

Case Details

Use the **Case Details** page to view and enter details related to a patient’s case history. **Note:** HHL PSS 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).

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Home **Clinical** Environmental Reports

Find Patient
Clinical Letters
Patient Info
Patient Address
Blood Lead Tests
Case Details
Case Exposure
Associated Persons

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 **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.

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Home Clinical **Environmental** Reports

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Clinical Letters
Patient Info
Patient Address
Blood Lead Tests
Case Details
Case Initiation
Case Information
Case Disposition
Disposition History
Case Exposure
Associated Persons
Other Blood Tests
Other Medical
Chelation
Notes
Patient Attachments

Case Type

Case Status: Open
Reason for Case Initiation (Surveillance Case Only): Other Clinical Level Of Concern

Case-Making Blood Result(s)

Date	Pb Value	Type	Patient Address at Draw Date
12/6/2018	22	Capillary	1403 Prairie Rose Drive Apt Suite #2

Case Initiation

Origin of case notification: [Dropdown]

... if Transfer, from where: [Dropdown]

... if Other, specify: [Text Field]

Date of case making BLL: 12/06/2018
Date LHD first received notice: [Text Field]
Date case first assigned to Case Manager: [Text Field]

Case Manager home visit done?: [Dropdown]
Date of first home visit: [Text Field]

Date environmental health notified case: [Text Field]
Primary residence environmental investigation done?: [Dropdown]
Date of initial environmental investigation: [Text Field]

Help
Save
Revert
Print Screen
Log 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.

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Home Clinical Environmental Reports

Case Type

Case Status: Open Reason for Case Initiation (Surveillance Case Only): Other Clinical Level Of Concern

Date	Pb Value	Type	Patient Address at Draw Date
12/6/2018	22	Capillary	1403 Prairie Rose Drive Apt Suite #2

Case Initiation

Origin of case notification: State

... if Transfer, from where:

... if Other, specify:

Date of case making BLL: 12/06/2018

Date LHD first received notice:

Date case first assigned to Case Manager:

Case Manager home visit done?:

Date of first home visit:

Date environmental health notified case:

Primary residence environmental investigation done?:

Date of initial environmental investigation:

Help 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.

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Home Clinical Environmental Reports

Case Details

Case Manager: pcampbell2 Case Status: Open

Case Events

Event Id	Event Type	Letter Type	Date Referred	Date Due	Date Completed	Result	Responsible Party	Delete	Edit
354309	*HOME VISIT - NURSE		1/08/2019	1/08/2019	1/08/2019	Complete	CoonsMJ, CoonsMJ	X	Edit

Find Patient Clinical Letters Patient Info Patient Address Blood Lead Tests Case Details Case Initiation Case Information Case Disposition Disposition History

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.

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Home Clinical Environmental Reports

Find Patient
Clinical Letters
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Case Details
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Case Information
Case Disposition

Case Details

Case Manager: pcampbell2 Case Status: Open

Case Events
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: qharris 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

Event ID	Event Type	Letter Type	Date Referred	Date Due	Date Completed	Result	Responsible Party	Delete	Edit
354309	*HOME VISIT - NURSE		1/08/2019	1/08/2019	1/08/2019	Complete	CoonsMJ, CoonsMJ	X	edit
354311	*EATS NON-FOOD		1/08/2019	1/08/2019	1/08/2019	Remediation Failed	CoonsMJ, CoonsMJ	X	edit
354292	*Birth To 3 Program Referral		11/28/2018	11/28/2018	11/28/2018	Complete	CoonsMJ, CoonsMJ	X	edit
354287	*HOME VISIT - NURSE		11/27/2018	11/27/2018	11/27/2018	Complete	CoonsMJ, CoonsMJ	X	edit
354288	*DEV TEST DDNE		11/27/2018	11/27/2018	11/27/2018	Complete	CoonsMJ, CoonsMJ	X	edit
354290	*DELAY IN GROSS MOTOR SKILL		11/27/2018	11/27/2018	11/27/2018	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

Date Referred Date Due

Date Completed Result

Responsible Party

Comment

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

Event ID	Event Description	Date Referred	Date Completed	Date Due	Result	Responsible Party	Delete	Edit
354290	*DELAY IN GROSS MOTOR SKILLS	11/27/2018	11/27/2018	11/27/2018	Complete	CoonsMJ, CoonsMJ	X	Edit
354286	*Home Visit Attempted	11/26/2018	11/26/2018	11/26/2018	Not Home	CoonsMJ, CoonsMJ	X	Edit

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.

Event ID	Event Description	Date Referred	Date Completed	Date Due	Result	Responsible Party	Delete	Edit
354309	*HON	1/08/2019	1/08/2019	1/08/2019	Complete	CoonsMJ, CoonsMJ	X	Edit
354311	*EAT	1/08/2019	1/08/2019	1/08/2019	Remediation Failed	CoonsMJ, CoonsMJ	X	Edit
354292	*Birth	11/28/2018	11/28/2018	11/28/2018	Complete	CoonsMJ, CoonsMJ	X	Edit
354287	*HON	11/27/2018	11/27/2018	11/27/2018	Complete	CoonsMJ, CoonsMJ	X	Edit
354288	*DEV	11/27/2018	11/27/2018	11/27/2018	Complete	CoonsMJ, CoonsMJ	X	Edit
354290	*DEL	11/27/2018	11/27/2018	11/27/2018	Referral Made	CoonsMJ, CoonsMJ	X	Edit
354286	*HOM	11/26/2018	11/26/2018	11/26/2018	Not Home	CoonsMJ, CoonsMJ	X	Edit

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

The screenshot shows the 'Case Events' form with a table of event listings. The 'Letter Type' dropdown menu is open, displaying a list of letter types such as 'Ad Hoc Letter', 'Case Follow-Up - Letter to Guardian', and 'Case Letter to Physician'. The 'Letter Type' label is highlighted with a red box.

Event Id	Event Type	Letter Type	Date Referred	Date Due	Date Completed	Result	Responsible Party	Delete	Edit
354309	*HOME VISIT - NURSE		1/08/2019	1/08/2019	1/08/2019	Complete	CoonsMJ, CoonsMJ	X	Edit
354311	*EATS NON-FOOD		1/08/2019	1/08/2019	1/08/2019	Remediation Failed	CoonsMJ, CoonsMJ	X	Edit
354292	*Birth To 3 Program Referral		11/28/2018	11/28/2018	11/28/2018	Complete	CoonsMJ, CoonsMJ	X	Edit
354287	*HOME VISIT - NURSE		11/27/2018	11/27/2018	11/27/2018	Complete	CoonsMJ, CoonsMJ	X	Edit
354288	*DEV TEST DONE		11/27/2018	11/27/2018	11/27/2018	Complete	CoonsMJ, CoonsMJ	X	Edit
354290	*DELAY IN GROSS MOTOR SKILLS		11/27/2018	11/27/2018	11/27/2018	Referral Made	CoonsMJ, CoonsMJ	X	Edit
354286	*Home Visit Attempted		11/26/2018	11/26/2018				X	Edit

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.

The screenshot shows the 'Case Events' form with several input fields highlighted in red boxes: 'Date Referred', 'Date Completed', 'Responsible Party', 'Date Due', and the 'Save Event' button.

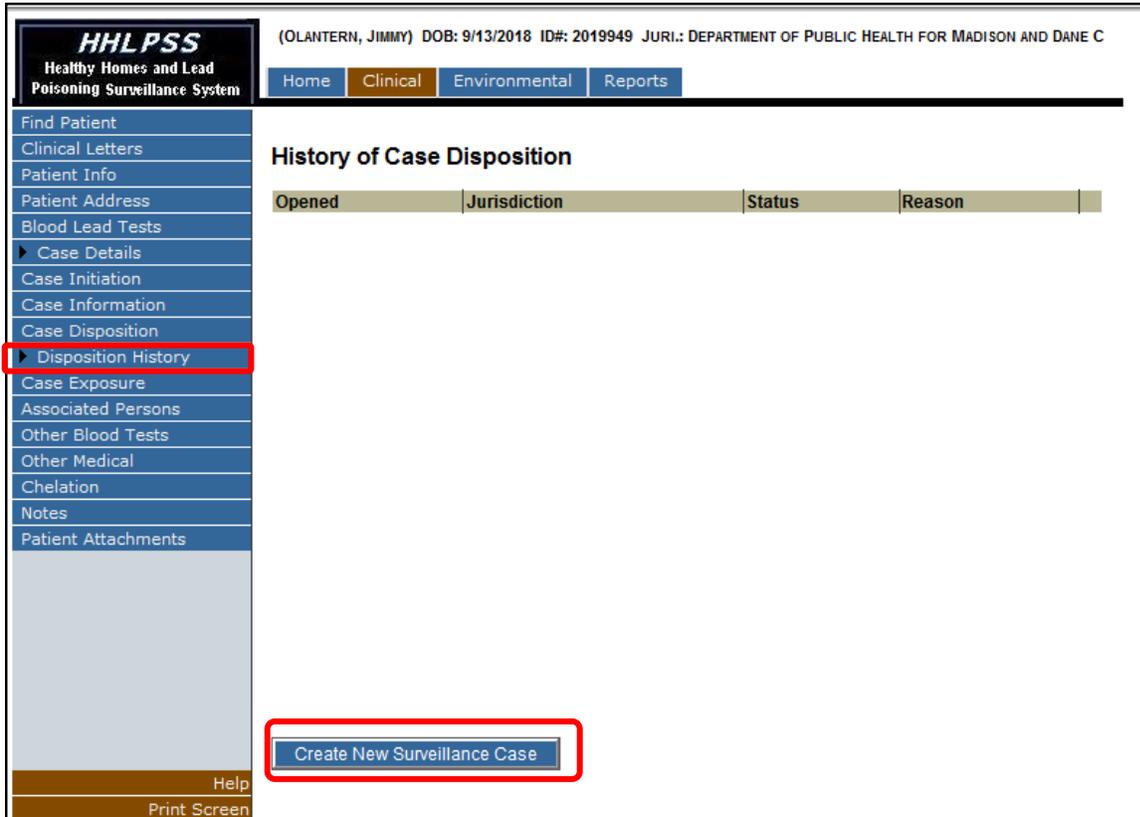
If validation errors are found, they will be displayed on the screen and indicate that one or more fields is missing required information.

The screenshot shows the 'Case Events' form with a red box highlighting a validation error message: 'Validation errors have occurred in Event Detail'. The message lists three required fields: 'Date Due is required.', 'Date Referred is required.', and 'Responsible Party is required.' The 'Save Event' button is also highlighted in red.

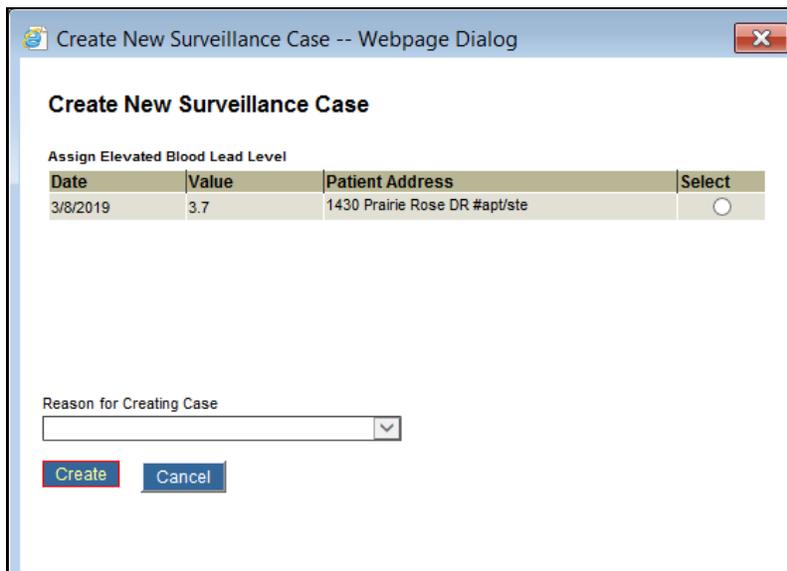
Opening a Patient Case Manually

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.

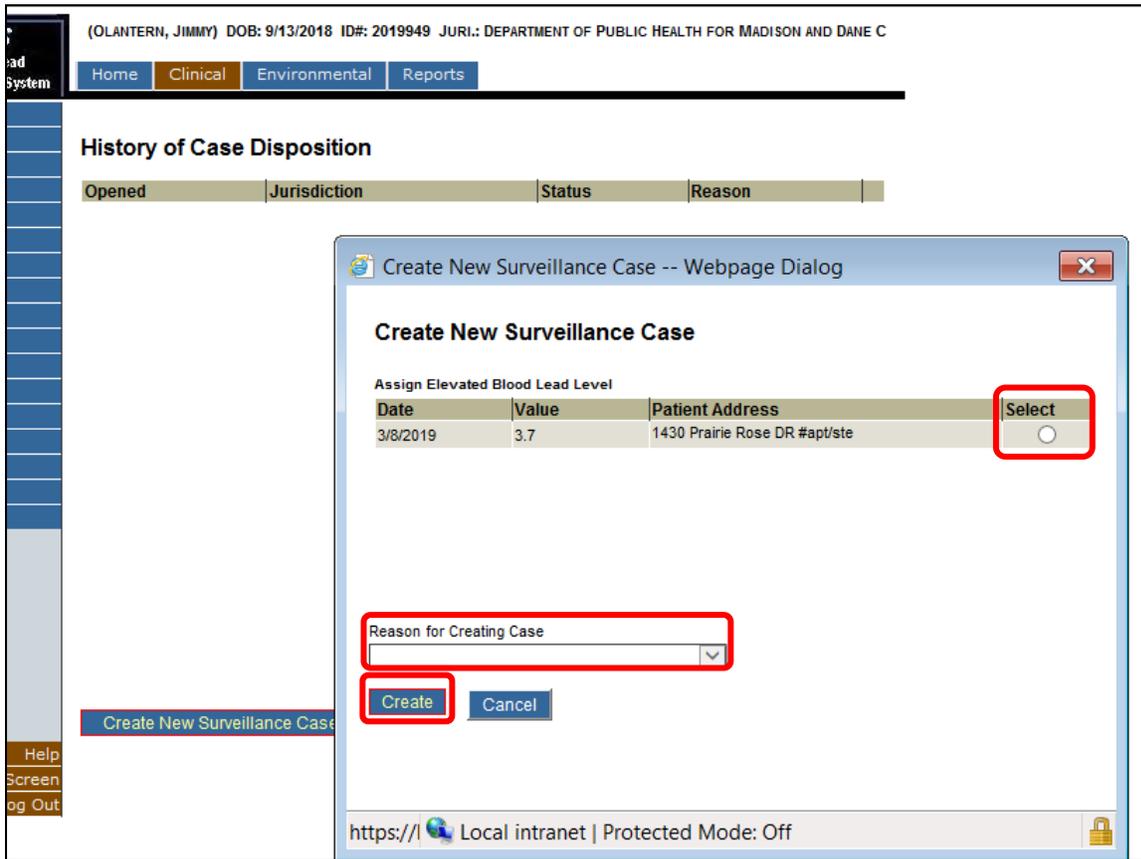
Step 1: Click on **Disposition History** on the left side menu to bring up the **History of Case Disposition** screen. Click on the **Create New Surveillance Case** button at the bottom of the screen.



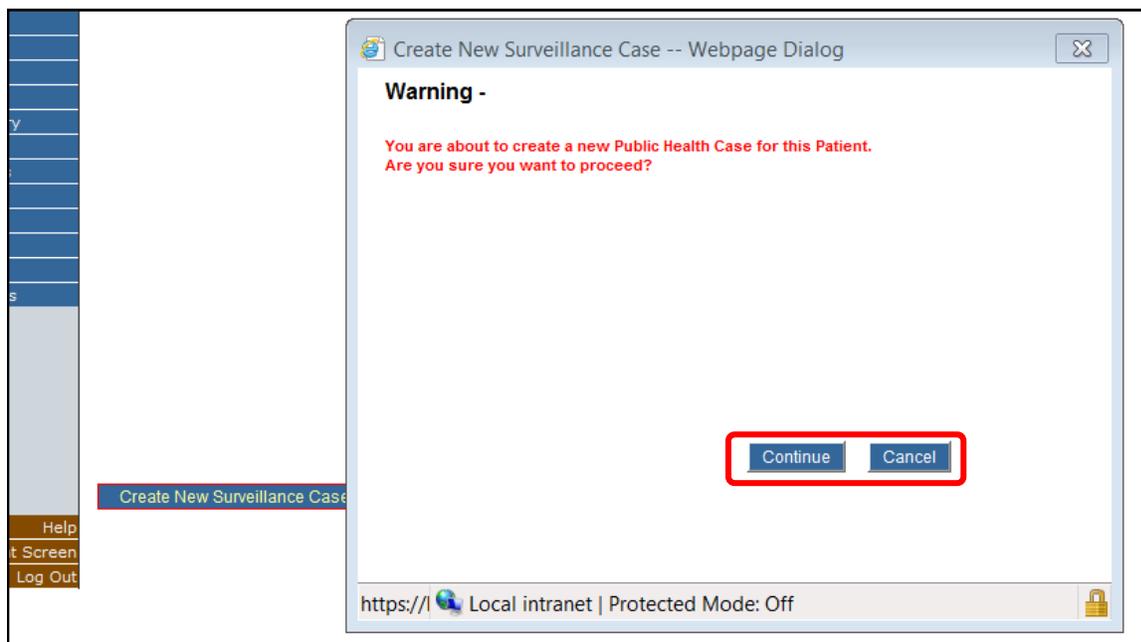
This will activate the **Create New Surveillance Case** pop-up window. This pop-up allows for the manual creation of a patient case.



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.

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Home Clinical Environmental Reports

Find Patient
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Blood Lead Tests
▶ Case Details
Case Initiation
Case Information
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▶ Disposition History
Case Exposure
Associated Persons
Other Blood Tests
Other Medical
Chelation
Notes
Patient Attachments

History of Case Disposition

Opened	Jurisdiction	Status	Reason	
3/18/2019	Department of Public Health for...	Open	Outreach Only	Details

Create New Surveillance Case

Help
Print Screen

Questions

Please contact the HHLPPS 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.