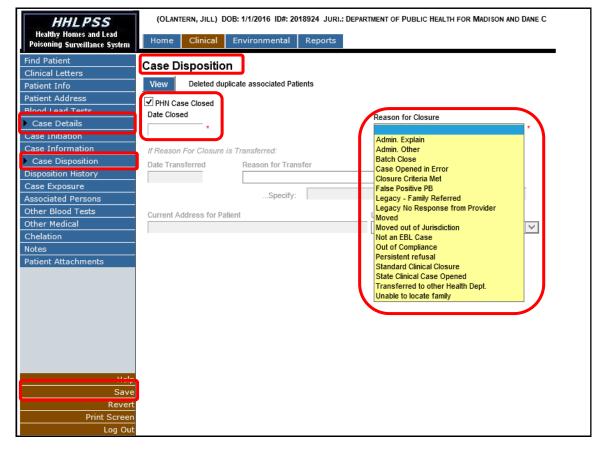## Case Closure

Do NOT close a case when a child moves to a new jurisdiction in Wisconsin, as this will close the case to the new jurisdiction, as well. Instead, if known, enter the child's new address in the Patient Address Screen (see Job Aid 3.4: Patient Address, P-02299-3.4). The case will then automatically transfer to the new jurisdiction.

Step 1: Using the **Clinical** tab under the **Find Patient** menu, 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 (see highlighted box below).
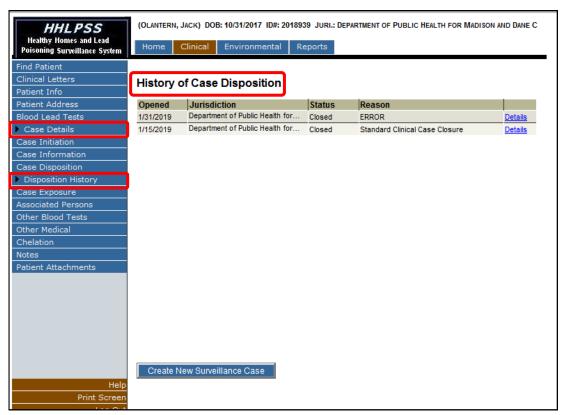

Step 2: To close the case, first select **Case Details**, then **Case Disposition,** from the left side menu.

Step 3: Click on the **PHN Case Closed** box to close the case. Enter the date in the **Date Closed** box.

Step 4: Review the descriptions of **Reasons for Closure** provided in the **Reference Table** at the end of this job aid, then select the appropriate reason from the **Reason for Closure** drop-down menu on the **Case Disposition** page.

Step 5: Click the **Save** button in the bottom left menu bar to update the case disposition data.

History of Case Disposition

Use the **Disposition History** screen to see details of the patient's current and past case closures.

Step 1: To view the history of the patient's past case closure status, select the **Case Details** on the left side menu, then select **Disposition History** from the submenu. This will bring up the **History of Case Disposition** screen.

Questions

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

Reference Table: List of Case Closure/Case Disposition Fields

Field Name	Meaning
Deleted duplicate associated patients	View patients merged with current record through record deduplication processing.
PHN Case Closed	Select to indicate case closure.
Date Closed	Indicate the date that the case was closed.
Reason for closure (Drop-down menu) The fields below will activate if **Transferred to other Health Dept** is selected.	**Use** • Admin Explain • Case Opened in Error • False Positive • Met Closure Criteria • Persistent Refusal • Transferred to Other Health Dept. • Unable to Locate Family **Do Not Use** • Admin Other • Batch Closure • Legacy—Family referred • Legacy—No response from provider • Moved • Moved out of Jurisdiction • Out of Compliance • Standard Clinical Case Closure • State Case Opened **Admin Explain:** Select this option if the case was closed for other administrative reasons. **Case Opened in Error:** Select this option if the case was opened for any result under 3.5 mcg/dL. **False Positive:** Select this option if the patient's venous confirmatory test was under 3.5 mcg/dL. **Met Closure Criteria:** Select this option if the case was closed because it met clinical case closure criteria. **Persistent Refusal:** Use this option if the case was closed because of persistent refusal to be retested after an initial case-making result. If closing a case for this reason, use the **Notes** section of the **Clinical** tab (on the bottom left side menu bar) to document the basis in the case file. **Transferred to Other Health Dept:** Use this option only if the family moved out of state and the new address is known. This will activate the fields highlighted in grey in the rows below, which can then be filled in. **Unable To Locate Family:** Use this option if the case is being closed because the patient's family cannot be located. If closing a case for this reason, use the **Notes** section of the **Clinical** tab (on the bottom left side menu bar) to document the basis in the casefile.
Date Transferred	If case is being transferred to another state, enter the date of transfer.
Reason for transfer	Use this drop-down to provide information about the nature of the transfer.
Specify	Specify reason for jurisdiction transfer not within list.
Current Address	Use this field to enter the current address for the patient (i.e., the patient's new address).
LHD referred to	*Do not use this field.* Leave it blank.

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