Optum

InterQual®: Conducting a Q&A review

Follow the steps in the example below to conduct a Q&A review. In this example we'll conduct a review using Home Care criteria. Home Care Services, Adult 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: HOME CARE Q & A.

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

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

   If the results had included multiple subsets, you could narrow the list of subsets by entering keywords or medical codes and then selecting Find Subsets. You can also open frequently used subsets using bookmarks.

3. Select Home Care Services, Adult from the subset list.

   The subset notes appear.

4. View the subset notes to get details about the subset. If more than one version of the subset is available, the most recent version is selected by default. If appropriate, select a different version based on the date of the request.

   You can also view the medical codes (for example, HCPCS codes) by selecting SHOW CODES.

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

The Clinical Reference, which you can view any time after you select a product and version, provides helpful resources to assist with conducting reviews. The Review Process is particularly important as it provides comprehensive guidelines for using the criteria. To view a clinical reference resource, you select **CLINICAL REFERENCE** and then select a document.

From here, there are several tasks you can perform:

BEGIN MEDICAL REVIEW ⊙ -- Begin a medical review.

BOOK VIEW 🗐 -- View criteria using Book View.

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

CHANGE SUBSET -- Select a different subset.

In this example, we'll begin a medical review with the Home Care Services, Adult subset.

5. Select BEGIN MEDICAL REVIEW.

As you conduct a review, criteria are presented in an interactive question-and-answer (Q&A) format. You answer questions that automatically appear in a specific pathway that leads to the most appropriate recommendation(s) for that clinical scenario.

Questions about homebound status, the services being requested, and the patient's illness are presented in Yes/No, Choose One, or multiple-choice formats.

6. Answer the questions as they appear. If necessary, select Next to continue to the next question. To follow this example, select the following:

a. Select No for Evaluation visit(s) only for all disciplines requested.

b. Select Yes for Intermittent skilled services required to address healthcare needs.

c. Select Yes for Payer requires patient to be homebound.

d. Select Need for supportive devices, special transportation, or assistance of another person.

e. Select Normal inability to leave home **and** Considerable and taxing effort required to leave home.

f. Select Reliable caregiver available to assist (with appropriate training) or no care giver assistance needed.

g. Select Skilled nursing.

h. Select Review for services within first 30 days of care.

i. Select Assessment, education, and/or medication reconciliation **and** Wound care.

j. Select Dressing changes.

k. Select 2x/week.

As you answer questions, you can optionally do the following:

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

- Return to the previous screen by selecting Previous. Your criteria selections are saved. To change your answers to questions, you can scroll up to see the questions and make different selections. You can select a different subset by selecting Change Subset.

When you answer all the required questions, the View Recommendations button is enabled.

7. Select VIEW RECOMMENDATIONS to continue.

Medical Review *Home Care Services, Adult* **CHANGE SUBSET** **CLINICAL REFERENCE**

COMMENTS ⓪

Wound care includes, Choose all that apply: **[≥ One, except Other clinical information (add comment)]** *Required* ☐ ☐

✔ Dressing changes ☐

Wound specialist evaluation and establishment of plan of care (POC) ☐

Or

Other clinical information (add comment)

Frequency of nursing visits for dressing changes and wound assessment, Choose one: *Required* ☐ ☐

1x/week

✔ 2x/week

3x/week

No remaining questions. Click View Recommendations to continue.

⑦

⊖ PREVIOUS   **SAVE REVIEW ▣**   **VIEW RECOMMENDATIONS ➡**

If there is a recommended service, it appears on the Recommendations screen after you answer the questions in a particular pathway (meeting criteria) and is based on the best available medical evidence. You can view and select a recommended service as allowed by the rules operating behind the scenes.

The recommendations in Home Care Criteria will include the services for which the review was completed, and criteria was met. The service and visit recommendations are displayed.

8. Select the Home Skilled Nursing recommendation. The medical codes (for example HCPCS) associated with the service are displayed.

9. Optionally, select a code (such as, G0299) associated with the service.

10. Select REVIEW SUMMARY.

The Review Summary shows the review details, including header information, all the medical review questions and answers, and any reviewer comments. It also shows the criteria status.

You can print the Review Summary in PDF format. Additionally, the Settings has several options that allow you to customize the review, such as including the InterQual notes in the PDF.

From the Review Summary screen, you also have the option to Save Review and Complete the review.

SAVE REVIEW -- Saves the review so you can edit and complete it later.

COMPLETE -- Completes the review. If you choose this option, you will see a warning telling you that the review will be locked from further edits.