

Process/ Steps for Staff to Access Their Caseload Report in CMIS

- Go to “User Workspace”
- Select “Home”
- Select “Reports”
- Select” OB Reports”
- Select “OB Case Status Reports”.
- Select” My Case Load” You can export this as an excel file.
- Choose the specific reports you would like to review.
 1. The OBCM may be listed more than once to include out of county listings and patients that have rolled off as well as Medicaid for Wake County. You may also choose to view the same categories by “Prenatal Care Provider”.
 2. The headings that you can chose from include:

Heavy	Medium	Light	Pending	Deferred	Inactive	Deceased	Total OB CM Cases	Total CA Cases
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3. Choose any listing with a number in that category and it will give you a list of the patients with their data in that category. The “Last Case Status Date” tells you the last date that the OB case status was updated/ changed
4. You may select an individual patient to view all the documentation on the patient by the OBCM including tasks.