



ACCEL Care Pathway  
*Newborn Securing Health Care Coverage (NBSHCC)*  
*Case Study*

**FOR SOUTH LAKE TAHOE ONLY**

**Milestone 0: Referral and Assignment of Pathway**

1. Referral Specialists at Tahoe Family Physicians (TFP) and Barton Community Clinic (BCC) generate referral via iREACH.  
See handout: “Referral Specialist – Making a New Pathway Referral for **Newborn Securing Health Care Coverage** in iREACH.”
2. iREACH automatically sends all referrals to Pathway Manager (Vicki).
3. Pathway Manager reviews new referrals in her task list and assigns pathway to appropriate CHW.  
See handout: “Pathway Manager: Assigning a New Pathway to CHW.”

**CHW Instructions**

1. After logging in, CHW reviews “My Tasks” on “List Screen,” and clicks on “Task Tracking #.”  
At bottom of detail screen, CHW reviews Milestone (tasks) steps, then clicks on client’s name in detail screen to pull up Client Info (all 4 tabs).
2. This pathway may begin after the baby has been born. When reviewing the referral, look carefully at the fields “Date of Birth” and “Expected Date of Birth.”
  - a. If “Date of Birth” has been filled in, CHW completes Milestones 1, 2 and 3 as successful [Module 4A: Complete Milestone/Task/Tickler – Successful] and begins **Milestone 4**.
  - b. If “Date of Birth” has not been filled in and “Expected Date of Birth” is filled in, start with **Milestone 1**.

## Milestone 1: Confirm Pregnancy Viability

### (5 Working Days to Complete)

1. CHW loads the client and reviews “Expected Date of Birth” field on Client Info tab. Then the CHW:
  - a. Changes the Milestone due date to conform to date the pregnant woman enters 3<sup>rd</sup> trimester, and
  - b. Reassigns this Milestone to BCC Referral Specialist to confirm viability of pregnancy  
[Module 3: Modify Milestone/Tickler/Task].
2. When Milestone comes due (it turns **red**), the BCC Referral Specialist: reviews the mother’s name/ birth date in iREACH  
[Module 9: Review of Pathway Referral]  
and checks viability of pregnancy in Barton Health System.
  - a. If the pregnancy is no longer viable, completes Milestone  
[Module 4B: Complete Milestone/Task/Tickler – Unsuccessful; select appropriate “barrier” – for example, termed pregnancy, moved out of town, etc.].
  - b. If the pregnancy is viable, completes Milestone  
[Module 4A: Complete Milestone/Task/Tickler – Successful].

## Milestone 2: Introductory Call to Mother

### (5 Working Days to Complete)

1. CHW checks outcome of previous Milestone  
[Module 5: Review & Edit Pathway Milestone].
  - a. If completed as “Successful,” CHW reviews the Client Info tab for expected date of birth and continues pathway.
  - b. If completed as “Unsuccessful” terminates pathway  
[Module 6: Terminate Pathway – using barrier reason from closed Milestone].
2. CHW makes “introductory call” to pregnant woman.
  - a. Documents date of call(s)  
[Module 1. Pathway Tracking – and confirms expected due date].  
Will attempt to reach mother up to three times, but will NOT terminate pathway if unable to reach.
  - b. Completes Milestone  
[Module 4A. Complete Milestone/Task/ Tickler – Successful] if reached.  
or  
Completes Milestone  
[Module 4B. Complete Milestone/Task/Tickler – Unsuccessful] if was unable to reach.

## Milestone 3: Confirmation of Birth Date

### (3 Working Days to Complete)

1. CHW creates tickler for one week post due date to contact BCC Referral Specialist to ID birth status of newborn  
[Module 2: Create Task/Tickler].

If BCC Referral Specialist has not informed CHW within one week of expected due date, the CHW calls BCC Referral Specialist to ID birth status of newborn.

2. CHW changes Milestone due date to conform with expected due date and reassigns this Milestone to BCC Referral Specialist  
[Module 3: Modify Milestone/Task/Tickler].

3. BCC Referral Specialist reviews iREACH tasks daily that remind her to check Barton Health System birth census for ACCEL births.

(To review mother's name and expected due date, use  
[Module 9. Review of Pathway Referral].)

- a. For each ACCEL birth, the Referral Specialist documents birth date of baby in "Client Notes"  
[Module 10: Client Notes: Writing and Reading]  
and

Completes Milestone

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

- b. If baby died during 3<sup>rd</sup> trimester, or family moved out of county, or for any other reason client is not available:

Referral Specialist completes Milestone

[Module 4B: Complete Milestone/Task/Tickler – Unsuccessful.  
Select appropriate "barrier" – for example, termed pregnancy, moved out of town, etc.].

**NOTE 1:** If the BCC Referral Specialist identifies an El Dorado County pregnant woman who has NOT been referred to ACCEL but has Medi-Cal coverage, the BCC Referral Specialist creates a new NBSHCC referral.

See *handout*: "Referral Specialist: Making a New Pathway Referral for **Newborn Securing Health Care Coverage (NBSHCC)**."

**NOTE 2:** If BCC Referral Specialist identifies a newborn baby at the 72-hour bilirubin check-up whose mother has in-county Medi-Cal, the Referral Specialist creates a new referral for NBSHCC.

See *handout*: "Referral Specialist: Making a New Pathway Referral for **Newborn Securing Health Care Coverage (NBSHCC)**."

## Milestone 4: Medi-Cal Request of Newborn Coverage

### (2 Working Days to Complete)

1. CHW checks outcome of previous Milestone  
[Module 5: Review & Edit Pathway Milestone].
  - a. If completed as “Successful,” CHW checks client notes for newborn birth date  
[Module 10: Client Notes: Writing and Reading]  
and continues pathway.
  - b. If completed as “Unsuccessful,” terminates pathway  
[Module 6: Terminate Pathway – using barrier reason from closed Milestone].
2. Close tickler  
[Module 4A: Complete Milestone/Task/Tickler/Successful].
3. CHW calls mother within 2 working days of birth and up to 3 times.  
Documents each call  
[Module 1: Pathway Tracking].
  - a. If reaches mother, CHW completes/updates Client Info (all 4 tabs), including the baby’s name, date of birth and the required fields for the mother  
[2<sup>nd</sup> Tab: Household/Relationships/Insurance].
  - b. If unable to reach mother, terminates pathway  
[Module 6: Terminate Pathway].
4. CHW teleconference with Medi-Cal worker to request enrollment of newborn into Medi-Cal.  
Documents call  
[Module 1: Pathway Tracking].
5. Completes Milestone  
[Module 4A: Complete Milestone/Task/Tickler – Successful].

## **Milestone 5: Confirm Newborn Medi-Cal Coverage**

**(10 Working Days to Complete)**

1. Call mother to confirm Medi-Cal enrollment.
  - a. CWH documents health coverage type and effective date of coverage [Module 11: Client Insurance Policy].
  - b. If mother does not know the baby's insurance status, CHW tries to confirm coverage through MEDS or by calling Medi-Cal worker.

Document

[Module 1: Pathway Tracking – confirm health care coverage].

Repeat step "1.a." above.

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

## **Milestone 6: Health Care Coverage Renewal**

**(2 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. Completes Milestone  
[Module 4A: Complete Milestone/Task/Tickler].

**NBSHCC PATHWAY COMPLETED**