

Observation Medicine

Observation Medicine

Principles and Protocols

Second Edition

Edited by

Sharon E. Mace

Cleveland Clinic Lerner College of Medicine, Ohio





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Contents

Advance Praise xi
About the Editors xvii
List of Contributors xix
Foreword xxvii
Nicholas Jouriles
Preface xxix

Prologue 1
Sharon E. Mace and Michael
A. Granovsky

Section 1 Administration

1 **Key Concepts of Observation Medicine:
How to Start (and Maintain) an Observation
Unit – What You Need to Know: Clinical
Issues** 5
Sharon E. Mace

2 **Key Concepts of Observation Medicine:
Administrative Issues** 14
Sharon E. Mace and Michael
A. Granovsky

3 **Development of Observation Medicine
Over Time** 31
Louis G. Graff

4 **Principles of Observation Medicine** 36
Louis G. Graff

5 **Design: Features Common to Successful
Observation Units** 39
David J. Robinson

6 **Staffing Considerations** 42
David A. Meguerdichian and
Christopher W. Baugh

7 **Nursing** 48
Sharon E. Mace

8 **Risk Management** 56
Howard Blumstein and Bret A. Nicks

9 **Metrics and Performance Improvement:
Patient Quality, Safety, and Experience** 59
Sharon E. Mace and Elaine Thallner

Section 2 Clinical Setting
and Education

10 **The Community Hospital Perspective
in a Suburban/Rural Setting** 69
Ryan Prudoff and Stephen
F. Sayles III

11 **Observation Medicine and the Urban
Community Hospital** 71
Robert S. Bennett

12 **The Tertiary Care Hospital and Academic
Setting** 73
Anwar Osborne

13 **Rural Observation Medicine** 76
J. Lane Schnell

14 **Observation Medicine and the Critical
Access Hospital** 79
Jeffrey E. Goode and Justin Rodgers

15 **Observation Medicine and the
Hospitalist** 86
David G. Paje

16 **Advanced Practice Providers** 88
Stephanie M. Figueroa and Dean T. Harrison

17 **Observation Medicine Training
and Education – Residents** 91
Pawan Suri

Contents

18 **Observation Medicine Training and Education – Medical Students/ Fellows** 93
Bradley D. Lepore and Margarita E. Pena

Section 3 New Developments

19 **Simple, Complex, and Extended Observation Services** 97
Pawan Suri

20 **Complex and Extended Observation** 99
Ramupriya Vaithi and Bret A. Nicks

21 **Hospital Readmissions** 102
Sharon E. Mace and Elaine Thallner

22 **Level of Care Determination: Medical Necessity Risk Stratification** 113
Louis G. Graff

23 **Acute Medicine in the United Kingdom** 117
Louella Vaughan

24 **Point-of-Care Ultrasound** 119
Courtney M. Smalley and Matthew Kostura

25 **Telehealth Use in Observation Medicine** 130
George B. Hughes

Section 4 Clinical

Subsection 4A Clinical – Cardiac

26 **Chest Pain** 135
Stephen Boone and W. Frank Peacock

27 **Acute Heart Failure** 141
Edgar Ordonez and W. Frank Peacock

28 **Atrial Fibrillation** 149
Catherine T. Puetz

29 **Syncope** 155
T. Andrew Windsor, Zachary Rogers, and Amal Mattu

30 **Cardiac Stress Testing** 162
Akilesh Honasoge, Kami M. Hu, and Amal Mattu

Subsection 4B Clinical – Respiratory

31 **Asthma** 171
Eric Anderson

32 **Acute Exacerbation of Chronic Obstructive Pulmonary Disease and Bronchitis** 176
Eric Anderson

33 **Community Acquired Pneumonia** 181
Eric Anderson

34 **Primary Spontaneous Pneumothorax** 185
Chai Chew Yian

Subsection 4C Clinical – Vascular

35 **Venous Thromboembolism** 191
Carol L. Clark and Hamzeh W. Omar

36 **Acute Pulmonary Embolism** 202
David G. Paje

37 **Anticoagulants** 210
David G. Paje

Subsection 4D Clinical – Neurologic

38 **Transient Ischemic Attack** 219
Jill A. Mohr and Jonathan Glauser

39 **Headaches** 228
Sharon E. Mace and Lucy Franjic

40 **Seizures** 234
Sharon E. Mace and Lucy Franjic

41 **Dizziness and Vertigo** 240
Saurin Bhatt

42 **Central Nervous System Shunts** 252
David A. Meguerdichian

Subsection 4E Clinical – Metabolic, Endocrine

43 **Hyperglycemia** 257
Pawan Suri and Taruna K. Aurora

44 **Hypoglycemia** 263
Pawan Suri and Taruna K. Aurora

45 **Electrolyte Abnormalities** 268
Grace Lambert and Jonathan Glauser

Subsection 4F Clinical – Hematologic

- 46 **Sickle Cell Disease** 277
Matthew Lyon, Ann Marie Kuchinski,
and Robert W. Gibson
- 47 **Blood Product Transfusions** 283
Ryan Yavorsky and Jonathan Glauser

Subsection 4G Clinical – Oncologic

- 48 **Oncology** 289
Adam Klotz

Subsection 4H Clinical – Infections

- 49 **Skin and Soft Tissue Infections** 297
Robert S. Bennett

Subsection 4I Clinical – Gastrointestinal

- 50 **Abdominal Pain** 303
Louis G. Graff
- 51 **Upper Gastrointestinal Bleeding** 307
Abhinav Chandra
- 52 **Lower Gastrointestinal Bleeding** 313
Christopher Bazzoli
- 53 **Dehydration, Gastroenteritis,
and Vomiting** 317
Maria Aini

Subsection 4J Clinical – Genitourinary

- 54 **Urolithiasis** 321
Claire Pearson, Laura Smylie, and
Robert D. Welch
- 55 **Pyelonephritis and Urinary Tract
Infections** 327
Elizebeth Dubey, Philip A. Lewalski,
and Robert D. Welch

Subsection 4K Clinical – Obstetrics
and Gynecology

- 56 **Pelvic Inflammatory Disease** 333
Sharon E. Mace and Veronica Sikka

- 57 **Vaginal Bleeding** 337
Veronica Sikka, Chona
D. Macalindong, Renee Reid, and
Sharon E. Mace
- 58 **Hyperemesis Gravidarum** 339
Sharon E. Mace, Veronica Sikka,
Edward P. Cutolo, and Raaj Popli

Subsection 4L Clinical – Surgical
Evaluation

- 59 **Abdominal Pain** 343
Daniel Drewry and Margarita E. Pena

Subsection 4M Clinical – Trauma

- 60 **Trauma** 355
Isra Al Jamed and Matthew A.
Wheatley

Subsection 4N Clinical – Pain
Management

- 61 **Pain Management** 363
Benjamin Beuchler, Nathaniel
L. Scott, and James R. Miner

Subsection 4O Clinical – Toxicology

- 62 **Toxicology** 369
Jennifer L. Hannum and Mary
A. Wittler

Subsection 4P Clinical – Pediatrics

- 63 **Pediatric Observation Medicine** 377
Sharon E. Mace
- 64 **Pediatric Observation Medicine at
a Children’s Hospital** 390
Chari Larsen and Aderonke Ojo

Subsection 4Q Clinical – Geriatrics

- 65 **The Geriatric Observation Unit** 397
Abbey M. Smiley and Lauren
T. Southerland

Contents

66 **Creating a Geriatric Care Unit for the Complex Older Patient** 407
Saket A. Saxena and Stephen W. Meldon

Subsection 4R Clinical – Skilled Nursing Placement from the Observation Unit

67 **Skilled Nursing Facility Placement** 415
Anthony R. Rosania and Akiva A. Dym

Subsection 4S Clinical – Hospice

68 **Transition to Hospice** 422
Lauren T. Southerland

Subsection 4T Clinical – Psychiatric

69 **Medical Clearance of Psychiatric Patients** 427
Gregory Adams and Jonathan Glauser

70 **Psychiatric Observation: Impactful Treatment and Cost-Effective Care in Lieu of Boarding** 435
John S. Rozel, Tony Thrasher, Scott Zeller, and Leslie Zun

Subsection 4U Clinical – Substance Abuse

71 **Opioid Use Disorder** 443
Brittney Gordon, Emma Sizemore, and Anwar Osborne

72 **Alcohol Use Disorder** 451
Daniel K. Colby and Elizabeth J. Johnson

73 **Smoking Disorders** 458
Nicklaus P. Ashburn and Jason P. Stopyra

Subsection 4V Clinical – Social

74 **Social Observation Medicine** 463
Anthony R. Rosania and Akiva A. Dym

Section 5 Disasters Including Pandemics

Subsection 5A Disasters Including Pandemics – Clinical

75 **Observation Centers During a Disaster** 471
Constance J. Doyle

Subsection 5B Disasters Including Pandemics – COVID-19

76 **Transforming Emergency Department Observation Units to Meet the Demands of the COVID-19 Pandemic** 481
Mallika Singh and Christopher Caspers

77 **Operational Flexibility of Observation Units During a Pandemic** 487
Maria Aini

78 **Using Observation Medicine for Pandemic Management** 490
David J. Robinson

79 **COVID-19 Patient Surge Emergency Management** 494
Robert H. Leviton

80 **Operational Changes in Response to COVID-19 Pandemic in Barbados** 508
Reginald King and Joanne M. Bradford-King

Section 6 Financial

Subsection 6A Financial – Coding and Reimbursement

81 **Observation Unit Physician Documentation and Coding** 513
Michael A. Granovsky and David A. McKenzie

82 **Observation Unit Hospital Coding and Reimbursement** 520
Sarah Todt and Michael A. Granovsky

Subsection 6B Financial – Case Management

- 83 **Correct Status** 527
Mary McLaughlin Davis
- 84 **Observational Status: Care Coordination Through Each Transition of Care** 529
Nancy E. Skinner

Subsection 6C Financial – Case Management: What Is the Correct Status?

- 85 **Was Observation a Good Choice?** 537
Tibian Abramovitz
- 86 **From Observation to Inpatient** 540
Tibian Abramovitz
- 87 **Observation versus Inpatient: “To Be or Not to Be?”** 543
Tibian Abramovitz
- 88 **Observation: Tales from the Trenches, Common Mistakes and How to Avoid Them** 546
Sharon E. Mace and Tibian Abramovitz

Subsection 6D Financial – Medical Necessity, Denials, and Appeals

- 89 **Medical Necessity** 555
Robert H. Leviton
- 90 **Denials and Appeals** 563
Robert H. Leviton

Subsection 6E Financial – The Business of Observation Medicine

- 91 **Ensuring Financial Viability: The Business Case for Observation Units** 567
David A. Meguerdichian and Christopher W. Baugh
- 92 **What Your Administration C-Suite Expects from Your Observation Unit** 575
Brian Hiestand

Section 7 Observation Medicine Regulations and Guidelines

- 93 **Observation Care Regulations** 587
Cheryl Grossman and Michael A. Granovsky
- 94 **Observation Care Guidelines** 599
Robert H. Leviton
- 95 **Observation Care Documentation** 604
Robert H. Leviton

Section 8 Observation Medicine Administration

- 96 **Utilization Management** 611
Matthew A. Wheatley
- 97 **Administrative Aspects of Observation** 615
Robert H. Leviton
- 98 **Role of the Physician Advisor** 621
Robert H. Leviton
- 99 **Leadership in Observation Medicine: Optimizing Your Team** 623
Bret A. Nicks and Julia V. Prokesova

Section 9 International

Subsection 9A International – Africa

- 100 **South Africa** 629
Lee A. Wallis and Lauren Lai King

Subsection 9B International – Asia

- 101 **Singapore** 633
Chai Chew Yian and Malcolm Mahadevan

Subsection 9C International – Europe

- 102 **United Kingdom** 637
Louella Vaughan and Dylan Jenkins

Contents

Subsection 9D International – Middle East

- 103 **Saudi Arabia** 641
Immad Shahnawaz Qureshi and
Yasser Masood Qureshi
- 104 **Türkiye** 645
Ayça Koca

Subsection 9E International – Australia/New Zealand

- 105 **New Zealand** 649
Peter Jones

Section 10 Administrative Policies

- Author’s and Editors’ Comments: Policies, Protocols, and Order Sets** 653
- 106 **Administrative Policies** 657
Sharon E. Mace

Section 11 Protocols

Subsection 11A Clinical Protocols

- 107 **Clinical Protocols** 691
Sharon E. Mace

Subsection 11B Specialized Protocols

- 108 **Protocols for Evaluation of a New Mass** 727
Jeffrey E. Goode
- 109 **Protocol for Low-Risk Pulmonary Embolism** 738
David G. Paje
- 110 **Protocol for Mild Traumatic Brain Injury** 739
Jason P. Stopyra
- 111 **Primary Spontaneous Pneumothorax** 740
Chai Chew Yian
- 112 **Protocol for Rattlesnake Bites** 747
Sean Bush

- 113 **Protocol for North American Crotalid (Pit Viper) Snake Bites** 751
Mary A. Wittler and Lisa Evans

- 114 **Protocol for Dengue** 755
Chai Chew Yian

Section 12 Order Sets

Subsection 12A Order Sets – Adult

- 115 **Adult Order Sets by Diagnosis/Clinical Condition** 759
Matthew J. Campbell and Sharon E. Mace
- 116 **Adult Order Sets: Electrolytes** 818
Matthew J. Campbell and Sharon E. Mace
- 117 **Adult Order Sets: Trauma** 820
Matthew J. Campbell and Sharon E. Mace
- 118 **Adult Order Sets: Intravenous Fluids, Laboratory, Radiology, and Special Studies** 836
Matthew J. Campbell and Sharon E. Mace
- 119 **Adult Order Sets: Medications** 839
Matthew J. Campbell and Sharon E. Mace
- 120 **Adult Order Sets: General Order Sets** 856
Matthew J. Campbell and Sharon E. Mace

Subsection 12B Order Sets – Pediatric

- 121 **Pediatric Order Sets: Medications** 861
Matthew J. Campbell and Sharon E. Mace
- 122 **Pediatric Order Sets: General Order Sets** 871
Matthew J. Campbell and Sharon E. Mace

Advance Praise

Observation Medicine: Principles and Protocols, second edition, edited by Dr. Sharon E. Mace, is a relevant and timely textbook to emergency medicine. The book is written in an easy-to-read format with many outstanding ideas and unique content as it relates to the development of both adult and pediatric observation medicine. The second edition has expanded from 96 to 122 Chapters including clinical, social issues, administrative, business, new developments, disasters/covid, financial, coding/reimbursement, policies, and protocols. This is an indispensable resource!

Isabel Barata, MS, MD, MBA

Professor of Pediatrics and Emergency Medicine,
 Donald and Barbara Zucker School of Medicine at
 Hofstra/Northwell; Pediatric Emergency Medicine
 Service Line Quality Director, Emergency
 Medicine and Pediatrics Service Line; Director of
 Pediatric Emergency Medicine, North Shore
 University Hospital

As a longstanding residency director, it is difficult to provide the training needed to keep up with the advancements in emergency care. Observation medicine is providing to be an extremely valuable addition to emergency care, and emergency medicine residents need to be exposed and trained in this facet of emergency care. Dr. Mace's textbook, *Observation Medicine*, provides a valuable training resource useful to all emergency medicine residencies. This textbook provides the background needed not only work within an emergency department that has an observation unit, but potentially to develop one. This is a great resource for training in observation medicine.

Michael Beeson, MD, MBA, FACEP

Professor of Medicine, Northeast Ohio Medical
 University, Program Director, Emergency
 Medicine Residency, Summa Health Akron
 Emergency Department; Vice Chair, Education,
 Department of Emergency Medicine

The textbook *Observation Medicine: Principles and Protocols*, edited by Sharon E. Mace, is a must have in your emergency medicine library. Dr. Mace, an experienced emergency physician, practicing observation medicine for adults and children at the Cleveland Clinic Hospital System for decades and now Director Emeritus of Observation Medicine at the Cleveland Clinic, has assembled a team of contributors representing the best and brightest of emergency medicine. In the 122 Chapters of this book, the reader will learn everything you need in implementing an observation unit for your emergency department and your hospital.

The breath of this book is exhaustive. The Chapters are organized into multiple sections. They include not only clinical, but also financial from coding and reimbursement to case management, denials and appeals, and even financial viability. Practical tools in this textbook, such as protocols, order sets, and administrative policies, can be adopted or modified to allow anyone to easily start or expand an observation unit in any setting; whether urban, suburban, rural or even critical access hospitals or freestanding emergency departments (EDs) and in any location, even internationally.

The second edition has additional Chapters that expands the use of observation for various patient populations: hospice, psychiatric, geriatric, substance abuse, skilled nursing home placement, and even those with social issues and/or illnesses/injuries arising from the social determinants of health. There are new innovative sections, for example, telemedicine, ultrasound, and the use of observation in pandemics. New business, financial, and administrative Chapters deal with regulations, utilization review, correct status, and the "C-suite."

Economics and the desire to provide optimal care to emergency department patients – who need just a little bit more time to stabilize their care, arrive at a definitive answer, or prepare patients for a safe discharge home without a hospital admission – helped to drive the specialty of emergency medicine and observation medicine.

Advance Praise

As written in the forward by Nicholas Jouriles, MD, FACEP from Greg Henry, MD, FACEP in the first edition (both Past Presidents of the American College of Emergency Physicians), “Remember the goals: cost effective care, time efficient care, the best patient outcomes, and more compassionate human centered care.” Observation medicine can achieve these goals.

This book can help establish an observation unit through its guidance of administration and protocols; exploring the types of clinical problems that would best be served by these units. They also bring in the experts of reimbursement to help you get paid for the services you provide. If you already have an observation unit, this book is essential to operating that unit correctly and at a higher level. If it is your responsibility, as an emergency department leader and/or you are responsible for medical or nursing education, the protocols, order sets and educational modules will make your life easier.

Do yourself a favor and purchase a book for yourself and your department. You will be glad you made the investment.

Andrew I. Bern, MD, FACEP

Past Member, Board of Directors of American College of Emergency Physicians (ACEP), Past Chairman of the ACEP Board of Directors

As a staff member and charge nurse who worked in the Cleveland Clinics Observation Unit for over 10 years, I experienced firsthand the utility of having clear protocols and guidelines. These protocols not only expedited patient care but reduced the stress for both staff and patients. By knowing exactly what was going to be done the team could clearly outline the care plan with the patient so that everyone was kept up to date. This resulted in an efficient and calm experience for all involved.

Paul Budny RN, MSN, APRN, FNP-C, NRCME, CCRA, CCRP

Staff Nurse/Charge Nurse, Nurse Practitioner, Clinical Research Nurse

This second edition contains new sections that describe innovative uses for the observation unit. It is essential reading for providers who want to overcome failures of imagination. The observation unit can address capacity challenges from the ongoing boarding frustrations to sudden unexpected crises

like mass casualty events, pandemic surges, or national disasters. Consolidation of patients with similar special needs allows for organized allocation of resources.

Emergency medicine is one of the specialties most often called to address social determinants of health. We are first responders for non-accidental trauma, substance use disorders, and housing insecurity. Thus, this text also offers guidelines for how emergency department providers – including our case management and social work colleagues – can use the observation unit to interrupt the self-perpetuating cycle of poverty and disease.

C. Clare Charbonnet, MD

Disaster Medicine and Emergency Management Fellow, UMass Chan Medical School, University of Massachusetts Medical Center

This textbook is a primer on observation medicine for the health care provider; whether physician, nurse practitioner, physician assistant or nurse; whoever is taking care of patients in an observation unit. As a practicing emergency physician this textbook is very useful for the health care provider working in the observation unit. It is “Observation course 101 and 201,” both basic and advanced observation medicine. It has all the components needed for starting or sustaining and expanding an observation unit. Everything from clinical protocols to administrative policies and even the financial/business aspects, regulatory issues, and billing/coding is included in the textbook. It has practical examples for all these topics and even includes using observation for social issues and during a pandemic/disaster. It is all in one place so you do not have to go searching for the information you need. It is often difficult or impossible to find information on topics related to the business, finance, administration, and billing of observation medicine. But now you have that information, easily accessible and in one place. This textbook is essential reading for any health care provider or administrator taking care of patients in an emergency department or observation unit.

Angela Cornelius MD MA FACEP FAEMS

Associate Professor Emergency Medicine, TCU/ UNTHSC School of Medicine and LSU-Shreveport EM Residency, Associate System Medical Director,

Office of the Medical Director Metropolitan Area
 EMS Authority

Dr. Mace's uses her extensive knowledge and experience to create a comprehensive textbook on observation medicine which is an absolute must have for all physicians and administrators who have or desire an observation unit. Jammed with even more information than the first edition, it is full of critical information, tips and valuable resources that will guarantee the success of your program!

Ann M Dietrich, MD, FAAP, FACEP

Professor of Pediatrics and Emergency Medicine,
 University of South Carolina School of Medicine,
 Division Chief Pediatric Emergency Medicine,
 Department of Emergency Medicine, Prisma

As an administrator, clinician and educator, I find that this textbook is a useful compendium of everything that is relevant to observation. The clinical sections with the protocols, order sets, and administrative policies are a pragmatic guide on how to establish and/or expand an observation unit at your institution. The textbook details how observation can be successfully applied to any hospital system, or any size institution from a tertiary care center, community hospital, rural, critical access hospital, or freestanding emergency department (ED) and delineates the value observation medicine can provide to hospital systems, healthcare, and society; and, most importantly, to patients and their families.

As the director of operations, I find that not just the clinical, but also the administrative, financial, and business sections of Dr. Mace's textbook are invaluable; especially since there is no other resource, whether a website and/or textbook, where all this information can be found in one source. The second edition also addresses the social determinants of health and social medicine encompassing such topics as substance abuse.

This textbook explains how the use of observation can help address problems facing EDs such as ED crowding or boarding of patients, and lack of access to care. For example, one Chapter explains how "psychiatric observation" can provide "impactful treatment and cost-effective care in lieu of boarding," resulting in better patient care. Addressing both the social determinants of care which affect individual health – ranging from

poverty, food insecurity, interpersonal violence to substance abuse – as well as the medical issues, can be done in the observation unit. Simultaneously dealing with social medicine concerns, while treating medical illnesses and/or injuries, in the observation unit, will lead to better patient outcomes.

As an educator and administrator, the section on clinical setting and education is particularly valuable. This textbook should be in the collection of references for any health care administrator or provider, whether nursing, advanced practice providers, physicians; and for medical students, residents, and fellows, since they will be caring for observation medicine patients throughout their practice.

This comprehensive textbook gives the reader a look at the future and how observation medicine can be used to help resolve some of the problems facing EDs, hospitals, and health systems, and even society. More importantly, it describes how to deliver better patient care in a humane, compassionate manner, thereby, resulting in improved patient outcomes.

Angela Gardner, MD, FACEP

Professor, University of Texas - Southwestern, Past President and Member of the Board of Directors of the American College of Emergency Physicians (ACEP); Vice Chair, Administrative Affairs, Chief of Operations, Quality and Patient Safety for the Department of Emergency Medicine at UT Southwestern

Observation Medicine is a must have for anyone working in the hospital environment. Dr. Sharon Mace clearly spells out the clinical approach to patients suited for observation and ties in the non-clinical administrative requirements. Physicians are key decision makers determining observation versus inpatient. *Observation Medicine* unambiguously also illustrates the supporting framework hospital administration needs to have in place for success. With the incredible transition of traditional Medicare to Managed Medicare Organizations and the aging population, *Observation Medicine* is required reading.

Tony Joseph, MD, CHCQM-PHYADV

Cofounder of the Observation Section of the American College of Emergency Physicians, Current Member of the American College of Physician Advisors Observation Committee

Advance Praise

Keep this book in arm's reach if you are operating or standing up an observation unit. Dr. Mace has put together the best amalgamated reference material for observation medicine in existence. Observation medicine is exceedingly difficult to operate in an efficient, compliant, and margin positive manner. This book will protect you from many of the pitfalls that cause observation units to fail while supporting efforts for its success. This is a must read for clinical operations, revenue cycle, utilization and care management, and physician advisors. A re-read for many of us in the business of health care delivery given the multitudes of updates in an ever-changing care environment.

B. Justin Krawitt MD

Assistant Professor of Medicine, Dartmouth Geisel School of Medicine; System Medical Director, Utilization & Clinical Documentation, Dartmouth Health

This is an excellent handbook for everything that is observation. There is no topic relevant to observation medicine that is omitted; whether clinical, administrative, financial, reimbursement, case management, utilization review, or regulations. This encyclopedia with 122 Chapters is the only authoritative source or textbook where “everything observation” is in one place. Bits and pieces of information germane to observation can occasionally be found on the internet or elsewhere but these sources, unfortunately, are usually incomplete, and may not be reliable.

The clinical protocols, administrative policies, and order sets are practical and can be used as is or easily adopted to fit any observation unit. Having worked in various countries throughout the world as a physician assistant, the international section demonstrates the usefulness of this manual, not only for the United States, but in nations on every continent. Advance practice providers, whether nurse practitioners or physician assistants, are providing care and administrative functions in observation units and there is a Chapter solely dedicated to their role in observation medicine.

This textbook explains how observation can be used to deal with complex healthcare and societal issues, while providing best practices and realizing optimal outcomes for patients. How to utilize observation medicine to address complex issues such as the social determinants of health from

homelessness to interpersonal violence, substance abuse, and mental health issues including psychiatric observation is described. This manual outlines how to successfully expand observation medicine to include the geriatric patient, hospice, and skilled nursing placement, and even to patients during a pandemic or disaster. The value of observation can be applied to any type of hospital, whether academic or community, and even the rural or critical access hospital is discussed. This compendium demonstrates how technology from ultrasound to telemedicine can be used to expand and advance observation medicine while providing better patient care and gives a view of the future.

Jereme Mellenthin, MPAS, PA-C

Assistant Professor, Physician Assistant Program, Case Western Reserve University School of Medicine. Prior lecturer at Lake Erie College and prior instructor at Physician Associate Program, University of Hertfordshire, UK. Former Foreign Service Medical Provider for the US Department of State at US embassies in Moldova and Turkmenistan. Returned Peace Corps Volunteer in Ukraine. 21 years of experience as a physician assistant in many different clinical settings: rural, suburban, urban in the United States, and internationally

From my experience as an registered nurse (RN) in the emergency department and the observation unit for 37 years, this textbook is a very useful reference for anyone working in the observation unit. This textbook is more than a collection of protocols, procedures, and order sets, which alone would make this a must have for any observation unit. This is an authoritative reference work where you can find an answer to all your questions on observation medicine: ranging from nursing, to case management, utilization review, regulations, and guidelines and even to the business and administrative aspects of observation medicine.

This is a valuable trustworthy source document for anyone involved in clinical, administrative, business or regulatory aspects of observation medicine. There is nowhere else where such factual, important, trusted information can be easily found and relied upon. This second edition is expanded from the first edition and has 122 Chapters and 72 authors covering every aspect of observation. It also includes the collective wisdom and experience gained from nearly three decades of observation medicine at the Cleveland Clinic, which to my

knowledge may be the longest or oldest continuously in operation observation unit in the United States and worldwide. It is a credit to Dr. Mace, with her almost 30 years of clinical and administrative experience at the Cleveland Clinic serving as the first and continuing director (and now director emeritus) of the observation unit at the Cleveland Clinic. This textbook will be invaluable to all those involved in an observation unit or observation medicine; whether as a nurse, nurse practitioner, physician assistant, physician, coder, case manager, reimbursement specialist, business operations or financial personnel, and compliance or regulatory officer.

Constance Pytel, BSN RN

RN Emergency Department, BSN Ursuline College,
 Staff RN, Magnet and Shared Governance Council,
 Cleveland Clinic

Working in the emergency department and observation unit daily as a clinician and associate residency director, this compendium of knowledge about observation medicine is a practical, easy to use, guide to anything and everything about observation medicine. Why reinvent the wheel? The protocols and order sets can be used or modified for any given observation unit or institution, whether a critical access hospital, community hospital, academic teaching, tertiary, or quaternary hospital in any location or setting from rural, suburban, or urban throughout the United States and even internationally. Everything is here is one place, easily referenced and accessed.

I find the sections on education of students, residents, and fellows particularly valuable as a physician involved in medical education. Any program director can use the textbook to provide materials for teaching, especially since observation medicine is part of the core curriculum for emergency medicine and hospital medicine programs and residencies. Many of the graduates of our residency program, have been able to use the information assembled in this textbook to go out and start and work in their own observation units. The section on education and new developments, which includes such topics as ultrasound and telemedicine, is relevant to the changes and advances occurring in medical practice.

As detailed in the specific textbook Chapters, the use of “geriatric” observation for elderly patients presenting to the emergency department, in our

experience, which has avoided inpatient admissions while providing needed services, has been very successful. The same can be said for pediatric patients. The use of observation for dealing with those affected by the social determinants of health, ranging from homelessness, poverty, interpersonal violence, and food insecurity, etc. or social medicine such as the initial management of those with alcohol or drug use disorders, hospice patients, and psychiatric disorders represents the cutting edge of medicine and has the potential for positively impacting healthcare and more importantly for achieving better outcomes for our patients. This textbook will prove to be an extremely valuable asset and reference for anyone involved in observation medicine and/or involved in the teaching of residents, fellows, students, nurses and allied health professionals.

John Queen, MD, FACEP

Assistant Professor of Medicine Cleveland Clinic
 Lerner College of Medicine at Case Western
 Reserve University, Associate Residency Program
 Director Case Western Reserve University/
 MetroHealth Medical Center/Cleveland Clinic
 Foundation Emergency Medicine Residency, Past
 President of the Ohio Chapter of the American
 College of Physicians

Observation Medicine: Principles and Protocols, 2nd edition, is a publication that should be in every practicing provider’s collection. The thorough yet succinct review of the common complaints and issues that will be encountered is an invaluable resource. Much like her numerous prior publications, Dr. Mace’s decades of experience is highlighted throughout the book as she has created one of the most useful references available. Whether you are just opening an observation unit or have had one for many years, this book should be your go-to reference.

Annalise Sorrentino MD, FAAP, FACEP

Professor of Pediatric Emergency Medicine
 University of Alabama at Birmingham, Director of
 Faculty Development Pediatric Emergency
 Medicine Division University of Alabama at
 Birmingham, Past President of the Alabama
 Chapter of the American College of Physicians

This edition of Dr. Mace’s text provides a much needed and highly relevant update on the rapidly

Advance Praise

growing and evolving area of emergency department and hospital observation medicine. It is a necessity for those involved in initiating and maintaining an observation unit and managing critical issues such as staffing, cost, quality, patient satisfaction, best practice pathways and protocols, regulations, and risk management. Dr. Mace is a national and international expert in administration, education, research, and observation medicine and has brought together top authorities to compose this outstanding resource. It needs to be in your armamentarium.

Jonathan H. Valente, MD, FACEP

Professor, Departments of Emergency Medicine and Pediatrics, The Warren Alpert Medical School of Brown University, Rhode Island Hospital and Hasbro Children’s Hospital, Providence, RI

The tectonic transformation in healthcare continues, with a rise in consumer-based value assessments driving care along with a need to “do things *differently* but well.” For those with new or worsened illness or injury, observation is

a key tool after emergency department care to optimize outcomes and enhance value. This approach is best when driven by data and collective experience, things that can be a challenge to have locally. This *Observation Medicine* text assembles the knowledge and experiences needed, from organization and oversight through symptom-driven approaches and disease-specific care. Rather than searching through many texts or sites, Dr. Mace and her team created an updated version of an accessible, singular source to aid those wanting to start or improve their observation unit and care. Use these Chapters and the insights as you give care to those in need, supported by the wisdom of many who have forged the path to quality and effective delivery.

Donald M. Yealy, MD

Distinguished Professor and Chair, Department of Emergency Medicine, University of Pittsburgh/University of Pittsburgh Physicians; Chief Medical Officer and Senior Vice President, UPMC Health Services

About the Editors

Editor

Sharon E. Mace, MD, FACEP, FAAP is Professor of Medicine at the Cleveland Clinic Lerner College of Medicine at Case Western Reserve University. Dr. Mace is board certified in both emergency medicine and pediatrics. Dr. Mace is faculty in emergency medicine for the MetroHealth Medical Center/Cleveland Clinic Emergency Residency Program in Cleveland, Ohio. Dr. Mace is the author of more than 200 peer-reviewed articles in the medical literature and author/editor of three medical textbooks including the first and the current second edition of *Observation Medicine: Principles and Protocols*. She has over 40 years of administrative and clinical experience in emergency medicine in academic and community hospital settings including nearly a decade as Director of the Emergency Department in a community hospital and another decade as Vice Chair of the Emergency Department at a large, urban, academic, trauma and tertiary care hospital, where she established an emergency medicine residency program and served as Director of the Emergency Medicine Residency Program. She has also served as Director of Pediatric Education and Quality Improvement for the Cleveland Clinic Emergency Services Institute.

She is Director Emeritus of the Clinical Decision Unit (observation unit) at the Cleveland Clinic, which was established in 1994, where she has been able to mentor nurses, advanced practice providers, medical students, residents, and even international fellows in observation medicine. She served as the founding director for the clinical decision unit at the Cleveland Clinic, which, to our knowledge, is the longest continuously in operation observation unit in the world. She was elected Chair of the Section of Observation Medicine of the American College of Emergency Physicians and served on the Observation Medicine Committee for the Society of Hospital Medicine that authored a White Paper on observation medicine.

She is the currently Director of Research for the Emergency Services Institute and Director of the Community Paramedicine Program for the Cleveland Clinic, Cleveland, Ohio. She has lectured nationally and internationally on every continent (except Antarctica) on emergency medicine, especially observation medicine. Dr. Mace has been the recipient of numerous grants and awards including a National Science Foundation Research Fellowship, Academic Residency Science Day Award, National Chapter Project Award, State Emergency Medical Services Council Award for Leadership and Excellence in Emergency Medical Services, the American Association of Women Emergency Physicians Research and Education Award, Who's Who in America and Who's Who in the World. A nationally and internationally recognized expert, she has been most recently honored as the American College of Emergency Physicians Pamela Benson Trailblazer Award in Emergency Medicine.

Section Editors

Matthew J. Campbell, PharmD, BCPS, BCCCP obtained his Doctor of Pharmacy degree from Ohio Northern University and completed postgraduate year 1 (PGY1) residency training at MetroHealth Medical Center in Cleveland, Ohio. He is a licensed pharmacist in the state of Ohio and is a Board Certified Pharmacotherapy Specialist (BCPS) and Board Certified Critical Care Pharmacist (BCCCP). He is currently Emergency Medicine Clinical Coordinator and the PGY2 Emergency Medicine Residency Program Director at Cleveland Clinic. He is actively involved in pharmacy student and pharmacy resident education as well as health-system quality initiatives and scholarly endeavors. He is Section Editor for Section 12A (Adult Order Sets) and Section 12B (Pediatric Order Sets).

Michael A. Granovsky, MD, CPC, FACEP is President of LogixHealth, a national emergency department (ED) coding and billing company

About the Editors

processing over 13,000,000 annual encounters. Following completion of his emergency medicine residency, Dr. Granovsky went on to found Greater Washington Emergency Physicians, serving as the Chief Financial Officer. Dr. Granovsky then attained a coding certification, followed by an ED subspecialty certification and ultimately led the Technical Expert Panel that designed the ED subspecialty coding certification exam. For the last 15 years, Dr. Granovsky has served as Director of the American College of Emergency Physicians (ACEP) Reimbursement course. He is the past Chairman of National ACEP’s Reimbursement Committee and Coding and Nomenclature Advisory Committee as well as the reimbursement subject matter expert to multiple task forces including telemedicine reim-

bursement, MIPS Value Pathways, quality measure development, episodes of care, alternative payment models, ACEP’s CEDR QCDR, and Out of Network Fair Payment coalition. Dr. Granovsky serves as editor for both ED Coding Alert and the American Academy of Professional Coders (AAPC) CEDC Certification Exam. A nationally recognized expert, Dr. Granovsky has been honored with numerous awards including ACEP Speaker of the Year as well as the Judith E. Tintinalli Lifetime Award for Outstanding Contribution in Education. He is Section Editor for Section 1, Chapters 1 and 2, Section 6A, Chapters 81 and 82, Section 6B Chapters 83 and 84, Section 6C Chapters 85–88 and Section 6D, Chapters 89 and 90, and the prologue.

Contributors

Tibian Abramovitz, MD, CHCQ

Physician Advisor, The Brundage Group, Pinellas Park, FL, USA

Gregory Adams, DO

Instructor/Fellow, University of Colorado School of Medicine, Aurora, CO, USA

Maria Aini, MD

Director of Clinical Operations, Thomas Jefferson University Hospital, Philadelphia, PA, USA and Associate Professor of Emergency Medicine, Sidney Kimmel Medical College, Philadelphia, PA, USA

Eric Anderson, MD, MBA, FACEP, FAAEM

Assistant Professor of Emergency Medicine, Cleveland Clinic Lerner College of Medicine of Case Western Reserve University, Cleveland, OH, USA and Co-Director International Project, Cleveland Clinic International Operations, Cleveland Clinic, Cleveland, OH, USA

Nicklaus P. Ashburn, MD, MS

Department of Emergency Medicine, Wake Forest University School of Medicine, Winston Salem, NC, USA

Taruna K. Aurora, MD

Professor, Emergency Department, Medical Director, Department of Care Coordination and Utilization Management, and Assistant Professor, Virginia Commonwealth University School of Medicine, Richmond, VA, USA

Christopher W. Baugh, MD, MBA, FACEP

Brigham and Women's Hospital, Department of Emergency Medicine, Boston, MA, USA and Associate Professor of Emergency Medicine, Harvard Medical School, Boston, MA, USA

Christopher Bazzoli, MD

Staff Emergency Physician, Cleveland Clinic, Cleveland, OH, USA and Assistant Professor of Emergency Medicine, Cleveland Clinic Lerner College of Medicine, Case Western Reserve University, Cleveland, OH, USA

Saurin P. Bhatt, MD, MBA

Staff Physician, Cleveland Clinic, Cleveland, OH, USA and Associate Professor, Cleveland Clinic Lerner School of Medicine, Case Western University, Cleveland, OH, USA

Robert S. Bennett, MD

Medical Director, Emergency Department Observation Unit, Highland Hospital, Rochester, NY, USA and Associate Professor, Clinical Emergency Medicine, University of Rochester School of Medicine and Dentistry, Rochester, NY, USA

Benjamin Beuchler, PA-C, MPAS

Physician Assistant, Department of Emergency Medicine, Hennepin Healthcare, Minneapolis, MN, USA

Howard Blumstein, MD, FAAEM

Hospital Risk Officer and Professor, Department of Emergency Medicine, Wake Forest University School of Medicine, Winston-Salem, NC, USA

Stephen Boone, MD FACEP

Assistant Professor, Department of Emergency Medicine and Internal Medicine, Baylor College of Medicine, Houston, TX, USA

Joanne M. Bradford-King, BSc, MBBS, DM, MHA

Associate Lecturer, Faculty of Medical Sciences, Cave Hill Campus, The University of the West Indies, Barbados

Sean Bush, MD, FACEP

Attending Physician, Vidant Medical Center, Greenville, NC, USA and Professor, Emergency Medicine, Brody School of Medicine, East Carolina University, Greenville, NC, USA

Matthew J. Campbell, PharmD, BCPS, BCCCP

Emergency Medicine Clinical Pharmacist, Emergency Medicine Clinical Coordinator, and Postgraduate Year 2 Emergency Medicine Pharmacy Residency Program Director, Cleveland Clinic, Cleveland, OH, USA

List of Contributors

Christopher Caspers, MD, MBA, FACEP

Chair, Department of Emergency Medicine, New York University Langone Health and Bellevue Hospital, New York City, NY, USA and Professor, New York University Long Island School of Medicine, New York City, NY, USA

Abhinav Chandra, MD, FACEP

Senior Partner, Emergency Medicine, South Sacramento Service Area, Sacramento, CA, USA and Volunteer Clinical Professor, University of California – Davis, Davis, CA, USA

Carol L. Clark, MD, MBA, FACEP

Director, Emergency Medicine Research, Corewell Health William Beaumont University Hospital, Royal Oak, MI, USA and Professor, Emergency Medicine, Oakland University William Beaumont School of Medicine, Rochester, MI, USA

Daniel K. Colby, MD

Associate Professor, UC Davis School of Medicine, University of California – Davis, Sacramento, CA, USA

Edward P. Cutolo, Jr., MD

Chief Medical Officer, Department of Veteran Affairs, VISN 8, University of South Florida, Associate Professor, Tampa, FL, USA

Constance J. Doyle, MD, FACEP

Emeritus Attending Physician and Core Retired Clinical Core Faculty, University of Michigan/St Joseph Mercy Hospital Emergency Medicine Residency, Ann Arbor, MI, USA

Daniel Drewry, MD

Attending Physician, Vituity, St. Lake City, UT, USA

Elizebeth Dubey, MD

Program Director, Emergency Medicine Residency, Detroit Receiving Hospital, Detroit, MI, USA and Associate Professor of Emergency Medicine, Wayne State University School of Medicine, Detroit, MI, USA

Akiva A. Dym, MD, MBA, FAAEM, FACEP

Medical Director, Emergency Department Observation Services, University Hospital, Newark, NJ, USA and Assistant Professor, Emergency Medicine, Rutgers New Jersey Medical School, Newark, NJ, USA

Lisa Evans, MD

Medical Director, Davidson County Emergency Medical Service, Atrium Health Wake Forest Baptist, Winston-Salem, NC, USA and Clinical Assistant Professor of Emergency Medicine, Department of Emergency Medicine, Wake Forest University School of Medicine, Winston-Salem, NC, USA

Stephanie M. Figueroa, MPAS, DFAAPA, PA-C

Director of Observation Medicine, Department of Emergency Medicine, Johns Hopkins Medicine, Baltimore, MD, USA

Lucy Franjic, MD, FACEP

Staff Physician Emergency Services Institute, Cleveland Clinic, Cleveland, OH, USA and Assistant Professor of Medicine, Cleveland Clinic Lerner College of Medicine, Case Western Reserve University, Cleveland, OH, USA

Robert W. Gibson, PhD, MSOTR/L, FAOTA

Director of Research, MCG Center for Telehealth, and Professor of Medicine, Medical College of Georgia at Augusta University, Augusta, GA, USA

Jonathan Glauser MD, MBA, FACEP

Faculty, Residency Program in Emergency Medicine, MetroHealth Medical Center and Cleveland Clinic, Cleveland, OH, USA and Professor, Emergency Medicine, Case Western Reserve University School of Medicine, Cleveland, OH, USA

Jeffrey E. Goode, MD

Medical Director, Clinical Decision Unit, Department of Emergency Medicine, Carilion Roanoke Memorial Hospital, Roanoke, VA, USA

Brittney Gordon, MD

Resident Physician, Emory University, School of Medicine and Department of Emergency Medicine, Atlanta, GA, USA

Louis G. Graff, MD, FACEP, FACP, FACC

Chair, Utilization Review Committee, Hartford Healthcare Corporation, Central Region Hospitals (retired), Hartford, CT, USA and Professor Surgery and Emergency Medicine, Clinical Professor Medicine, University of Connecticut School of Medicine (retired), Farmington, CT, USA

List of Contributors

Michael A. Granovsky, MD, CPC, FACEP

President, LogixHealth, Bedford, MA, USA and Adjunct Professor, Emergency Medicine, George Washington University, Washington, DC, USA

Cheryl Grossman

Associate Director Provider Education and Audit, LogixHealth, Bedford, VA, USA

Jennifer L. Hannum, MD, FACEP

Medical Toxicologist, Atrium Health Wake Forest Baptist, Winston-Salem, NC, USA and Associate Professor of Emergency Medicine, Wake Forest University School of Medicine, Winston-Salem, NC, USA

Dean T. Harrison, MPAS, PA-C, DFAAPA

Director of the Clinical Observation Unit, Department of Emergency Medicine, Duke University Medical Center, Durham, NC, USA

Brian C. Hiestand, MD, MPH, FACEP

Emergency Medicine Service Line Leader, Wake Forest Market, Systems Director, Regional Operations, Atrium Health Wake Forest Baptist, Winston-Salem, NC, USA and Professor of Emergency Medicine, Wake Forest University School of Medicine, Winston-Salem, NC, USA

Akilesh Honasoge, MD

Fellow Physician, Department of Cardiology, Rush University Medical Center, Chicago, IL, USA

Kami M. Hu, MD

Program Director, Combined Emergency/Internal Medicine Program and Combined Emergency/Internal/Critical Care Program, University of Maryland Medical System, Baltimore, MD, USA and Assistant Professor, Departments of Emergency and Internal Medicine, University of Maryland School of Medicine, Baltimore, MD, USA

George B. Hughes, MD

Director of the Clinical Decision Unit, Emory University Hospital, Atlanta, GA, USA and Assistant Professor, Emory University School of Medicine, Atlanta, GA, USA

Isra Al Jamed, MD

Attending Physician, Emergency Department, Swedish American Hospital, Rockford, IL, USA

Dylan Jenkins, MBBS

Consultant, Doncaster Royal Infirmary, Doncaster, UK

Elizabeth J. Johnson, MD

Assistant Professor, UC Davis School of Medicine, University of California – Davis, Sacramento, CA, USA

Peter Jones, MBChB, MSc(Oxon), PhD, FACEM

Director of Emergency Research, Adult Emergency Department | Te Toka Tumai | Auckland City Hospital, New Zealand, Chair, NZ Emergency Medicine Network, Clinical Lead for Acute Care, Health New Zealand | Te Whatu Ora and Associate Professor of Emergency Medicine, Department of Surgery, University of Auckland, Auckland, New Zealand

Reginald King, MBBS, MSc, DM

Senior Lecturer and Coordinator, DM Emergency Medicine, Cave Hill Campus, The University of the West Indies, Barbados

Adam Klotz, MD

Associate Attending Physician, Emergency Care Service, Memorial-Sloan Kettering Cancer Center, New York, NY, USA

Ayça Koca, MD

Associate Professor, Department of Emergency Medicine, Ankara University School of Medicine, Ankara, Türkiye

Matthew Kostura, MD, FAAEM

Assistant Program Director, CWRU/Metrohealth System/Cleveland Clinic Emergency Medicine Residency Program, Cleveland Clinic Emergency Services Institute, Cleveland, OH, USA and Assistant Professor, Emergency Medicine, Cleveland Clinic Lerner College of Medicine, Case Western Reserve University, Cleveland, OH, USA

Ann Marie Kuchinski, PhD

Assistant Professor, Department of Emergency Medicine, Medical College of Georgia at Augusta University, Augusta, GA, USA

Lauren Lai King, MBBCh, DipPEC, MMedEM, FCEM

Chief Executive Officer, African Federation for Emergency Medicine and Senior Lecturer, Division of Emergency Medicine, University of Cape Town, Cape Town, South Africa

List of Contributors

Grace Lambert, MD

Education Scholarship Fellow and Instructor of
Emergency Medicine, Oregon Health and Sciences
University, Portland, OR, USA

Chari Larsen, MD

Assistant Professor of Pediatrics, University of Utah
School of Medicine, Salt Lake City, UT, USA,
Pediatric Section Chief, Division of Pediatric
Emergency Medicine, University of Utah School of
Medicine, Salt Lake City, UT, USA, Medical
Director, Rapid Treatment Unit, Primary Children’s
Hospital, Intermountain Health, Salt Lake City, UT,
USA, and Medical Director, Observation Unit,
Primary Children’s Hospital – Miller Campus,
Intermountain Health, Lehi, UT, USA

Bradley D. Lepore, MD

Emergency Medicine Physician, Lutheran
Hospital Emergency Department, Fort Wayne, IN,
USA

Robert H. Leviton, MD, MPH, FACEP, FAMIA

Physician Advisor, New York City Health and
Hospitals/Metropolitan Hospital, New York City,
NY, USA and Assistant Professor, Emergency
Medicine, New York Medical College, New York
City, NY, USA

Philip A. Lewalski, MD, FACEP

Medical Director Emeritus – Observation
Medicine, Detroit Receiving Hospital, Detroit, MI,
USA and Assistant Professor of Emergency
Medicine, Wayne State University School of
Medicine, Detroit, MI, USA

Matthew Lyon, MD, FACEP

J Harold Harrison University Chair for Telehealth,
Professor and Director, MCG Center for
Telehealth, Medical College of Georgia, Augusta,
GA, USA

Chona D. Macalindong, MD, FACP

Staff Physician, Department of Veterans
Affairs, Sunshine Healthcare Network, Tampa,
FL, USA

**Malcolm Mahadevan, MBBS, MHPE(Mas),
FRCPEd, FRCSEd, FAMS**

Group Chief Emergency Medicine and Designated
Institutional Official National University Hospital,
National University Health System, Singapore and
Adjunct Professor, Department of Surgery,
National University Singapore, Singapore

Amal Mattu, MD, FAAEM, FACEP

Professor and Vice Chair of Academic Affairs,
Department of Emergency Medicine, University of
Maryland School of Medicine, Baltimore, MD,
USA

David A. McKenzie, BS, CAE

Reimbursement Director, American College of
Emergency Physicians, Dallas, TX, USA

**Mary McLaughlin Davis, DNP, ACNS-BC, NEA-
BC, CCM-R**

Project Manager of Care Management, Cleveland
Clinic, Cleveland, OH, USA

David A. Meguerdichian, MD, FACEP

Director of Observation Medicine, Brigham
and Women’s Hospital, Department of
Emergency Medicine, Boston, MA, USA and
Assistant Professor, Department Emergency
Medicine, Harvard Medical School, Boston,
MA, USA

Stephen W. Meldon MD, FACEP

Co-Director, Geriatric Emergency Department
Program, Cleveland Clinic, Cleveland,
Division Chair, Emergency Medicine, Cleveland
Clinic Florida and Academic Chair, Department of
Emergency Medicine, Lerner College of Medicine,
Case Western Reserve University, Cleveland, OH,
USA

James R. Miner, MD

Chair, Department of Emergency Medicine,
Hennepin Health, Minnesota, MN, USA and
Professor and Department Head, University of
Minnesota, Minneapolis, MN, USA

Jill A. Mohr, MD

Attending Physician, Hillcrest Hospital,
Cleveland, OH, USA and Associate Staff,
Emergency Services Institute, Cleveland Clinic
Health Systems, Cleveland, OH, USA

Bret A. Nicks, MD, MHA, FACEP

Professor and Executive Vice Chair and Emergency
Medicine Director, Emergency Medicine
Administrative Leadership Fellowship, Department
of Emergency Medicine, Wake Forest University
School of Medicine, Winston-Salem, NC, USA

Aderonke Ojo, MBBS, MHA, FACEP, FAAP

Physician Advisor and Associate Medical Director,
Care Coordination and Utilization Management,

List of Contributors

Emergency Department, Texas Children’s Hospital, Houston, TX, USA and Professor of Pediatrics, Baylor College of Medicine, Houston, TX, USA

Hamzeh W. Omar, MD

Emergency Medicine, Corewell Health William Beaumont University Hospital, Royal Oak, MI, USA

Edgardo Ordonez, MD, MPH, FAAEM, FACEP, FACP

Director of Health Equity and Community Engagement, Henry JN Taub Department of Emergency Medicine, Baylor College of Medicine, Houston, TX, USA

Anwar Osborne, MD, MPM, FACEP

Medical Director, Chest Pain Center, Medical Director, Observation Unit, and Assistant Professor, Emergency Medicine and Internal Medicine, Emory University School of Medicine, Atlanta, GA, USA

David G. Paje, MD, MPH

Medical Director, Short Stay Unit, Michigan Medicine University Hospital, Ann Arbor, MI, USA and Associate Professor of Internal Medicine, University of Michigan Medical School, Ann Arbor, MI, USA

W. Frank Peacock, MD, FACEP, FACC, FESC

President, Comprehensive Research Associates, LLC and Vice Chair for Research and Professor, Henry JN Taub Department of Emergency Medicine, Baylor College of Medicine, Houston, TX, USA

Claire Pearson, MD, MPH, FACEP

Director of Clinical Research, Ascension St. John Hospital, Detroit, MI, USA and Professor of Emergency Medicine, Wayne State University School of Medicine, Detroit, MI, USA

Margarita Pena, MD, FACEP

Medical Director, Clinical Decision Unit and Associate Program Director, Emergency Medicine Residency, Ascension St. John Hospital, Detroit, MI, USA and Clinical Professor, Wayne State University School of Medicine, Detroit, MI, USA

Raaj Popli, MD

Gastroenterologist/Partner, Digestive Disease Consultants, UCF College of Medicine, Orlando, FL, USA and Assistant Professor of Gastroenterology, Altamonte Springs, FL, USA

Julia V. Prokesova, MD, MBA, FAAEM

Attending Physician, Northeast Emergency Medicine Specialists, Winston-Salem, NC, USA

Ryan Prudoff, DO, MS

Director of Observation Medicine, Family Emergency Room of Georgetown, Georgetown, TX, USA

Catherine T. Puetz, MD

Emergency Physician, Sanford Health, Bismarck, ND, USA and Associate Professor of Emergency Medicine, University of North Dakota School of Medicine, Bismarck, ND, USA

Immad Shahnawaz Qureshi, MBBS, MSc Critical Care, RCPATHME, MACadMed, AFICM, FRCM, FFSEM

Clinical Governance Lead and Consultant in Emergency Medicine, St. Mary’s Hospital, Isle of Wight NHS Trust, UK, Emergency Medicine Specialty and Specialist Doctors (EMSAS) Chair and Trustee Board Member, Royal College of Emergency Medicine, London, UK, Simulation Education Lead, International Federation for Emergency Medicine, West Melbourne, Australia, Ambassador Program UK Liaison, American College of Emergency Physicians, Dallas, TX, USA, and Editorial Board Member, South Asian Journal of Emergency Medicine, Shifa International Hospital, Islamabad, Pakistan

Yasser Masood Qureshi, MBBS, FRCM

Consultant Emergency Medicine and Resuscitation Lead, Department Emergency Medicine, King Faisal Specialist Hospital and Research Center, Jeddah, Saudi Arabia, Member of the Department of Emergency Medicine Committee on Observation Medicine Unit Project, King Faisal Specialist Hospital and Research Center, Jeddah, Saudi Arabia, and Certificate Program in Emergency Medicine, Overseas Faculty, The Indus Hospital, Karachi, Pakistan

Renee Reid, MD, FACEP

Attending Physician and Associate Professor, Virginia Commonwealth University Medical Center, Department of Emergency Medicine, Richmond, VA, USA

David J. Robinson, MD, MS, MMM

Professor and Vice Chair of Emergency Medicine, Department of Emergency Medicine, University of Texas Health Science Center at Houston,

List of Contributors

McGovern Medical School (UTHEALTH),
Houston, TX, USA

Justin Rodgers, MPA, DHSc

Carilion Clinic Senior Director, Department of
Emergency Medicine, Carilion Roanoke Memorial
Hospital, Roanoke, VA, USA

Zachary J. Rogers, MD

Critical Care Fellow, Department of
Emergency Medicine and Internal Medicine,
University of Maryland Medical Center,
Baltimore, MD, USA

Anthony R. Rosania, MD, MHA, FACEP

Medical Director, Emergency Department
Observation Services, University Hospital,
Newark, NJ, USA and Vice Chair for Clinical
Operations and Associate Professor, Rutgers New
Jersey Medical School, Department of Emergency
Medicine, Newark, NJ, USA

John S. Rozel, MD, MSL, DFAPA

Medical Director, Resolve Crisis Services, UPMC
Western Psychiatric Hospital, Pittsburgh, PA, USA
and Professor of Psychiatry and Adjunct Professor
of Law, University of Pittsburgh, Pittsburgh, PA,
USA

Saket A. Saxena, MD

Co-Director, Geriatric Emergency Department
and Geriatric Care Unit, Cleveland Clinic,
Cleveland, OH, USA and Assistant Professor of
Medicine and Emergency Medicine, Cleveland
Clinic Lerner College of Medicine, Case Western
Reserve University, Cleveland, OH, USA

Stephen F. Sayles III, MD, FACEP

Medical Director, Cleveland Clinic Medina
Hospital Emergency Department, Medical
Director, Cleveland Clinic Brunswick
Freestanding Emergency Department, and
Clinical Assistant Professor of Medicine,
Center for Emergency Medicine, Cleveland
Clinic Lerner College of Medicine, Case
Western Reserve University, Cleveland, OH,
USA

J. Lane Schnell, MD, FACEP

System Medical Director, Emergency Medicine,
UT Health East Texas, Tyler, TX, USA and
Assistant Professor, UT Tyler School of Medicine/
University of Texas Health Science Center at Tyler,
Tyler, TX, USA

Nathaniel L. Scott, MD, MHA

Chief of Clinical Operations and Quality,
Hennepin Healthcare, Minneapolis, MN, USA and
Associate Professor, University of Minnesota
Medical School, Minneapolis, MN, USA

**Veronica Sikka, MD, PhD, MHA, MPH, FACEP,
FAAEM**

Chief, Virtual Care, VA Sunshine Healthcare
Network, St. Petersburg, FL, USA and Associate
Professor of Emergency Medicine, University of
Central Florida College of Medicine, Orlando, FL,
USA

Mallika Singh, MD

Senior Resident, New York University Langone
Health and Bellevue Hospital, New York City, NY,
USA

Emma Sizemore, MD, MPH

Assistant Professor, Emory University School of
Medicine, Department of Emergency Medicine,
Atlanta, GA, USA

**Nancy E. Skinner, RN, CCM, CMGT-RN, ACM-RN,
CMCN, FCM**

Principal Consultant, Riverside HealthCare
Consulting, Whitwell, TN, USA

Courtney M. Smalley, MD

Director of Emergency Ultrasound, Emergency
Services Institute, Cleveland Clinic, Cleveland,
OH, USA and Associate Professor of Medicine,
Cleveland Clinic Lerner College of Medicine, Case
Western Reserve University, Cleveland, OH, USA

Abbey M. Smiley, MD

Clinical Instructor, Department of Emergency
Medicine, The Ohio State University College of
Medicine, Columbus, OH, USA

Laura Smylie, MD

Associate Program Director, Emergency Medicine
Residency, Detroit Receiving Hospital, Detroit,
MI, USA and Associate Professor of Emergency
Medicine, Wayne State University School of
Medicine, Detroit, MI, USA

Lauren T. Southerland, MD, MPH

Director of Clinical and Implementation Research,
The Ohio State University Wexner Medical
Center, Columbus, OH, USA and Associate
Professor, The Ohio State University College of
Medicine, Columbus, OH, USA

List of Contributors

Jason P. Stopyra, MD, MS

Professor, Department of Emergency Medicine,
Wake Forest University School of Medicine,
Winston Salem, NC, USA

Pawan Suri, MD

Chief, Division of Observation Medicine,
Department of Emergency Medicine and
Internal Medicine and Associate Professor,
Virginia Commonwealth University School of
Medicine, Richmond, VA, USA

Elaine Thallner, MD, MPOD

Former Emergency Services Institute Quality
Improvement Officer, Cleveland Clinic
Foundation, Cleveland, OH, USA

Tony Thrasher, DO, MBA, CPE, DFAPA

Medical Director of Crisis Services, Milwaukee
County Behavioral Health Division, Milwaukee,
WI, USA and Clinical Associate Professor, Medical
College of Wisconsin Department of Psychiatry,
Milwaukee, WI, USA

Sarah Todt, RN, CPC, CPCO, CPCA, CEDC

Executive Director of Revenue Integrity,
LogixHealth, Bedford, MA, USA

Ramupriya Vaithi, MD

Attending Physician, North Fulton Wellstar
Emergency Department, Atlanta, GA, USA

Louella Vaughan, MBBS, MPhil, DPhil, FRACP

Senior Clinical Research Fellow, Nuffield Trust,
London, UK

**Lee A. Wallis, MBChB, FRCS, DIMCRCS, Dip
Sport Medicine, FCEM, FIFEM**

Head of Emergency Medicine, Western Cape
Government University of Cape Town, Cape Town,
South Africa and Professor and Head of Emergency
Medicine, Stellenbosch University, Stellenbosch,
South Africa

Robert D. Welch, MD, MS

Staff Physician, Detroit Receiving Hospital,
Detroit, MI, USA and Professor of Emergency
Medicine, Director of the Clinical Research

Fellowship, Wayne State University School of
Medicine, Detroit, MI, USA

Matthew A. Wheatley MD, FACEP

Associate Medical Director, Emergency Care
Center, Medical Director – Clinical Decision Unit,
and Medical Director – Urgent Care Grady Health
Systems, Atlanta, GA, USA and Associate
Professor, Department of Emergency Medicine,
Emory University School of Medicine, Atlanta,
GA, USA

**T. Andrew Windsor, MD, RDMS, FAAEM,
FACEP**

Assistant Professor, Department of Emergency
Medicine, University of Maryland School of
Medicine, Baltimore, MD, USA

Mary A. Wittler, MD

Medical Toxicologist, Atrium Health Wake Forest
Baptist, Winston-Salem, NC, USA and
Associate Professor of Emergency Medicine, Wake
Forest University School of Medicine, Winston-
Salem, NC, USA

Ryan Yavorsky, DO

Attending Physician, UCLA Health and White
Memorial Medical Center, Los Angeles, CA, USA

Chai Chew Yian, MBBS, MCEM, MMed

Senior Consultant and Director of the Extended
Diagnostic Treatment Unit, Department of
Emergency Medicine, National University
Hospital, Singapore

Scott Zeller, MD

Vituity Vice President, Acute Psychiatry,
Emeryville, CA, USA and Assistant Clinical
Professor of Psychiatry, University of California –
Riverside, Riverside, CA, USA

Leslie S. Zun, MD

Medical Director, Lake County Health
Department, Waukegan, IL, USA and Professor,
Department of Emergency Medicine, Rosalind
Franklin University of Medicine and Science,
Chicago, IL, USA