

Healthy Homes and Lead Poisoning Surveillance System (HHL PSS)

Job Aid 3.3: Adding Family Members and Guardian

You can use the **Family Members and Guardian** screen to enter details for family members and guardian of the selected patient, including phone numbers.

Step 1: Using the **Clinical** tab, find the patient record [see [Job Aid 3.1: Find a Patient and Patient Information, P-02299-3.1](#)]. Verify you have the correct patient by reviewing the patient information at the top of the screen (highlighted in yellow).

The screenshot shows the HHL PSS interface with the 'Clinical' tab selected. At the top, a yellow box highlights the patient information: (OLANTERN, JILL) DOB: 1/1/2016 ID#: 2018924 JURI.: DEPARTMENT OF PUBLIC HEALTH FOR MADISON AND DANE C. Below this, a table lists patient records:

Name	HHL PSS ID	Date of Birth	Local ID	Address	Case Status	Jurisdiction
Jack OLantern	2018878	10/31/2017		1403 PRAIRIE ROSE Dr Su...	Open	Department of Pub...
Jill OLantern	2018924	1/1/2016		1403 Prairie Rose Dr Sun...	Open	Department of Pub...

Step 2: Click on **Patient Info** in the left side menu to expand a submenu for **Family Members**.

The screenshot shows the 'Patient Info' screen for JILL OLANTERN. The 'Family Members' option in the left menu is highlighted. The form displays the following information:

- Personal Info:** Last Name: OLantern, First Name: Jill, Middle Name: Middle, Case Type: Surveillance Case (Open)
- Demographics:** DOB: 01/01/2016, Current Age: 3 Yrs. 2 Mos., Sex: Female, Twin:
- Medical History:** Local ID No., Medical Rec, Max Blood Pb: 23, # Reports: 8, SSN, Medicaid ID, Next Pb Date: 1/31/2019
- Physical Characteristics:** Ethnicity: Unknown, Race: Unknown
- Address:** Number: 1403, Direction: [Dropdown], Street: Prairie Rose Drive Apt Suite, Type: [Dropdown], Direction: [Dropdown], Apt. No.: 2

Step 3: Click on **Family Members** in the left side menu to open the **Family Members and Guardian** screen.

The screenshot shows the 'Family Members and Guardian' screen. The 'Family Members' option in the left menu is highlighted. The table below lists the family members:

Name	Relationship	Primary	Choose
Jack OLantern	Brother	No	<input type="button" value="Choose"/>
Jack Sr. OLantern	Father	No	
Jane OLantern	Mother	No	

Adding Family Member or Guardian

Step 4: To add a family member or guardian for the patient, press the **New** button in the bottom left menu to enable the fields. The minimum fields required to create a new family member are indicated with a red asterisk (*) (circled in red). Enter these and other known information for the new family member.

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Family Members and Guardian

Name	Relationship	Primary	Choose
Jack Olantern	Brother	No	
Jack Sr. Olantern	Father	No	
Jane Olantern	Mother	No	

First Name: Jack * Middle Name: Last Name: Olantern * Maiden Name:

DOB: 10/31/2017 Sex: Male Relationship to Child: Brother * Primary Guardian: No

Add Phone Cancel

New Help Save Revert Print Screen Log Out

Step 5: Click the **Save** button in the bottom left side menu to save the record.

New Help Save Revert Print Screen Log Out

Adding Phone Numbers

Step 6: To add a phone number to a family member, select the hyperlinked name (circled in red).

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Family Members and Guardian

Name	Relationship	Primary	Choose
Jack Olantern	Brother	No	
Jack Sr. Olantern	Father	No	
Jane Olantern	Mother	No	

Step 7: Click on the **Add Phone** button. This will open the phone number box within the page.

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Family Members and Guardian

Name	Relationship	Primary	Choose
Jack Olantern	Brother	No	
Jack Sr. Olantern	Father	No	
Jane Olantern	Mother	No	

First Name: Jack Middle Name: Last Name: Olantern Maiden Name:

DOB: 10/31/2017 Sex: Male Relationship to Child: Brother Primary Guardian: No

Add Phone Cancel

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Step 8: Enter the phone number in the format (XXX) XXX-XXXX, and select the phone type from the drop-down menu. Click the radio button labeled **Main** if this is the main contact number for the person. Click **Save** to add the phone number to the family member’s record. A phone number can be edited or deleted by clicking on **Edit** or **Delete**.

Other Blood Tests Other Medical Chelation Notes Patient Attachments

First Name: Jane Middle Name: Last Name: Olantern Maiden Name: M

DOB: Sex: Female Relationship to Child: Mother Primary Guardian: Yes

Add Phone Cancel

Phone	Type	Main	Edit	Delete
(555) 555-5555	Mobile	<input checked="" type="radio"/>	Edit	Delete
		<input type="radio"/>		Save

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Making a Family Member a Guardian

Step 9: From the **Family Members and Guardian** screen, select the hyperlinked name you want to make a guardian and then click the **Choose** button.

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Family Members and Guardian

Name	Relationship	Primary	Choose
Jack Olantern	Brother	No	<input type="checkbox"/>
Jack Sr. Olantern	Father	No	<input checked="" type="checkbox"/>
Jane Olantern	Mother	Yes	<input type="checkbox"/>

First Name: Jack Sr. Middle Name: Last Name: Olantern Maiden Name:

DOB: Sex: Relationship to Child: Father Primary Guardian: No

Add Phone Cancel

Step 10: A dialog box pops up titled, “Parents/Guardian -- Webpage Dialog.” Click on the radio button under **Primary Guardian** and click on the **Choose** button. Close the dialog box by clicking the red X.

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Home Clinical Environmental Reports

Parent/Guardians -- Webpage Dialog

Select Primary Guardian for Patient

Name	Relationship to Case	Primary Guardian
Jack Olantern	Brother	<input type="radio"/>
Jack Sr. Olantern	Father	<input checked="" type="radio"/>
Jane Olantern	Mother	<input type="radio"/>

Choose Cancel

https://hhlpsu: Local intranet | Protected Mode: Off

Step 11: You will return to the **Family Members and Guardian** screen. The family member selected as guardian will show “Yes” in the **Primary** column. Under **Primary Guardian** in the drop-down menu it is greyed out, but also says “Yes.”

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Family Members and Guardian

Name	Relationship	Primary	Choose
Jack Olantern	Brother	No	
Jack Sr. Olantern	Father	Yes	
Jane Olantern	Mother	No	

First Name: Jack Sr. * Middle Name: Last Name: Olantern * Maiden Name:

DOB: Sex: Relationship to Child: Father * Primary Guardian: Yes

Step 12: When you are done making changes, you must click the **Save** button in the bottom left corner before leaving the screen or your changes will not be saved and added to the record.

New
Help
Save
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Questions

Please contact the HHLPPS coordinator at 608-266-5817 or email [DHS Lead Poisoning Prevention](#).