



ACCEL Care Pathway
Pediatric Mental Health Consults - PMHC
Case Study

Milestone 0: Referral and Assignment of Pathway

1. PCP fills out paper referral form and obtains parent/guardian signature for “Release to Share Medical and Psychiatric Information.”
2. PCP Referral Specialist verifies insurance is Medi-Cal, Healthy Families or CHDP Gateway.
3. Referral Specialist:
 - a. Faxes all referrals to Mental Health Department to the MHW (Catrina) at (530) 295-2532 **and** to the Public Health Department to the CHW (Nancy Hyzer) at (530) 642-0892.
 - b. Keeps original paper referral form in client chart.
 - c. For iREACH Users – **also** completes iREACH New Pathway Referral. See handout:
“Referral Specialist: Making a New Pathway Referral in iREACH.”
Be sure to fill in specific “PMHC Referral Information.”
4. **If** the PMHC referral has not been entered into iREACH, CHW enters the referral into iREACH.
 - a. Completes New Pathway Referral. See handout
“Referral Specialist: Making a New Pathway Referral in iREACH.”
 - b. Designates who the referral source is, e.g., EDCCHC.
 - c. Fills in specific “PMHC Referral Information.”
5. Pathway Manager (Vicki Cowley) at the Public Health Department reviews new referral and assigns to CHW.

CHW Instructions

1. After logging in, CHW reviews “My Tasks” on “List Section” of screen, clicks on “Task Tracking #.”
At bottom of detail screen, CHW reviews Milestone (task) steps then clicks on client’s name in detail screen to pull up Client Info (seen on all 4 tabs).
2. Reviews Pathway Referral to obtain overview of client and the referral [Module 12: Pathway Referral Review, Edit & Print].

Milestone 1: Document Health Care Coverage

(10 Working Days to Complete)

1. CHW assigns Milestone to MHW
[Module 3: Modify Milestone/Task/ Tickler].
2. MHW verifies insurance.
 - a. First checks iREACH referral for PCP-documented insurance type
[Module 12: Pathway Referral Review, Edit & Print].
 - b. MHW verifies via MEDS that client has **right kind of in-county** Medi-Cal or Healthy Families. Documents in iREACH
[Module 11: Client Insurance Policy].
 - c. Completes all required **red** fields in 4 Client Info tabs.
 - d. Completes Milestone
[Module 4A: Complete Milestone/ Task / Tickler – Successful].
 - e. Skips to Milestone 2: step 2.
3. If client has **out-of-county** Medi-Cal or Healthy Families, the MHW obtains authorization to provide services in El Dorado County.
 - a. If MHW is able to obtain authorization:
 - i. Documents
[Module 11: Client Insurance Policy].
 - ii. Completes Milestone
[Module 4A: Complete Milestone/Task/ Tickler – Successful].
 - b. If MHW unable to obtain authorization:
 - i. Terminates pathway
[Module 6: Terminate Pathway,
Barrier is: Unauthorized Out-of-County Medi-Cal,
Termination Reason is: Inappropriate Insurance].
 - ii. Go to Appendix 1: Early Termination.
4. If child is **CHDP Gateway** or **uninsured**, MHW:
 - a. Documents need for health coverage
[Module 1: Pathway Tracking, “PMHC-Pending Insurance Coverage”].
 - b. Reassigns PMHC1 Milestone to CHW
[Module 3: Modify: Milestone/ Task/Tickler].

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- c. Creates date tickler for 25 working days to follow up on status of health care coverage with the CHW
 [Module 2: Create Task/Tickler, Choose “PMHC-Pending Insurance Coverage”].
 - d. Makes referral for SHCC.
 See handout:
 “Referral Specialist: Making a New Pathway Referral in iREACH].
- 5. Pathway Manager reviews new SHCC referral and assigns to CHW for insurance assistance.
 See handout:
 “Pathway Manager: Assigning a New Pathway to CHW”].
- 6. CHW checks task list and reviews Pathway Tracking
 [Module 1: Pathway Tracking]
 to see that client requires insurance assistance.
 - a. Calls PCP Referral Specialist and informs of delay in appointment due to insurance need.

 Documents call
 [Module 1: Pathway Tracking].
 - b. CHW checks task list to find Mental Health referral for SHCC for client and begins SHCC pathway.
 - c. When insurance has been obtained:
 - i. CHW documents
 [Module 11: Client Insurance Policy].
 - ii. **CHW completes PMHC Document Health Care Coverage Milestone 1**
 [Module 4A: Complete Milestone/Task/Tickler – Successful].
 - d. If CHW is unable to obtain insurance:
 - i. Terminates pathway
 [Module 6: Terminate Pathway, Barrier: “Not Eligible,” Termination Reason: ”Inappropriate Insurance”].
 - ii. Goes to Appendix 1: Early Termination.

Milestone 2: Pre-Screen Call and Schedule Intake Appointment

(2 Working Days to Complete) – MHW completes this Milestone

1. Calls parent/guardian to perform pre-screen within 2 working days of receiving referral.
 - a. If no response by 3rd call, sends letter informing parent/guardian of MHD call attempts and gives parent/guardian 5 working days to call MHD.

Parent is invited to re-initiate referral in the future.

 - i. If no response within 5 working days, terminates pathway [Module 6: Terminate Pathway, Termination Reason is “Loss of Contact with Parent”].
 - ii. Goes to Appendix 1: Early Termination.
 - b. If Intake Appointment scheduled, Completes Milestone as Successful. [Module 4A: Complete Milestone/Task/Tickler].

Milestone 3: Confirm Attendance for Intake Appointment

(5 Working Days to complete) – MHW completes this milestone

1. If client **kept** the intake appointment, MHW
 - a. Assigns Clinician on following Wednesday for Initial Mental Health Assessment.
 - b. Documents on:
[Module 1: Pathway Tracking,
Select: “PMHC -assigned to clinician”].
 - c. Completes the Milestone as successful
[Module 4A: Complete Milestone/ Task/Tickler – Successful].

Skip to Next Milestone

2. If client did **not keep** the Intake Appointment, MHW
 - a. Contacts client to assess barriers with client and reschedule intake appointment.
 - b. Changes Milestone due date to rescheduled Intake Appointment date.
[Module 3: Modify Milestone/Task/Tickler].
3. If client **keeps rescheduled** Intake Appointment, MHW
 - a. Completes Milestone
[Module 4A: Complete Milestone/Task/Tickler].

or
4. If client has a 2nd “**no show**” for Intake Appointment, MHW
 - a. Terminates pathway
[Module 6: Terminate Pathway,
Termination reason is: “No Shows to Medical Provider Appointment”].
 - b. Goes to Appendix 3: Early Termination.

Milestone 4: Completion of Preliminary Assessment (may require multiple appointments)

(20 Working Days to Complete) – MHW completes this Milestone

1. MHW checks I-Trac to see Preliminary Assessment appointment made for the client:
 - a. Enters appointment into iREACH
[Module 7A: Appointments – Make New/Reschedule Appointment].
 - b. Changes Milestone due date for one day following appointment
[Module 3: Modify Milestone/Task/Tickler].
2. An Appointment Reminder Call tickler (ARC) will appear in Task List. Completes as successful if call made, and unsuccessful if not made
[Module 4A: Complete Milestone/Task/Tickler].
3. Based on Milestone due date coming due and turning **red**, MHW verifies whether reminder call was made and whether client kept appointment on iREACH Appointment page
[Module 7B: Document Final Outcome of Appointment].
4. If the client **kept** the appointment, MHW asks clinician to inform MHW when Preliminary Mental Health Assessment is complete.
5. When Assessment is complete, MHW completes Milestone
[Module 4A: Complete Milestone/Task/Tickler].
6. If client **did not keep** the Preliminary Assessment appointment, MHW:
 - a. Closes out old appointment
[Module 7B: Document Final Outcome of Appointment].
 - b. Checks I-Trac system to see whether appointment has been rescheduled by clinician. If so, repeats all steps of this Milestone.
 - c. **If not yet rescheduled**, MHW creates tickler to check if appointment has been rescheduled by clinician
[Module 2: Create Task/Tickler].
 - i. Based on tickler, MHW checks in I-Trac to see if clinician has rescheduled an appointment with the client and closes tickler
[Module 4A: Complete Milestone/Task/Tickler].
 - ii. Repeats all steps of this Milestone.
 - d. If client **does not keep** 2nd appointment, goes to Appendix 1: Early Termination.

Milestone 5A: Preliminary Report Written and Sent to PCP

(10 Working Days to Complete)

1. The MH clinician completes the Preliminary Report.
2. MHW uses [\[Module 12: Pathway Referral Review, Edit & Print\]](#) to:
 - a. Update the Pathway Referral under PMHC Referral Response and complete these fields:
 - i. “Is there a Psychiatrist Report?” yes = **will** be completed.
 - ii. “Date preliminary report sent to PCP and CHW”.

Or, if the preliminary report is the final report:

- b. Complete these fields:
 - i. “Is there a Psychiatrist Report?” no = not required for client.
 - ii. “Date Final Report is available,”
 - iii. “Date final report sent to PCP and CHW.”
 - c. Print Pathway Referral.
3. MHW faxes Pathway Referral to CHW and PCP, including the Preliminary/ Final Report for the PCP. (CHW does not need to see report.)
4. MHW reassigns Milestone to CHW
[\[Module 3: Modify Milestone/Task/ Tickler\]](#).
5. CHW reviews Referral Form to:
 - a. Note that Preliminary Report has been faxed to PCP.
 - b. Verify date CHW’s received Preliminary Pathway Referral Report fax
[\[Module 12: Pathway Referral Review, Edit & Print\]](#).

Non-iREACH users:

1. CHW calls PCP Referral Specialist to verify date of receipt of Report.

Documents on Pathway Referral Form
[\[Module 12: Pathway Referral Review, Edit & Print\]](#).

2. Referral Specialist puts Referral Form and Report into PCP’s “inbox.”
3. CHW completes Milestone
[\[Module 4A: Complete Milestone/Task/Tickler - Successful\]](#).

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iREACH users:

1. CHW reassigns Milestone to Referral Specialist *(or to PCP, if PCP is using iREACH)*.

Identifies in the notes that

- a. Report is complete, and
- b. Referral Specialist needs to verify date of receipt of fax
[\[Module 3: Modify Milestone/Task/Tickler\]](#).

2. Referral Specialist receives e-mail to log into iREACH.

- a. Selects “My Tasks” from left nav bar.
- b. Selects “Task Tracking Number” for new Milestone.
- c. Clicks on client name to load client into system.
- d. Verifies date that faxed Preliminary Report was received & prints Referral Form if needed.
[\[Module 12: Pathway Referral Review, Edit & Print\]](#).

- e. Referral Specialist puts reports into PCP’s “inbox.”

PCP also has the option to log in to iREACH & print Referral Form.
(When scanning is available, the full report will also be attached to this referral and only be available to the PCP and Referral Specialist.)

- f. Completes the Milestone
[\[Module 4A: Complete Milestone/Task/ Tickler – Successful\]](#).

Milestone 5B: Final Report - Psychiatric Evaluation

(22 Working Days to Complete)

1. If psychiatric evaluation is:
 - a. **Not required**, and the Preliminary Report is the Final Report, CHW deletes Milestone
[Module 5: Review and Edit Pathway Milestone].
 - b. **Required**, CHW reassigns Milestone to MHW
[Module 3: Modify Milestone/Task/Tickler].
2. MHW checks I-Trac to see if appointment has been scheduled by psychiatrist:
 - a. If scheduled, enters appointment into iREACH
[Module 7A: Appointments – Make New/Reschedule Appointment].
 - b. If not scheduled, creates tickler for 7 working days to check if appointment has been scheduled by the psychiatrist
[Module 2: Create Task/Tickler].
 - c. Changes Milestone due date to one day following appointment
[Module 3: Modify Milestone/Task/Tickler].
3. An Appointment Reminder Call tickler (ARC) will appear in Task List. Completes as successful if call made, and unsuccessful if not made
[Module 4A: Complete Milestone/Task/Tickler].
4. Based on Milestone due date coming due and turning **red**, MHW verifies whether reminder call was made and client has kept appointment then enters on iREACH Appointment page
[Module 7B: Document Final Outcome of Appointment].
5. If client **did not keep** the appointment, MHW:
 - a. Checks I-Trac system to see if appointment has been rescheduled. If so, repeats all steps of this Milestone.
 - b. **If not yet rescheduled**, MHW creates tickler to check if appointment has been rescheduled.
[Module 2: Create Task/Tickler].
 - i. Based on tickler, MHW checks I-Trac to see if appointment has been rescheduled with the client and closes tickler
[Module 4A: Complete Milestone/Task/Tickler].
 - ii. Repeats all steps of this Milestone.

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6. When the psychiatrist completes the Final Report, MHW uses [\[Module 12: Pathway Referral Review, Edit & Print\]](#) to:
 - a. Update the Pathway Referral under PMHC Referral Response and complete fields:
 - i. “Date Final Report is available,”
 - ii. “Date final report sent to PCP and CHW”.
 - b. Print Pathway Referral.
7. MHW faxes Pathway Referral to CHW and PCP, including Final Report for PCP.
8. MHW reassigns Milestone to CHW [\[Module 3: Modify Milestone/Task/ Tickler\]](#).
9. CHW reviews Referral Form to:
 - a. Note that Final Report has been faxed to PCP.
 - b. Verify date CHW received Final Pathway Referral Report fax [\[Module 12: Pathway Referral Review, Edit & Print\]](#).

Non-iREACH users:

1. CHW calls PCP Referral Specialist to verify date of receipt of Final Report.
Documents on Pathway Referral Form
[\[Module 12: Pathway Referral Review, Edit & Print\]](#).
2. Referral Specialist puts Referral Form and Final Report into PCP’s “inbox.”
3. CHW completes Milestone
[\[Module 4A: Complete Milestone/Task/Tickler – Successful\]](#).

iREACH users:

1. CHW reassigns Milestone to Referral Specialist (*or to PCP, if PCP is using iREACH*).

CHW Identifies in the notes that Final Report is complete, and that Referral Specialist needs to verify date of receipt of fax.
[\[Module 3: Modify Milestone/Task/Tickler\]](#).
2. Referral Specialist receives e-mail to log into iREACH.
 - a. Selects “My Tasks” from left nav bar.
 - b. Selects “Task Tracking Number” for new Milestone.
 - c. Clicks on client name, to load client into system.

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- d. Verifies date that faxed Final Report was received, and prints Referral Form, if needed
[Module 12: Pathway Referral Review, Edit & Print].
- e. Referral Specialist puts reports into PCP's "inbox." PCP also has the option to log into iREACH and print the Referral Form
(When scanning is available, the full report will also be attached to this referral and only be available to the PCP and Referral Specialist.)
- f. Completes the Milestone.

Milestone 6: Confirm PCP Read Final Pediatric MH Report

(5 Working Days to Complete)

(Preliminary Report may be the final report)

iREACH users:

1. CHW reassigns Milestone to Referral Specialist
[Module 3: [Modify Milestone/Task/Tickler](#)].
2. The Referral Specialist:
 - a. Pulls the client chart to verify that the Final Report has been signed by the PCP and placed in the chart.
 - b. Documents on Pathway Referral the “Date the PCP read the report” according to the date when PCP signed the report
[Module 12: [Pathway Referral Review, Edit & Print](#)].
 - c. Completes the Milestone
[Module 4A: [Complete Milestone/Task/ Tickler](#)].

Non-iREACH users:

1. On a monthly basis, the CHW calls or faxes each Referral Specialist regarding each client for which a Final Report should have been received by the office.
2. The Referral Specialist:
 - a. Pulls the client chart to verify that the Final Assessment has been signed by the PCP and placed in the chart.
 - b. Informs CHW of “Date the PCP read the report” according to the date when PCP signed the report.
3. CHW documents in iREACH on the Pathway Referral “Date the PCP read the report,” according to the date when PCP signed the report
[Module 12: [Pathway Referral Review, Edit & Print](#)].
4. CHW completes Milestone
[Module 4A: [Complete Milestone/Task/ Tickler](#)].

Milestone 7: Pathway Finalization

(1 Working Day to Complete)

1. CHW Reviews Pathway Referral to ensure it is complete
[Module 12: [Pathway Referral Review, Edit & Print](#)].
2. CHW completes Milestone as successful
[Module 4A: [Complete Milestone/Task/Tickler – Successful](#)].

PMHC PATHWAY COMPLETED

Appendix 1 Early Termination

These steps to be completed by MHW

1. Document on Referral Form under “Patient History and Concerns” that pathway has been terminated and state the reason.

Print PMHC Referral Letter
[\[Module 12: Pathway Referral Review, Edit & Print\]](#).
2. For Non-iREACH users, fax Letter to PCP Referral Specialist and to CHW.
3. For iREACH users, MHW creates two ticklers, assigned to PCP Referral Specialist and CHW respectively, stating that Pathway has been terminated
[\[Module 2: Create Task/Tickler\]](#).
4. Based on tickler, iREACH users can review the client Pathway Referral to see reasons Pathway was terminated and to print referral for PCP review and for patient chart
[\[Module 12: Pathway Referral Review, Edit & Print\]](#).
5. Close tickler
[\[Module 4A: Complete Milestone/Task/Tickler – Successful\]](#).