from multiple years, select a version.
 - Enter keywords (for example, words found in the subset name).
 - Enter medical codes (for example, ICD codes).
- 2. If you searched by keywords or medical codes, select FIND SUBSETS.

When the results appear, the Results count indicates the number of subsets that match the search criteria.

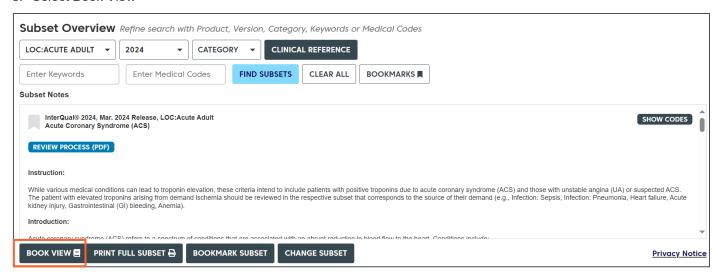
3. Select a subset.

The subset notes appear.

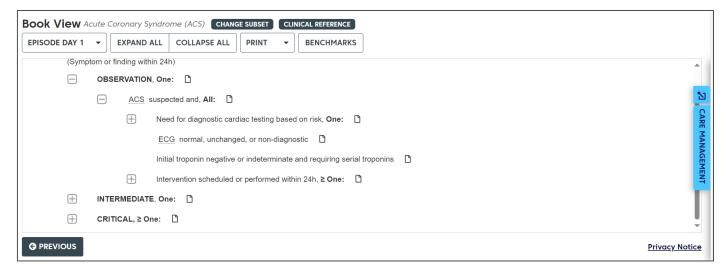
- 4. If there is more than one version of the subset available, select a subset version.
- 5. Read the subset notes to get information about the subset. You can also access select supporting Clinical Reference resources (for example, the Review Process) from the Subset Notes screen.

Note: If necessary, at any time, you can clear your subset selection by selecting CLEAR ALL or selecting CHANGE SUBSET to select a different subset.

6. Select Book View



- 7. Depending on the subset you selected, do the following:
 - Level of Care: Acute Adult and Pediatric -- select an Episode Day from the list.
 - Level of Care: Long Term Acute Care and Inpatient Rehabilitation -- select a review type (that is, Preadmission, Admission, Continued Stay, or Discharge).
 - Subacute and Skilled Nursing -- select a review type (that is Preadmission, Admission, Week
 1, Week 2-3, Week 4-6, and so on, or Discharge Screens).
 - Behavioral Health -- select a level of care and then choose the appropriate Episode Day or Week.
 - Care Planning: Specialty Referral -- select an indication from the list.
- 8. Expand the decision tree as follows:
 - Select a plus sign (+) to expand a section of the decision tree and select a minus sign (-) to collapse it.
 - Select Expand All to expand all criteria in the decision tree and select Collapse All to collapse it.
 - Use the vertical scroll bar to see all the criteria.



- 9. View any notes associated with the criteria by selecting the appropriate note icon:
 - Informational note --- provides reminders of best clinical practice, new clinical knowledge, procedural information, explanations of criteria rationale, and current literature references.
 - **Transition Plan note** often indicates that the patient might be at a higher risk for readmission and could benefit from comprehensive discharge planning. If you select a criteria point that has a Transition Plan note, we recommend that you complete a transition plan.
 - Note (Red) Note: Mandatory notes are associated with an indication or criteria point and provide important information that you must read while conducting a review.

 - CMS Two-Midnight Rule Note 2MN -- provides instructions for the Two-Midnight rule.
- 10. When you finish viewing criteria, do any of the following:
 - Select Change Subset to view criteria for a different subset.
 - Select Previous to return to the Subset Overview screen.
 - Select Menu to exit the workflow and then, if appropriate, select an option from the navigation pane.

Viewing the Clinical Reference

The Clinical Reference provides important information about InterQual® Criteria and how to conduct reviews.

You can use the Clinical Reference while you conduct a review, or as a resource for clinical information. If your organization has access to InterQual Criteria from previous years, then the appropriate historical versions of the Clinical Reference are also available.

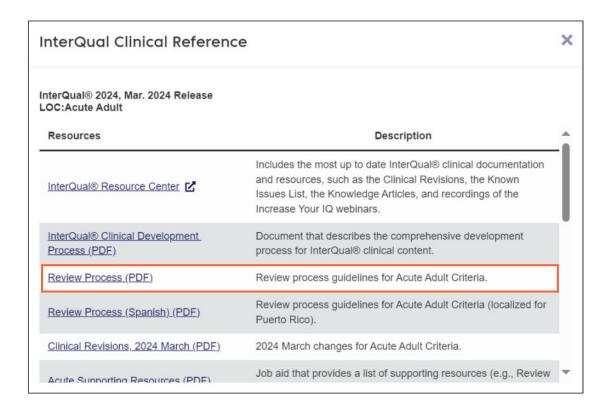
Note: You can also access select Clinical Reference resources (for example, the Review Process) directly from the Subset Notes screen.

View the Clinical Reference as follows:

- On the main (Select Subset) screen, select a criteria product and version.
 The Clinical Reference button is enabled.
- 2. Select CLINICAL REFERENCE

A list of resources is displayed (for example, clinical revisions, Review Process, and other supporting materials).

- 3. Select a resource to view it.
 - If the resource is a PDF, depending on the options available, select Open or select Download PDF.
- 4. Use the controls in the PDF to save and/or print a document.

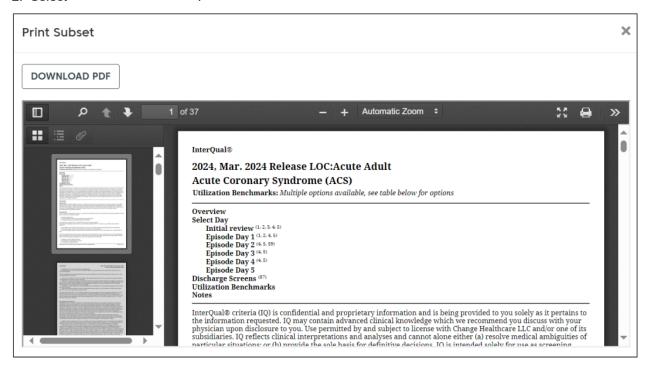


Printing a subset

Printing a subset enables you to print the entire contents of a subset, including InterQual® Notes.

To print a subset:

- 1. Find and select a subset.
- 2. Select PRINT FULL SUBSET ₽



- 3. Depending on the options available, select Open or select Download PDF.
- 4. Use the controls in the PDF to save and/or print the PDF.

Viewing the Help

The online help provides a step-by-step guide for you to refer to as you use the application to work with InterQual Criteria. It also includes job aids and video tutorials.

You can access the Help by selecting the Help button at any time.

