



Standard Work Case Booking Appeal Escalation		Owner: Dr CJ Gibson, Dr. Emily Durkin Author: Robin Finkbeiner/Christy Going	Rev. Date: 5.20.2021
Step:	Purpose: Prioritize appropriate use of resources in Grand Rapids hospitals.	Value Stream: Surgical Services	
			

Seq. No	Task Description:	Key Point / Image / Measure (what good looks like)	Who
1.	<p>A need for an appeal involving a surgical procedure is identified:</p> <p>A. Physician office unable to schedule an outpatient procedure at BW/BL because it is eligible for the ASC environment</p> <p>B. Physician office has a case ordering appeal</p> <p>C. Physician has a medical clearance hard stop appeal</p> <p>D. A dental office needs to schedule a procedure into the hospital/ASC environment that can't be safely supported in the office.</p>	<p>A. Patient acuity related concerns will be evaluated by the Surgical Optimization Center physician team. All other concerns (block time, access to instruments, etc.) will be managed by the Enterprise Scheduling Team.</p> <p>B. Typical schedules will have outpatients occurring first in order to ensure time for discharges to happen prior to procedures requiring a bed being completed. If there is an acuity-related reason why this ordering needs to be changed, SOC physician team will review.</p> <p>C. Clearance criteria is specialty specific and includes:</p> <ul style="list-style-type: none"> • Elevated HgbA1c • Smoking cessation • BMI • MME <p>D. Managed by EST</p>	SOC and/or EST
2.	<p>Physician/Office Manager/Scheduler submits a Case Booking Appeal Escalation Form to surgical services via email (requests relating to dental procedures must instead use the Dental Medical Necessity form)</p> <p>These forms can be found on the Surgical Services Form web page: https://www.spectrumhealth.org/surgical-services-forms</p>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <p>To <input type="text" value="Surgical - Case Booking Appeal Escalation"/></p> <p>Cc <input type="text"/></p> <p>Subject [secure] Case Booking Appeal Escalation[Location: Butterworth Procedure date: 11.12.2020 MRN: 1234567]</p> </div> <ol style="list-style-type: none"> 1. Email TO: Surgical - Case Booking Appeal Escalation distribution list 2. Email Subject Line – include the following: <ol style="list-style-type: none"> a. Case Booking Appeal Escalation b. Requested procedure location c. Requested procedure date d. MRN (reminder to send securely) 3. Attach Completed Case Booking Appeal Escalation Form 	Physician/Office Manager/Enterprise Scheduling

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3.	EST receives the emails and checks for completeness prior to adding the request to a tracking spreadsheet and notifying the responsible reviewer	Incomplete forms will be returned to the requester	Enterprise Scheduling Team
4.	The SOC physician team will indicate that they are reviewing the appeal via the Case Booking Appeal Teams chat If they approve the request, they will update the tracking spreadsheet with their decision If they deny the request, the SOC physician will note in the comments the reason for denial. The aligned enterprise scheduler will contact the office to confirm the decision.	Response expected within 48 hours If neither responds EST Supervisor will contact SOC Manager and/or Medical Director via cell or PerfectServe	SOC Manager/SOC Medical Director
5.	Enterprise Scheduling will confirm final decision and notify the Office Manager/Office Scheduling Outpatient Cases: If approved: Enterprise Scheduling will inform the practice and mark "Ready to Schedule" If denied: A. Office Manager/Office Scheduling will update date/location on the case request before marking "Yes, Ready to Schedule." B. An Epic Referral is placed to SOC (REF943) or PCP to further assess patient for best scheduling option C. Independent offices using paper case requests will send an amended request with updated date/location	Enterprise Scheduling marks the case "Yes, Ready to Schedule" Add to the snapboard If additional information is needed to make a decision, contact the SOC at (616) 774-0276 or PerfectServe (Dr. Adam Edlund or Amy Pearce) ES Team scripting to surgeon office if denial and needs referral to SOC or PCP: "Further patient assessment is needed to determine (insert commentary from SOC physician from tracking spreadsheet). A referral can be placed to the SOC or PCP for additional assessment and testing." If escalation is needed, notification will be made to SOC physician and the ES team will help to facilitate the connection.	EST/ Office Managers/Office Scheduling
6.	Appeals are tracked by Enterprise Scheduling Supervisor	Tracking every appeal Approval/Denial Requesting Physician Procedure Date Final Location	Enterprise Scheduling