



## **Guideline: Reviewers/Vendors, External/On-Site Visits – Case Management**

**Effective: 08/08/23**

**Identifier: S-CM-PC-0117G**

**Acute Care: ENC ☒ GR ☒ LJ ☒ MER ☒**

**SHAS ☒**

These guidelines provide department specific information for Case Management staff for managing/directing on-site visits for non-hospital personnel, external reviewers, and vendors.

Vendors include, but are not limited to, representatives of: Rehab, Subacute, Skilled Nursing, Board and Care, Assisted Living Facilities, Home Health, Home Care, Infusion, or Durable Medical Equipment Agencies.

Instruct external reviewers/vendors as follows:

- A. Complete requirements as per Scripps policy “Access to Patient Care Facilities, Non-Employee Requirements for” S-FW-EC-1157.
- B. Register in Scripps Health Vendormate if registered.
- C. With each site visit - *prior to chart review and/or entering patient care areas*:
  - 1. The vendor must provide proper identification and wear a nametag with name and agency represented.
  - 2. Obtain Scripps Health vendor badge through Vendormate (or Case Management office).
  - 3. Report to Case Management office for appropriate processing / directions.
  - 4. For access to a patient area, patient record, and/or patient interview, the vendor must provide the Careport referral or Careport referral number when checking into Case Management office. Case Management staff must review Careport referral or Careport referral number presented and verify that patient is still in the hospital.
  - 5. Obtain all patient information needed by the reviewers/vendors through communication with Case Management staff, staff physicians, or the patient/family.
- D. Communicate any benefit determination changes to the appropriate personnel.
- E. Manage patient information from any source as confidential to be used solely for review of treatment, payment, and authorization of services.

### **ATTACHMENT**

Case Management Outside Reviewer Sign In

### **RELATED PRACTICE DOCUMENTS**

- A. Health Information, Access, Use and Disclosure; [S-FW-IM-0203](#)
- B. Access to Patient Care Facilities, Non-Employee Requirements for; [S-FW-EC-1157](#)

### **SUPERSEDED**

Reviewers/Vendors, External/On-Site Visit; S-CM-PC-0117G, 07/20



## CASE MANAGEMENT OUTSIDE REVIEWER SIGN IN

[illegible]