

Healthy Housing and Lead Poisoning Surveillance System User Manual

Ohio Department of Health
Healthy Homes and Lead Poisoning Prevention Program
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An Introduction to HHLPSS

When you log into the Healthy Housing and Lead Poisoning Surveillance System User Manual (HHLPSS), you will see a screen similar to this this:



Across the top of the screen (left to right) is a list of modules. These modules control what information is displayed in the HHLPSS window and change the menu options available in the left-hand pane. The exact modules listed may vary depending on your role in HHLPSS.

Every user will have a **Home** module, which will be the first screen you see upon logging into HHLPSS. Here on the **Home** page are tabs that will allow you to view your Alerts, your Dashboard if you have

access to one, and any [Messages](#) sent by the HHLPSS administrators. In the left-hand pane you can also access *Alert History Search* to look up an alert you have removed from your unread alerts list by marking as read, and the *Account Information* page to update your user information.

The next two modules most users will have access to are the **Clinical** and **Environmental** modules. These two modules drive the key functions of HHLPSS, tracking clinical cases and environmental investigations. The final **Reports** module is used to run pre-generated reports.

NOTE: While it is tempting to open HHLPSS in two windows or tabs to navigate back and forth between modules or pages, HHLPSS is not designed to work with multiple windows open. Working in two windows or tabs at once can result in data corruption.

CLINICAL MODULE

Overview

The **Clinical** module stores information about patients and clinical cases. A clinical case is opened when a child less than 72 months old has a confirmed elevated blood lead test.

In order to be confirmed as elevated, a blood lead test must:

1. Be a venous blood draw, not a capillary draw;
2. Have a result greater than or equal to 5 micrograms of lead per deciliter of blood ($\mu\text{g}/\text{dL}$); and
3. Not be analyzed on a point-of-care device (i.e. LeadCare).

Depending on the blood lead level, for a confirmed elevated blood test one of two types of cases will be opened:

- For a blood lead level $\geq 5 \mu\text{g}/\text{dL}$ but $< 10 \mu\text{g}/\text{dL}$, a **5-9 case** will open.
- For a blood lead level $\geq 10 \mu\text{g}/\text{dL}$, a **10+ case** will open.

Opening of a clinical case will send an alert to a case manager, who will work with the family to lower the child's blood level through nutritional and behavioral interventions (hand-washing, cleaning play areas, preventing child from contacting contaminated soil, etc.).

Once opened, clinical cases remain open either until manually closed or one of the following three criteria are met:

1. The child has two confirmed blood lead tests (venous draw, not analyzed on a LeadCare device) with levels $< 5 \mu\text{g}/\text{dL}$, taken at least 60 days apart;
2. The child reaches 72 months of age; or
3. The child has no follow-up testing for 6 months.

All clinical case follow-up activities should be entered in the **Clinical** module.

Patient Search

To find a patient, click the **Clinical** module and then in the left-hand pane click *Find Patient*. The patient search window will come up. You can search for patients with a variety of criteria. If you know the Patient ID you can search by that only to retrieve the patient record. Otherwise you can search for the patient record using other information, such as patient name and address. All text fields will return partial matches, so you may still be able to find a child even if you are unsure of the spelling of the child's name or their full address. The search will return results for all jurisdictions that you have access to, but can be limited further by using the Jurisdiction drop-down.

Once you have filled in the search criteria, click "Advanced Search" to run the search.

The screenshot shows the Ohio Department of Health HHLPPS interface. The top navigation bar includes 'Home', 'Clinical', 'Environmental', 'Administrative', and 'Reports'. The 'Clinical' module is selected. On the left-hand pane, 'Find Patient' is highlighted. The 'Find Patient' form includes the following fields and buttons:

- Buttons: 'Advanced Search', 'Clear'
- Fields: Patient ID, Last Name, First Name, Age Category (dropdown), SSN, Medicaid ID, Starting DOB, Ending DOB, Elevated (checkbox), Starting Next PB, Ending Next PB, Address, PO Box, Jurisdiction (dropdown), County (dropdown), City, Zip, Phone, Case Status (dropdown), Case Type (dropdown)
- Search Results: Search Results (text box)

NOTE: Because of the way the search handles patients with a history containing more than one clinical case, searching by open clinical case will not always return a full list of 5-9 and 10+ cases. To retrieve a list of all open 5-9 or 10+ cases for your jurisdiction, instead use the Clinical Referral Status report in the **Reports** module (see page 42).

Clinical Module Pages

Once you have located and selected a patient, you can use the various links listed in the left-hand pane of the **Clinical** module to retrieve information on that patient. Key pages are:

Patient Info: This page displays basic information for the child including name, date of birth, sex, guardian name, phone number, and address. The child's maximum confirmed blood lead level is also displayed, as well as the total number of blood lead tests and due date of the next follow-up test.

- Find Patient
- Patient Info**
- Patient Address
- ABLES
- Associated Persons
- Blood Lead Tests
- Cases
- Events
- Jurisdictions
- Documents
- Notes
- Other Lab Test(s)
- Patient AKAS
- PHLI Combined Questionnaire
- Provider History

Print Complete Patient Report
Case Type (Case Status)
STATE CASE (CLOSED)

ABLES ID:
Medical Rec:
Highest Confirmed BLL: 10.00
Reports: 4
SSN:
Medicaid ID:
Next Pb Date: 04/12/2015

Last Name: GREENSLEEVES First Name: AGATHA Middle Name: Suffix:

DOB: 08/20/2013 Current Age: 1 Yrs. 11 Mos. Sex: FEMALE Twin:

Race(s): Select. WHITE

Ethnicity: Non-Hispanic Patient Phone: Follow-up received:

Birth Country: State/Province: Language: Interview in English?:

Lived outside US in last year?: Country: Date Moved to U.S.:

Current Address

Number	Direction	Street	Type	Direction	Apt. No.
2	W	MAIN	Street		

City: COLUMBUS County: Franklin State: OH Zip: 43215

Census Tract: 3904900400 Parcel No.: District:

Guardian(s)

ID	First Name	Last Name	DOB	Relationship
3427690	THIRD	RANDOM		MOTHER

Save Log Out

Patient Address: This page lists all addresses associated with the patient. Clicking the number in the left-most column of the main pane will open up the address information below the list of addresses. This will primarily be necessary to change the Address Type, "From" and "Until" dates to show when the child moved in and moved out, and to mark an address as the primary address or current mailing address.

- Find Patient
- Patient Info
- Patient Address**
- ABLES
- Associated Persons
- Blood Lead Tests
- Cases
- Events
- Jurisdictions
- Documents
- Notes
- Other Lab Test(s)
- Patient AKAS
- PHLI Combined Questionnaire
- Provider History

Full	Go To Environmental	Most Recent Activity	Delete	Status	Currently Resides At	Mailing Address
1721384	246 N SPRING ST		X	OPEN	False	False
2464762	246 N HIGH ST		X	NO CASE	False	False

1 New

Address ID: 1721384

Number: 86 Verify

Pre Direction:

Street: Spring Save

Type: ST

Post Direction:

Apt. No.:

PO Box:

*City: XENIA

*State: OH

The address link in the second column will take you to the address's page in the **Environmental** module. If you discover during case management visits or a public health lead investigation (PHLI) that the child lives at or spends more than six hours a week at an address not listed on this page, add that address and document it in the PHLI Combined Questionnaire (see page 34).

ABLES: This page will not be of use to most HHLPS users.

Associated Persons: This page primarily lists the child's guardians, although siblings or other family members may also be included.

Blood Lead Tests: This page lists all blood lead tests documented for the child. To open the details for a test, click on the link in the left-most column of the main pane. If you discover during case management follow-up or completion of a public health lead investigation that the child lived at a different address than the one attributed to the lead test, please contact the Ohio Department of Health with full documentation to ensure that HHLPS is corrected.

Ohio
Department of Health
HHLPS

(GREENSLEEVES, AGATHA) DOB: 8/20/2013 ID#: 3414075

Home Clinical Environmental Administrative Reports

Select	Date Drawn	Result	Sample Type	Patient Address (at time of draw)	Delete
3333277	3/17/2015	5.50	VENOUS	2 W MAIN ST	X
3333278	3/16/2015	5.50	VENOUS	2 W MAIN ST	X
3333040	3/15/2015	10.00	VENOUS	2 W MAIN ST	X
3310941	8/18/2014	10.00	VENOUS	2 W MAIN ST	X

Blood Test ID: 3333277

Test Type: Blood Lead Test Result: 5.50 µg/dL Lab Smpl #: Detection: Greater Than

Sample Type: VENOUS Sample Description: Date Drawn: 03/17/2015 Date received at lab: Date Analyzed: Date Reported: Reported By: Lab

Patient Address (at time of draw): 2 W MAIN ST COLUMBUS, OH 43215

Age reported by lab: 0 Yrs, 0 Mos Age at draw (Calculated): 1 Yrs, 6 Mos Age Category at draw: CHILD

Provider: DR. ASHWINI GANDHE M.D. (181) Analyzing Laboratory: NATIONWIDE CHILDREN'S HOSPITAL (C08)

Comment: Date Created: 04/07/2015 12:02 Created By: William.Harvey Date Modified: 08/10/2015 02:58 Modified By: Amy.Hayes

Create Case(s) From Blood Test: Clinical Case Environmental Case Create Case(s)

Cases: This page lists all clinical cases opened for the child and shows the assigned case manager and current case status (open or closed). If the case is closed, the reason for closure will be listed.

You can open the case details by clicking the Case ID number in the left-most column of the main pane. This will bring up details on the case opening and closure and a Case Management History showing all case managers who have been assigned to the case. The Case Management History can also be used to transfer the case to another case manager if necessary (see page 11).

Ohio Department of Health
HPLSS

(GREENSLEEVES, AGATHA) DOB: 8/20/2013 ID#: 3414075

Home Clinical Environmental Administrative Reports

Find Patient
Patient Info
Patient Address
ABLES
Associated Persons
Blood Lead Tests
Cases
Events
Jurisdictions
Documents
Notes
Other Lab Test(s)
Patient AKAS
PHLI Combined Questionnaire
Provider History

Case(s)

Edit	Date Opened	Status	Date Closed	Reason For Closure	Case Manager	Status Type
31275	8/20/2014	CLOSED	2/1/2015	THREE FAILED CONTACT ATTEMPTS	AMY HAYES	10+

*Case Status: Closed

Date Opened: 08/20/2014

Reason For Case: Met State Case Criteria

Case Manager: HAYES, AMY

Date Closed: 02/01/2015

Reason For Closure: Three failed contact attempts

Case Management History

Transfer

*Transfer To:

Date	Status	Case Manager
1/15/2015	TRANSFERRED	AMY HAYES

Documents: Any documents for clinical case follow-up can be uploaded here, including copies of letters and the PHLI report. Documents for a case can be viewed by clicking the corresponding Case ID number in the left-most column of the main pane. For more detail, see page 37.

Events: This page tracks clinical case follow-up attempts, letters sent, completion of questionnaires, and other events. For more detail see page 36.

Jurisdictions: This page lists all health jurisdictions to which a patient has been associated.

Notes: This page shows any notes that have been written about a patient. To create or save a new note, click the links at the bottom of the left-hand pane.

Other Lab Tests: This page shows lab results that are not from blood lead tests. These could include urine lead test results, as well as blood or urine arsenic, cadmium, or mercury test results.

Patient AKAs: If a child has duplicate Patient IDs that are merged together, the inactivated name will appear here. This is the best way to check if a patient has previously been merged.

PHLI Combined Questionnaire: The combined questionnaire is completed for both 5-9 and 10+ clinical cases. For details on entering the questionnaire information (including how to properly upload the signed questionnaire), see section starting on page 34.

Provider History: This page lists all healthcare providers to which a patient has been associated.

ENVIRONMENTAL MODULE

Overview

If a child has a confirmed elevated blood lead level of 10 µg/dL or greater, there will be an environmental investigation opened at the address reported with the child's blood lead test. This is opened separately and simultaneously with the 10+ clinical case. This environmental investigation is tracked in the **Environmental** module.

Clinical cases are tied to the child, and follow the child wherever the child moves. Environmental investigations are opened on behalf of a child with an elevated blood lead level, but are tied to a property. Environmental investigations are independent of clinical cases. A child's clinical case may be closed while an environmental investigation opened on that child's behalf remains open, or vice versa.

An environmental investigation will be closed automatically if it is documented in HHLPS that a Lead Hazard Control Order is issued and subsequently lifted by a Notice of Compliance or Notice of Non-Compliance/Order to Vacate. Closure for other reasons must be approved by ODH staff.

All environmental investigation follow-up should be entered in the **Environmental** module. Guidance on how to do this is found in Environmental Investigation HHLPS Entry Protocol on page 14.

Address Search

To find an address, go to the **Environmental** module and click the *Find Address* page in the left-hand pane. If you know the Address ID you can search using only this, otherwise fill in the street address information. Click "Find" to run the search. All text fields will return partial matches, which is useful if you are unsure of some part of the address. The search will return only addresses in your jurisdiction, but can also be limited to a particular county, city, etc. You can search for addresses with investigations assigned to a particular investigator by choosing the investigator from the Investigator drop-down.

The screenshot shows the Ohio Department of Health HHLPS interface. At the top, there are navigation tabs: Home, Clinical, Environmental (highlighted), Administrative, and Reports. On the left, a vertical menu lists various options, with 'Find Address' circled in red. The main content area is titled 'Find Address' and contains the following fields:

- Address ID:
- Street #: Dir Prefix:
- Street Name: Street Type: Dir Suffix:
- Apt/Unit: PO Box:
- City: State: Zip: County: Investigator:

At the bottom of the form, there are two buttons: 'Find' (circled in red) and 'Clear'.

NOTE: If you are looking for a listing of all investigations assigned to an investigator, the address search is not suitable because it will not prioritize open versus closed

investigations and does not show investigation outcome. Instead, run the Environmental Investigation Status Report found in the **Reports** module (see page 41). Investigators may also view their dashboard to see a summary of their investigations.

Once you have selected an address using the address search, you can access various pages with information on that address.

Environmental Module Pages

Address Info: This page records information about an address including the full address, county, census tract, jurisdiction, dwelling type, and ownership type. The dwelling type and ownership type should be corrected if they are wrong because these fields are used in the generation of Environmental Letters (see page 26). There is a notes field on this page, which should be used for information regarding the property itself, and not for a specific investigation.

The screenshot shows the 'Address Details' page in the Ohio HHLPS system. The address is 246 N High St, Columbus, OH 43215-2406. The page includes a navigation menu on the left with options like 'Find Address', 'Address Info', 'Associated Patients', etc. The main content area contains various fields for address information, such as 'Investigation Status: OPEN', 'Number: 246', 'Prefix: N', 'Street Name: HIGH', 'Street Type: ST', 'City: COLUMBUS', 'State: OH', 'Zip: 43215-2406', 'County: Franklin', 'Jurisdiction: Columbus City', 'Census Tract Number: 003000', 'District', 'Parcel Number', 'Year Built', 'Number Of Units', 'Dwelling Type', 'Phone', 'Ownership Type', and 'High Risk Structure?'. There is also a 'Notes about address:' field at the bottom.

Associated Patients: This page lists all patients who have a blood lead test recorded in HHLPS for the address. If there is more than one child at an address with an elevated blood lead level, this page can be useful to navigate to each patient's page.

Associated Tests: This page lists all the blood lead tests that are recorded in HHLPS as having taken place at that address.

Environmental Letters: This page is used to generate letters and reports related to a PHLI. For more detail see Chapter 4, Environmental Letters Generation, on page 26.

EVA: The Environmental Visual Assessment is used to evaluate a home for various hazards. Please see page 37 for more information.

Investigation Summary: This page lists all investigations for the address, their statuses (open or closed), the assigned investigators, and the dates opened and closed. To view details for an investigation, click the investigation ID in the far-left column of the investigation list.

Notes: This page shows any notes that have been written about an address. To create or save a new note, click the links at the bottom of the left-hand pane.

A list of all blood lead tests for the property with results ≥ 10 $\mu\text{g}/\text{dL}$ is shown below the investigation list (all tests regardless of level are listed on the *Associated Tests* page).

More information about functions within the *Investigation Summary* page can be found on pages 12, 14, and 17.

The screenshot shows the HHLPS system interface. At the top left is the Ohio Department of Health HHLPS logo. At the top right is the address: 2 W MAIN ST COLUMBUS, OH 43215 (2457621). Below the address is a navigation menu with buttons for Home, Clinical, Environmental (highlighted), Administrative, and Reports. The main content area is divided into two sections. The top section is the 'Investigation Summary' table, which lists investigations with columns for Edit, Status, Investigator, Date Opened, Date Closed, Delete, and Create Referral Event?. Two investigations are listed: one with ID 52594 (Open, Investigator: Harvey, William) and one with ID 52370 (Closed, Investigator: SERAFINI, TYLER). The bottom section is a table of '10+ Tests Associated to the Property' with columns for Test Id, Sample Type, Result, Date Drawn, First Name, Last Name, DOB, and Phone. The table lists four tests for GERALD GREENSLEEVES, all with a result of 10.00. The 'Investigation Summary' link in the left-hand navigation pane is circled in red.

Edit	Status	Investigator	Date Opened	Date Closed	Delete	Create Referral Event?
52594	Open	Harvey, William	5/4/2015		X	<input type="checkbox"/>
52370	Closed	SERAFINI, TYLER	1/27/2015	3/1/2015	X	<input type="checkbox"/>

Test Id	Sample Type	Result	Date Drawn	First Name	Last Name	DOB	Phone
3340216	VENOUS	12.00	7/1/2015	GERALD	GREENSLEEVES	8/20/2012	
3333040	VENOUS	10.00	3/15/2015	AGATHA	GREENSLEEVES	8/20/2013	9371012002
3319942	VENOUS	10.00	8/19/2014	GERALD	GREENSLEEVES	8/20/2012	
3319941	VENOUS	10.00	8/18/2014	AGATHA	GREENSLEEVES	8/20/2013	9371012002

Property Owner Information: This page keeps a record of current and past owners of the property. It is important to keep this page updated when there is a public health lead investigation so that the correct owner can be listed on the risk assessment report and any follow-up documents can be sent to the right person (see Chapter 4, Environmental Letters Generation, on page 26).

Renovation History: This page will not be of use to most HHLPS users.

Radon History: This page will not be of use to most HHLPS users.

REPORTS MODULE

Some users, such as local program administrators, may have access to reports for their jurisdiction. These are found in the **Reports** module. Each available report (listed in the left-hand pane) has a notes paragraph detailing the purpose of the report and the parameters needed to generate that report. More information on reports can be found in Generating Reports in HHLPS on page 41.

Referral Process

REPORTING OF TESTS

All entities performing lead testing for Ohio residents (i.e. laboratories, clinics) are required to electronically report all lead tests results to the Ohio Healthy Homes and Lead Poisoning Prevention Program (OHHLPPP) within seven days of analysis. At 5:00 each morning, tests are automatically imported from their network location into the Healthy Housing and Lead Poisoning Surveillance System (HHLPSS).

If no issues with the blood lead test record are detected by the system, the test is imported into HHLPSS automatically. If there are any issues, such as blank or otherwise invalid fields, the blood lead records will be directed to the FixELR queue. The record will be held in the FixELR queue until the issue with the record is manually corrected, at which time the test is imported into HHLPSS. The OHHLPPP surveillance team logs into HHLPSS and corrects detected issues in the FixELR queue daily to ensure timely import.

NOTE: While laboratories are required to report test results within one week of analysis, sometimes labs will report late or accidentally omit a test. If you receive a report from a physician or parent about a child with an elevated blood lead level that does not appear in HHLPSS, please contact OHHLPPP staff to look into this. If the level is ≥ 45 $\mu\text{g}/\text{dL}$ and the child is in urgent need of clinical support and an environmental investigation, please fax or email the blood lead test results including all patient information to the OHHLPPP.

REFERRAL GENERATION

Upon import to HHLPSS, a confirmed blood lead test for a child less than six years of age will trigger one of the following three options:

- 1) If the blood lead level (BLL) is < 5 $\mu\text{g}/\text{dL}$, the test will be imported and no cases will be generated.
- 2) If the BLL is ≥ 5 $\mu\text{g}/\text{dL}$ and < 10 $\mu\text{g}/\text{dL}$, a 5-9 clinical case will be opened for the child, and will be assigned to the default 5-9 case manager in the health jurisdiction of the child's reported residence.
- 3) If the BLL is ≥ 10 $\mu\text{g}/\text{dL}$, a 10+ clinical case will be opened for the child, and will be assigned to the default 10+ case manager in the health jurisdiction of the child's reported residence. Additionally, an environmental investigation will open on the property reported as the child's residence. This is assigned to the default investigator for the health jurisdiction in which the property lies.

Upon the clinical and environmental investigations being created in HHLPSS, notification to the default case manager or public health lead investigator will be made via a HHLPSS alert. The alert will have a

hyperlink that will take the user to the appropriate child or property. **This alert is to be considered the official referral from ODH.**

NOTE: Each health jurisdiction will have a single default case manager and a single default investigator. This person will receive all initial new case and investigation alerts.

If the person initially assigned the clinical case or investigation does not do the follow-up, it is important for that person to transfer the clinical case or investigation in HHL PSS so that the correct case manager or investigator will receive the follow-up alerts for the child or property.

TRANSFERRING CLINICAL CASES

To transfer a clinical case, the user can navigate to the patient (either through using the *Find Patient* search in the **Clinical** Module [see page 3] or by following the link in the clinical case assignment alert) and open the patient’s *Cases* page from the left-hand pane. In the list of cases, click the Case ID in the first column for the case to be transferred. The case details will open below the list of cases. Click the “Transfer To” drop-down and choose the appropriate case manager. Then click the “Transfer” button to transfer the case.

Once the “Transfer” button is clicked, the assigned case manager field will be updated and the newly assigned case manager will be alerted in HHL PSS that the case has been re-assigned to them.

The screenshot shows the Ohio Department of Health HHL PSS interface. At the top right, a patient identifier is displayed: (GREENSLEEVES, GERALD) DOB: 8/20/2012 ID#: 3414076. Below this is a navigation menu with tabs for Home, Clinical, Environmental, Administrative, and Reports. On the left is a sidebar with various menu items, including 'Cases', which is circled in red. The main content area displays a table of cases:

Case ID	Date Opened	Status	Date Closed	Reason For Closure	Case Manager	Status Type
69288	8/11/2015	OPEN			AMY HAYES	10+
61276	8/20/2014	CLOSED	4/1/2015	NO FOLLOW-UP TESTING FOR 6 MONTHS	ROBIN CRANE	10+

Below the table, the details for the selected case (69288) are shown. The 'Case Status' is set to 'Open'. The 'Date Opened' is 08/11/2015. The 'Reason For Case' is 'Met State Case Criteria'. The 'Case Manager' is 'HAYES, AMY'. There is a 'Transfer' button circled in red. Below the button, the '*Transfer To:' dropdown menu is open, showing 'SERAFINI, TYLER' as the selected option. At the bottom, a 'Case Management History' table shows a record of the case being transferred:

Date	Status	Case Manager
8/11/2015	TRANSFERRED	AMY HAYES

TRANSFERRING ENVIRONMENTAL INVESTIGATIONS

To transfer an investigation, the user can open the address (either through the address search [see page 7] or through a link in the investigation assignment alert) and then open the property’s *Investigation Summary* page from the left-hand pane. From the list of investigations, click the investigation ID in the

far-left column of the main pane for the investigation to be transferred. This will open the investigation information below the listing of investigations. Click the Detail tab, then click the “Investigator” drop-down and choose the appropriate investigator. To complete the transfer, click the “Save Detail” button. Once this button is clicked, the assigned investigator field will be updated and the new investigator will be alerted in HHLPSS that the investigation has been reassigned to them.

Ohio Department of Health
HHLPSS

2 W MAIN ST COLUMBUS, OH 43215 (2457621)

Home Clinical Environmental Administrative Reports

Address Info
Associated Patients
Associated Tests
Find Address
Environmental Letters
EVA
Investigation Summary
Notes
Property Owner Information
Renovation History

Id	Status	Investigator	Date Opened	Date Closed	Delete	Create Referral Event?
52594	Open	Harvey, William	5/4/2015		X	<input type="checkbox"/>
52370	Closed	SERAFINI, TYLER	1/27/2015	3/1/2015	X	<input type="checkbox"/>

Print Investigation Referral

10+ Tests

Test Id	Sample Type	Result	Date Drawn	First Name	Last Name	DOB	Phone
3340216	VENOUS	12.00	7/1/2015	GERALD	GREENSLEEVEES	8/20/2012	
3333040	VENOUS	10.00	3/15/2015	AGATHA	GREENSLEEVEES	8/20/2013	9371012002
3319942	VENOUS	10.00	8/19/2014	GERALD	GREENSLEEVEES	8/20/2012	
3319941	VENOUS	10.00	8/18/2014	AGATHA	GREENSLEEVEES	8/20/2013	9371012002

Investigation ID: 52594

Detail Sources Of Exposure Identified Investigation Outcome Lead Hazard Control Methods Used

Patient/BLL Associated When Case Opened Events Photos And Documents Risk Assessment Clearance Inspection

Save Detail

Investigator: Harvey, William

Status: Open

Funding Source:

Billed To Medicaid:

Date Opened: 05/04/2015

Investigation Reason: Meets Standard Investigation Criteria

Target Investigation:

Comments:

PRINTING OF CLINICAL CASE OR INVESTIGATION REFERRALS

If necessary, the assigned case manager or investigator can print a paper copy of the summary information for their referral.

For environmental investigation referrals, the user should first open the address in the **Environmental** module, either through the address search (see page 7) or by following a link in an alert for the property. Once the address is opened, the user should click *Investigation Summary* in the left-hand pane. This will open a list of investigations for the property. Find the appropriate investigation and click the “Print Investigation Referral” button in that row.

- Address Info
- Associated Patients
- Associated Tests
- Find Address
- Environmental Letters
- EVA
- Investigation Summary**
- Notes
- Property Owner Information
- Renovation History

Edit	Status	Investigator	Date Opened	Date Closed	Delete		Create Referral Event?
52594	Open	Harvey, William	5/4/2015		X	Print Investigation Referral	<input type="checkbox"/>
52370	Closed	SERAFINI, TYLER	1/27/2015	3/1/2015	X	Print Investigation Referral	<input type="checkbox"/>

10+ Tests Associated to the Property	Test Id	Sample Type	Result	Date Drawn	First Name	Last Name	DOB	Phone
	3340216	VENOUS	12.00	7/1/2015	GERALD	GREENSLEEVES	8/20/2012	
	3333040	VENOUS	10.00	3/15/2015	AGATHA	GREENSLEEVES	8/20/2013	9371012002
	3319942	VENOUS	10.00	8/19/2014	GERALD	GREENSLEEVES	8/20/2012	
	3319941	VENOUS	10.00	8/18/2014	AGATHA	GREENSLEEVES	8/20/2013	9371012002

1 2

For clinical case referrals, the user should open the patient’s record in the **Clinical** module either by using the patient search (see page 3) or by clicking a link to the patient’s record in a clinical alert. Once the patient record is open, click *Patient Info* in the left-hand pane. On the *Patient Info* page is a button labeled “Print Complete Patient Report” in the top-right of the screen. Click this to print the referral.

- Find Patient
- Patient Info**
- Patient Address
- ABLES
- Associated Persons
- Blood Lead Tests
- Cases
- Events
- Jurisdictions
- Documents
- Notes
- Other Lab Test(s)
- Patient AKAS
- PHLI Combined Questionnaire
- Provider History

Last Name				First Name		Middle Name		Suffix	
GREENSLEEVES				GERALD					
DOB		Current Age		Sex		Twin			
08/20/2012		2 Yrs. 11 Mos.				<input type="checkbox"/>			
Race(s)		<input type="button" value="Select"/>							
Ethnicity		Patient Phone		Follow-up received					
				<input type="checkbox"/>					
Birth Country				State/Province		Language		Interview in English?	
								<input type="checkbox"/>	
Lived outside US in last year?				Country		Date Moved to U.S.			
<input type="checkbox"/>									

Print Complete Patient Report	
Case Type (Case Status)	
STATE CASE (OPEN)	
ABLES ID:	<input type="text"/>
Medical Rec:	<input type="text"/>
Highest Confirmed BLL:	12.00
# Reports:	3
SSN:	<input type="text"/>
Medicaid ID:	<input type="text"/>
Next Pb Date:	07/29/2015

Environmental Investigation HHLPSS Entry Protocol

RECORDING CONTACT ATTEMPTS

All contact attempts for environmental investigations should be documented. To do this, first open the address in the **Environmental** module, either through the address search (see page 7) or through an investigation alert. Once the address is opened, click *Investigation Summary* in the left-hand pane to open a list of investigations for that address.

In the listing of investigations at the top of the page, click the blue investigation ID hyperlink with the appropriate investigator and date opened to open a tabbed form used to document activity for the investigation. Click the Events tab and then click the “Add Event” button.

Ohio Department of Health
HHLPSS

2 W MAIN ST COLUMBUS, OH 43215 (2457621)

Home Clinical **Environmental** Administrative Reports

Address Info
Associated Patients
Associated Tests
Find Address
Environmental Letters
EVA
Investigation Summary
Notes
Property Owner Information
Renovation History

Edit	Status	Investigator	Date Opened	Date Closed	Delete	Create Referral Event?
52594	Open	Harvey, William	5/4/2015		X	Print Investigation Referral
52370	Closed	SERAFINI, TYLER	1/27/2015	3/1/2015	X	Print Investigation Referral

10+ Tests Associated to the Property

Test Id	Sample Type	Result	Date Drawn	First Name	Last Name	DOB	Phone
3340216	VENOUS	12.00	7/1/2015	GERALD	GREENSLEEVES	8/20/2012	
3333040	VENOUS	10.00	3/15/2015	AGATHA	GREENSLEEVES	8/20/2013	9371012002
3319942	VENOUS	10.00	8/19/2014	GERALD	GREENSLEEVES	8/20/2012	
3319941	VENOUS	10.00	8/18/2014	AGATHA	GREENSLEEVES	8/20/2013	9371012002

1 2

Investigation ID: 52594

Detail Sources Of Exposure Identified **Investigation Outcome** Lead Hazard Control Methods Used

Patient/BLL Associated When Case Opened **Events** Photos And Documents Risk Assessment Clearance Inspection

Select	Event Type	Sub Event Type	Date Completed	Notes	Delete
2719	ENVIRONMENTAL INVESTIGATION REFERRAL MADE		5/4/2015		X

[Add Event](#)

[Property Status Update Report](#)

Specify the Event Type “Contact Attempt,” and the appropriate “Contact Attempt Type” from the dropdown. “Responsible Party” and “Date Completed” will populate, but can be changed as necessary. Free-text notes can also be added related to the event in the “Notes” field.

Click the “Save Event” button at the bottom of the form to save all inputted information.

Investigation ID: 52101

Detail Sources Of Exposure Identified Investigation Outcome Lead Hazard Control Methods Used

Patient/BLL Associated When Case Opened **Events** Photos And Documents Risk Assessment Clearance Inspection

No Events Found [Add Event](#)

[Property Status Update Report](#)

Event ID: New

Event Detail

Event Type: CONTACT ATTEMPT

Letter Type:

Phone Type:

Document Type:

Contact Attempt Type: PHONE CALL

Responsible Party: TEST.USER

Date Completed: 07/24/2015

Notes: Additional Notes (left voicemail, no response at door, letter returned, etc.)

[Save Event](#)

RECORDING LEAD RISK ASSESSMENTS

Find the Correct Property

To find the correct property, it is recommended that you search for the child associated with the property being investigated using the *Find Patient* search within the **Clinical** module (see page 3).

NOTE: The environmental address search will only return addresses with an associated blood lead test. This means that some alternate addresses for a child can only be found by searching for the child in the **Clinical** module and locating the address on the child's *Patient Address* page.

Enter search criteria and click "Advanced Search" to return a list of patient matches. If the correct patient does not return in the search results, it is helpful to search using partial names in case the reported name was misspelled. In the "Select" column of the search results, click the blue Patient ID hyperlink for the correct patient to open to the *Patient Info* page.

Click on the *Patient Address* page listed in left-hand pane and click the hyperlink of the investigated address listed in the "Go To Environmental" column.

Find Patient									
Patient Info	Edit	Go To Environmental	Most Recent Activity	Delete	Status	Currently Resides At	Mailing Address		
Patient Address	24576	21 2 W MAIN ST	8/19/2014	X	OPEN	False	True		
ABLES									
Associated Persons									New

NOTE: If the address on which the investigation was performed is NOT listed on the *Patient Address* page, it must be added. To add the address, click on “New” in the bottom right corner of the screen, enter all known information, and click “Verify.” If a green “Address Verified” appears on the screen, click “Save.” If red “Error Occurred Validating Address” appears, ensure that address information is correct before saving. To then open an investigation at this alternate address, please contact the Ohio Department of Health. Your request should include the child’s name, the new address for investigation, and the reason for investigating the alternate address. **Alternate addresses should be added and an investigation opened at that address prior to visiting the property.**

Clicking the address link in the “Go To Environmental” column will take you to the *Address Info* page within the **Environmental** module.

Investigation Status: OPEN

Number:

Prefix:

Street Name:

Street Type:

Suffix:

Apt/Unit:

PO Box:

City:

State:

Zip:

County:

Jurisdiction:

Census Tract Number:

District:

Parcel Number:

Year Built:

Number Of Units:

Dwelling Type:

Phone:

Ownership Type:

High Risk Structure?

Notes about address:

On the *Address Info* page make sure that the year built, dwelling type, number of units (if multiple unit housing), and ownership type are correct. The “Notes about Address” field should be used for notes related to the property, not the investigation (i.e. “adjacent garage belongs to other lot” or “other unit in duplex is 123 Main St (address ID 123456789)”). Notes related to an investigation can be added on the *Investigation Summary* page in the comments field on the Details tab.

Click “Save” at the bottom of the left-hand pane to save any changes.

DOCUMENTING INVESTIGATION DETAILS

On the *Investigation Summary* page, in the listing of investigations at the top of the page, click the blue Investigation ID hyperlink with the appropriate investigator and date opened to open a tabbed form used to document activity for the investigation.

- 1) Review the Detail tab to ensure that the correct investigator is listed. If any changes are made, click the blue “Save Detail” button at the top of the tab prior to switching tabs.

NOTE: Saving an investigator change will notify the new investigator that the investigation has been reassigned.

Investigation ID: 52097

Detail Sources Of Exposure Identified Investigation Outcome Lead Hazard Control Methods Used

Patient/BLL Associated When Case Opened Events Photos And Documents Risk Assessment Clearance Inspection

Save Detail

Investigator: INTERNAL_HHLPS Date Opened: 11/06/2014

Status: Open Investigation Reason: Meets Standard Investigation Criteria

Funding Source: Target Investigation:

Comments:

- 2) Open the Risk Assessment tab. Click the “New Risk Assessment Inspection” button
 - a) Enter the start and completion dates and click “Save Risk Assessment Inspection.” The start and completion date will be the same unless the risk assessment took place over multiple days.
 - b) Click on the XRF Results sub-tab of the risk assessment and choose the appropriate manufacturer of the XRF analyzer used, and then browse to the CSV file containing your XRF results. Once the correct CSV file has been selected, click “Upload Results” to save the file to HHLPS. A listing of all imported XRF results will display below the “Upload Results” button.

Detail Samples XRF Results

Upload XRF File

Manufacturer: Niton

File To Upload: Browse... No file selected. (CSV File)

Upload Results

No XRF Results Found

- c) Click the Samples sub-tab of the risk assessment to add environmental samples. Click “New Sample” and complete all known fields for the sample. The fields in red are required to save the sample. Once complete, click “Save Sample” at the bottom of the form. At least one sample with the highest sample results from each sample type (dust, soil, water, or paint chips) must be entered. If the result exceeds the hazard level for that sample type, check the “Hazard Identified” box.

Hazard levels are defined as follows:

Dust		Soil		Paint Chips	Water
Floors	Window Sills	Play Areas	Non-play Areas		
40 µg/ft ²	250 µg/ft ²	400 ppm	1200 ppm	0.5%	15 ppb

NOTE: Be sure to check the “Hazard Identified” box if the sample result exceeds the hazard threshold.

- 3) Open the Photos and Documents tab. This tab can be used to save copies of all required documents to HHLPS. Click “New Document” button and then choose the appropriate document type and add a free text description. Click “Browse” to find/select the appropriate file from your computer. Click the “Save Document” button to import to HHLPS.

NOTE: If the document is required to be signed, the scanned and signed copy should be uploaded to HHLPS. Any signed document should have a .PDF extension and uploaded photos should be .JPG. If an error message appears upon upload attempt, the file size

may be too large. If this is the case, it may be necessary to reduce the resolution of the file.

- 4) Open the Sources of Exposure Identified tab and select all appropriate check boxes. Click the blue “Save Sources of Exposure Identified” button at the top left of the tab.

Investigation ID: 52097

Detail Sources Of Exposure Identified Investigation Outcome Lead Hazard Control Methods Used

Patient/BLL Associated When Case Opened Events Photos And Documents Risk Assessment Clearance Inspection

Save Sources Of Exposure Identified

No Hazard Identified: Alternate Location Identified

Lead Paint Found: Yes No Unknown

Lead Source Other Than Paint Found: Cosmetics Food Hobbies
 Industrial Jewelry Miniblinds
 Occupations Toys Traditional Medicines
 Other Specify:

Lead Hazards Identified: Interior Paint Exterior Paint Dust
 Soil Water Paint Chips

Documenting Property Owner Information

Go to the *Property Owner Information* page listed in the left menu. Click “New” in the bottom left corner of the screen to add a new property owner. Complete all fields, ensuring the owner’s name (if an individual) is entered as “FirstName LastName.” Be sure to click “Save” in the bottom left corner of the screen.

Property Owner ID: NEW

*Name:

Phone:

Lives On Property:

Foreclosure:

Owned From:

Owned To:

Current Owner? Lead Hazards Disclosed and Informational Material Received at Purchase:

Address Line 1:

Address Line 2:

City:

State:

Zip:

County:

Documenting Renovation Activities on Property

Go to the *Renovation History* page listed in the left-hand pane. Click “New” in the bottom left corner of the screen to add a renovation activity to the property. Complete all known fields concerning when and where the renovation/remodeling was done, as well as who performed the work. Specify a description of the remodeling and be sure to click “Save” in the bottom left corner.

Renovation History ID: New

Approximate Year of Renovation:

Location:

Who did the Remodeling?

RRP Certified Contractor

Licensed Lead Abatement Contractor

Private Contractor

Self or Family

Other

Property Owner

Unknown

Contractor Name:

Contractor Name:

Contractor Name:

Specify:

Description of the Remodeling

RECORDING INVESTIGATION FOLLOW-UP

Lead Hazard Control Orders

If a Lead Hazard Control Order has been issued, open the Investigation Outcome tab from the *Investigation Summary* page, check the “Lead Hazard Control Order Issued,” box, and enter date issued, date received (the date on the certified mail return slip), and due date. The due date will automatically calculate to 90 days after date received, but can be changed by the user. Click the blue “Save Investigation Outcome” button at the top of the tab.

Detail Sources Of Exposure Identified **Investigation Outcome** Lead Hazard Control Methods Used

Patient/BLL Associated When Case Opened Events Photos And Documents Risk Assessments Clearance Inspection

Date Closed:

Closure Reason:

Risk Assessment date(s):

Lead Hazard Control Issued? Date Issued: Date Received: Due Date:

Clearance Inspections

If a clearance inspection has been done, open the Clearance Inspection tab and click the blue “New Clearance Inspection” button.

- a) Enter the date of the clearance inspection and click the radio button (circle) next to the correct inspection outcome (Failed, Partial, or Passed). Click the binocular icon to search for and select the risk assessor who carried out the clearance inspection.

NOTE: All valid risk assessors should appear in the search list. If the risk assessor who carried out the clearance inspection cannot be found, then contact ODH surveillance staff to determine why the risk assessor is not listed. The risk assessor may not have had a valid license on the clearance inspection date, which would cause the clearance inspection to be invalid.

- b) Click the radio button corresponding to the role of the person who performed the work. If “Abatement Contractor” or “Other” is selected, use the binocular icon to search for and select the proper person.
- c) Check the appropriate lead hazard control methods used. Typically both abatement and interim controls will be used. If interim controls are used, the property owner must file an Ongoing Maintenance and Monitoring plan.

NOTE: A passed clearance examination must be entered into HHLPSS before a Notice of Compliance can be recorded for the property.

Detail Sources Of Exposure Identified Investigation Outcome Lead Hazard Control Methods Used

Patient/BLL Associated When Case Opened Events Photos And Documents Risk Assessment Clearance Inspection

Clearance Inspections(s)

New Clearance Inspection

No Clearance Inspections

Clearance Inspection ID: NEW

Save Clearance Inspection Detail

Clearance Exam Date

Clearance Outcome FAILED PARTIAL PASSED

Risk Assessor Name

Risk Assessor License Number

Risk Assessor License Expiration

Work done by :

Property Owner

Other

Abatement Contractor

Lead Hazard Control Methods Used

Abatement

Interim Controls

Ongoing Maintenance and Monitoring

Notes

Notice of Compliance or Notice of Non-Compliance/Order to Vacate

If a Notice of Compliance or Notice of Non-Compliance/Order to Vacate has been issued, on the Investigation Outcome tab check the appropriate box and enter the date of the notice. Entering a Notice of Compliance or Notice of Non-Compliance/Order to Vacate will close the investigation with that closure reason and the date of the notice as the closure date. This update to the closure reason will happen upon clicking "Save Investigation Outcome."

NOTE: A Notice of Compliance date cannot be entered without a passed clearance inspection saved.

Detail Sources Of Exposure Identified **Investigation Outcome** Lead Hazard Control Methods Used

Patient/BLL Associated When Case Opened Events Photos And Documents Risk Assessment Clearance Inspection

Save Investigation Outcome

Date Closed: 07/07/2015

Closure Reason: Notice of Compliance

Risk Assessment date(s): 06/01/2015

Lead Hazard Control Issued? Date Issued: 06/15/2015 Date Received: 06/16/2015 Due Date: 09/14/2015

First Extension Request Received: Date Received:

First Extension: Date Issued: Due Date:

Second Extension Request Received: Date Received:

Second Extension: Date Issued: Due Date:

Third Extension Request Received: Date Received:

Third Extension: Date Issued: Due Date:

Clearance Inspection date(s): 07/01/2015

Notice of Compliance: Date Issued: 07/07/2015

Notice of Non-Compliance / Order to Vacate: Date Issued:

Placard Placed: Date Placed:

Order Rescinded: Date Rescinded:

Order Rescinded Notes:

Lead Hazard Control Order Deadline Extensions

Go to the *Investigation Summary* page listed in the left-hand pane. Click the hyperlink in the far-left column to select the investigation with appropriate Investigation ID, investigator, and date opened within the listing of investigations.

On the Investigation Outcome tab of that investigation, select the box noting that an extension has been issued, and provide the dates for which an extension request was received and issued. “Due Date” will populate as 90 days after the date received (the date on the green certified mail return slip).

ALL OTHER EVENTS

To track all other environmental events (phone calls, referrals, letters, site visits, etc.) use the procedures listed below:

Go to the *Investigation Summary* page listed in the left-hand pane. Click the hyperlink of the appropriate investigation in the far-left column. This will open a tabbed form used to document activity for the investigation. Navigate to the Events tab and click “Add Event.”

Specify the event type and sub-type as appropriate. Responsible party and date completed will populate but can be changed as necessary. Free-text notes can also be added related to the event.

Click “Save Event” at the bottom of the form to save all inputted information.

INVESTIGATION CLOSURE INSTRUCTIONS

Investigations will be closed for the following reasons:

- A Notice of Compliance is issued
- A Notice of Non-Compliance/Order to Vacate is issued
- The public health lead investigation identifies only non-property hazards
- The public health lead investigation identifies no hazards
- Required contact attempts have been made without successfully contacting the family
- An alternate address has been identified for the child
- A child’s blood lead level is declining at a new address
- The investigation has been referred for legal action
- An investigation was opened in error
- The original order was rescinded

Note: Follow the guidance of the Public Health Lead Investigation Manual to determine which addresses should be investigated. If the investigator discovers that the child did not actually reside at the address reported with the elevated blood lead test when the test was done, please notify the Ohio Department of Health for correction of the blood lead test’s address and opening of the investigation at the correct address.

Investigations will close automatically only when a Notice of Compliance or Notice of Non-Compliance/Order to Vacate is entered into HHLPSS. **In these cases, a signed copy of the notice should be uploaded to HHLPSS.**

For all other closure reasons, record all appropriate documentation in HHLPSS and submit a closure request to ODH. This can be found at the bottom of the Investigation Outcome tab of the *Investigation Summary* page of the **Environmental** module. Enter the date at which the investigation should be listed as closed, the reason for closure, and any notes that will help the closure committee to understand the reasoning for closing the investigation. Click “Submit Closure Request” to submit it to ODH. The request

shall be reviewed within 30 days. If the case is disapproved for closure ODH will provide comments and recommendations. If the wrong closure reason was selected the case will be disapproved.

If you have an investigation that you believe needs to be closed for a reason other than the standard reasons listed above, please notify the Ohio Department of Health.

NOTE: When an investigation qualifies for closure it is important that it be closed promptly in HHLPSS. This will ensure that if a child has an elevated blood lead level at that address in the future, a new investigation will correctly open.

These are the closure reasons currently valid in HHLPSS:

Notice of Compliance: This option should be selected when a property owner has completed the required lead hazard control work and passed a clearance examination. The date of the clearance examination must be entered on the Clearance Report tab and the clearance report uploaded into HHLPSS. These actions enable the date of the Notice of Compliance to be entered. This closure reason will automatically populate when the Notice of Compliance is entered on the Investigation Outcome tab (see page 22).

Notice of Non-Compliance/Order to Vacate: This closure reason will automatically populate when the Notice of Non-Compliance/Order to Vacate is entered on the Investigation Outcome tab (see page 22).

Non-Property Source Identified: If an investigation of the property does not uncover a property-related source but a non-property source is identified, the investigation may be closed for this reason. Examples include the child chewing on furniture painted with lead-based paint, lead dust in a residence with no lead-based paint that is attributable to a family member's occupation or hobby, or the detection of lead in traditional cosmetics (i.e., surma, kohl) used on the child.

No Source Identified: If a public health lead investigation finds no hazards at a property and no non-property sources are discovered, the investigation can be closed for this reason. An investigation can only be closed for "No Source Identified" if targeted environmental samples are collected and find no hazards (for eligible properties) or a risk assessment has been conducted and no hazards are identified.

No Contact: When all qualifying unsuccessful contact attempts (see Public Health Lead Investigation Manual) have been exhausted with clear supporting documentation in HHLPSS, this closure reason can be used. This option should be used on a limited basis. If contact with the parent/guardian is documented in either the Clinical or Environmental modules of HHLPSS or documentation of the contact process is not demonstrated, the case will not be closed for no contact.

Other Address Probable Source: This option should be used when the child's lead poisoning is believed to be caused by an alternate address. Typically, it will be used when a child lives in a home built after 1978 but routinely spends time in an older residence. If the child resided in the property listed on the referral less than six weeks an investigation must be done at the previous residence to select this closure reason. If it is reasonable to suspect the current residence as a contributing source this option should not be used, but an assessment done of the child's residence as well as at the alternate residence.

Declining BLL: This option is used in situations where an investigation was done at the child’s previous address and the child subsequently moves to a new address. If the child’s elevated blood lead level continuously drops after the child has moved, an investigation of the new residence is not required. However, if the previous address was not investigated and the first elevated blood lead test was done within six weeks of moving into the new residence, the previous residence should be investigated as a contributing source. The address for the previous investigation must be provided for this closure reason to be considered for approval.

Referral for Legal Action: This option should be selected when the parent or guardian has refused entry or jurisdiction has been established to conduct the lead investigation but access to the property has been denied by the property owner. This closure reason will only be approved if the delegated authority has demonstrated full compliance with all steps of the algorithm.

Prior PHLI with Notice of Compliance: When a child remains in an address that was investigated, lead hazards found, and a Notice of Compliance issued, but the child continues to have an elevated blood lead level, the investigation may be closed for this reason. However, if the child’s elevated blood lead level persists or increases after two consecutive blood lead tests, the address may need to be investigated again to identify any previously undiscovered sources and determine if new lead hazards have been created or previously identified lead hazards were not adequately controlled.

Investigation Opened in Error: This option is used only for cases where the address was not a valid site for an investigation, such as an address reported incorrectly by the physician, a capillary test reported as a venous test, or an investigation opened due to a HHPSS bug. Please report any investigations you believe were opened in error to ODH staff through a closure request.

Order Rescinded: This closure option is rarely used, and applies only in specific, limited situations. If you believe that you need to rescind a lead order, please contact ODH.

Environmental Letters Generation

HHLPSS can generate most documents and letters that you might need to send for environmental investigation follow-up. These are included in the *Environmental Letters* page of the **Environmental** module. These include letters to property owners, guardians, case managers, HealthChek coordinators, and healthcare providers; the public health lead investigation report; risk assessment report; lead hazard control order; and many others.

Ohio
Department of Health
HHLPSS

Home Clinical **Environmental** Administrative Reports

Environmental Letters

Investigation: 49363 (referred 7/24/2013) ▼

Initial Contact Letters

- Guardian Initial Contact Letter
- Guardian Initial Contact Letter 2nd Notice
- Access Letter - Property Owner
- Access Letter - Property Owner 2nd Notice

Post-Inspection Documents

- PHLI Report
- Lead Inspection/Risk Assessment Report
- Environmental Lead Report
- Lead Hazard Control Order

Enforcement/Follow-up Documents

- Extension Request Form
- Extension Request Letter
- Notice of Extension
- Notice of Compliance
- Ongoing Monitoring and Maintenance Plan
- Notice of Noncompliance/Order to Vacate
- Transfer of Ownership Letter
- Transfer of Ownership Letter with 2nd Order

Follow-up Letters

- 3-Day Letter
- Follow-up Letter to Case Manager
- Follow-up Letter to Parent/Guardian
- Follow-up Letter to Provider
- Follow-up Letter to Healthchek

Internal Memos - ODH Only

- Lead Hazard Control Order Memo
- Notice of Compliance Memo
- Notice of Extension Memo
- Notice of Noncompliance Memo

Log Out



Templates can be generated for an investigation by choosing the investigation from the drop-down box on the *Environmental Letters* page for the address. The referral date is included to help you distinguish which investigation is the correct one. By default, the most recently opened investigation will be selected.

Environmental Letters

Investigation: 52093 (referred 11/6/2014) ▼

These templates can reduce the amount of time spent editing and proofreading documents. However, they can only be useful if the information in HHL PSS that they are using is correct. There are a variety of fields you need to check in HHL PSS to make sure that documents are generated correctly.

NOTE: If information required for the environmental letters is not entered into HHL PSS, text will be missing from the generated documents. If it is entered incorrectly, documents may be sent to the wrong address or person. It is crucial that you enter the required information completely and correctly.

All documents will populate information about the investigator. Some is entered by ODH staff when your account is created. You can enter other information in your *Account Information* page of the **Home** module.

Account Information

Username:
Title:

Organization:

Program:

Address Line 2

Phone: Ext:

Cell:

Fax:

Email

Risk Assessor License:

Expiration Date:

Sanitarian Status:

Sanitarian ID:

Expiration Date:

Receive daily email notification of alerts?

All letters have a 1.5 inch top margin to accommodate your letterhead.

After sending one of these documents, go to the **Environmental** module *Events* page and enter the corresponding event (see page 23).

Documents are divided into different categories (Initial contact letters, Post-Inspection Documents, and Enforcement/Follow-up Documents):

INITIAL CONTACT LETTERS

Initial Contact Letters

Guardian Initial Contact Letter

Guardian Initial Contact Letter 2nd Notice

Access Letter - Property Owner

Access Letter - Property Owner 2nd Notice

To Parent or Guardian

1. Guardian Initial Contact Letter
2. Guardian Initial Contact Letter 2nd Notice

These letters are sent to the parent or guardian if the investigator is unable to reach them by phone to schedule an investigation. Required information includes:

Mailing address: If you receive a different mailing address than the one on record, you will need to add the new address associated to the child and set it as the mailing address and, if appropriate, current address.

Primary parent or guardian name: If no associated person is checked as the primary guardian the letter will be addressed generically to "Parent or Guardian of".

To Property Owner

1. Access Letter - Property Owner
2. Access Letter - Property Owner 2nd Notice

These letters are sent to the property owner to attempt to gain access to the property after the family of the lead-poisoned child has moved out. Required information includes:

Property Owner: Enter the property owner into HHPSS and check them as the current owner. If property ownership changes, edit the old property owner to note they are no longer the current owner, and put in the date that the property switched ownership. Enter the new owner as a current owner with a start date of the day that the property switched ownership.

POST-INSPECTION DOCUMENTS



PHLI Report

This is the Public Health Lead Investigation Report. The PHLI report only supports merging data for one investigated address. If a second address is investigated on behalf of the child, the investigator will need to edit the document to include that information. Required information includes:

Mailing address: If you receive a different mailing address than the one on record, you will need to add the new address and set it as the mailing address and, if appropriate, current address.

Primary parent or guardian name: If no associated person is checked as the primary guardian the letter will be addressed generically to “Parent or Guardian of”. This would be inappropriate at this time, since the investigator likely personally interviewed the guardian, as reported in the PHLI.

Primary parent or guardian relationship: This is the relationship of the guardian to the child (mother, grandfather, aunt, etc.)

Lead Inspection/Risk Assessment Report

The lead inspection/risk assessment report is the most complicated report of the environmental letters. Upon generating this template, the investigator will need to edit it to add necessary information and remove unnecessary sections (for example, the template contains a section and appendix for paint chip testing, which is rarely done). Required information includes:

Construction date: This is added in the *Address Info* page.

Mailing address: If you receive a different mailing address than the one on record, you will need to add the new address and set it as the mailing address and, if appropriate, current address.

Primary parent or guardian name: If no associated person is checked as the primary guardian the letter will be addressed generically to “Parent or Guardian of”. This would be inappropriate at this time, since the investigator likely personally interviewed the guardian, as reported in the PHLI report.

Property owner: Enter the property owner into HHLPSS and check them as the current owner. If property ownership changes, edit the old property owner to note they are no longer the current owner, and put in the date that the property switched ownership. Enter the new owner as a current owner with a start date of the day that the property switched ownership.

Environmental investigation date: The date of the initial site visit for the environmental investigation.

Environmental Lead Report

This template is very similar to the lead inspection/risk assessment report. It is an abbreviated version used at properties where a screen determines no risk assessment is necessary. It requires the same information as the lead inspection/risk assessment report. However, since there is no risk assessment entered into HHLPSS, the date of the target screening will not be filled in automatically. **This also applies to all other documents generated for a target screen. In each case the user will need to enter the inspection date manually.**

Lead Hazard Control Order

The lead hazard control order requires the same information as the risk assessment.

ENFORCEMENT/FOLLOW-UP DOCUMENTS



The documents include all follow-up documents needed after the lead hazard control order is issued.

Extension Request Form

The Extension Request Form is mailed to property owners who are requesting a 90-day extension to their lead hazard control order deadline. It requires that all information related to the lead hazard control order and existing extensions, including all deadlines, be entered in the Investigation Outcome tab of the *Investigation Summary* page in the **Environmental** module.

Extension Request Letter

The Extension Request Letter accompanies the Extension Request Form. It requires the same information as the Extension Request Form.

Notice of Extension

The Notice of Extension is mailed to property owners who have been granted an extension to their lead hazard control order deadline. It requires all fields required by the Extension Request Form, plus the information on the newly granted extension.

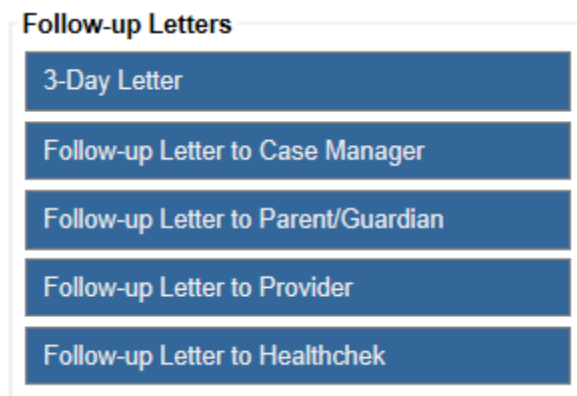
Notice of Compliance

The Notice of Compliance is issued once lead hazards have been addressed and a clearance examination has been passed. In addition to previously required information, the clearance examination must be entered on the Clearance Inspection tab of the *Investigation Summary* page.

Notice of Non-Compliance/Order to Vacate

A Notice of Non-Compliance/Order to Vacate is issued when a property owner does not address the lead hazards at a property within the allotted time. It requires the same information as the Lead Hazard Control Order.

FOLLOW-UP LETTERS



3-Day Letter

The investigator is required to send this letter within three days of the environmental investigation being opened. Required information includes:

Property Owner: Enter the property owner into HHLPSS and check them as the current owner. If property ownership changes, edit the old property owner to note that they are no longer the current owner, and enter the date that the property switched ownership. Enter the new owner as a current owner with a start date of the day that the property switched ownership.

Follow-up Letter to Case Manager

This letter is sent to the assigned Case Manager if the guardian elects to have the report sent to them.

Follow-up Letter to Parent/Guardian

This letter is sent to the parent/guardian along with the report. The parent's/guardian's name must be entered into HHLPSS and the correct mailing address specified.

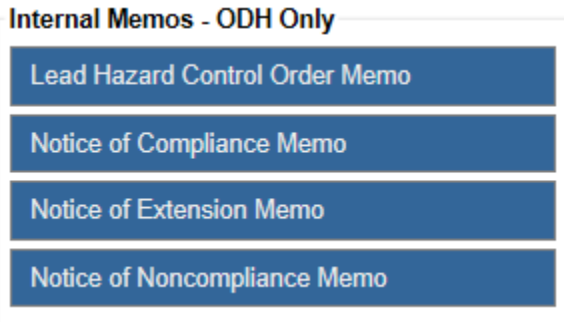
Follow-up Letter to Provider

This letter is sent to the child's healthcare provider if the guardian elects to have the report sent to them. The child's provider needs to be added and marked as the current provider.

Follow-up Letter to Healthcek

This letter is sent to the HealthChek Coordinator if the guardian elects to have the report sent to them. Since HealthChek coordinator contact information is not stored in HHPSS, users will need to fill out this information in the letter that is generated.

MEMOS



These memos are for internal use by ODH personnel.

Lead Hazard Control Order Memo

Generate this memo for routing with the Lead Hazard Control Order.

Notice of Compliance Memo

Generate this memo for routing with the Notice of Compliance.

Notice of Extension Memo

Generate this memo for routing with the Notice of Extension.

Notice of Noncompliance Memo

Generate this memo for routing with the Notice of Non-Compliance/Order to Vacate.

Case Management Entry

RECORDING PHLI COMBINED QUESTIONNAIRES

Complete the Combined Questionnaire

Go to the patient for whom the questionnaire was completed using the *Find Patient* tool in the **Clinical** module (see page 3) or by navigating to the patient record through a clinical alert. If the patient's associated address is open in the **Environmental** module, users can navigate to the patient through the "Go to Patient Info" link on the *Associated Patients* page.

Go to the *PHLI Combined Questionnaire* page listed in the left-hand pane and click the Case ID link for the child's case for which the questionnaire was completed (the date opened and assigned case manager are listed) to open the questionnaire.

(GREENSLEEVES, GERALD) DOB: 8/20/2012 ID#: 3414076

Case ID	Date Opened	Status	Date Closed	Assigned Case Manager
69288	8/11/2015	OPEN		AMY HAYES
3414076	8/20/2014	CLOSED	4/1/2015	ROBIN CRANE

PHLI Combined Questionnaire for Case ID :69288

Demographics | Potential Exposure | Environmental Questions | Exposure | Medical/Development Information

Lead Notification

Detail | Sibings Less Than 6 Yrs | Residential Addresses | Guardians

Date of Questionnaire:

Last Name: GREENSLEEVES

First Name: GERALD

Middle Name:

DOB: 8/20/2012

Sex:

The questionnaire is different from most other pages in HHLPPS in that it has a set of tabs which each contain sub-tabs. This form should be completed and saved a single sub-tab at a time using the blue save buttons within each sub-tab. There are six primary tabs for the PHLI Combined Questionnaire: Demographics, Potential Exposure, Environmental Questions, Exposure, Medical/Developmental Information, and Lead Notification. The Lead Notification tab is completed by the investigator, but all other tabs can be completed by the case manager or the investigator. Beneath the primary tabs are a variety of sub-tabs, dependent on which primary tab is selected.

To match the order of the paper version of the PHLI Combined Questionnaire (HEA 7869), users should complete the sub-tabs for each primary tab moving from left to right. For example, the user should start within Demographics, on the Detail sub-tab.

Demographics Potential Exposure Environmental Questions Exposure Medical/Development Information

Lead Notification

Detail Siblings Less Than 6 Yrs Residential Addresses Guardians

Date of Questionnaire:

Last Name: GREENSLEEVES

First Name: GERALD

Middle Name:

DOB: 8/20/2012

Sex:

After completing and saving the fields on the Detail sub-tab, the user should complete and save the Siblings Less Than Six, Residential Addresses, and Guardians sub-tabs prior to moving to the Potential Exposure primary tab. The user will then proceed to complete the Environmental Questions, Exposure, Medical/Development Information, and the Lead Notification primary tabs in this same manner. When completing the Environmental Questions tab, the user should select the check boxes for all addresses that are considered potential sites of exposure.

Once all questionnaire fields are complete, a user with an investigator role needs to access the questionnaire and click the blue “Mark Questionnaire as Complete” button on the Demographics > Detail sub-tab. This button will only appear to users who are investigators, and only if a date has been entered for the questionnaire. Once clicked, the PHLI Combined Questionnaire Completed event will be added to the child’s *Events* page. The investigator will not be alerted that a questionnaire needs to be approved, but will have to coordinate with the case manager or other staff that are inputting questionnaire answers to ensure that questionnaires are marked as complete.

Medicaid #:

Lived Outside US in Last Year: Yes No

Country:

Date moved to U.S.

Save Detail

Mark Questionnaire Complete

NOTE: In order to ensure correct Medicaid reimbursement for questionnaires on Medicaid enrolled children with 5-9 cases, these steps must be completed:

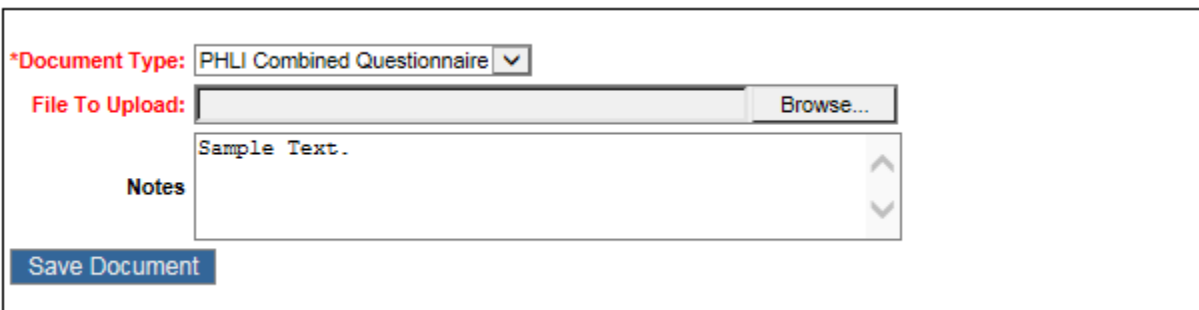
1. Verify that “Date of Questionnaire” is entered on the Demographics > Detail sub-tab.
2. In the Demographics > Residential Addresses sub-tab, select the hyperlink in the “Edit” column for the primary address for which the questionnaire was completed (this should

be the address in the user’s jurisdiction). The address details will open below the addresses list. Confirm that the “Use for Medicaid Reimbursement” box is checked.

3. A user with the investigator role must open the questionnaire and click the “Mark Questionnaire Complete” button on the Demographics > Detail sub-tab to generate the reimbursable clinical event needed for the Medicaid Billing report.
4. Finally, a signed copy of the completed questionnaire must be uploaded to HHL PSS.

Upload the Scanned Questionnaire

Go to the *Documents* page listed in the left-hand pane of the **Clinical** module and choose the hyperlink for the case the questionnaire applies to. Click the “New Document” button and select “PHLI Combined Questionnaire” from the document type drop-down. Browse for and select the appropriate signed copy of the PHLI Combined Questionnaire to upload. Add notes, if appropriate, and select “Save Document.”



*Document Type: PHLI Combined Questionnaire

File To Upload: [Browse...]

Notes: Sample Text.

Save Document

If the questionnaire was completed for a 10+ case, the PHLI report must also be uploaded to HHL PSS in order to be reimbursed for the public health lead investigation by Medicaid. Directions for how to upload this document can be found on page 18.

RECORDING CASE ACTIVITY

Record the Clinical Event

Case activity as part of the case management follow-up on a lead-poisoned child is documented on the *Events* page within the **Clinical** module.

To document case management activities (contacting the parent/guardian or physician, performing a home visit, sending educational materials, making a referral, etc.), use the following steps:

Locate the child using the patient search (*Find Patient*, see page 3) or by navigating to the patient record through a clinical alert. Click the *Events* page in the left-hand pane. Select “New” in the bottom left corner of the screen to add an event. Specify the appropriate event type from the first drop-down as well as type of letter, contact attempt, phone call, or referral, where appropriate. The responsible party and date completed fields will populate with your name and the current date, but both fields can be changed if necessary. Add any additional notes and click “Save” in the bottom left corner of the screen to save to HHL PSS.

Recording Case Management Contact Attempts

If you are making an initial contact attempt after receiving a clinical referral, these contact attempts regardless of method (calls, letters, home visits, etc.) must be entered as the event type “Contact Attempt.” After choosing “Contact Attempt” from the drop-down for Event Type, select the appropriate contact attempt type. The Clinical Referral Status Report in the **Reports** module will display these contact attempts in addition to documented combined questionnaires so that clinical case follow-up can be tracked.

NOTE: Any contact attempts entered into HHL PSS with an event type other than “Contact Attempt” will not register as valid contact attempts on the Clinical Referral Status Report, and it will appear that no follow-up has been done on the clinical case.

RECORDING OTHER CASE MANAGEMENT DOCUMENTS

Upload the Documents

In addition to the PHLI Combined Questionnaire, other case management documents can be uploaded to HHL PSS using the steps below.

Go to the *Documents* page listed in the left-hand pane of the **Clinical** module and choose the hyperlink for the case the questionnaire applies to. Click the “New Document” button and select the appropriate document type from the document type drop-down. Browse for and select the appropriate file to upload. Add notes, if appropriate, and select “Save Document.”

NOTE: If the document is intended to be signed, the copy that is uploaded and saved to HHL PSS should be the signed copy. Any signed document should have a .PDF extension. If an error message appears upon upload attempt, the file size may be too large. If this is the case, it may be necessary to reduce the resolution of the file.

RECORDING ENVIRONMENTAL VISUAL ASSESSMENTS

Complete the Environmental Visual Assessment

The Environmental Visual Assessment (EVA) form contains information specific to the property, and as such this information is recorded within the **Environmental** module.

Go to the address in HHL PSS by using the *Find Address* tool in the **Environmental** module (see page 7) and selecting the address ID in the search results, or if currently on the patient’s profile, visiting the *Patient Address* page in the left-hand pane and clicking on the address’s “Go To Environmental” link. Once the address displays in the top right corner of the window, go to the *EVA* page listed in the left-hand pane.

Select “New” in the bottom left corner of the screen to open a fillable EVA form. The form has ten tabs: one for property details, one for property owner information, seven for the key healthy homes principles, and a summary tab. Fields on all tabs should be completed. When entering the number and

ages of children in the home, selecting the number of children in the home from the drop-down will refresh the form with the appropriate number of fields needed to document ages. Some fields in the form appear as read-only since the information is recorded elsewhere in HHLPS (property information and year built, property owner). If these fields still need to be specified in HHLPS, the user can navigate to the *Address Info* or *Property Owner Information* pages to add the information and save.

Once all fields are complete in the EVA, select “Save” in the bottom left corner of the screen. If either the “Date of Visual Inspection” or “Visual Inspections Conducted By” fields is blank, then the user will not be able to save. Once saved, the created form will be listed at the top of the EVA page. Users can select the “Print” link listed in the Actions column to print the completed EVA form.

The screenshot displays the Ohio HHLPS Visual Assessment Tool interface. At the top left is the Ohio Department of Health HHLPS logo. A navigation bar includes 'Home', 'Clinical', 'Environmental', 'Administrative', and 'Reports'. A left-hand menu lists various functions: Find Address, Address Info, Associated Patients, Associated Tests, Environmental Letters, EVA (selected), Notes, Investigation Summary, Property Owner Information, and Renovation History. At the bottom of this menu are 'New', 'Save', and 'Log Out' buttons. The main content area is titled 'Visual Assessment Tool' and shows 'No EVAs' in a search box. Below this, it indicates 'EVA ID: NEW' and provides tabs for 'Property Details', 'Property Owner Information', 'Keep it Well Ventilated', 'Keep it Pest-Free', 'Keep it Dry', 'Keep it Contaminant Free', 'Keep it Clean', 'Keep it Safe', 'Keep it Well Maintained', and 'Summary'. The form fields include: Resident/Provider Name, Telephone, Property Address, City, State (OH), Zip, Type of Structure, Approximate Year Built, Number of Children in Home and Ages (a dropdown menu showing '0'), Pets/Animals Indoors (checkboxes for Dog, Cat, Bird, Other), Specific health concerns (checkboxes for Child and Adult), and Visual Assessment Conducted By.

Managing Alerts

Users are directed to actionable items in the HHLPSS system through alerts that are generated automatically based on new tests entering the system, or based on changes in a case/investigation due to documentation by a user.

The Alerts tab on the *Home* page of the **Home** module is typically the first thing a user will see upon logging into HHLPSS. Users will see a list of all alerts that they have not marked as read. A user logging into the system should always review the alerts on this screen, as well as check additional pages of alerts if there are too many alerts to fit on a single page.

Users who do not frequently receive alerts may elect to receive an email notifying them when they have received an alert. This option can be set in your *Account Information* page within the **Home** module.

Ohio
Department of Health
HHLPSS

Home Clinical Environmental Administrative Reports

Home
Account Information
Alert History Search

Account Information

Username:
Title:

Organization:
Program:

Address Line 2

Phone: Ext:

Cell:

Fax:

Email

Risk Assessor License:
Expiration Date:

Sanitarian Status:
Sanitarian ID:
Expiration Date:

Receive daily email notification of alerts?

Each row on the [Alerts](#) tab represents a single alert. There are seven columns in the table of alerts:

- View Message
- Description
- Date Received
- Transferred from
- Check All
- Transfer To
- High Priority

The “Description” field details why you as a user are being alerted and the “Date Received” field displays the date/time that the message first displayed in your list of alerts. Each alert has been designed so that clicking the View Message hyperlink will navigate the user to the appropriate screen in HHLPSS to further research or take action upon a patient, blood lead test, patient’s case, property, or investigation. This is typically evidenced by the patient name and DOB, or the property address displaying in the top right corner of the newly opened page.

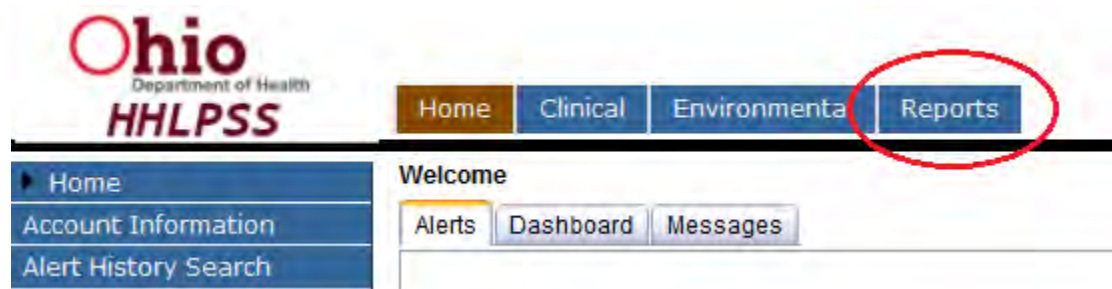
The “Transferred From” column will only contain information if a user has transferred a copy of his/her alert to you. In this case, the name of the user making the transfer will display here. Similarly, if you wish to transfer a carbon copy of your alert to another user to inform them of the alert you have received, you can click the “Transfer To” button for that alert. This will send a copy of the alert you have received to the user that you specify. This will not alter the case or investigation the alert may refer to. As such, you will need to follow the appropriate protocol if you are seeking to reassign a case or investigation (see pages 11 and 11).

Once an alert has been read and acted upon, it can be hidden from the alerts screen by checking its box in the “Check All” column and clicking “Mark Selected as Read.” If all alerts on a page of alerts have been acted upon, the user can click the “Check All” header to check all check boxes for alerts on the current page. By then clicking “Mark Selected as Read,” any alert which has been checked will be removed from the [Alerts](#) tab. If multiple users have received the same alert, marking your copy of an alert as “read” will NOT affect any other user’s copy of their alert.

If a user wishes to view an alert that has been hidden from their [Alerts](#) tab, he or she can choose *Alert History Search* from the menu in the left-hand pane to search through all alerts he or she has received.

Generating Reports in HHLPSS

The **Reports** module is found by clicking “Reports” from the listing of modules at the top of all HHLPSS pages.



Not all users will see the **Reports** module, since access to reports is limited according to the role of the user in HHLPSS. For users who do have access to this module, not all reports may be available. If you believe you need access to a report that does not appear on your Reports module, please contact the Ohio Department of Health.

Information about the reports present in HHLPSS and about how the specified parameters will limit each report can be found in the individual report descriptions. These are displayed in the user interface of HHLPSS on the appropriate report page, as well as below.

Most reports will generate a .PDF file or Excel spreadsheet, which can be opened immediately or saved to the user’s desktop or other secure local drive location. Some reports will generate a zipped folder containing several files, which should be saved immediately to the user’s desktop or other secure local drive location.

ENVIRONMENTAL INVESTIGATIONS

Environmental Investigation Referrals

This report retrieves a concatenated PDF document including the environmental investigation referral cover sheet and the associated complete child report for each investigation opening in the specified date range.

Environmental Investigation Status

This report retrieves the current status of environmental investigations opened in HHLPSS. Dates entered specify the date range for which environmental investigations were opened in HHLPSS. The jurisdiction drop-down filters the report by the jurisdiction of the property at which the investigation was opened.

Environmental Investigation Referrals

This report retrieves a concatenated PDF document including the environmental investigation referral cover sheet and the associated complete child report for each investigation opening in the specified date range.

CASE MANAGEMENT

5-9 Case Management

5-9 Initial Contact: This report retrieves the initial contact letters to the guardians of patients with newly opened 5-9 cases. The report is inclusive to all clinical cases created in the specified jurisdiction(s) since the previous time the report was run. The report retrieves a zipped folder containing two items. The first is .doc file that is a concatenated list of the letters, and the second is a .csv file with the fields necessary to generate mailing labels (via mail merge). Upon generating the letters, HHLPSS automatically generates the "5-9 Initial Contact" HHLPSS event for all patients included. The event date is set as the date that the report is run. **Attempting to re-run the report will exclude any patient who has already been marked with the clinical event for that report, so it is important to save/print the letters and reports upon generation.** This report is restricted to children <72 months of age.

5-9 Final Reports: This report retrieves the final reports of 5-9 cases to be sent to the guardians of patients who have been provided the PHLI combined questionnaire service. The report is inclusive to all 5-9 cases with PHLI combined questionnaires documented in the specified jurisdiction(s) since the previous time the report was run. The report retrieves a zipped folder containing two items. The first is .doc file that is a concatenated list of the letters, and the second is a .csv file with the fields necessary to generate mailing labels (via mail merge). Upon generating the letters, HHLPSS automatically generates the "Final 5-9 Report" HHLPSS event for all patients included. The event date is set as the date that the report is run. **Attempting to re-run the report will exclude any patient who has already been marked with the clinical event for that report, so it is important to save/print the letters and reports upon generation.** This report is restricted to children <72 months of age.

Confirmatory Letter

This report retrieves a concatenated list of letters to individuals who do not have open clinical cases, but who have received an elevated (5+) Blood Lead Level (BLL) that needs to be confirmed. This report retrieves a zipped folder containing two items. The first is .doc file that is a concatenated list of the chosen letters/reports, and the second is a .csv file with the fields necessary to generate mailing labels

(via mail merge). Upon generating the letters, HHLPSS automatically generates the “Letter-Confirmatory” event for all patients included. The event date is set as the date that the report is run. **Attempting to re-run the report for the same date range will exclude any patient who has already been marked with the clinical event for that report, so it is important to save/print the letters and reports upon generation.** This report is restricted to children <72 months of age.

Due Letters

In the *Due Letters* page from the left-hand pane is the “Due Letter - Guardian” report. This report retrieves batch letters to individuals who are due for additional blood lead testing by the specified date for the chosen jurisdiction. This report retrieves a zipped folder containing two items. The first is .doc file that is a concatenated list of the chosen letters/reports, and the second is a .csv file with the fields necessary to generate mailing labels (via mail merge). Upon generating the letters, HHLPSS automatically generates the “Due Letter-Guardian” event for all patients included. The event date is set as the date that the report is run. **Attempting to re-run the report for the same date range will exclude any patient who has already been marked with the clinical event for that report, so it is important to save/print the letters and reports upon generation.** This report is restricted to children <72 months of age.

Initial 10+ Case Management Letter

This report retrieves the initial case management letters to the guardians of patients with newly opened 10+ cases. The report is inclusive to all clinical cases created in the specified jurisdiction(s) since the previous time the report was run. The report retrieves a zipped folder containing two items. The first is .doc file that is a concatenated list of the letters, and the second is a .csv file with the fields necessary to generate mailing labels (via mail merge). Upon generating the letters, HHLPSS automatically generates the “Initial 10+ Letter” HHLPSS event for all patients included. The event date is set as the date that the report is run. **Attempting to re-run the report will exclude any patient who has already been marked with the clinical event for that report, so it is important to save/print the letters and reports upon generation.** This report is restricted to children <72 months of age.

Clinical Referral Status Report

This report retrieves the current status of clinical cases opened in HHLPSS. These outcomes include current case status (open/closed), whether a questionnaire was completed, and number of contact attempts if no questionnaire is documented. The report returns all cases opened in HHLPSS within the specified date range. The jurisdiction drop-down filters the report by the jurisdiction of the property reported with the case-creating blood lead test. The user running the report must also specify the case type of interest (5-9 or 10+).

TESTING

10+ Test Report

This report retrieves all blood lead tests $\geq 10 \mu\text{g/dL}$ that were imported/created in HHL PSS during the specified date range. This report is not restricted by the sample draw date, but rather by the date that the test entered HHL PSS. Both capillary and venous draws, confirmed and unconfirmed, will display in this report. The report will only include patients who reside in the assigned jurisdictions of the user running the report.

5-9 Test Report

This report retrieves all blood lead tests $\geq 5 \mu\text{g/dL}$ and $< 10 \mu\text{g/dL}$ that were imported/created in HHL PSS during the specified date range. This report is not restricted by the sample draw date, but rather by the date that the test entered HHL PSS. Both capillary and venous draws, confirmed and unconfirmed, will display in this report. The report will only include patients who reside in the assigned jurisdictions of the user running the report.