Bureau of Maternal and Infant Health, Illinois Department of Human Services

**FY18 BBO Case Manager Observation Tool**

| Agency: |  | Present = X  Absent = 0  Not Applicable = NA |
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| Review Date: |  |
| MCH Nurse Consultant: |  |
| BBO Case Manager Observed: |  |

| Cornerstone ID Number |  |  |  |  |  | X | 0 | NA |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **BBO Case Management** | | | | | | | | |
| Amount of time client spent with Case Manager |  |  |  |  |  |  |  |  |
| Bilingual, hearing impaired or visually impaired services were provided directly or arranged as needed |  |  |  |  |  |  |  |  |
| Transportation was arranged as needed and only to assist client in keeping health-related appointments |  |  |  |  |  |  |  |  |
| Discussed the importance of early initiation of prenatal |  |  |  |  |  |  |  |  |
| Discussed frequency of prenatal care and stressed importance of adequate prenatal care |  |  |  |  |  |  |  |  |
| Explained the client’s risk factors (reason for eligibility) to the client |  |  |  |  |  |  |  |  |
| Educated client on the importance of the post-partum medical follow-up visit |  |  |  |  |  |  |  |  |
| Provided assistance as indicated with accessing prenatal care services |  |  |  |  |  |  |  |  |
| Case manager demonstrates Motivational Interviewing techniques: |  |  |  |  |  |  |  |  |
| * asks open-ended questions |  |  |  |  |  |  |  |  |
| * is non-judgmental of the client |  |  |  |  |  |  |  |  |
| * uses statements to highlight the client’s competence and accentuate the positive |  |  |  |  |  |  |  |  |
| * uses reflective listening |  |  |  |  |  |  |  |  |
| * summarizes to help guide the conversation |  |  |  |  |  |  |  |  |
| * actively works to establish rapport |  |  |  |  |  |  |  |  |
| **Care Plan Development** | | | | | | | | |
| Administered required assessments (at least 700 General Assessment) |  |  |  |  |  |  |  |  |
| Developed an individualized plan of care jointly with input from the client |  |  |  |  |  |  |  |  |
| Selected goals and planned services for care plan as appropriate to needs identified by assessment |  |  |  |  |  |  |  |  |
| Provided or scheduled services reflective of highest priority client needs as identified by assessment(s) |  |  |  |  |  |  |  |  |
| Made referrals reflective of highest priority client needs as identified by assessment(s) |  |  |  |  |  |  |  |  |
| Gave copies of all referrals to client |  |  |  |  |  |  |  |  |
| **Delivery of Prenatal Education** | | | | | | | | |
| Followed the *Becoming a Mom* curriculum |  |  |  |  |  |  |  |  |
| Considered client’s knowledge base and needs in selecting education topic/content; client was encouraged to self-select topics she wanted |  |  |  |  |  |  |  |  |
| Utilized the BBO Prenatal Education Curriculum Guide to align education content with trimester of pregnancy |  |  |  |  |  |  |  |  |
| Demonstrated knowledge of the topic(s) delivered |  |  |  |  |  |  |  |  |
| Delivered the information clearly and concisely |  |  |  |  |  |  |  |  |
| Adapted the education to reflect client’s level of comprehension and understanding |  |  |  |  |  |  |  |  |
| Adapted the education as needed to meet client’s cultural needs |  |  |  |  |  |  |  |  |
| Note any omissions, enhancements or deviations from the Curriculum Guide that you observed |  |  |  |  |  |  |  |  |
| Provided directly or arranged bilingual, hearing impaired or visually impaired education of the client as needed |  |  |  |  |  |  |  |  |
| Utilized motivational interviewing techniques in delivery of prenatal education |  |  |  |  |  |  |  |  |
| Only utilized brochures / materials as prescribed by the Curriculum Guide; materials were relevant and number given did not overwhelm client |  |  |  |  |  |  |  |  |
| **Well Woman’s Health Education** | | | | | | | | |
| Discussed importance of inter-conception health care and healthy lifestyle and habits |  |  |  |  |  |  |  |  |
| Discussed importance of 24-month pregnancy intervals to healthy outcomes |  |  |  |  |  |  |  |  |
| Provided contraceptive education and information about family planning methods |  |  |  |  |  |  |  |  |
| Introduced Reproductive Life Planning |  |  |  |  |  |  |  |  |
| Assisted client in completion of a Reproductive Life Plan; or reviewed the existing RPL with client |  |  |  |  |  |  |  |  |
| Assisted client in accessing contraceptive services |  |  |  |  |  |  |  |  |
| **Delivery of Prenatal Education – Group Education Only** | | | | | | | | |
| The classroom environment utilized is conductive to learning; free of noise and distraction |  |  |  |  |  |  |  |  |
| Case manager was skillful in managing behavioral issues with the group |  |  |  |  |  |  |  |  |
| Case manager encouraged student participation |  |  |  |  |  |  |  |  |
| Case manager followed the *Becoming a Mom* curriculum re: group activities |  |  |  |  |  |  |  |  |
| Note the average size of group education sessions |  |  |  |  |  |  |  |  |

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| Comments: |  |
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