Case Details

Use the **Case Details** page to view and enter details related to a patient's case history. **Note:** HHLPSS automatically opens case records for blood lead levels of 5 micrograms per deciliter or higher.

Step 1: Using the Clinical tab, find the patient record (see <u>Job Aid 3.1: Find a Patient and Patient</u> <u>Information, P-02299-3.1</u>). Verify you have the correct patient by reviewing the patient information at the top of the screen (in highlighted box below).

HHLPSS	(OLANTERN, JILL) DOB: 1/1/2016 ID#: 2018924 JURI.: DEPARTMENT OF PUBLIC HEALTH FOR MADISON AND DANE C										
Healthy Homes and Lead Poisoning Surveillance System	Home Clinical	Clinical Environmental Reports									
Find Patient		HHLPSS	Date of	Local							
Clinical Letters	Name	ID	Birth	ID	Address	Case Status	Jurisdiction				
Patient Info	Jack OLantern	2018878	10/31/2017		1403 PRAIRIE ROSE Dr Su	Open	Department of Pub				
Patient Address	Jill OLantern	2018924 1/1/2016			1403 Prairie Rose Dr Sun	Open	Department of Pub				
Blood Lead Tests					1						
Case Details											
Case Exposure											
Associated Persons											

Step 2: Click on **Case Details** in the left side menu. Clicking on the **Case Details** menu expands a submenu of pages, including **Case Initiation** and **Case Information**, for adding data related to the open case.

The **Case Details** screen below includes **Case Type** and **Case Initiation** (so you don't need to open the **Case Initiation** screen separately). The **Case Status** window under **Case Type** is greyed out but shows the case status is "Open." Only the initial **Case-Making Blood Result(s)** are shown in the table circled in red below. Case initiation information can be added in the **Case Initiation** section.

HHLPSS	(OLANTERN,	JILL) DOB: 1/1/20	016 ID#: 2018924 JURI.: DEPARTMENT C	OF PUBLIC HEALTH FOR MADISON AND DANE C
Healthy Homes and Lead Poisoning Surveillance System	Home Cli	nical Enviror	nmental Reports	
Find Patient	Case Typ	e		
Clinical Letters	Case Status		Reason for Cas	e Initiation
Patient Info	0		(Surveillance Ca	
Patient Address	Open		Other Clinical Lo	evel Of Concern
Blood Lead Tests	Case-Making E	Blood Result(s)		
Case Details	Date	Pb Value	Туре	Patient Address at Draw Date
Case Initiation	12/6/2018	22	Capillary	1403 Prairie Rose Drive Apt Suite #2
Case Information				
Case Disposition				
Disposition History				
Case Exposure				
Associated Persons	Case Initia	tion		
Other Blood Tests	Origin of case n	otification		
Other Medical				
Chelation			<u>▼</u>	
Notes	if Tran	sfer, from where:		×
Patient Attachments	if Othe	r, specify:		
	Date of case ma	king	Date LHD first received	Date case first assigned
	DLL		houce	to case manager
	12/06/2018		I	
	Case Manager h	ome visit done?	Date of first home visit	
		~		
	Date environmer	ntal health	Primary residence environmental	Date of initial environmental
Help	notified case		Investigation done?	investigation
Save				
Revert	1		•	1
Print Screen				
Los Out				

Case Initiation

Enter details for the creation of a patient's case in the **Case Initiation** section of the **Case Details** page.

- Step 1: Clicking on either Case Details or Case Initiation on the left side menu takes you to the same screen. Enter case initiation information under Case Type and Case Initiation. A reference table is provided at the end of this job aid that describes in detail the various fields on this screen.
- Step 2: When done entering data, click the Save button in the bottom left side menu to save the record.

HHLPSS Healthy Homes and Lead	(OLANTERN,	JILL) DOB: 1/1/20	16 ID#: 2018924 JURI.: DEPAR	RTMENT OF PUBLIC HEALTH FOR MA	ADISON AND DANE C
Poisoning Surveillance System	Home Cli	inical Environ	imental Reports		
Find Patient	Case Typ	e			
Clinical Letters	Case Status		Reason	for Case Initiation	
Patient Info	0.000		(Surver		
Patient Address	Open		Other	clinical Level of Concern	•
Blood Lead Tests	Case-Making I	Blood Result(s)			
Case Details	Date	Pb Value	Туре	Patient Address at D)raw Date
Case Initiation	12/6/2018	22	Capillary	1403 Prairie Rose Drive	Apt Suite #2
Case Information					
Case Disposition					
Disposition History					
Case Exposure					
Associated Persons	Case Initia	tion			
Other Blood Tests	Origin of case n	otification			
Other Medical	-				
Chelation	State		~		
Notes	if Tran	sfer, from where:			\sim
Patient Attachments	if Othe	r, specify:			
	Date of case ma BLL	aking	Date LHD first received notice	Date case first as to Case Manager	ssigned
	12/06/2018				
	Case Manager h	ome visit done?	Date of first home visit		
		~			
Helt	Date environmer notified case	ntal health	Primary residence enviro Investigation done?	nmental Date of initial envi investigation	ironmental
Save		-	~		
Revert					
Print Screen					
Log Out					

Case Information

View and edit case information and events associated with the patient on the **Case Information** page.

Step 1: Click on Case Information on the left side menu. Case Manager assignments can be viewed or edited under Case Details. Case Status is also displayed, however it is not editable on this page.

HHLPSS Healthy Homes and Lead	(OLANTERN, JILL) DOB: 1/1/2016 ID#: 2018924 JURI.: DEPARTMENT OF PUBLIC HEALTH FOR MADISON AND DANE C
Poisoning Surveillance System	Tome content choronacture reports
Find Patient	
Clinical Letters	Case Details
Patient Info	
Patient Address	Case Manager: [pcampbell2] Case Status: [Open]
Blood Lead Tests	
Case Details	
Case Initiation	Case Events
Case Information	
Case Disposition	Event Listing
Disposition History	Status Status Responsible Party Delete Completed Result Responsible Party Delete Completed Result 354309 *HOME VISIT - NURSE 1/08/2019 1/08/2019 Complete CoonsMJ, CoonsMJ X Edit

Step 2: To change the case manager assignment, click on the Edit Case Manager Assignment hyperlink (in blue below). Select the appropriate case manager from the list of available case managers in the drop-down menu.

HHLPSS Healthy Homes and Lead Poisoning Surveillance System	(OLANTERN, JILL) DOB: 1/1/2016 ID#: 2018924 JURI:: DEPARTMENT OF PUBLIC HEALTH FOR MADISON AND DANE C Home Clinical Environmental Reports
Find Patient	
Clinical Letters	Case Details
Patient Info	
Patient Address	Case Manager: [pcampbell2 Case Status: Open V
Blood Lead Tests	<u>Edit Case Manader Assignment</u>
Case Details	
Case Initiation	Case Events
Case Information	
Case Disposition	Event Listing

Step 3: When you click on the Edit Case Manager Assignment hyperlink, it will change to Assign Case Manager. Click on Assign Case Manager to assign a new case manager to the case.

Case Details	
Case Manager: Iqharris	Case Status: Open

Step 4: Case actions are recorded in the Case Events section. Past case events can be viewed, edited, or deleted from the Event Listing table.

To review details of a past event, click the hyperlink corresponding to the **Event ID** you want to review. The details will display in the user form below the table, but they will not be editable.

To edit past event details, click the **Edit** hyperlink at the end of that event's row. The details will display in the user form below the table and the form will be activated for editing. Click **Save Event** at the bottom of the page to save your edits.

To delete a past event, click the "X" in the Delete column in that event's row.

	Case Events						
	Event Listing	Letter Type Date Referred	Date Due	Date Completed	Result	ResponsiblePart	Delete dit
	354309 *HOME VISIT - NURSE 354311 *EATS NON-FOOD	1/08/2019 1/08/2019	1/08/2019 1/08/2019	1/08/2019 1/08/2019	Complete Remediation Failed	CoonsMJ, CoonsMJ CoonsMJ, CoonsMJ	X Edit X Edit
	354292 *Birth To 3 Program Referral 354287 *HOME VISIT - NURSE	11/28/2018 11/27/2018	11/28/2018	11/28/2018 11/27/2018	Complete Complete	CoonsMJ, CoonsMJ CoonsMJ, CoonsMJ	X dit
	354288 *DEV TEST DONE 354290 *DELAY IN GROSS MOTOR SKILL	11/27/2018 11/27/2018	11/27/2018 11/27/2018	11/27/2018 11/27/2018	Complete Referral Made	CoonsMJ, CoonsMJ CoonsMJ, CoonsMJ	X Edit X Edit
	354286 *Home Visit Attempted	11/26/2018	11/26/2018	11/26/2018	Not Home	CoonsMJ, CoonsMJ	X
	Event Type	×	Letter Type				v
	Date Completed		<u>D</u> ue R <u>e</u> sult			~	
	Responsible	~					
Help	Comment			^			
creen g Out				\sim			
	Save Event Cancel			,			

Step 5: To add an event to a patient's record, click on the Add Event button at the bottom of the screen.

	004200 004	ILOT DONL	1112112010	1112112010 1112112010	complete	coonama, coonama A	LOR
	354290 *DELA	AY IN GROSS MOTOR SKILLS	11/27/2018	11/27/2018 11/27/2018	Referral Made	CoonsMJ, CoonsMJ X	Edit
	354286 *Home	e Visit Attempted	11/26/2018	11/26/2018 11/26/2018	Not Home	CoonsMJ, CoonsMJ X	Edit
	Event Type	*HOME VISIT - NURSE	\checkmark	Letter			
	Date Referred	1/8/2019		Date 1/8/2019			
	Date	1/8/2019		Due			
	Completed	10/2010		Result Complete		~	
	Responsible Party	CoonsMJ	\sim				
Help reen Out	Comment			< >			
	Add Event						

Note that the **Add Event** button changes to **Save** and **Cancel** buttons once you click on the **Add Event** button. The boxes in the lower portion of the screen are now activated for data entry.

354290 *DELAY IN GROSS MOTOR SKILLS 11/27/2018 11/27/2018 11/27/2018 11/27/2018 Referral Made 354286 *Home Visit Attempted 11/26/2018 11/26/2018 11/26/2018 Not Home Event Type	CoonsMJ, CoonsMJ X Edit CoonsMJ, CoonsMJ X Edit
354286 "Home Visit Attempted 11/26/2018 11/26/2018 Not Home Event Type V Letter Type Date Date Date Date Date V V V	CoonsMJ, CoonsMJ X Edit
Event Type Letter Type Date Date Date Date	
Completed Result	
Earty Help Comment g Out Save Event Cancel	

Step 6: Click on the drop-down menu for Event Type to select an event action. For example, if you conduct a developmental screen with a patient, select DEV TEST DONE from the list.

	Case Manage	r: pcampbell2		✓ Ca	se Status: Open	\checkmark					
	Edit Case Mana	ger Assignment									
		*CHEW/MOUTH]							
		*CHILD PROTECTIVE SERVICES	^								
	Case Events	*Close-Complete									
		*Closed for Other Reasons									
	Event Listing	*Closed-Administrative									
	Event Id Ever	*Closed-Lost		red Date Due	Date Completed	Result	Respons	ibleParty	Delete	Edit	
	354309 *HON	*Closed-Met Criteria		1/08/2019	1/08/2019	Complete	CoonsMJ,	CoonsMJ	X	Edit	
	354311 *EAT	*closed-moved		1/08/2019	1/08/2019	Remediation Failed	CoonsMJ,	CoonsMJ	X	Edit	
	354292 *Birth	*Closed-Moved/Referred		11/28/2018	11/28/2018	Complete	CoonsMJ,	CoonsMJ	X	Edit	
	354287 *HON	*Closed-Refuses Intervention		11/27/2018	11/27/2018	Complete	CoonsMJ,	CoonsMJ	х	Edit	
	354288 *DEV	*CLOSURE LETTER SENT		11/27/2018	11/27/2018	Complete	CoonsMJ,	CoonsMJ	X	Edit	
	354290 *DEL	*CLOSURE REPORT SENT: DHS		11/27/2018	11/27/2018	Referral Made	CoonsMJ,	CoonsMJ	х	Edit	
	354286 *Hom	*Contact by Phone-Left Message		11/26/2018	11/26/2018	Not Home	CoonsMJ,	CoonsMJ	x	Edit	
		Copy of Lead level to Phin							_	_	
	Event Turns										
	Event Type	JAYCADE		Type							\sim
	Date	*DDST Refused		Type -							
	Referred	*DELAY IN FINE MOTOR SKILLS		Date							
	Date	*DELAY IN GROSS MOTOR SKILLS		Due							
	Completed	*DELAY IN SOCIAL SKILLS		Result		•	I				
	Deservesible	*Demolition					_				
	Responsible	*Denveril Developmental Screen									
	Party	*DEV TEST DONE									
		*DEVELOPEMENTAL SCREEN REFUSED									
		*DIFF PB SAFE ENV W/CHELATION			~						
		*Direct Administration									
Help	Comment	*Double Jamb Liner Spec									
creen		*DUST WIPE	Y								
ia Out		*EARLY CHILDHOOD			\sim						
gout											

Step 7: If you sent a letter, click on the drop-down menu under Letter Type to select the type of letter sent.

							-	
Event Id Event Type	Letter Type Date Referre	d Date Due	Date Completed	Result	ResponsibleParty	Delete	Edit	
354309 *HOME VISIT - NURSE	1/08/2019	1/08/2019	1/08/2019	Complete	CoonsMJ, CoonsMJ	<u>X</u>	Edit	
354311 *EATS NON-FOOD	1/08/2019	1/08/2019	1/08/2019	Remediation Failed	CoonsMJ, CoonsMJ	<u>×</u>	Edit	
354292 *Birth To 3 Program Referral	11/28/2018	11/28/2018	3 11/28/2018	Complete	CoonsMJ, CoonsMJ	<u>X</u>	Edit	
354287 *HOME VISIT - NURSE	11/27/2018	11/27/2018	3 11/27/2018	Complete	CoonsMJ, CoonsMJ	<u>X</u>	Edit	
354288 *DEV TEST DONE	11/27/2018	11/27/2018	3 11/27/2018	Complete	CoonsMJ, CoonsMJ	<u>X</u>	Edit	
354290 *DELAY IN GROSS MOTOR SKILLS	11/27/2018	11/27/2018	3 11/27/2018	Referral Made	CoonsMJ, CoonsMJ	<u>X</u>	Edit	
354286 *Home Visit Attempted	11/26/2018	11/26/20						
		A	d Hoc Letter					
Event Type *DEV/ TEST DONE	×	Letter	ase Follow-Up - Let	ter to Guardian				
Event Type DEV TEST DONE	•	Type	ase Letter to Physic	ian				
Date		C Spe	hange of Jurisdictio	n Letter				
<u>R</u> eferred		Date C	hild Due for Re-Test	: - EBLL >= 20 μg/dl	- Letter to Guardian			
Date		Due	hild Due for Re-Test	: - EBLL 10-14 µg/dl	- Letter to Guardian			
Completed		Result C	hild Due for Re-Test	: - EBLL 15-19 µg/d	- Letter to Guardian			
Descentible		C	hild Over-Due for Re	e-Test - EBLL >= 20	µg/dL - Letter to Gua	rdian		
Responsible	~	C	hild Over-Due for Re	e-Test - EBLL 10-14	µg/dL - Letter to Gua	irdian		
Party			hild Over-Due for Re	e-Test - EBLL 15-19) µg/dL - Letter to Gua	ardian		
		C	hild Over-Due for Re	e-Test - Letter to Pr	ovider			
			ontirmatory lest Ne	eded - Letter to Gu	ardian Letter te Desuides			
			ontrinatory rest ive	eded for Capillary -	Letter to Provider			
Comment			visting Case Blood F	locut				
			Alsting Case Dioou P	tu Ownor				
			azard Notice Proper	ty Owner ant				
			lieeing Data - Letter	to Provider				
		N	enative Test Result	to i rovider				
		N	enative Test Result					
Save Event Cancel		N	ew Case					
		N	ew Case - Letter to	Guardian				
		N	on-Elevated Result -	Letter to Guardian				
		N	otice of Inspection F	Results - Child Asso	ciated to Address - L	etter to (Owners	
		N	otice of Inspection F	Results - No Child A	ssociated to Address	- Letter	to Owners	
		i c	ther					
		P	anic Alert					
		R	etest Required					

Step 8: Enter the **Date Referred**, **Due Date**, and **Date Completed**. For **Responsible Party**, select the person from the drop-down menu. Click the **Save Event** button to save the event to the patient's record.

	25 4299 #DEV/ TEST DONE	44/07/0049	11/07/0019 11/07/0019	Complete	Coopelli Coopelli	V Edd	
	334200 DEV TEST DUNE	11/2//2010	11/2//2010 11/2//2010	Complete	Coolism3, Coolism3		
	354290 *DELAY IN GROSS MOTOR SKILLS	11/2//2018	11/2//2018 11/2//2018	Referral Made	CoonsMJ, CoonsMJ	X Edit	
	354286 *Home Visit Attempted	11/26/2018	11/26/2018 11/26/2018	Not Home	CoonsMJ, CoonsMJ	X Edit	
	Event Type	~	Letter Type				~
	Referred		Due				
	Date		Date		_		
	Completed		Result		✓		
	Responsible						
	Party						
Help creen g Out	Comment		< >				
	Save Event Cancel						

If validation errors are found, they will be displayed on the screen and indicate that one or more fields is missing required information.

* Responsible Party	y 🔽	
	Validation errors have occured in Event Detail	
	 Date Due is required. Date Referred is required. ResponsibleParty is required. 	
Save Event	Cancel	

Opening a Patient Case Manually

Use the **Disposition History** screen to manually open a case, such as for a patient with a blood lead level less than 5 mcg/dL. The patient must currently have no open case, but may have a previously closed case.

Step 1: Click on Disposition History on the left side menu to bring up the History of Case Disposition screen. Click on the Create New Surveillance Case button at the bottom of the screen.



This will activate the **Create New Surveillance Case** pop-up window. This pop-up allows for the manual creation of a patient case.

Ø Create New Surveillance Case Webpage Dialog				
Create New Surveillance Case				
Assign Elevat	Assign Elevated Blood Lead Level			
Date	Value	Patient Address	Select	
3/8/2019	3.7	1430 Prairie Rose DR #apt/ste	0	
Deserve for Con	ation Conso			
Reason for Cre	ating case	$\mathbf{\mathbf{\vee}}$		
	<u> </u>			
Create Cancel				

Step 2: To create a new case, click the radio button in the **Select** column in the row matching the date, blood lead value and address for the new case. Select a reason for the manual case creation from the list of available choices in the drop-down menu under **Reason for Creating Case**. Click the **Create** button.

id I	(OLANTERN, JIMMY) DOB: \$	9/13/2018 ID#: 2019949 JURI.:	DEPARTMENT OF PUE	BLIC HEALTH FOR MADISON AND DANE C	
ystem	Home Clinical E	nvironmental Reports			
	History of Case Di	isposition			
	Opened	Jurisdiction	Status	Reason	
		Create Nev	w Surveillance C	Case Webpage Dialog	×
		Create Ne	w Surveillanc	e Case	
		Assign Elevate	d Blood Lead Level	B	
		3/8/2019	Value 3.7	Patient Address 1430 Prairie Rose DR #apt/ste	Select
Help	Create New Surveillar	Reason for Create	ting Case Cancel		
og Out		https://l 🔩 Lo	cal intranet Pr	otected Mode: Off	_

Step 3: A pop-up window will appear with a warning about creating a new Public Health Case for this patient. To proceed, click **Continue**. To cancel the new case creation, click **Cancel**.

		Ø Create New Surveillance Case Webpage Dialog	×
		Warning -	
<u>у</u>		You are about to create a new Public Health Case for this Patient. Are you sure you want to proceed?	
5			
		Continue Cancel	
Help	Create New Surveillance Case		
t Screen Log Out			
		https://l 🔍 Local intranet Protected Mode: Off	9

Step 4: You will be returned to the History of Case Disposition screen. To view or enter case details, click on the Details button, which will return you to the Case Details screen.

HHLPSS	(OLANTERN, .	JIMMY) DOB: 9/13/2018 ID#: 201994	19 JURI.: DEF	PARTMENT OF PUBLIC HEALT	TH FOR MADISON AND DANE C
Healthy Homes and Lead Poisoning Surveillance System	Home C	Clinical Environmental Re	eports		
Find Patient					
Clinical Letters	History o	f Case Disposition			
Patient Info					
Patient Address	Opened	Jurisdiction	Status	Reason	
Blood Lead Tests	3/18/2019	Department of Public Health for	Open	Outreach Only	<u>Details</u>
Case Details					
Case Initiation					
Case Information					
Case Disposition					
Disposition History					
Case Exposure					
Associated Persons					
Other Blood Tests					
Other Medical					
Chelation					
Notes					
Patient Attachments					
	Create N	ew Surveillance Case			
Help					
Print Screen					

Questions

Please contact the HHLPSS coordinator at 608-266-5817 or email <u>DHS Lead Poisoning Prevention</u>.

Reference Table: Case Initiation Field Listing

Field Name	Meaning			
Case Status	Whether the case is open or closed.			
Reason for Case Initiation	Result value of test.			
Case Making Blood Results Listing	Displays blood test that triggered case opening.			
Origin of case notification	Select the first source of case notification to the Health Department from the choices given:			
	Lab: The laboratory that determined the patient's blood lead level.			
	State: The state health department's Childhood Lead Poisoning Prevention Program.			
	Provider : The child's medical provider.			
	Transfer From Other Health Department: Choose this option if the case has been transferred from another health department. If this option has been selected, the If Transfer , from where drop-down will be activated and you will need to specify the health department.			
	Other : If none of the above options is correct, use this option. When Other is selected, the If Other, specify field is activated. This is a free-form text field that allows you to type a short description of the origin of the case.			
If Transfer, from where	This drop-down menu is active only if the Origin of case notification drop-down is set to Transfer From Other Health Department . Use it to specify the jurisdiction the case has transferred from.			
If Other, specify	This text-entry field is only enabled when the Origin of case notification drop-down is set to Other . Use this field to specify the other source of the case notification.			
Date of case making BLL	Specify the date the case-making blood lead level (BLL) draw occurred.			
Date LHD first received notice	Specify the date that the local health department (LHD) was first notified of the case. This should be the date the LHD first learned of the case, regardless of the source of notice.			
Date first assigned to Case Manager	Specify the first date that the case was assigned to a case manager.			
Case Manager home visit done?	Select Yes, No, or Unknown to indicate whether a site investigation has been done for this case.			
Date of first home visit	This field is active only if the public health nurse home visit was done. Drop-down is set to Yes. If a home visit has been made, use this field to specify the date of the first visit. This should be the date the home was first visited and not necessarily the date of the first family interview.			
Date environmental health notified case	Specify the date of the first notification to environmental health.			
Primary residence environmental investigation done	Select Yes, No, or Unknown to indicate whether an environmental investigation has been done for this case. Select Yes if the environmental investigation of the primary residence has been completed. Other investigations (day care, grandparents, etc.) need not have been completed yet.			
Date of initial environmental investigation	This field is active only if the primary residence environmental Investigation was done. Drop-down is set to Yes. If an environmental investigation has occurred, use this field to specify the date that the investigation took place.			



Division of Public Health Bureau of Environmental and Occupational Health P-02299-3.6 (08/2019) Page 9