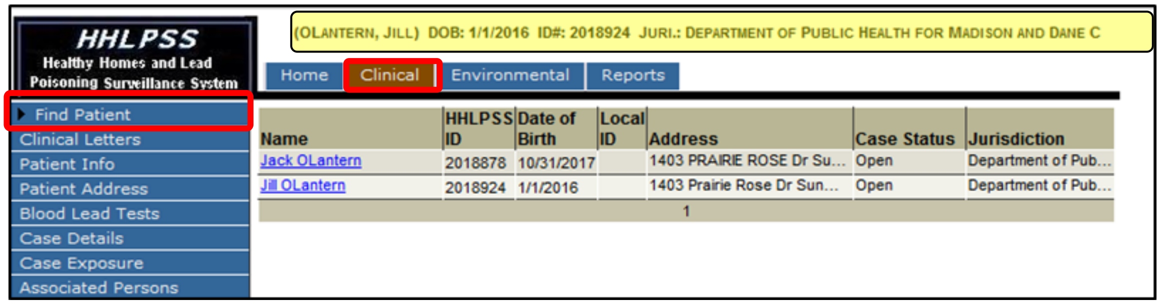
Case Details

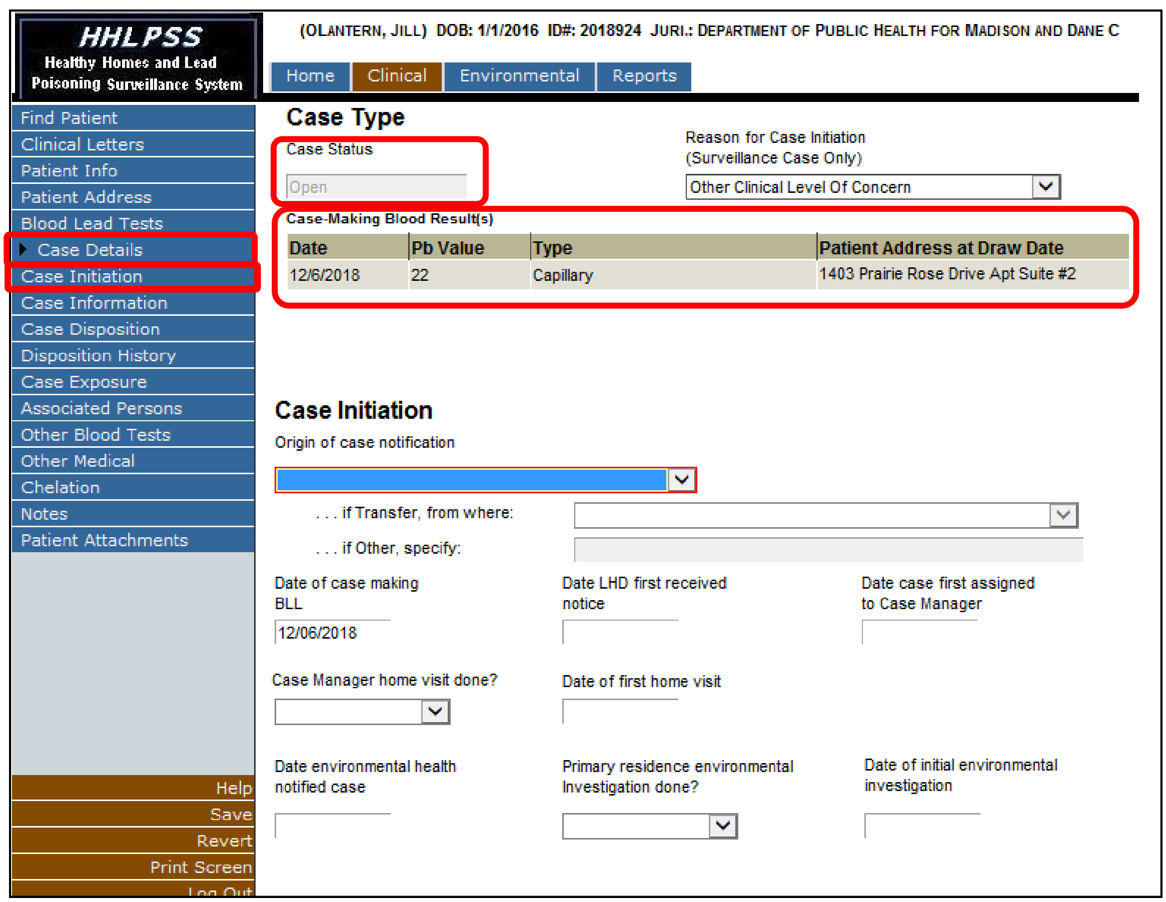
Use the **Case Details** page to view and enter details related to a patient's case history. **Note:** HHLPSS automatically opens case records for blood lead levels of 5 micrograms per deciliter or higher.

Step 1: Using the **Clinical** tab, find the patient record (see 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 (in highlighted box below).



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.

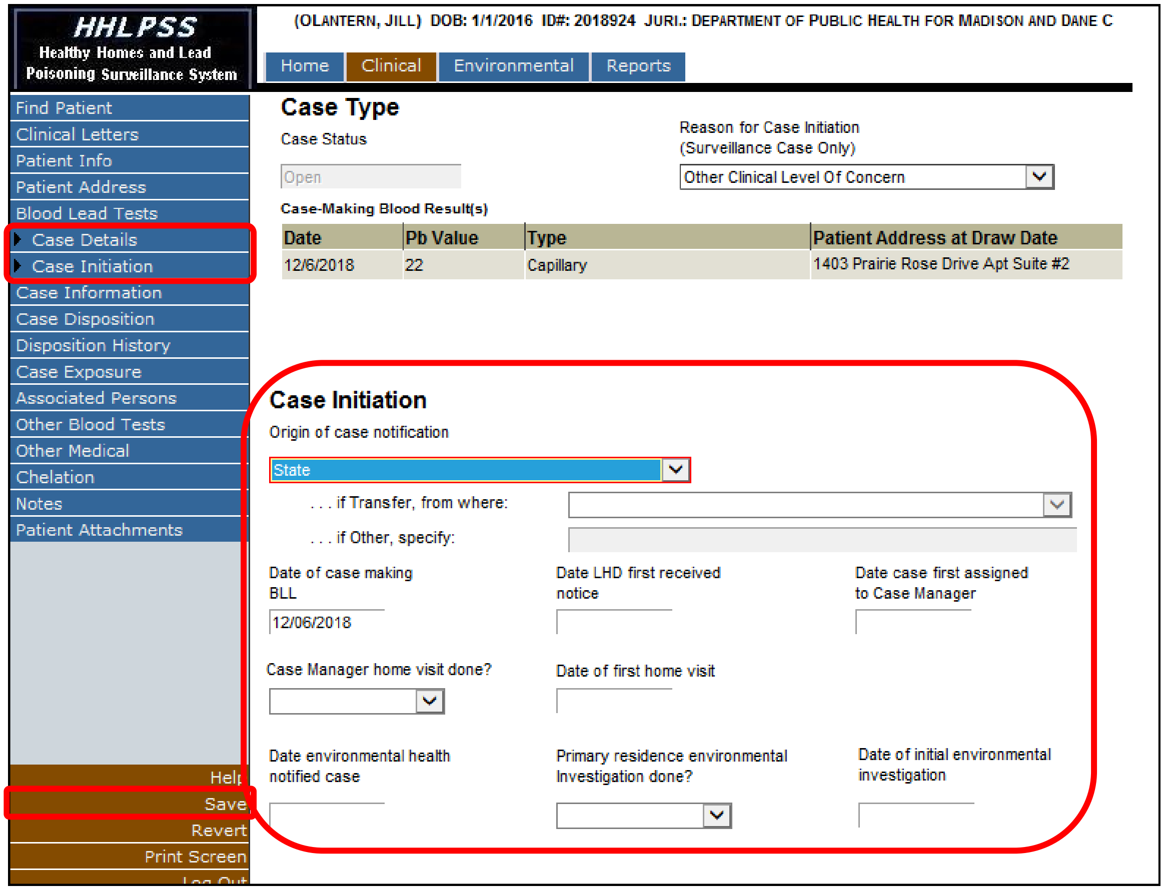


Case Initiation

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.

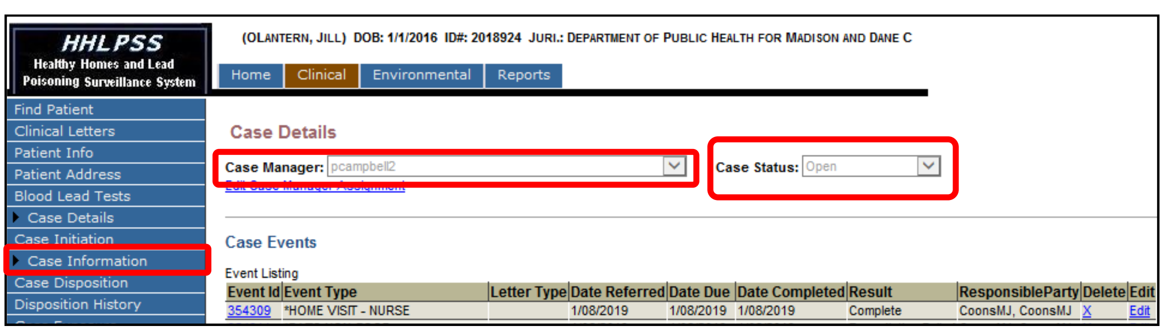
Step 2: When done entering data, click the **Save** button in the bottom left side menu to save the record.



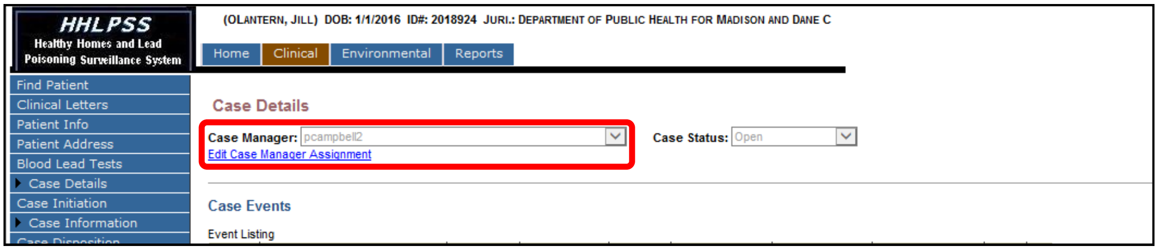
Case Information

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

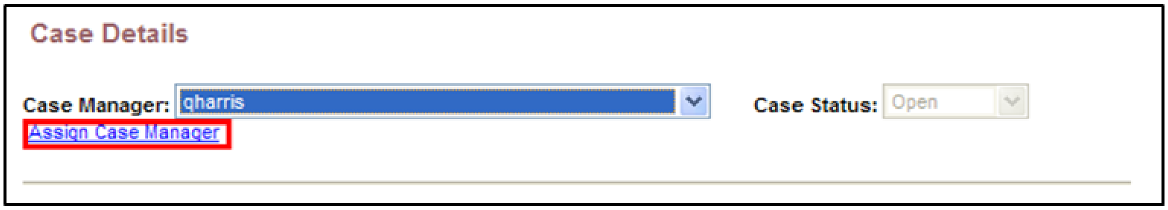
Step 1: Click on **Case Information** on the left side menu. **Case Manager** assignments can be viewed or edited under **Case Details**. **Case Status** is also displayed, however it is not editable on this page.



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.



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.

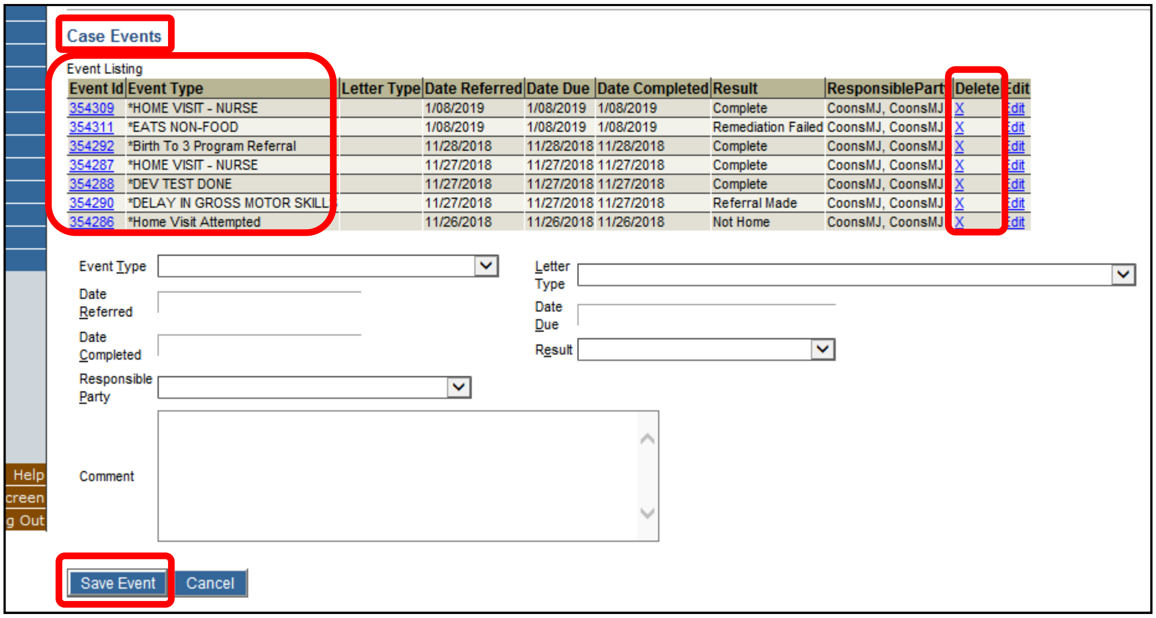


Step 4: Case actions are recorded in the **Case Events** section. Past case events can be viewed, edited, or deleted from the **Event Listing** table.

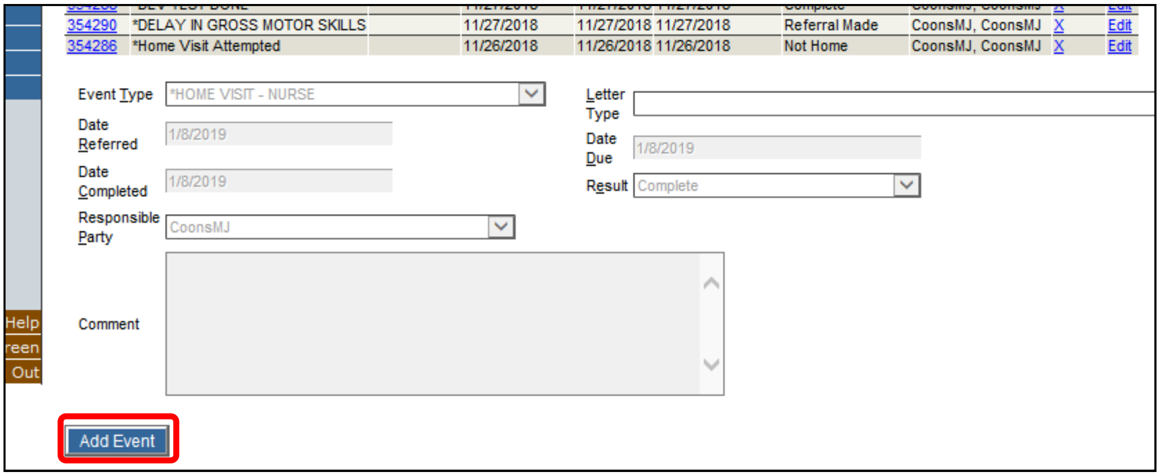
To review details of a past event, click the hyperlink corresponding to the **Event ID** you want to review. The details will display in the user form below the table, but they will not be editable.

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.

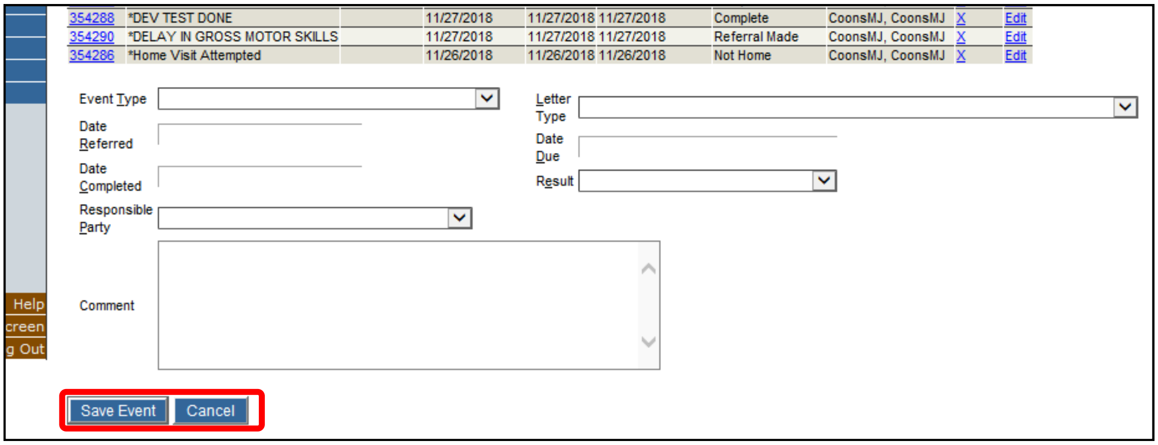
To delete a past event, click the "**X**" in the Delete column in that event's row.



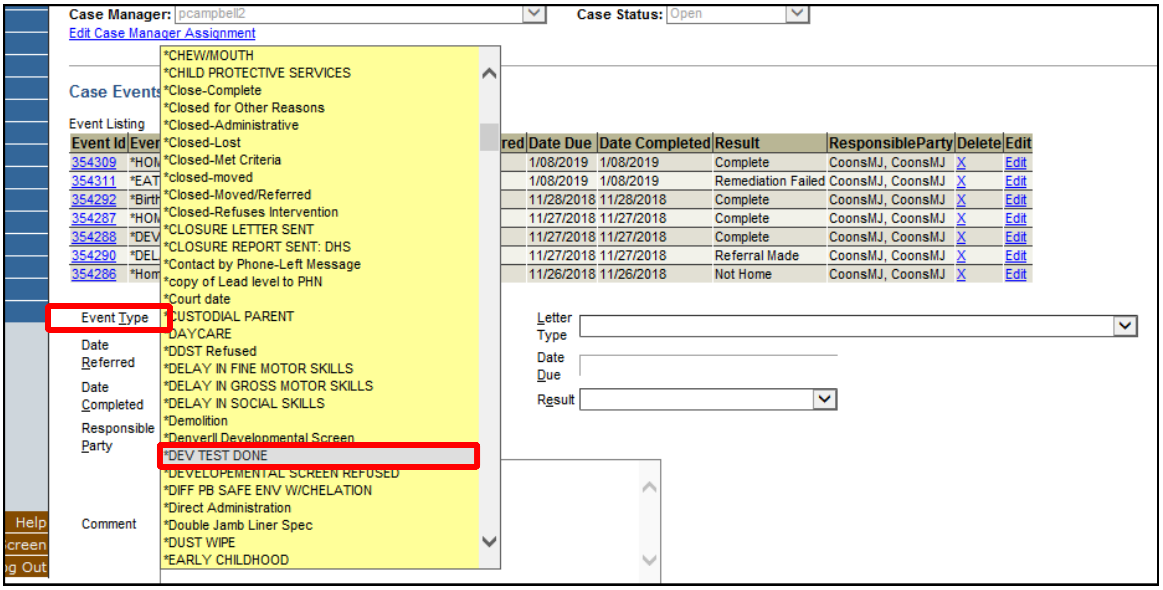
Step 5: To add an event to a patient's record, click on the **Add Event** button at the bottom of the screen.



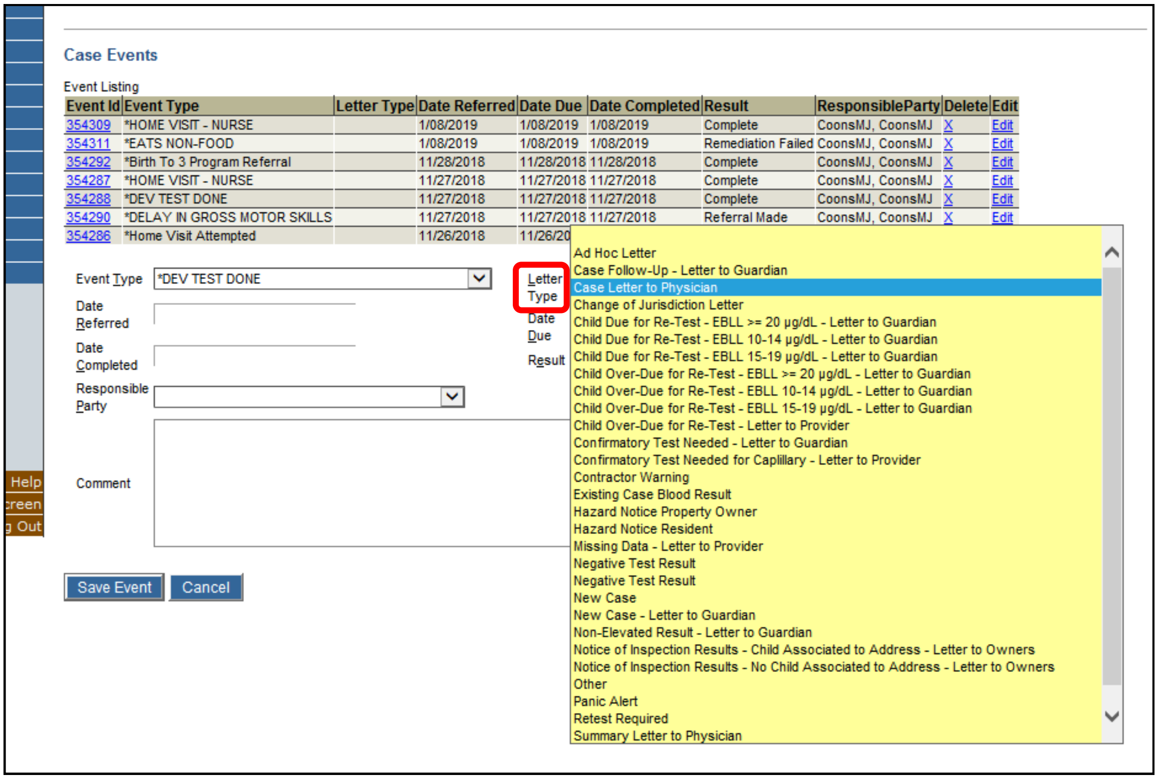
Note that the **Add Event** button changes to **Save** and **Cancel** buttons once you click on the **Add Event** button. The boxes in the lower portion of the screen are now activated for data entry.



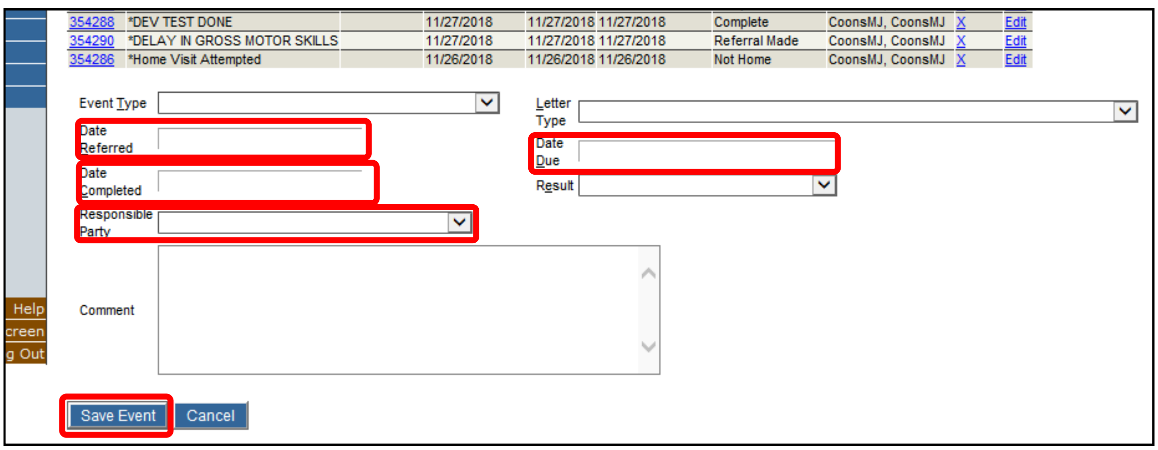
Step 6: Click on the drop-down menu for **Event Type** to select an event action. For example, if you conduct a developmental screen with a patient, select **DEV TEST DONE** from the list.



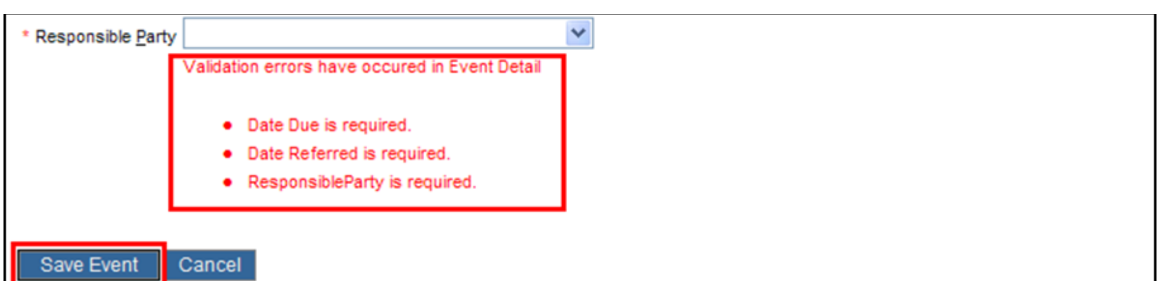
Step 7: If you sent a letter, click on the drop-down menu under **Letter Type** to select the type of letter sent.



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.



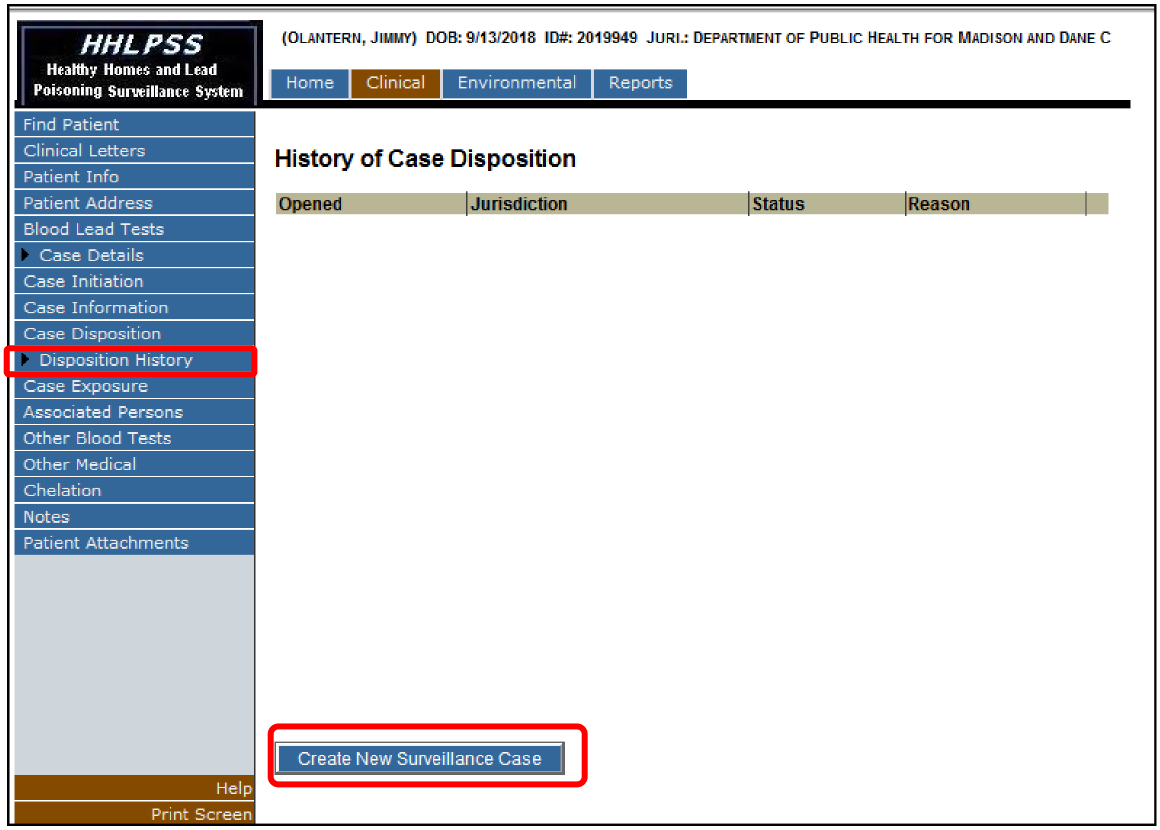
If validation errors are found, they will be displayed on the screen and indicate that one or more fields is missing required information.



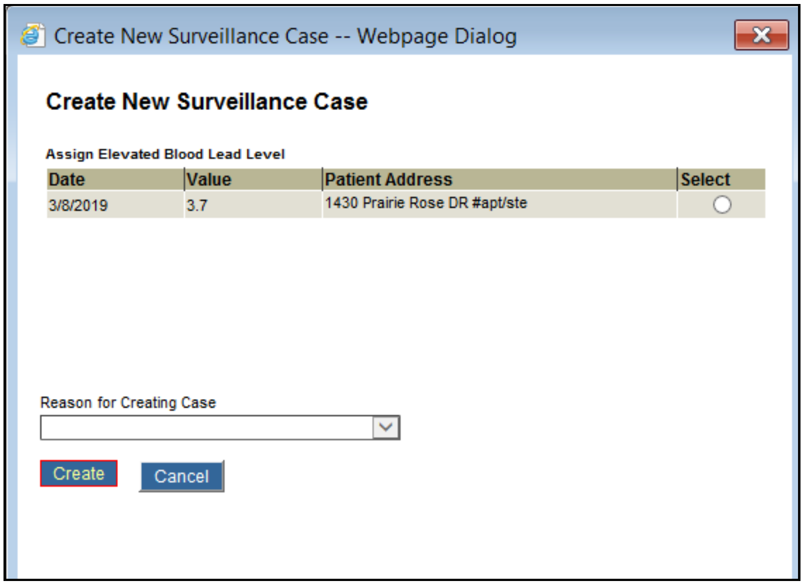
Opening a Patient Case Manually

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.

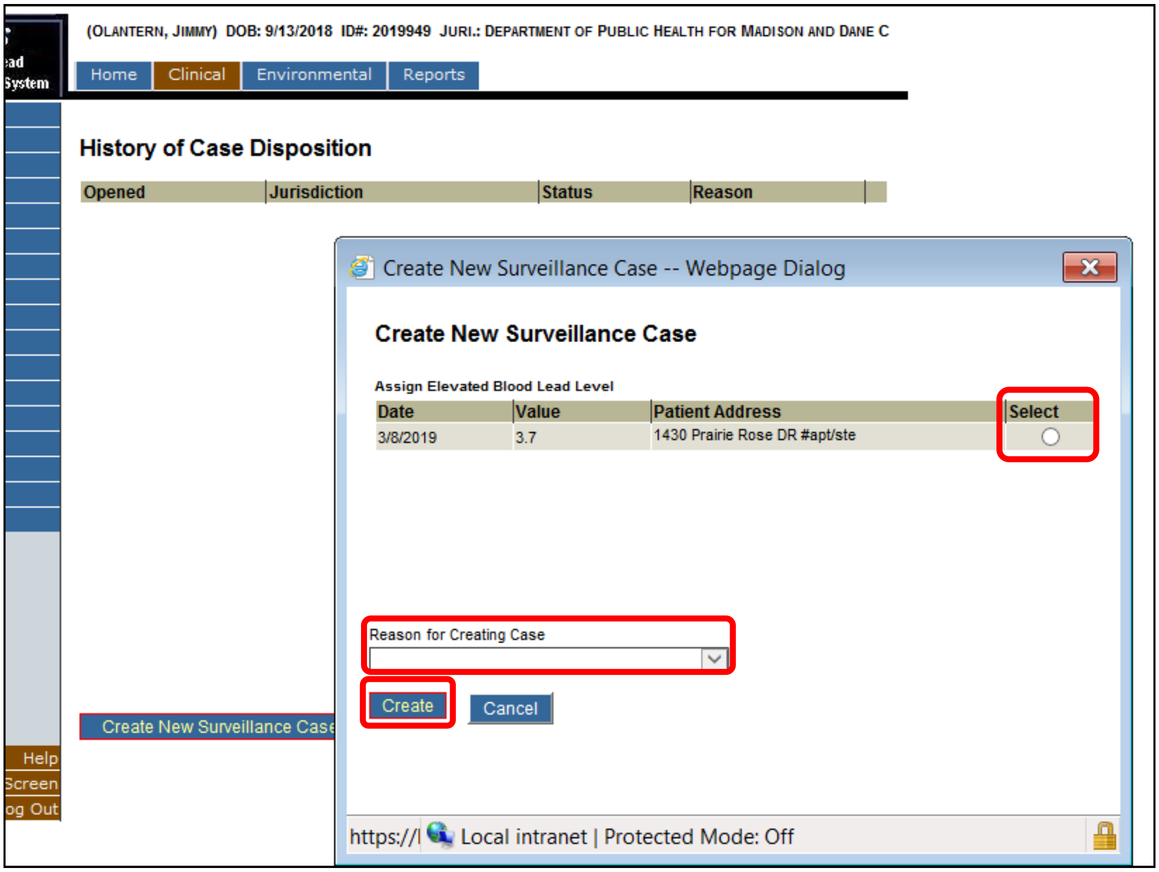
Step 1: Click on **Disposition History** on the left side menu to bring up the **History of Case Disposition** screen. Click on the **Create New Surveillance Case** button at the bottom of the screen.



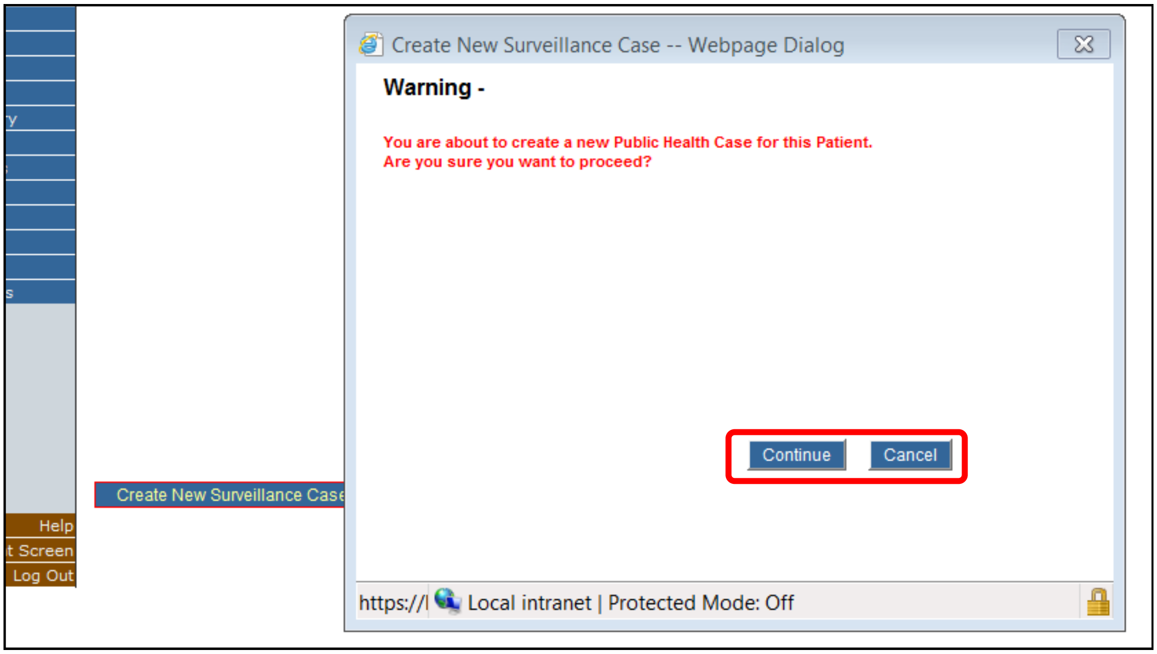
This will activate the **Create New Surveillance Case** pop-up window. This pop-up allows for the manual creation of a patient case.



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.



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**.



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.

Questions

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

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.