



ACCEL Care Pathway
Annual Eligibility Review (AER)
Case Study

CHW Starting a Pathway from ACCESS Database

1. CHW identifies clients from ACCESS database who are due for renewal.
2. CHW uses “Referral Specialist: Making a New Pathway Referral in iREACH” for making a pathway referral for Annual Eligibility Review (AER).

*****OR*****

CHW Receives Cold Calls and Walk-Ins for Help with Insurance Renewal

1. *Go to the left navigation bar and select “New” and then “Client.” Complete EMPI search.*
 - a. *If client is already in the database, click on name to review what information you need to assess for insurance eligibility.*
 - b. *If client is NOT in database, do a quick paper pre-screening of the client to evaluate whether or not the client may qualify for a renewal of Health Care Coverage.*
2. *If client is most likely eligible for one of the available insurance options, discuss the Notification of Privacy Practices (NPP) and document on paper form the answers to:*
 - a. *Notification of Privacy Practices given?*
 - b. *Notification of Privacy Practices date, and*
 - c. *Patient/client is an ACCEL Participant?*
3. *While still on the phone, in iREACH click on “New Client” which brings you to the “New Client Registration” page. Complete all required fields. Click “Register.”*
4. *Complete Client Info (4 tabs), including the answers to the NPP. Complete work required for **Milestone 1**.*

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5. *On the Left Navigation Bar, select “Notes.” Write a note to the Pathway Manager explaining that this was a cold call or walk-in, that Screening A was done and an appointment established. Ask for the pathway assignment.*
6. *Select “Pathway Referral” on the left navigation bar. Complete all necessary fields, including referral type (AER) and the answers to the NPP related fields. Click “Save.”*

This referral goes directly to Pathway Manager (Vicki) for assignment.

7. ***If there are other siblings to enroll in AER or SHCC, do it now by clicking on the “Sibling” icon at top right hand corner of Pathway Referral page.***
 - a. *On the pop-up screen, select sibling name.*
 - b. *If the sibling is not listed, add the sibling by selecting “new” at top of pop-up screen.*
 - c. *This brings up a New Pathway Referral page. It should have pre-populated relevant data from the 1st client.*
 - d. *Complete all **red (required)** fields.*
 - e. *Select Household Relationships and verify/link all siblings and relevant household members.*
 - f. *Click “Save.”*
8. ***If necessary, document Face-to-Face Appointment (Milestone 2, Step 1).***
 - a. *Select “My Tasks”*
 - b. *Select Task Process number for client just referred.*
 - c. *In Details screen, select client name.*
 - d. *With the client loaded, document the appointment on the appointment page and link it to the referral.*

Milestone 0: Referral and Assignment of Pathway

1. Pathway Manager reviews:
 - a. AER0 Task for a new renewal (coming from CHW ACCESS database)
or
 - b. SHCC Renewal Tickler when it comes due. Identifies which CHW worked on the SHCC pathway
[Module 1: Pathway Tracking].
2. Assigns to appropriate CHW.
[Module 0: Pathway Assignment].

CHW Instructions

1. For this pathway, 3 working days can elapse between a CHW receiving the referral and contacting parent/guardian for the first milestone.
2. After logging in, CHW reviews “My Tasks” on “List Section” of screen, clicks on “Task Tracking #” for AER1 – Screening A: Telephone Screening.

At bottom of detail screen, CHW reviews milestone (tasks) steps, then clicks on client’s name in detail screen to pull up Client Info (4 tabs).
3. If this is a client the CHW had started through a **Cold Call/Walk-In**, complete Milestone 1 as successful
[Module 4A: Complete Milestone/Task/Tickler – Successful].

Continue with the Pathway starting at Milestone 2, step 10.

Milestone 1: Screening A: Telephone Screening

(3 Working Days to Complete)

1. CHW calls parent/guardian for pre-screening
[Locate home phone number on Client Info tab;
work and cell phone numbers are on Demographics tab].
 - a. If unable to reach the parent/guardian, create a date tickler to remind you to recall. Repeat up to 3 times
[Module 2: Create Task/Tickler].

Document each call
[Module 1: Pathway Tracking].

If NO contact, terminate pathway
[Module 6: Terminate Pathway].
 - b. If you reach the parent/guardian, conduct eligibility assessment and document answers on Client Info page, using all 4 tabs.

If siblings need insurance, be sure to capture all of their information in the Household/Relationship tab.

- c. Determine if client may qualify for an insurance option according to FPL. (CHW does not determine eligibility but assists parent / guardian in completing application for health care coverage options.)

If client may qualify, complete milestone
[Module 4A: Complete Milestone/Task/Tickler - Successful].
- d. **As appropriate, initiate a new referral for each sibling.**

While still in the 1st client record, go to the left nav bar and click on “Pathway Referrals.”

On the upper right hand corner of the page, click on “Sibling” icon.

On the pop-up screen, select sibling name. It brings up a New Pathway Referral page. It should have pre-populated relevant data from the 1st client.

Complete all **red (required)** fields including NPP and Pathway Selection. For this pathway it could be AER or SHCC.

Select Household Relationships and verify or link all siblings and relevant household members.

Click “Save.”

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2. If Federal Poverty Level (FPL) >300%, the client is NOT eligible for ACCEL.

Offer and document options for commercial health care coverage
[\[Module 1: Pathway Tracking\]](#).

Terminate pathway
[\[Module 6: Terminate Pathway\]](#).

Milestone 2: Schedule Face-to-Face Appointment

(One Working Day to Complete)

1. Document date, time and location of appointment on Appointment page [Module 7A: Appointments – Make New/Reschedule Appointment].

(iREACH will remind you to call one day in advance.)

2. Send package or provide to the parent/guardian a list of documentation needed at appointment.

Document that you sent/provided packet
[Module 1: Pathway Tracking].

Complete milestone
[Module 4A: Complete Milestone/Task/Tickler – Successful].

Milestone 3: Attend at Face-to Face Application Appointment

(10 Working Days to Complete)

1. Based on appointment reminder call (ARC) tickler, call parent/guardian to remind them of appointment.

- a. If you reach parent/guardian and they plan to keep appointment, document on Appointment page (on left navigation bar)

Complete tickler
[Module 4A: Complete Milestone/Task/ Tickler – Successful].

- b. If you reach parent/guardian and they need to reschedule appointment, complete

[Module 7B: Appointments – Determine Final Outcome of Appointment.]

From drop-down box “Appointment not kept reason”
select “Needed to reschedule” and click “Save.”

Then go to Appointment page and document new date, time and location of appointment.

Complete tickler
[Module 4A: Complete Milestone/Task/Tickler – Successful].

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c. If unable to reach parent/guardian, leave message.
Complete tickler
[Module 4A: Complete Milestone/Task/Tickler – Successful].

d. If unable to leave message, complete tickler
[Module 4A: Complete Milestone/Task/Tickler – Successful]

but do not terminate pathway.

2. Document on Appointment page if parent/guardian attends face-to-face appointment
[Module 7B: Appointments – Document Final Outcome of Appointment].

Complete milestone
[Module 4A: Complete Milestone/Task/ Tickler – Successful].

3. If parent/guardian did NOT attend appointment, document
[Module 7B: Appointments – Document Final Outcome of Appointment].

4. Call up to 3 times to reschedule. Document each call
[Module 1: Pathway Tracking]

a. If unable to reach parent, terminate pathway
[Module 6: Terminate Pathway – Unsuccessful].

b. If able to reach parent/guardian, reschedule appointment
[Module 7A: Appointments – Make New/Reschedule Appointment].

Change milestone due date to coincide with the new appointment date
[Module 3: Modify/Milestone/ Task/Tickler].

c. Document on Appointment page if parent/guardian attends face-to-face appointment
[Module 7B: Appointments – Document Final Outcome of Appointment].

Complete Milestone
[Module 4A: Complete Milestone/Task/Tickler – Successful].

d. If 2nd rescheduled appointment is a no-show, return to Appointment page and document final outcome of appointment
[Module 7B: Appointments - Document Final Outcome of Appointment].

Terminate pathway
[Module 6: Terminate Pathway - Unsuccessful].

Milestone 4: Confirm Program Eligibility

(1 Working Day to Complete)

1. Verify and/or update information as appropriate.
 - a. Click on Task Tracking #, click on client name to pull up Client Info. Document: Client Info; Demographics; Household/Relationships / Insurance; and Income/Assets/Expenses.

Click “Save.”
 - b. Conduct Needs Assessment on Demographics page.

Click “Save.”
2. Confirm the FPL and document eligibility:
 - a. If FPL is < 300%, complete milestone
[Module 4A: Complete Milestone/Task/Tickler – Successful].
 - b. If FPL is > 300%, terminate pathway
[Module 6: Terminate Pathway].

Milestone 5: Fill out Health Care Coverage Application

(1 Working Day to Complete)

1. Generate and complete appropriate application.
[Module 8: Generate HealthCare Coverage Application].

Document type of health care coverage applied for
[Module 1: Pathway Tracking].
2. After application has been completed, give **parent packet**, including list of PCPs that accept the client’s health care coverage and include health education materials regarding how to use their medical home.
3. Document date application was mailed:
 - a. If CHW knows the application was mailed immediately after appointment, document
[Module 1: Pathway Tracking – include date application was mailed].
 - b. If CHW does NOT know, use milestone as a tickler, changing milestone due date for 5 working days
[Module 3: Milestone/Task/Tickler].

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- c. Call up to 3 times, but do NOT close case if unable to reach.

Document each call

[Module 1: Pathway Tracking –include date application was mailed].

4. Complete milestone

[Module 4A: Complete Milestone/Task/Tickler –Successful].

Milestone 6: Confirm Health Care Coverage Status

(30 Working Days to Complete)

1. Change due date of milestone to conform with applied for health care plan
[Module 3: Modify Milestone/Task/Tickler].
2. Review insurance applied for in order to call health care plan for status of Coverage
[Module 1: Pathway Tracking].
3. Call health care plan and document call dates to health plan to confirm insurance status
[Module 1: Pathway Tracking].
4. If approved, document health coverage type and effective date of coverage
[Module 11: Client Insurance Policy].

Complete milestone

[Module 4A: Complete Milestone/Task/Tickler].

5. If NOT approved, document and state reason
6. Then correct or generate new application
[Module 8: Generate Health Care Coverage Application].

Document the resend

[Module 1: Pathway Tracking] and:

- a. Repeat steps 1 - 4 above.
- b. If denied, document and state reason
[Module 1: Pathway Tracking].

Repeat until insurance is obtained or until Pathway Manager says to stop.

Terminate Pathway

[Module 6: Terminate Pathway].

Milestone 7: Health Coverage Renewal

(3 Working Days to Complete)

1. Pathway Manager creates tickler for renewal for 9 months from the date of coverage
[Module 2: Create Task/Tickler].
2. Complete milestone
[Module 4A: Complete Milestone/Task/Tickler – Successful].

AER PATHWAY COMPLETED