

Pregnancy Care Management Reports

OB Priority Patient Report

CMIS > User Workspace > Reports > OB Reports > Priority OB Patients

Description:

This report is a list of all patients who had a risk screening form done within the selected time period AND who had a priority risk factor. It includes:

- Patient date of birth
- Patient county of residence (based on Medicaid record)
- Due date
- Assigned OBCM
- Current OB case status
- Date the risk screening form was completed
- Priority risk factor(s)
- Prenatal care provider

There is an icon beside each patient's name to take you directly to the patient's CMIS record.

Export:

This report is best viewed and printed when exported as an Excel or PDF file. When exported to Excel, filter the categories to view by OB case status, prenatal care provider, or OBCM or sort the list by any of these fields.

Purpose:

The Priority OB Patient Report allows for a review of all patients identified as "priority" in a given time period to assess the management of the priority OB population according to program expectations. This is the target population for pregnancy care management, so this report is an essential tool to assure that priority patients are receiving these services.

Areas of specific focus:

- Do all priority patients have an assigned OBCM?
- Do all priority patients have a case status?
- Do all priority patients have a prenatal care provider?
- What proportion of priority patients was deferred?
- What were the main deferral reasons?
- Have the proportion of deferrals and deferral reasons changed over time?
- Which prenatal care providers have the greatest volume of priority patients?

Use:

This report should be reviewed at least monthly and will be most useful when selecting a recent one- to three-month time period.

OB Case Load Reports: My Case Load

CMIS > User Workspace > Reports > OB Reports > OB Case Status Reports > My Case Load

Description:

This report is a snapshot of a user's own caseload at a point in time for OB Heavy, Medium, Light, Pending, and Pending Over 30 Days.

The sub-report for each OB case status can be viewed by clicking on the **blue number**. The sub-report shows the last completed, last attempted and next pending task for each patient.

Export:

This report is best viewed and printed when exported as an Excel or PDF file.

Purpose:

The OBCM can review this list to make sure that patients are in the appropriate case status, identify patients who should no longer be in active case status, and ensure all patients in active case status have a pending task.

If a patient does not require the level of activity indicated by the current case status, the case status should be updated to reflect the patient's current level of need for care management follow up. If the patient's needs are not being met by the current level of care management activity, the OBCM should establish an appropriate follow up plan and create pending tasks accordingly. The pending task(s) needed to meet patient needs and accomplish the goals of the care plan should determine the appropriate case status.

Use:

The OBCM should review this report at least once a month to ensure the accuracy of the caseload and make any needed updates or modifications. It may be helpful to review this report more frequently.

OB Case Load Reports: OB Case Load Report by OBCM

CMIS > User Workspace > Reports > OB Reports > OB Case Status Reports > By OBCM

Description:

This report is only accessible by users with Restricted Site Administrator or Site Administrator access to review caseloads of all OBCMs in the county. Supervisors can run this report for all staff assigned to them. It is a snapshot of the current active caseload of the selected OBCM. It includes:

- Number of unique patients in OB Heavy, Medium, Light, Pending
- Number of patients in Pending status >30 days (subset of the Pending category)
- Total OBCM cases

This report does not include deferred patients as it only reflects the active caseload at a given point in time (see Caseload Activity Summary Report for deferrals during a given time period).

The sub-report for each OB case status can be viewed by clicking on the **blue number**. The sub report shows the last completed, last attempted and next pending task for each patient.

Export:

This report is best viewed and printed when exported as an Excel or PDF file.

Purpose:

This report allows for review of the current, active caseload of each OBCM in the county. The supervisor can assess caseload size for each staff member, caseload distribution across case statuses (OB Heavy, Medium, Light, Pending), and pending patients who have been in that status for more than 30 days to assure appropriate outreach is ongoing.

The supervisor can verify that all patients in active case status have a pending task reflecting activity to address a patient need or goal. The supervisor can review the most recent completed and attempted tasks to ensure care manager activity is consistent with the patient's case status. If a patient does not require the level of activity indicated by the current case status, the case status should be updated to reflect the patient's current level of need for care management follow up. If the patient's needs are not being met by the current level of care management activity, the supervisor should work with the care manager to establish an appropriate follow up plan and to create pending tasks accordingly. The pending task(s) needed to meet patient needs and accomplish the goals of the care plan should determine the appropriate case status.

Use:

This report should be run at least once a month for each assigned OBCM.

OB Case Load Reports: OB Case Load Report by Prenatal Care Provider

CMIS > User Workspace > Reports > OB Reports > OB Case Status Reports > By Prenatal Care Provider

Description:

This report lists the number of patients in OB Heavy, Medium, Light, Pending, and Pending Over 30 Days for each Prenatal Care Provider. It can only be run by the county in which the practice is located. The report contains a list of all patients assigned to the Prenatal Care Provider, based on what was documented on each patient's Demographics page, regardless of the patients' county of residence.

The sub-report for each OB case status can be viewed by clicking on the **blue number**. It includes all patients that are listed as going to that prenatal care provider even if the care management is being provided by other counties or networks. This is an excellent tool for the assigned OBCM to review with their PMH practices.

Export:

This report is best viewed and printed when exported into PDF. To sort, filter or work with the information in the report, exporting into Excel is most effective.

Purpose:

This report provides an overview of the volume of patients receiving care management from a given practice. This may help with OBCM assignment to specific PMH practices.

The OBCM covering a given prenatal care practice may want to share this report with the practice so they are aware of which patients from their practice are receiving pregnancy care management.

This report shows how many different pregnancy care managers are working with patients from each prenatal care practice.

Use:

The OBCM should run this at least monthly for each prenatal care practice to which he/she is assigned. The supervisor should run this at least monthly for each prenatal care practice within the county to assess volume of patients in active case management for each practice and consistency of assignment of the patients in the practice to the OBCM covering the practice. This report can be shared with Pregnancy Medical Home and can be used as a communication tool to discuss patients on the list and review their clinical care plans.

Case Load Activity Report - OB

CMIS > User Workspace > Reports > OB Reports > OB Activity Reports > User Case Load Activity Report – OB

Description:

This report displays information about the caseload of the selected user(s), including case load distribution at the beginning and end of the selected time period, deferrals and deferral reasons during the time period, completed and attempted tasks and interventions for patients in active case status. This report does not include work done for patients not on the active case load. It displays the total attempted tasks, unique patients touched, and unique patients on OB Heavy, Medium and Light. Sub-reports, viewed by clicking on a **blue number**, provide a list of patients for that task type or case status.

Export:

This report is best viewed and printed when exported as a PDF.

Purpose:

This report should be reviewed by the OBCM and the supervisor to evaluate activity during the selected time period for patients on each OBCM's active caseload. Analysis should also include deferrals during the selected time period, with a focus on the main deferral reasons. The "Unique Patients OB Heavy, Medium & Light" indicates the number of patients on the OBCM's active caseload for whom there was at least one attempted or completed task during the selected time period. This allows for an understanding not only of how many patients are on the OBCM's active caseload but also the proportion of these patients for whom there was care management activity during the selected time period. The report also displays the types of activities and interventions the OBCM performed with or on behalf of patients on the active caseload.

Use:

This report should be run by each assigned OBCM and reviewed by the supervisor at least monthly. It can also be run at the county level (all users selected) for to review characteristics of the activity and status of all patients currently on the county's active caseload and those who were deferred during the selected time period.

Tasks Activity Summary Report - OB

CMIS > User Workspace > Reports > OB Reports > OB Case Load Reports > Tasks Activity Summary – OB

Description:

This report is based upon the user's tasks within a specific time period. It shows all of the care management activity for the selected user(s), regardless of whether the patients are assigned to the OBCM's caseload. This report displays a total of all tasks by task status (attempted, completed, pending), patient task details by task type and intervention, and user tasks (from My Task tab). Sub-reports with more information can be viewed by clicking on a **blue number**.

This report can be filtered to view only attempted tasks, only completed tasks, only pending tasks, or all task statuses combined. This report also includes a filter for patient county, to limit results only to tasks for patients in a specific county of residence.

Export: This report is best viewed and printed when exported as a PDF.

Purpose:

Reviewing a user's tasks allows the supervisor to evaluate productivity and efficiency. Analysis of the completed tasks-only version of this report indicates the volume of activity that was successfully completed during the time period. Comparing the ratio of attempted tasks to completed tasks for a given time period will also help understand how effectively OBCM time is being used. This report also allows for an analysis of the type of tasks the OBCM attempted and completed during the selected time period (home visits, phone calls, practice encounters, case reviews, etc.).

Use:

This report should be reviewed monthly for each assigned OBCM, or more often as needed.

Initial Risk Screening Form Report

CMIS > User Workspace > Reports > OB Reports > OB Activity Reports > Initial Risk Screening Form Report

Description:

This report provides statistics about the initial risk screening forms entered into CMIS by the selected county during the selected time period. This report addresses each patient's first risk screening form for the current pregnancy, which is where the majority (>95%) of priority risk factors are identified. The data includes both raw numbers and rates for the following items:

- Initial risk screening forms completed during the time period
- Initial risk screening forms with at least one priority risk factor (positive risk screening forms)
- Positive initial risk screening forms with a pregnancy assessment completed within 45 days of the date the form was completed
- Case status of patients with an initial risk screening completed during the time period (case status as of the last day of the selected time period)
- Deferral reasons for all patients who had an initial risk screening form completed during the selected time period and whose case status was OB Deferred on the last day of the time period
- Priority patients with OBCM contact within 7, 14, 30 and 60 days of the date of the initial risk screening form
- Priority patients who were on active OB case status (OB heavy, medium or light) within 7, 14, 30 and 60 days of the date of the initial risk screening form
- Prevalence of each of the priority risk factors

Export: This report is best viewed and printed when exported as a PDF.

Purpose:

This report allows the county to understand at the aggregate level the data from the initial risk screening forms completed during the time period, including the volume of referrals received, the proportion that were priority and the reasons for which patients were identified as priority. Further details about deferral reasons, as well as the ability to drill down to individual patient lists, can be found on the OB Caseload Activity Report (see page 5). This data also allows the county to assess the timeliness of contact with priority patients and of engaging these patients in active case management.

Use:

This report should be viewed regularly for relatively short time intervals (1-3 months) and is most useful to capture trends over time. If the report is run for a recent time period (such as the previous month), it should be run again later when the data about patient contact, engagement in active case status and documentation of pregnancy assessment will be more complete.