

Allscripts Care Management

Client Setup Instructions for InterQual® Integration Updated 2013

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Set up Instructions for Allscripts Integration to InterQual®

Purpose:

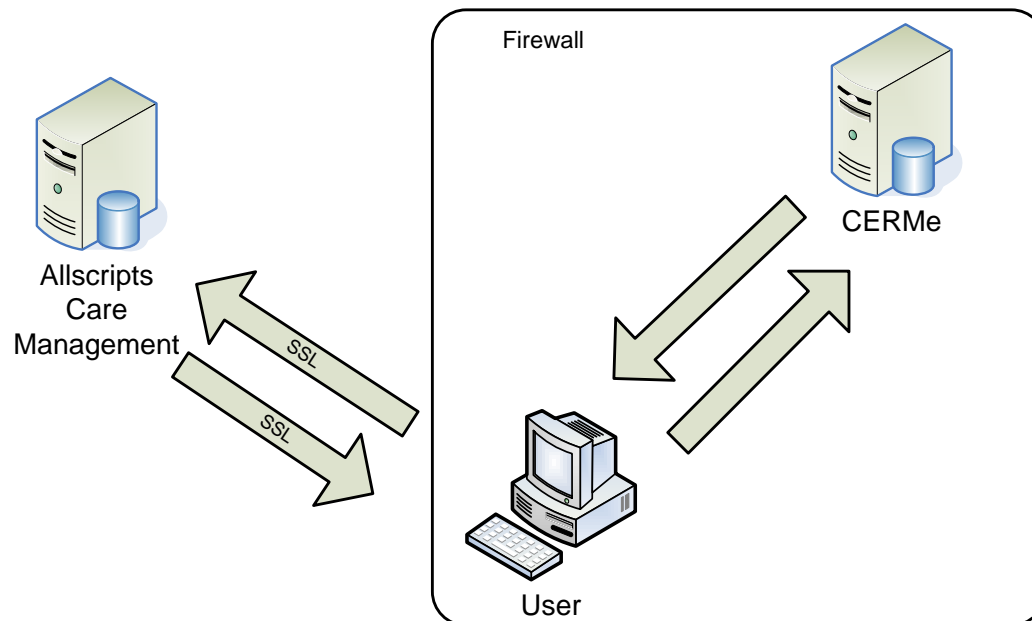
This documentation will provide instructions for setting up integration between All script's Care Management Solution and McKesson's InterQual®. These instructions are appropriate for integration with the Version 11.0 thru 12.0 releases of InterQual®. Please read the entire document before you start.

Enabling InterQual® in Allscripts

If you are interested in using Allscripts and McKesson's InterQual® product in an integrated environment, you will need to request assistance by your Allscripts Care Management account or project manager. They will discuss with you the optional and required application configuration options.

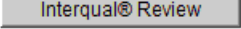
Prerequisites

To set up a secure communication, the CERMe® Server and CERMe® Users are both accessed behind your organization's firewall. An SSL connection is not necessary between the user and the CERMe® Server.



The following must be completed before the integration between the Organization's installations of CERMe® is integrated with Allscripts Care Management.

1. **CERMe®** 11.0 or 12.0 must be installed on the organization's server. For assistance with installing or upgrading CERMe®, please call McKesson's client support at 1.800.274.8374 or contact your McKesson Account Manager. The CERMe® database can be installed on a second server separate from the CERMe® application if desired.
2. **Internet Information Services (IIS)** must be installed on the same server. IIS is required in order to execute the CermelIntegrationPage.asp document which will be installed in Step 1. Please see your Microsoft documentation to perform the installation of IIS if it is not already installed.
3. **ASP Role Services** installed successfully.

When a user clicks the InterQual® Review button  on the Review Criteria Page in Allscripts Care Management the following steps take place:

- Opens a new browser window which posts back to <http://CERMEServer/McKesson/CermelIntegrationPage.asp>, this page contains an IFrame where the CERME application gets loaded into. CERME login information is embedded in the CermelIntegrationpage.asp page to facilitate auto-login into the CERME application. The CERME application lives in the IFrame during execution.
- From within CERME when the user completes their tasks they will click the CERME Save button. This transfers control from CERME application IFrame to Allscripts code on the same page via java script which then saves the page to the Allscripts Server.

Because of this java script communication between the CermelIntegrationPage.asp and the IFrame that contains CERME, MS Internet Explorer requires that any two pages that want to communicate to each other via java script have to be loaded from the same server due to cross-frame scripting security requirements. If this is not done, users will see warnings and errors based on their IE configurations when they access this page. That is the reason the CermelIntegrationPage.asp and CERME have to be installed on the same server.

For further information about cross-frame scripting and security please go to the following Microsoft page:

http://msdn.microsoft.com/library/default.asp?url=/workshop/author/om/xframe_scripting_security.asp

<http://www.microsoft.com/technet/archive/security/news/crssite.mspx?mfr=true>

Who Performs Steps in this Document: Technical or Clinical Staff:

Performed by the client IT staffer who is responsible for the CERMe server(s):

Steps 1-6 except for the last item 'Save data in CERME' checkbox which should be done by client Clinical Administrator.

Performed by the Clinical administrator at the client site:

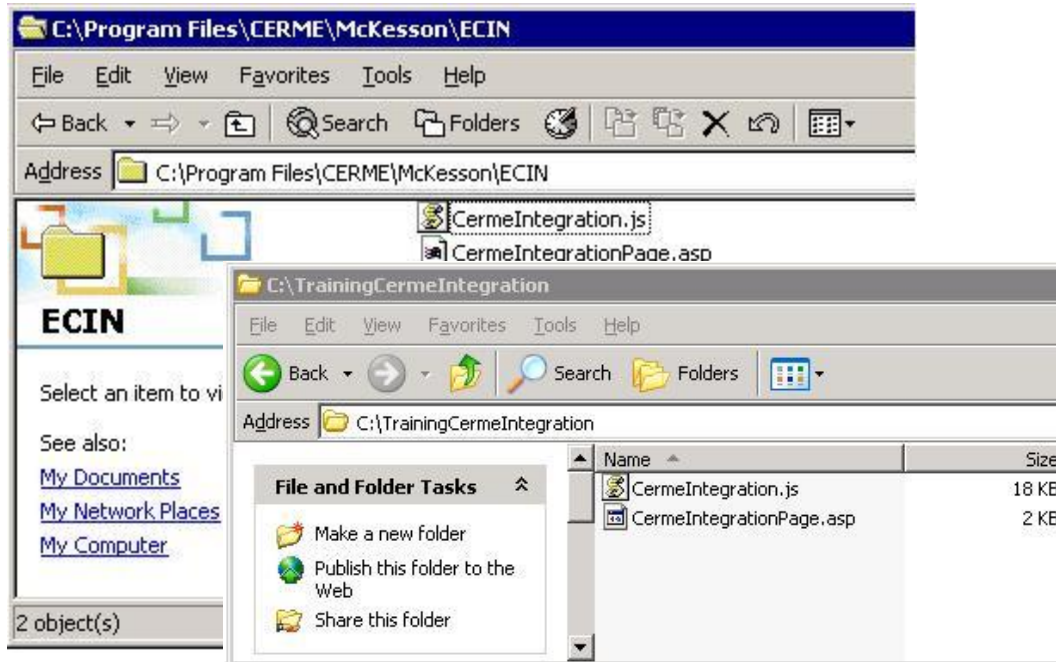
Step 6: Last item listed only: the 'Save data in CERME' checkbox which should be done by client Clinical Administrator.

Step 7: Clinical administrator should do all of the testing of the CERMe® Integration, both in the Training and Production environments.

Step 1: Allscripts Files

Two files will be sent to the organization's IT staff in order to complete the integration: CermeIntegration.txt and CermeIntegrationPage.txt. They will be sent via email as text files and will be stored on the same server as the organization's CERMe® install by completing the following:

1. Create a folder on the **same drive** CERMe® is installed on. Some clients prefer to place this folder within the file structure of the CERMe® application, others don't. The name of the folder may be whatever makes the most sense for the client. Below are some examples for Production and Training sites. It is required that both Training and Production are set up, so that the integration can first be tested in Training. Your McKesson rep can advise you on your setup.



2. Save both of the text files within the newly created folder and change the file extensions from:

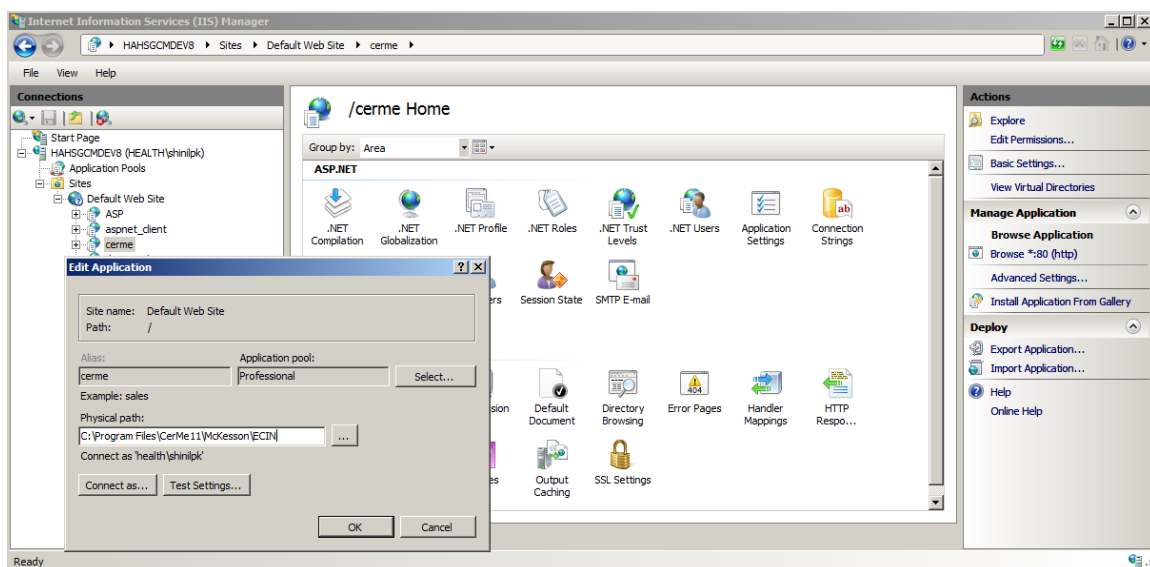
CermeIntegration.txt to CermeIntegration.js

CermeIntegrationPage.txt to CermeIntegrationPage.asp

Note: The files are not sent as the correct java script or asp file types because most email servers will flag these file types as "potentially unsafe" and prevent them from entering a user's inbox

Step 2: Create Allscripts Integration Site

1. In IIS Manager, expand the local computer and the **Sites** folder, and then find the Web site that you want to add a virtual directory for. Use the following steps:
 - For, right-click the site or folder where you want to create the virtual directory, and then click **Add Application**.
 - For Windows Server 2008, right-click the site or folder where you want to create the virtual directory, click **Manage Web Site**, and then click **Add Application**.
2. In the **Add Application** dialog box, specify the following information:
 - **Alias**. Type a name for the virtual directory. Choose a short name that is easy to type, because the user types this name to access the Web site. (eg:cCERME)
 - **Physical Path**. Type or browse to the physical directory that contains the virtual directory. Above case Browse to C:\Program Files\CERME\Mckesson\ECIN
3. To provide credentials to connect to a UNC path, click the **Connect as** button.
4. Click **OK**.



Step 3: Create Integration URL

The Integration URL is inserted on the Utilization Management Configuration page in Allscripts Care Management at Configure > Utilization Review > Utilization Management Configuration: CERME Integration section. The Integration URL is created using the following template:

<http://ServerName:PortNumber/filepath/CermelIntegrationPage.asp>

CRITICAL: This is the **CERMe Application server name**, not the name of the database server if there is a separate DB server.

For the screenshots used in steps 1-3, the Integration URL would be:

<http://ServerName/CermelIntegration/CermelIntegrationPage.asp>

Notes:

- Server name may be replaced with the server's IP address.
- If using standard port 80, the port number is not required in the Integration URL.

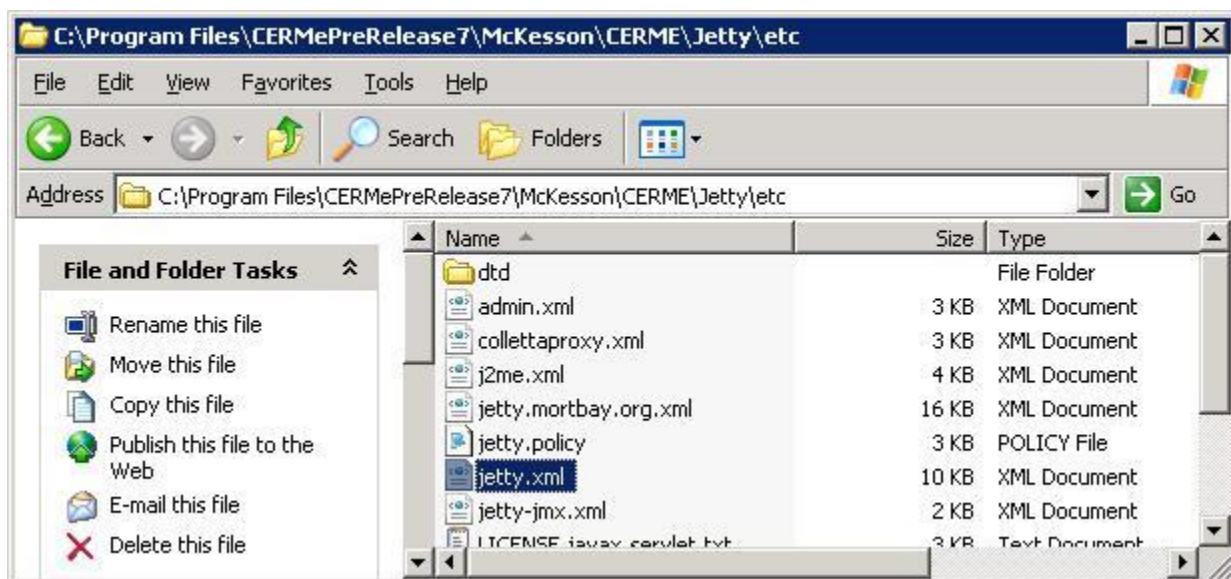
Step 4: Create Root URL

The Root URL is also stored on the Utilization Management Configuration page in Allscripts Care Management at Configure > Utilization Review > Utilization Management Configuration: CERME Integration section at bottom.

The Root URL is created using the following template:

http://ServerName:PortNumber/rm

If the Port Number used for the database is unknown, it may be looked up in the jetty.xml file stored in the file path described in the following screenshot:



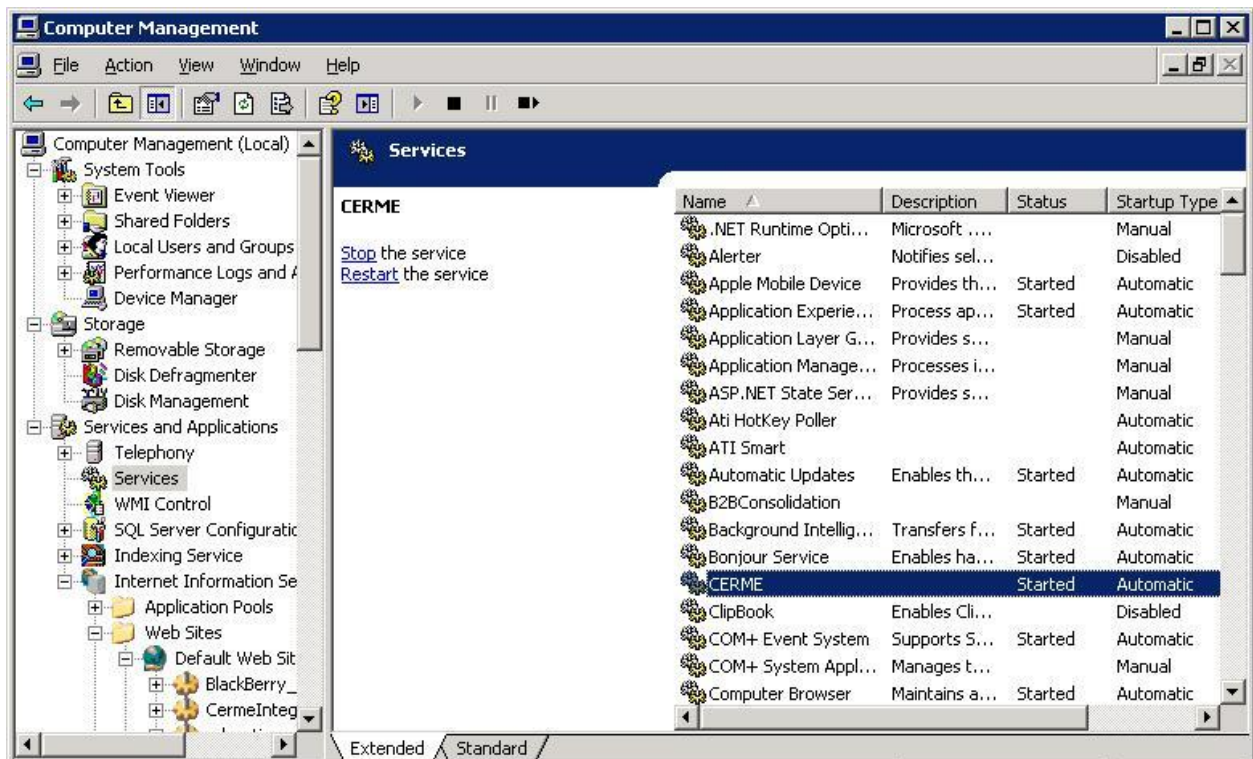
Notes:

- Server name may be replaced with the server's IP address.
- CERMe® application server and Database server may be the same.

Step 5: Restart CERME Service

To restart the CERMe® service open **Computer Management** from the Administrative Tools. Expand **Services and Applications** and click on **Services**.

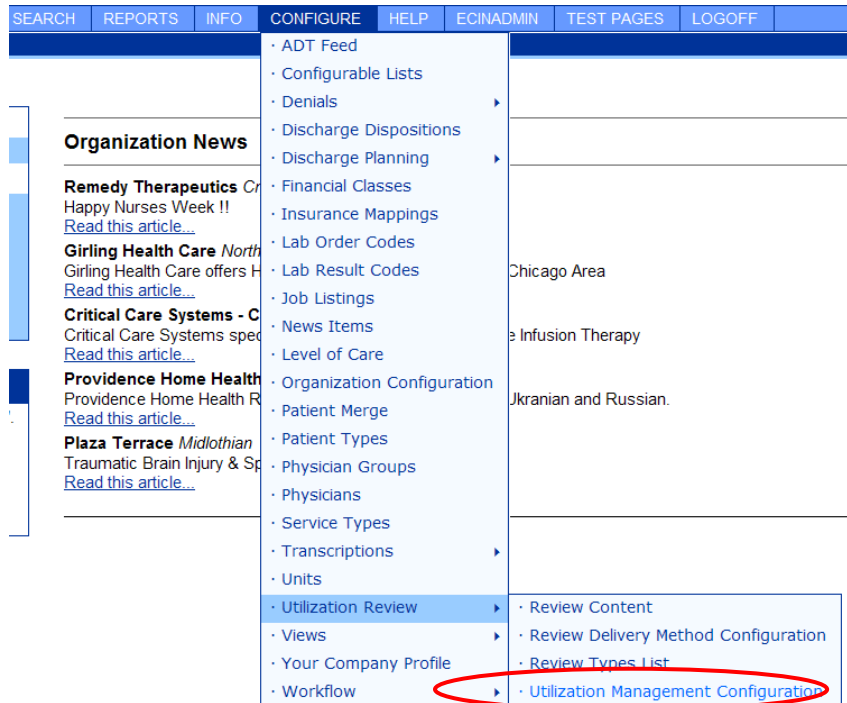
In the frame to the right, a list of services running on the server will appear. Click on the CERME service and click [Restart](#) to the left.



Step 6: Utilization Management Configuration

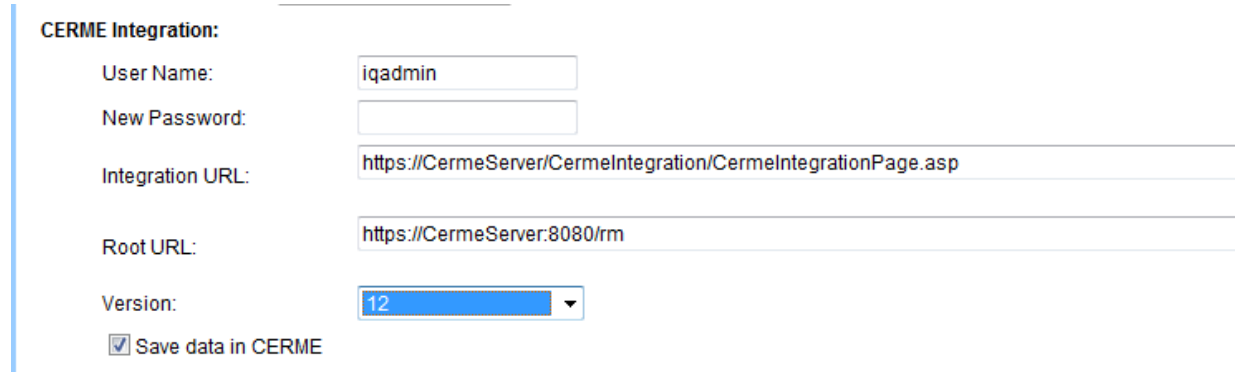
To complete the integration, log into the organization's Allscripts Care Management site.

The CERMe® launch settings are beneath the **Utilization Management Configuration** option under **CONFIGURE** and **Utilization Review**.



SEARCH	REPORTS	INFO	CONFIGURE	HELP	ECINADMIN	TEST PAGES	LOGOFF	
			<ul style="list-style-type: none"> ADT Feed Configurable Lists Denials Discharge Dispositions Discharge Planning Financial Classes Insurance Mappings Lab Order Codes Lab Result Codes Job Listings News Items Level of Care Organization Configuration Patient Merge Patient Types Physician Groups Physicians Service Types Transcriptions Units Utilization Review Views Your Company Profile Workflow 					
Organization News Remedy Therapeutics Cr Happy Nurses Week !! Read this article... Girling Health Care North Girling Health Care offers H Read this article... Critical Care Systems - C Critical Care Systems spec Read this article... Providence Home Health Providence Home Health R Read this article... Plaza Terrace Midlothian Traumatic Brain Injury & Sp Read this article...			<ul style="list-style-type: none"> Review Content Review Delivery Method Configuration Review Types List Utilization Management Configuration 					

The **CERME Integration** section can be found near the *bottom* of the **Utilization Management Configuration** page.



The screenshot shows a web form titled "CERME Integration:". It contains the following fields and controls:

- User Name:** A text input field containing the value "iqadmin".
- New Password:** An empty text input field.
- Integration URL:** A text input field containing the value "https://CermeServer/CermeIntegration/CermeIntegrationPage.asp".
- Root URL:** A text input field containing the value "https://CermeServer:8080/rm".
- Version:** A dropdown menu with "12" selected.
- Save data in CERME:** A checkbox that is checked.


The **User Name** and **Password** must be entered here.

McKesson supplies an initial admin username (iqadmin) and password that can be changed by the organization's **CERMe®** System Admin. But any user on the client CERMe server at Security – Users can be used that has All Activities, All Locations and All Products assigned to it.

Note: After saving the information the password “disappears” but is still stored in the product.


The **Integration URL** (step 3) and **Root URL** (step 4) are also required for the launch to work.

Selecting the **CERMe® Version** the organization is using is done through the drop down provided. Currently, Allscripts Care Management is certified to launch into CERMe® 11.0 and 12.0.

Click  at the bottom of the screen to **save** the CERMe® Integration settings.

Clinical Admin Performs This Step:

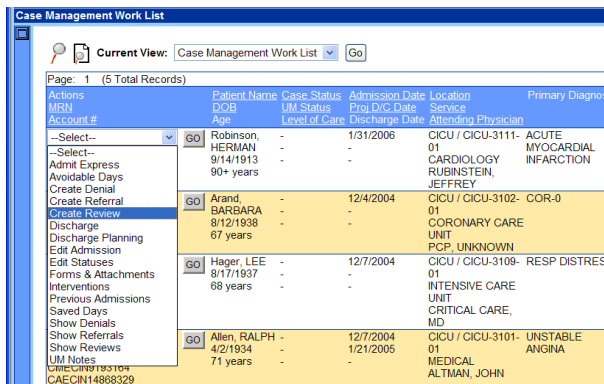
Finally, an organization may **check to Save data in CERME**, allowing users to return to reviews entered in CERMe® for editing or utilize CERMe® reports. That decision and selection should be done by the Clinical Administrator rather than IT personnel. This selection can be completed later.

Click  at the bottom of the screen to **save** the CERMe® Integration settings.

Step 7: Testing the Integration: Clinical Admin Performs this Step


To test the integration between Allscripts Care Management and CERMe®, you must complete a review using the following steps. First see Workstation Requirements Section at the end of this document.

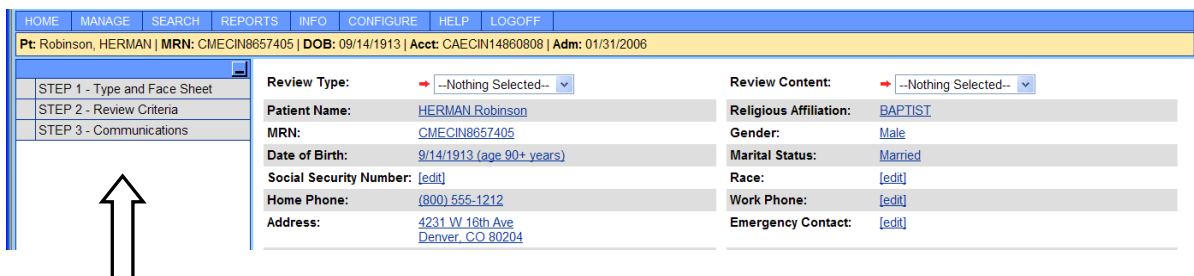
1. Create a New Review



Actions	Patient Name	Case Status	Admission Date	Location	Primary Diagnosis
MANAGE	HERMAN, ROBINSON	ACUTE	1/31/2006	CICU / CICU-3111- ACUTE	MYOCARDIAL INFARCTION
GO	HERMAN, ROBINSON	ACUTE	1/31/2006	CICU / CICU-3111- ACUTE	MYOCARDIAL INFARCTION
GO	ARAND, BARBARA	CORONARY CARE	12/4/2004	CICU / CICU-3102- COR-0	CORONARY CARE
GO	HAGER, LEE	INTENSIVE CARE	12/7/2004	CICU / CICU-3109- RESP DISTRES	INTENSIVE CARE
GO	ALLEN, RALPH	UNSTABLE	12/7/2004	CICU / CICU-3101- UNSTABLE	ANGINA

Find a patient's admission by clicking on MANAGE, hovering over Admissions, and clicking on an Admissions View that appears to the right.


To create a review on a patient, select **Create Review** from the Actions dropdown menu and click  next to the patient's name.



HOME | MANAGE | SEARCH | REPORTS | INFO | CONFIGURE | HELP | LOGOFF

Pt: Robinson, HERMAN | MRN: CMCEIN8657405 | DOB: 09/14/1913 | Acct: CAECIN14860808 | Adm: 01/31/2006

STEP 1 - Type and Face Sheet
STEP 2 - Review Criteria
STEP 3 - Communications

Review Type:  --Nothing Selected--

Patient Name: HERMAN, ROBINSON


MRN: CMCEIN8657405

Date of Birth: 9/14/1913 (age 90+ years)

Social Security Number: [\[edit\]](#)

Home Phone: (800) 555-1212

Address: 4231 W 16th Ave, Denver, CO 80204

Review Content:  --Nothing Selected--

Religious Affiliation: BAPTIST


Gender: Male


Marital Status: Married

Race: [\[edit\]](#)

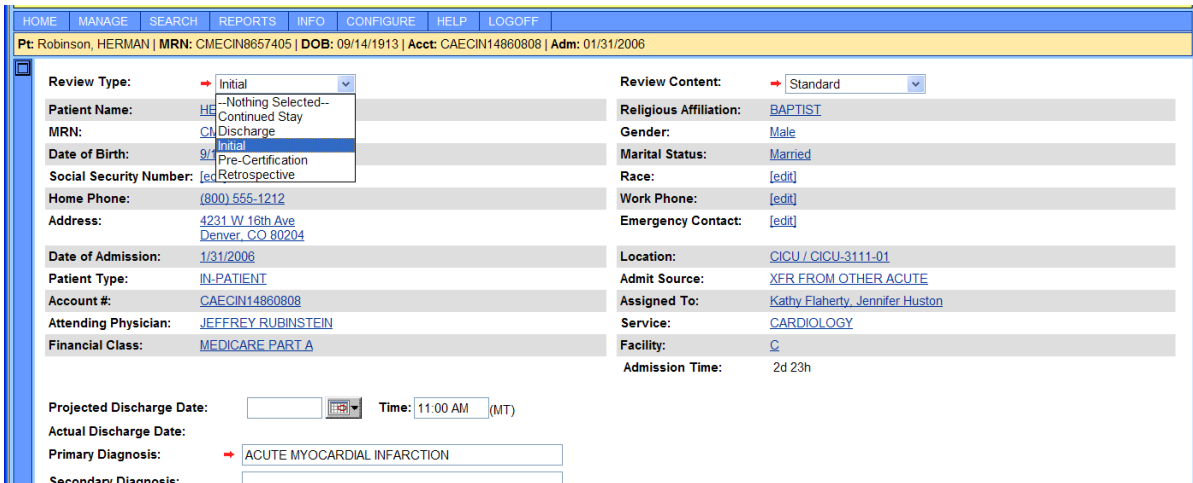
Work Phone: [\[edit\]](#)

Emergency Contact: [\[edit\]](#)

Users can view their progress by checking the **Step Check List** on the left hand side of the review screens. To close this window, click on the  in the upper right hand corner of the Step Check List. Click it again to reopen the list.

Remember that all  indicate a **required field** and must be filled in before moving to another screen/step in the review.

2. Review Types



HOME | MANAGE | SEARCH | REPORTS | INFO | CONFIGURE | HELP | LOGOFF

Pt: Robinson, HERMAN | MRN: CMECIN8657405 | DOB: 09/14/1913 | Acct: CAECIN14860808 | Adm: 01/31/2008

Review Type: Initial	Review Content: Standard
Patient Name: H	Religious Affiliation: BAPTIST
MRN: C	Gender: Male
Date of Birth: 9/14/1913	Marital Status: Married
Social Security Number: [redacted]	Race: [edit]
Home Phone: (800) 555-1212	Work Phone: [edit]
Address: 4231 W 16th Ave, Denver, CO 80204	Emergency Contact: [edit]
Date of Admission: 1/31/2008	Location: CICU / CICU-3111-01
Patient Type: IN-PATIENT	Admit Source: XFR FROM OTHER ACUTE
Account #: CAECIN14860808	Assigned To: Kathy Flaherty, Jennifer Huston
Attending Physician: JEFFREY RUBINSTEIN	Service: CARDIOLOGY
Financial Class: MEDICARE PART A	Facility: C
	Admission Time: 2d 23h

Projected Discharge Date: [] Time: 11:00 AM (MT)

Actual Discharge Date: []


Primary Diagnosis: ACUTE MYOCARDIAL INFARCTION

Secondary Diagnosis: []

First select the **Review Type** necessary for this patient:

- **Initial** or **Admit** review are created when a patient is admitted into the hospital.
- **Continued Stay** reviews are created when the initial review has already been sent and the patient has stayed longer than the initially approved/denied number of days.
- **Pre-Certification** reviews are created for patients that have been pre-registered and approved by the payor.
- **Retrospective** reviews are created after the initial review and after the patient has already been discharged because the total length of stay is greater than the total reviewed days.
- **Discharge** reviews are created to communicate to payors that a patient has been discharged.

Next select the **Review Content**. Each review type will have a default, but a user may change the content asked for during the review process by making a selection from the drop down list.

Click  at the bottom of the screen until you reach the **Review Criteria** page.

3. Review Criteria

The Reviewer and Review Date must be included.

IOB: 04/13/1954 | Acct: V010000005 | Adm: 02/21/2006 | Review: Admission - 2785

Reviewer: → Creen, Erica Review Date: → 7/10/2006

Review Criteria Status: → Open Next Review Date:

Level of Care: ACUTE UM Status: ADMIT

Previous Review Date: - Case Status: Open

Review Reasons: [\[edit\]](#) User Assignments: [Link](#)

[Review History](#) [Patient Information](#) [Interventions](#) [Avoidable Days](#)

Medical Necessity: [InterQual® Review](#) [InterQual® Book View](#)

Criteria Status:

InterQual® Criteria:

Launch InterQual® by clicking on the InterQual® Review button.

After clicking the InterQual® Review button, the McKesson Proprietary Notice will appear for about three seconds and then the user will be logged into CERMe®.

Patient Name/ID: MICHELE JONES / V010000005

Review # New Review Product Subset

Save Help

Subset

InterQual Products

LOC:Acute Adult

LOC:Acute Pediatric

LOC:Long-Term Acute Care

LOC:Rehabilitation

LOC:Subacute / SNF

LOC:Home Care

Categories

All Categories

Observation

Critical Care

Intermediate Care

Acute Care

Keyword(s) Medical Code(s)

Find Subsets Clear Search Criteria

Notes Subset Description Product

Cardiac (Critical) LOC:Acute Adult

Cardiac / Telemetry (Intermediate) LOC:Acute Adult

Cardiovascular / Peripheral Vascular (Acute) LOC:Acute Adult

CNS / Musculoskeletal (Acute) LOC:Acute Adult

Endocrine / Metabolic (Acute) LOC:Acute Adult

Eye, Ear, Nose, and Throat (Acute) LOC:Acute Adult

Gastrointestinal / Biliary / Pancreatic (Acute) LOC:Acute Adult

Hematology / Oncology (Acute) LOC:Acute Adult

Infectious Disease (Acute) LOC:Acute Adult

Medical - Surgical (Intermediate) LOC:Acute Adult

Medical - Surgical (Critical) LOC:Acute Adult

OB - Antepartum (Acute) LOC:Acute Adult

Observation Status (6-24h) LOC:Acute Adult

Obstetrics / Gynecology / Genitourinary (Acute) LOC:Acute Adult

Respiratory / Chest (Acute) LOC:Acute Adult

Skin / Connective Tissue (Acute) LOC:Acute Adult

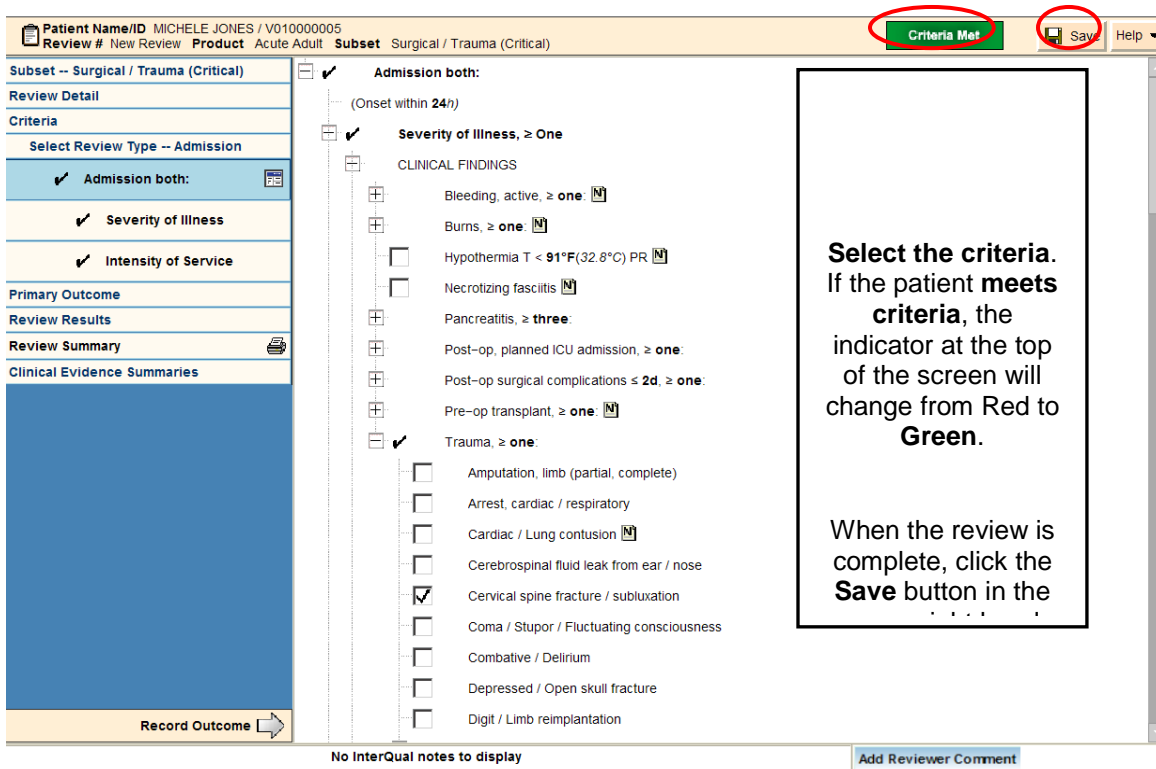
Surgery / Trauma (Acute) LOC:Acute Adult

Surgical / Trauma (Critical) LOC:Acute Adult

Transplant (Acute) LOC:Acute Adult

After launching InterQual®, select the InterQual® Product, then select the Subset Description

Depending on how ECIN and InterQual® were set up, a user may or may not have to select the review type within InterQual® (i.e. Admission, Continued Stay, etc.).



Patient Name/ID: MICHELE JONES / V010000005
Review #: New Review **Product:** Acute Adult **Subset:** Surgical / Trauma (Critical)

Criteria Met **Save** **Help**

Subset -- Surgical / Trauma (Critical)

Review Detail

Criteria

Select Review Type -- Admission

☒ **Admission both:**

☒ **Severity of Illness**

☒ **Intensity of Service**

Primary Outcome

Review Results

Review Summary

Clinical Evidence Summaries

Admission both:
 (Onset within 24h)

Severity of Illness, ≥ One

CLINICAL FINDINGS

☒ Bleeding, active, ≥ one: ☒

☒ Burns, ≥ one: ☒

☐ Hypothermia T < 91°F (32.8°C) PR ☒

☐ Necrotizing fasciitis ☒

☐ Pancreatitis, ≥ three:

☐ Post-op, planned ICU admission, ≥ one:

☐ Post-op surgical complications ≤ 2d, ≥ one:

☐ Pre-op transplant, ≥ one: ☒

☒ Trauma, ≥ one:

☐ Amputation, limb (partial, complete)

☐ Arrest, cardiac / respiratory

☐ Cardiac / Lung contusion ☒

☐ Cerebrospinal fluid leak from ear / nose

☒ Cervical spine fracture / subluxation

☐ Coma / Stupor / Fluctuating consciousness

☐ Combative / Delirium

☐ Depressed / Open skull fracture

☐ Digit / Limb reimplantation

Record Outcome

No InterQual notes to display

Add Reviewer Comment

Select the criteria.
 If the patient **meets** **criteria**, the indicator at the top of the screen will change from Red to **Green**.

When the review is complete, click the **Save** button in the

[Review History](#) [Patient Information](#) [Interventions](#) [Avoidable Days](#)

Medical Necessity:

Criteria Status: Severity of Illness Met
 Intensity of Service Met

InterQual® Criteria:
 Product: Acute Adult
 Subset: Surgical / Trauma (Critical)

Admission both:
 Severity of Illness
 (Onset within 24h)
 Severity of Illness, ≥ One
 CLINICAL FINDINGS
 Trauma, ≥ one:
☒ Cervical spine fracture / subluxation
☒ Pelvic fracture, unstable

Intensity of Service
 (At Least Daily)
 Intensity of Service, One:
 ≥ One IS
 (Excludes PO medications unless noted)
☒ Anti-infectives ≥ 3 drugs, ≤ 2d
☒ Complex dressing q2h / with anesthesia

The criteria selected in InterQual® will now be included in the ECIN review. If the InterQual® criteria needs editing, click on the **InterQual® Review** button to return to the InterQual® criteria pages.

Workstation Requirements for CERMe InterQual Launches :

- CERMe® integration requires an Active X control downloaded onto every workstation using the application. This should be downloaded from:
<http://www.extendedcare.com/download/download.html>
Allscripts Hosted McKesson Cerme section
Click on the Print Utility 7.0 link to download the RMUtilsIE.zip file
- Popup blockers must be off. These prevent CERMe® from opening on a workstation.

Required Internet Explorer Settings for each user machine at:

At Internet Explorer > Tools > Internet Options > Security > Trusted Sites zone

Client CERMe server Root URL must be added as a Trusted Site to each user's IE settings in the Trusted Sites Zone pop-up, in the Settings section.

At Internet Explorer > Tools > Internet Options > Security > Trusted Sites zone - Custom Level button.

For IE7:

Miscellaneous category, set the:

'Launching programs and files in an IFRAME' to Enable.

'Navigate sub-frames across different domains' to Enable,

For IE 8 and IE 9:

Miscellaneous category, set the:

'Access data sources across domains' to Enable.

'Launching programs and files in an IFRAME' to Enable.

'Navigate windows and frames across different domains' to Enable.

Scripting category, set the

'Enable XSS filter' to Disable.