

CMIS Documentation Reminders 9-11

1. Whenever a patient is assigned to an OBCM, a pending task should be assigned.
2. Whenever a task was attempted or is completed, a new pending task should be set.
3. Whenever a task is attempted, but not completed (example: phone call or home visit), please mark as attempted, not completed. Notes related to that attempted task should still be entered in comment section.
4. Unless a patient has been appropriately deferred, there should always be a pending task.
5. On the task bar that appears when task are selected or completed, do not use the tab "Update / Set Primary Case Status". This will set or change the status for the primary care manager not the OBCM.
6. When setting a pending task for yourself or for a PCM (if applicable when deferring a patient upon completion of post partum period), make sure the person the task is "assigned to" is the correct person.
7. Make sure that multiple tasks completed or attempted are documented on individual tasks unless they are performed on the same date. Multiple entries of tasks completed or attempted on different dates, should be documented on a separate task with appropriate date and marked as attempted or completed as applicable.
8. When you are working with a patient, make sure to enter/ update the information under "Pregnancy Medical Home" in addition to documenting your tasks.
9. If you find that a patient is being followed at a non- Pregnancy Medical Home, then it is up to your agency's policy as to whether you would continue to follow the patient or defer them.
10. When a task occurs with this message: "auto generated task was recorded when user saved the OB Assessment tool" you can go and edit/ add an addendum comment to that task to explain anything in that section. Example: "Received notification that patient delivered. Post partum assessment completed and documented in CMIS." Make sure and include date of completion.

- 11. When completing a task, put all notes under comments which will make them permanent. If you need to add an additional comment on that same date to the completed task, select the task and chose to edit it and just type the additional comments in the comment section. Then click update twice to save the notes which will show up as an ADDENDUM.**
- 12. When setting a pending task for yourself or someone else, please put note in instructions, not comments.**
- 13. When setting a pending task for yourself or someone else, be sure to that you complete a task and document your actions in the completed task. For example: Complete a task stating that you met with patient at the office and completed the OB Assessment. Then set a pending task of your next planned patient encounter/ activity and scheduled date depending on the status of the patient and the patient risk factors.**
- 14. Remember, if it is not documented in a completed or attempted task, it was not done.**
- 15. Remember, if you do not set a pending task, you have not indicated your action plan and you have no way to track patients that require follow-up within specific timeframes.**
- 16. For patients that we have not cared for during the pregnancy, but receive as a post partum patient with risk factors, the following should occur:**
 - Once the OB assessment for post partum intervention is completed and entered into CMIS a completed task stating “auto generated task was recorded when user saved the OB Assessment tool” will be generated.**
 - Add/ edit that task to add a comment indicating the following: “Patient not followed during Prenatal care. Post Partum assessment completed on (enter date). This will show up as an ADDENDUM to this task. This will help to clarify, to anyone reviewing the case in CMIS, why there is no OB screening or OB assessment completed at an earlier date, and why no previous tasks are recorded.**