

OHIO DEPARTMENT OF HEALTH

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Healthy Homes and Lead Poisoning Prevention Program

# Healthy Housing and Lead Poisoning Surveillance System User Manual

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# Healthy Housing and Lead Poisoning Surveillance System User Manual

Ohio Department of Health  
Healthy Homes and Lead Poisoning Prevention Program  
246 North High Street  
Columbus, Ohio 43215  
1-877-LEADSAFE  
1-877-532-3723

Revised 11/5/2015

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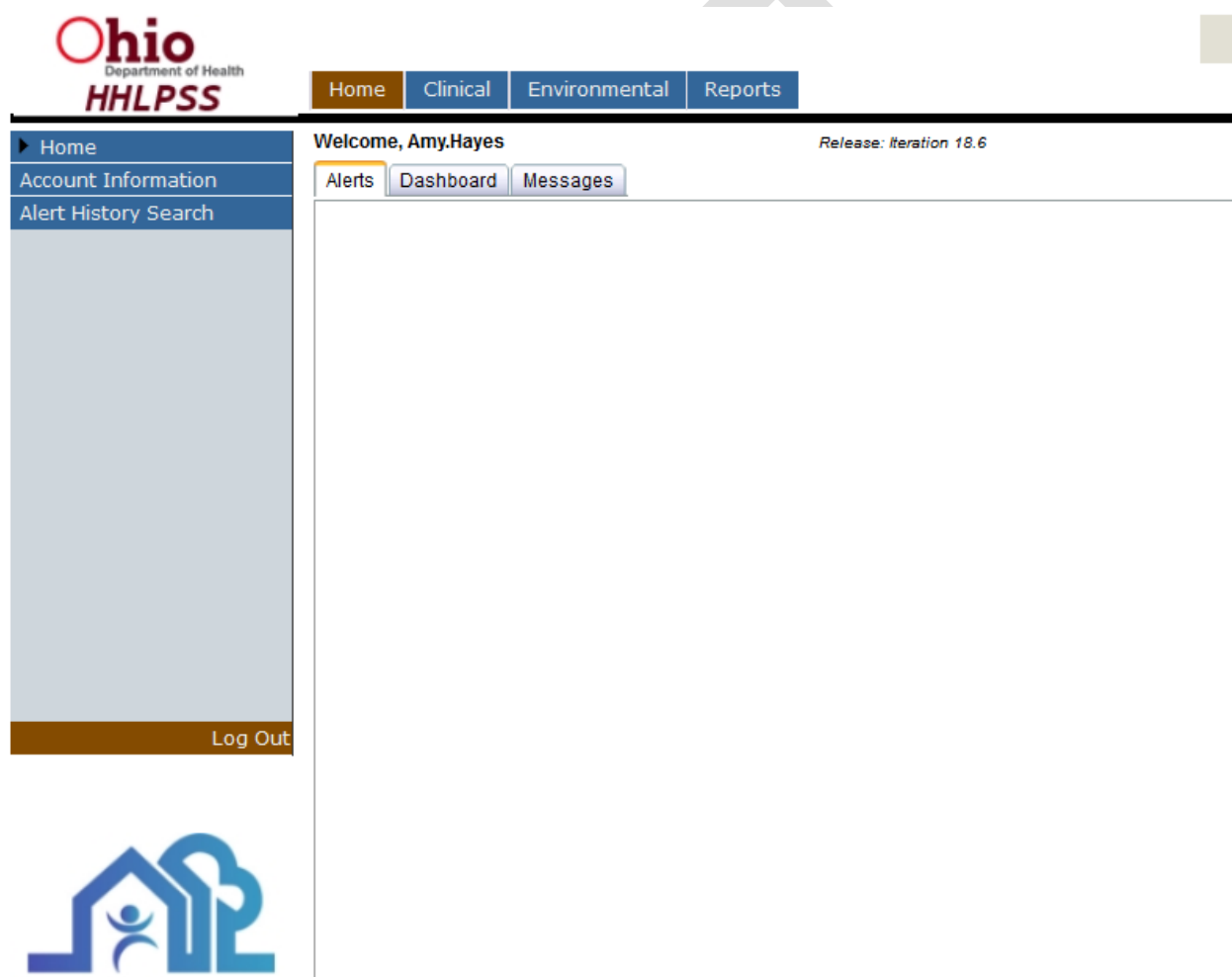
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## An Introduction to HHPSS

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



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

Every user will have a Home module, which will be the first screen you see upon logging into HHPSS. 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 HHPSS 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, the Clinical and Environmental modules. These two modules drive the key functions of HHPSS, tracking clinical cases and environmental investigations. The final Reports module is used to run pre-generated reports.

**NOTE:** While it is tempting to open HHPSS in two windows or tabs to navigate back and forth between modules or pages, HHPSS 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 per deciliter ( $\mu\text{g}/\text{dL}$ ); and
3. Not be analyzed on a LeadCare II instrument.

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 by Ohio Department of Health (ODH) staff or one of the following three criteria are met:

1. The child has two confirmed (venous draw, not analyzed on a LeadCare II) blood lead 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 done for 6 months.

All clinical case follow-up should be entered on the Clinical module.

### Patient Search

To find a patient, click the Clinical module to select it 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 for this only and 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 dropdown.

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

The screenshot shows the Ohio Department of Health HHLPPS Clinical module. The top navigation bar has tabs for Home, Clinical (selected), Environmental, Administrative, and Reports. The left-hand pane lists various modules, with 'Find Patient' selected. The 'Find Patient' form is displayed, featuring multiple search criteria fields and a prominent 'Advanced Search' button. A 'Search Results' box is located at the bottom of the form area.

**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 43).

## Clinical Module Pages

Once you have located and selected a patient you can use the various links in the clinical module listed in the left-hand pane to retrieve various 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	Last Name: GREENSLEEVES First Name: AGATHA Middle Name: Suffix:				Print Complete Patient Report	
Patient Info	DOB: 08/20/2013 Current Age: 1 Yrs. 11 Mos. Sex: FEMALE Twin: <input type="checkbox"/>				Case Type (Case Status): STATE CASE (CLOSED)	
Patient Address	Race(s): WHITE				ABLES ID: <input type="text"/>	
ABLES	Ethnicity: Non-Hispanic Patient Phone: Follow-up received: <input type="checkbox"/>				Medical Rec: <input type="text"/>	
Associated Persons	Birth Country: State/Province: Language: Interview in English? <input type="checkbox"/>				Highest Confirmed BLL: 10.00	
Blood Lead Tests	Lived outside US in last year? <input type="checkbox"/> Country: Date Moved to U.S.:				# Reports: 4	
Cases	Current Address				SSN: <input type="text"/>	
Events	Number: 2 Direction: W Street: MAIN Type: Street Apt. No.:				Medicaid ID: <input type="text"/>	
Jurisdictions	City: COLUMBUS County: Franklin State: OH Zip: 43215				Next Pb Date: 04/12/2015	
Documents	Census Tract: 3904900400 Parcel No.: District:					
Notes	Guardian(s)					
Other Lab Test(s)	ID: 3427690 First Name: THIRD Last Name: RANDOM DOB: Relationship: MOTHER					
Patient AKAS						
PHLI Combined Questionnaire						
Provider History						
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 addresses 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							

Edit	Go To Environmental	Most Recent Activity	Delete	Status	Currently Resides At	Mailing Address
<a href="#">1721384</a>	<a href="#">86 SPRING ST</a>		<input checked="" type="checkbox"/>	OPEN	False	False
<a href="#">2464762</a>	<a href="#">246 N HIGH ST</a>		<input checked="" type="checkbox"/>	NO CASE	False	False

1

Address ID: 1721384

Number: 86

Pre Direction:

Street: Spring

Type: ST

Post Direction:

Apt. No.:

PO Box:

\*City: XENIA

\*State: OH

Verify

Save



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 combined questionnaire (see page 35).

**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 done for the child. To open the details for a test, click on the link in the left-most column. 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 on Draw Date	Delete
<a href="#">3333277</a>	3/17/2015	5.50	VENOUS	2 W MAIN ST	X
<a href="#">3333278</a>	3/16/2015	5.50	VENOUS	2 W MAIN ST	X
<a href="#">3333040</a>	3/15/2015	10.00	VENOUS	2 W MAIN ST	X
<a href="#">3319941</a>	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:

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) Choose Clear

2360 HOSPITAL DR , ALIQUIPPA PA 15001-2120 (724) 378-0830

Analyzing Laboratory: NATIONWIDE CHILDREN'S HOSPITAL (C08) Choose Clear

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.

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
61275	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

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).

**Documents:** Any documents for clinical case follow-up can be uploaded here, including copies of letters and the PHLI report. For more detail see page 38.

**Events:** The **Events** page will track clinical case follow up attempts, letters sent, questionnaire completion, and other events. For more detail see page 37.

**PHLI Combined Questionnaire:** The combined questionnaire is completed for both 5-9 and 10+ clinical cases. For detail on entering the questionnaire (including how to properly upload the signed questionnaire) see section starting on page 35.

## ENVIRONMENTAL MODULE

### Overview

If a child has a confirmed elevated blood lead level of 10 µg/dL or greater, simultaneously with the opening of the 10+ case, there will be an environmental investigation opened at the address reported with the child's blood lead test. This 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.

Environmental investigations will be closed automatically if it is documented in HHL PSS that a Lead Hazard Control Order is issued and subsequently lifted by a Notice of Compliance or Notice of Noncompliance/Order to Vacate. Closure for other reasons must be approved by ODH staff.

All environmental investigation follow-up should be entered on the Environmental module. Guidance on how to do this is found in Environmental Investigation HHL PSS 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 this only, otherwise fill in the street address information and click 'Find' to run the search. All text fields will return partial matches in case you are unsure of some part of the address. The search will return only addresses within your jurisdiction, but can 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 dropdown.

Ohio Department of Health  
HHL PSS

Home Clinical Environmental Administrative Reports

Find Address

Address ID

Street #: Dir Prefix: Street Name: Street Type: Dir Suffix: Apt/ Unit PO Box

City: State: Zip: County: Investigator:

Find Clear

**NOTE:** If you are looking for a listing of all investigations assigned to a particular 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 43). Investigators may 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:** The **Address Info** 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 **Environmental Letters** (see page 27). There is a Notes field on this page, which should be used for information regarding the property, not a specific investigation.

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

### Address Details

Number: Prefix: Street Name: Street Type: Suffix: Apt/Unit PO Box  
 246 N HIGH ST  
 City: State: County: Investigation Status:  
 COLUMBUS OH 43215-2406 Franklin OPEN  
 Census Tract Number: Parcel Number: District: Jurisdiction: Year Built:  
 003000 Columbus City  
 Dwelling Type: Number Of Units: Phone: Ownership Type High Risk Structure?  
 Multiple Unit: 5 or more Rental  
 Notes about address:

**Associated Patients:** The **Associated Patients** page lists all of the patients who have a blood lead test recorded in HHL PSS at that 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:** The **Associated Tests** page lists all of the blood lead tests that are recorded in HHL PSS 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 27.

**EVA:** The Environmental Visual Assessment is used to evaluate a home for various hazards. Please see page 38 for more information.

**Investigation Summary:** This page lists all investigations, their status (open or closed), the assigned investigator, and date opened and closed. To view details for a particular investigation, click the investigation ID in the first column of the table.

A list of all blood lead tests with results  $\geq 10$   $\mu\text{g}/\text{dL}$  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.

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

Edit	Status	Investigator	Date Opened	Date Closed	Delete		Create Referral Event?
<a href="#">52594</a>	Open	Harvey, William	5/4/2015		X	Print Investigation Referral	<input type="checkbox"/>
<a href="#">52370</a>	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
	<a href="#">3340216</a>	VENOUS	12.00	7/1/2015	GERALD	GREENSLEEVES	8/20/2012	
	<a href="#">3333040</a>	VENOUS	10.00	3/15/2015	AGATHA	GREENSLEEVES	8/20/2013	9371012002
	<a href="#">3319942</a>	VENOUS	10.00	8/19/2014	GERALD	GREENSLEEVES	8/20/2012	
	<a href="#">3319941</a>	VENOUS	10.00	8/18/2014	AGATHA	GREENSLEEVES	8/20/2013	9371012002

1 2

**Property Owner Information:** The **Property Owner Information** 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 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 ).

## REPORTS MODULE

Some users, such as local program administrators, may have access to reports for their jurisdiction. These are found on the Reports module. Each report 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 HHL PSS on page 42.

## Referral Process

### REPORTING OF TESTS

Reference labs or clinics doing point-of-care lead testing for Ohio residents 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 AM each morning tests are automatically imported from their network location into the Healthy Housing and Lead Poisoning Surveillance System (HHLPPS). For details on how the files arrive at the network location, please see the Lab Import protocol.

If no issues with the blood lead test record are detected by the system, the test is imported into HHLPPS. 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 corrected, at which time the test is imported into HHLPPS. The OHHLPPP surveillance team logs into HHLPPS 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 HHLPPS and it has been more than one week since analysis please contact OHHLPPP staff to look into this. If the level is  $\geq 45$   $\mu\text{g}/\text{dL}$  and the child is in urgent need of an environmental investigation, please fax the blood lead test results including all patient information to the Lead Poisoning Prevention Program at 614-728-6793 for consideration for manual opening of an investigation, and follow up with the Customer Service Assistant at 614-466-6337.

### REFERRAL GENERATION

Upon import to HHLPPS, 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  $\geq 5$   $\mu\text{g}/\text{dL}$  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  $\geq 10$   $\mu\text{g}/\text{dL}$ , 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 HHLPS, notification to the default case manager or public health lead investigator will be made via a HHLPS 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 HHLPS 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 patient search (see page 2) 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' dropdown 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 HHLPS that the case has been re-assigned to them.



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

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
<a href="#">69288</a>	8/11/2015	OPEN			AMY HAYES	10+
<a href="#">61276</a>	8/20/2014	CLOSED	4/1/2015	NO FOLLOW-UP TESTING FOR 6 MONTHS	ROBIN CRANE	10+

**\*Case Status:** Open

**Date Opened:** 08/11/2015

**Reason For Case:** Met State Case Criteria

**Case Manager:** HAYES, AMY

**Date Closed:**

**Reason For Closure:**

Case Management History

Transfer

**\*Transfer To:** SERAFINI, TYLER

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 first column 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 dropdown and choose the appropriate investigator. To complete the transfer, click the 'Save Detail' button. Once the 'Save Detail' button is clicked, the assigned investigator field will be updated and the new investigator will be alerted in HHLPS that the investigation has been reassigned to them.

Ohio Department of Health  
HHLPS

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	<input type="button" value="Print Investigation Referral"/>
52370	Closed	SERAFINI, TYLER	1/27/2015	3/1/2015	X	<input type="button" value="Print Investigation Referral"/>

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

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

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 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
<b>Investigation Summary</b>
Notes
Property Owner Information
Renovation History

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

10+ Tests Associated to the Property	Test Id	Sample Type	Result	Date Drawn	First Name	Last Name	DOB	Phone
	<a href="#">3340216</a>	VENOUS	12.00	7/1/2015	GERALD	GREENSLEEVES	8/20/2012	
	<a href="#">3333040</a>	VENOUS	10.00	3/15/2015	AGATHA	GREENSLEEVES	8/20/2013	9371012002
	<a href="#">3319942</a>	VENOUS	10.00	8/19/2014	GERALD	GREENSLEEVES	8/20/2012	
	<a href="#">3319941</a>	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 2) 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
<b>Patient Info</b>
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: GREENSLEEVES First Name: GERALD Middle Name: Suffix:   
 DOB: 08/20/2012 Current Age: 2 Yrs. 11 Mos. Sex: ☐ Twin: ☐   
 Race(s):    
 Ethnicity:  Patient Phone:  Follow-up received: ☐   
 Birth Country:  State/Province:    
 Lived outside US in last year? ☐ Country:

[Print Complete Patient Report](#)   
 Case Type (Case Status):   
 STATE CASE (OPEN)   
 ABLES ID:    
 Medical Rec:    
 Highest Confirmed BLL: 12.00   
 # Reports: 3   
 SSN:    
 Medicaid ID:    
 Next Pb Date: 07/29/2015

Language:  Interview in English? ☐   
 Date Moved to U.S.:

## Environmental Investigation HHLPS 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 HHLPS**

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?
<a href="#">52594</a>	Open	Harvey, William	5/4/2015		X	<a href="#">Print Investigation Referral</a>
<a href="#">52370</a>	Closed	SERAFINI, TYLER	1/27/2015	3/1/2015	X	<a href="#">Print Investigation Referral</a>

10+ Tests Associated to the Property

Test Id	Sample Type	Result	Date Drawn	First Name	Last Name	DOB	Phone
<a href="#">3340216</a>	VENOUS	12.00	7/1/2015	GERALD	GREENSLEEVES	8/20/2012	
<a href="#">3333040</a>	VENOUS	10.00	3/15/2015	AGATHA	GREENSLEEVES	8/20/2013	9371012002
<a href="#">3319942</a>	VENOUS	10.00	8/19/2014	GERALD	GREENSLEEVES	8/20/2012	
<a href="#">3319941</a>	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
<a href="#">2719</a>	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. 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:

Letter Type:

Phone Type:

Document Type:

Contact Attempt Type:

Responsible Party:

Date Completed:

Notes:

[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 2).

**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 in search criteria and hit '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 menu and click the hyperlink of the investigated address listed in the 'Go To Environmental' column.

- Find Patient
- Patient Info
- Patient Address**
- ABLES
- Associated Persons

Edit	Go To Environmental	Most Recent Activity	Delete	Status	Currently Resides At	Mailing Address
	<a href="#">2457621 2 W MAIN ST</a>	8/19/2014	X	OPEN	False	True

New

**NOTE:** If the address for 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 left corner of the screen, and enter all known information, and click 'SAVE'. 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 Details** page within the Environmental module.

### Address Details

Number:	Prefix:	Street Name:	Street Type:	Suffix:	Apt/Unit	PO Box
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
City:	State:	County:	Investigation Status:			
<input type="text" value="CLEVELAND"/>	<input type="text" value="OH"/>	<input type="text"/>	<input type="text" value="Cuyahoga"/> OPEN			
Census Tract Number:	Parcel Number:	District:	Jurisdiction:	Year Built:		
<input type="text" value="121401"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Cleveland City"/>	<input type="text"/>		
Dwelling Type:	Number Of Units:	Phone:	Ownership Type:	High Risk Structure?		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		

Notes about address:

On the **Address Details** 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' in the bottom of the left-hand pane to save any changes.

## DOCUMENT THE 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, and ensure 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\_HHLPSS 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
  1. Enter the start and completion dates and hit 'Save Risk Assessment Inspection.' The start and completion date will be the same unless the risk assessment took place over multiple days.
  2. Click on the *XRF Results* tab 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 HHLPSS. 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:  No file selected. (CSV File)

No XRF Results Found

3. Click the *Samples* tab 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 <sup>2</sup>	250 µg/ft <sup>2</sup>	400 ppm	1200 ppm	0.5%	15 ppb

Detail Samples XRF Results

New Sample

No Samples Found

Sample ID: New

NOTE: Please enter at least the highest result for each sample type analyzed.

\*Sample Location: Soil  Hazard Identified: ☒

\*Room/Site: Backyard  Site Identifier:

Component:  Component Condition:

\*Testing Method: Soil  Substrate:

\*Result: Equal to  2000  \*Unit: Parts Per Million

\*Date Collected: 07/24/2015  Laboratory: SAMPLE LAB

Date Sent: 07/24/2015  Date Received: 07/24/2015

Side Identifier:

Save Sample

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

- 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.

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

New Document

No Documents Found

Document ID: NEW

Save Document

\*Document Type: LHCO

\*Description: Lead Hazard Control Order

File To Upload:  Browse...

**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 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

## Document Property Owner Information

Go to the **Property Owner Information** page listed in the left menu. Click 'New' in the bottom left corner 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:

## Document Renovation Activities on Property

Go to the **Renovation History** page listed in the left menu. Click 'New' in the bottom left corner 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:  Choose

Contractor Name:  Choose

Contractor Name:  Choose

Specify:

Description of the Remodeling

Kitchen remodeled by family. High levels of dust experienced during remodeling.

## RECORDING INVESTIGATION FOLLOW-UP

### Lead Hazard Control Orders

If a lead hazard control order has been issued, open the *Investigation Outcome* tab, select 'Lead Hazard Control Order Issued,' 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 the 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

**Save Investigation Outcome**

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.

1. Enter the date of the clearance inspection and click the correct radio button for the 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, and the clearance inspection may be invalid.

2. Click the radio button corresponding to the person who did the work. If Abatement Contractor or Other is selected, use the binocular icon to search for and select the proper person.
3. 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 HHLPS 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	<b>Investigation Outcome</b>	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 menu. Click the hyperlink for the investigation with appropriate Investigation ID, Investigator, and date opened within the listing of investigations.

On the *Investigation Outcome* tab, be sure to 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 post Date Received (the date on the green certified mail return slip).

## FOR ALL OTHER EVENTS

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

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. 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
- Notice of Non-compliance/Order to Vacate is issued
- The public health lead investigation identifies no hazards
- Required contact attempts have been made without successful contacting the family
- An alternate address has been identified

**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 HHPSS. In these cases a signed copy of the notice should be uploaded to HHPSS.

For all other closure reasons, record all appropriate documentation in HHPSS and notify the Ohio Department of Health that you need to close the investigation and specify the closure reason. If the investigation is being closed due to an inability to contact the family, the contact attempts should be documented in HHPSS. Follow the guidelines for qualifying contact attempts given in the Public Health Lead Investigation Manual.

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 HHPSS. 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 HHPSS:

**Alternate Address Investigated:** 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 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.

**Clearance Achieved – No Order:** On very rare occasions the family will have already had a risk assessment done and hired a lead abatement contractor by the time the investigator contacts them. In

these cases it may be appropriate to close the investigation with Clearance Achieved – No Order once a clearance inspection is passed. In situations like this, please consult with Angela Evans (614-644-7799).

**Declining BLL at New Address:** 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.

**Initial Contact Unsuccessful:** Investigations can be closed after three qualifying unsuccessful contact attempts and notification of closure to the family by certified mail (see the Public Health Lead Investigation manual).

**In Residence <6 Weeks:** If a child has an elevated blood lead test within six weeks of moving into a new residence, the investigation at the new address may be closed with the reason "In Residence <6 Weeks". However, the child's previous address should be evaluated as a contributing source. If it is determined that the child's previous address is a potential contributing source, an investigation should be opened at that address as well (please see the note on page 16).

**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 HHLPS bug. Please report any investigations you believe were opened in error to Angela Evans (614-644-7799). In the case of an address error, the blood lead test address information will need to be corrected to open the investigation at the proper address.

**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 with the reason "No Source Identified". An investigation can only be closed for "No Source Identified" if a full target (for eligible properties) or risk assessment has been carried out.

**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 with "Non-Property Source Identified". 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.

**Notice of Compliance:** 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).

**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 with the reason “Prior PHLI with Notice of Compliance”. However, if the child’s elevated blood lead level persists or increases, 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.

**Unit Demolished:** If a property was not under a lead hazard control order but was demolished during the course of an investigation, the investigation can be closed with the reason “Unit Demolished”. If the property was under a lead hazard control order, a clearance examination should be done consisting of a visual examination for paint debris and bare soil and soil samples. If the clearance examination passes a Notice of Compliance should be issued, and the investigation closed with this reason.

DRAFT

## Environmental Letters Generation

HHLPPSS 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. 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  
**HHLPPSS**

Home Clinical **Environmental** Administrative Reports

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

**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 dropdown box on the **Environmental Letters** page for the address. The referral date is included to help you distinguish which investigation is the correct one.

## Environmental Letters

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

By default, the most recently opened investigation will be selected.

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

**NOTE:** If information required for the environmental letters is not entered into HHPSS, 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.

**Ohio**  
Department of Health  
**HHPSS**

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? ☐



The **Account Information** page can be reached from your Home screen in HHLPS.

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 2<sup>nd</sup> 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 2<sup>nd</sup> 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 HHLPS 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



Post-Inspection Documents

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

### PHLI Report

This is the Public Health Lead Investigation Report. At this point 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 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". 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 information screen.

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”. 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 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.

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, being 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 HHPSS, the date of the target 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



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

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.

## 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, including 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 test has been passed. In addition to previously entered information, the clearance exam must be entered on the *Clearance Inspection* tab of the **Investigation Summary** page.

## Notice of Noncompliance/Order to Vacate

The Notice of Noncompliance/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 on the Lead Hazard Control Order.

## FOLLOW-UP LETTERS

### 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

## 3-Day Letter

The investigator is required to send this letter within 3 days of the environmental investigation. 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.

### **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 the Case Manager.

### **Follow-up Letter to Parent/Guardian**

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

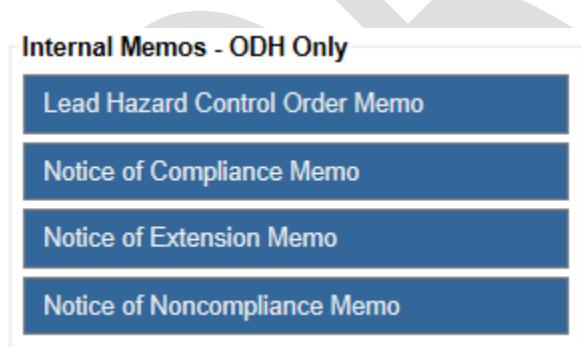
### **Follow-up Letter to Provider**

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 HealthChek**

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 generated letter.

## **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 Noncompliance/Order to Vacate.

DRAFT

## 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 2) 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 menu 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.

The screenshot displays the Ohio Department of Health HHLPPS interface. At the top right, a patient header shows "(GREENSLEEVES, GERALD) DOB: 8/20/2012 ID#: 3414076". Below this is a navigation bar with tabs: Home, Clinical, Environmental, Administrative, and Reports. On the left is a vertical menu with various options; "PHLI Combined Questionnaire" is circled in red. The main content area shows a table with case information:

Case ID	Date Opened	Status	Date Closed	Assigned Case Manager
<a href="#">69288</a>	8/11/2015	OPEN		AMY HAYES
<a href="#">3414076</a>	8/20/2014	CLOSED	4/1/2015	ROBIN CRANE

Below the table, the "PHLI Combined Questionnaire for Case ID :69288" is displayed. It features a series of tabs: Demographics, Potential Exposure, Environmental Questions, Exposure, Medical/Development Information, and Lead Notification. The "Demographics" tab is selected, showing sub-tabs: Detail, Sibings Less Than 6 Yrs, Residential Addresses, and Guardians. The "Detail" sub-tab is active, displaying the following information:

Date of Questionnaire:   
 Last Name: GREENSLEEVES  
 First Name: GERALD  
 Middle Name:   
 DOB: 8/20/2012  
 Sex:

The questionnaire is different from other pages in HHLPPS in having a set of tabs which each contain sub-tabs. This form should be completed and saved a single tab at a time using the blue save buttons within each 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.

The screenshot shows the top navigation bar with tabs: Demographics, Potential Exposure, Environmental Questions, Exposure, and Medical/Development Information. Below this is a sub-tab bar with: Detail, Siblings Less Than 6 Yrs, Residential Addresses, and Guardians. The 'Demographics' tab is highlighted in red. The 'Detail' sub-tab is also highlighted in red. The form fields are as follows:

- Date of Questionnaire:
- Last Name:
- First Name:
- Middle Name:
- DOB:
- Sex:

Once 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* tab. The user will then proceed to complete the *Environmental Questions*, *Exposure*, *Medical/Development Information*, and the *Lead Notification* tabs. When completing the *Environmental Questions* tab, the user should select the check boxes for all address they need to answer the questions for.

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 *Detail* sub-tab (within the *Demographics* 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 inputting questionnaire answers to ensure questionnaires are marked complete.

The screenshot shows the bottom section of the questionnaire form with the following fields:

- Medicaid #:
- Lived Outside US in Last Year: ☐ Yes ☒ No
- Country:
- Date moved to U.S.

At the bottom left is a 'Save Detail' button. At the bottom right is a 'Mark Questionnaire Complete' button, which is highlighted in red.

**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* tab.
2. In the *Residential Addresses* tab of the questionnaire, 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 HHLPS.

## Upload the Scanned Questionnaire

Go to the **Documents** page listed in the left menu 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 HHLPS 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 (see page 2) 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 to add an event. Specify the appropriate Event Type and type of letter, contact attempt, phone call, or referral, if appropriate. The responsible party and date completed fields will populate with the user logged in and the current date, but both fields can be changed if necessary. Add any additional notes and hit 'Save' in the bottom left corner to save to HHLPS.

## 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, then 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 HHPSS 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 HHPSS using the steps below.

Go to the **Documents** page listed in the left menu of the Clinical module and choose the hyperlink for the case the questionnaire applies to. Click the 'New Document' button and select 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 HHPSS 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 HHPSS 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 and clicking on the address's 'Go To Environmental' link. Once on the address displays in the top right corner of the window, go to the **EVA** page listed in the left menu.

Select 'New' in the bottom left corner 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 dropdown 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 specify and save.

Once all fields are complete, select 'Save' in the bottom left corner. If either of 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 'Visual Assessment Tool' interface within the Ohio HHLPS system. The top navigation bar includes links for Home, Clinical, Environmental (highlighted), Administrative, and Reports. A left sidebar 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 the sidebar are buttons for New, Save, and Log Out. The main content area is titled 'Visual Assessment Tool' and shows 'No EVAs' in a search bar. Below this, it indicates 'EVA ID: NEW' and provides tabs for Property Details, Property Owner Information, and several 'Keep It' status options (Well Ventilated, Pest-Free, Dry, Contaminant Free, Clean, Safe, Well Maintained), with a Summary tab also present. The form fields include: Resident/Provider Name, Telephone, Property Address, City, State (pre-filled with 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, and Other), and Specific health concerns (allergies, asthma, coughing/wheezing) with checkboxes for Child and Adult. A large text area is provided for additional notes. At the bottom, there is a field for 'Visual Assessment Conducted By:'.

## Managing Alerts

Users are directed to actionable items in the HHLPS 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 is typically the first thing a user will see upon logging into HHLPS. 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  
**HHLPS**

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 6 columns in the table of alerts:

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

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 HHPSS 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.

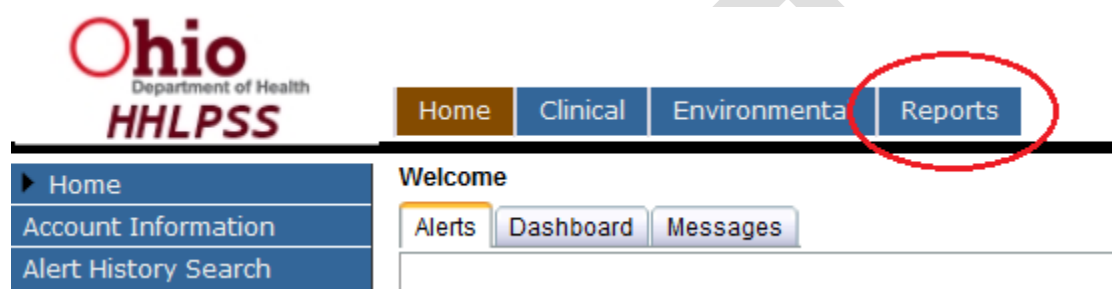
The 'Transferred From' column will only contain information if a user has transferred a copy of his/her alert to you. In this case the name of the user making the transfer will display here. Similarly, if you wish to transfer a carbon copy of your alert to another user to inform them of the alert you have received, you can click the 'Transfer To' button for that alert. This will send a copy of the alert you have received. This will not alter the case or investigation the alert may refer to, and as such if you are seeking to reassign a case or investigation, you will need to follow the appropriate protocol (see pages 11 and 12).

Once an alert has been read and been acted upon it can be hidden from the alerts screen by checking the 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 a user wishes to recover 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 HHL PSS

The Reports module is found by clicking 'Reports' from the listing of modules at the top of all HHL PSS pages.



Not all users will see the Reports module, since access to reports is limited according to the role of the user in HHL PSS. For users who do have access to the Reports 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 HHL PSS 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 HHL PSS 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.

### PATIENT INFORMATION

#### Complete Child Report

This report provides a summary of information recorded in HHL PSS for a given patient. After searching for and selecting the patient, clicking 'View Report' will open the report as a PDF. The report includes summary demographic and contact information, reported addresses of residence, blood lead testing details, case management notes and events, and a listing of providers reported on the tests.

## **ENVIRONMENTAL INVESTIGATION**

### **Environmental Investigation Status**

This report retrieves the most current status of environmental investigations opened in HHPSS. Dates entered specify the date range for which environmental investigations were opened in HHPSS. 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**

### **Clinical Referral Status**

This report retrieves the most current status of clinical cases opened in HHPSS. 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 HHPSS 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+).

### **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+) 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, HHPSS 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 Letter – Guardian**

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, HHPSS 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+ Contact**

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, HHLPS automatically generates the 'Initial 10+ Letter' HHLPS 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 Case 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, HHLPS automatically generates the '5-9 Initial Contact' HHLPS 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, HHLPS automatically generates the 'Final 5-9 Report' HHLPS 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.



## **Case Closure Letter**

This report retrieves letters to the guardians of patients whose clinical cases have been closed. The report is inclusive to all clinical cases that were closed in the specified jurisdiction(s) since the report was last run. This 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, HHPSS automatically generates the 'Case Closure Letter' clinical 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.

## **TESTING**

### **10+ Tests**

This report retrieves all blood lead tests  $\geq 10 \mu\text{g/dL}$  that were imported/created in HHPSS during the specified date range. This report is not restricted by the sample draw date, but rather by the date that the test entered HHPSS. Both capillary and venous draws, confirmed and unconfirmed, will display in this report. Only patients residing in jurisdictions to which the user running the report are included in the report.

### **5-9 Tests**

This report retrieves all blood lead tests  $\geq 5 \mu\text{g/dL}$  and  $< 10 \mu\text{g/dL}$  that were imported/created in HHPSS during the specified date range. This report is not restricted by the sample draw date, but rather by the date that the test entered HHPSS. Both capillary and venous draws, confirmed and unconfirmed, will display in this report. Only patients residing in jurisdictions to which the user running the report are included in the report.

## **REFERRALS**

### **OSHA**

This report retrieves all adult blood lead tests that meet or exceed the specified minimum blood lead level during the specified date range.

### **Women Child Bearing Age**

This report retrieves all blood lead tests  $\geq 5 \mu\text{g/dL}$  for women between the ages of 14 and 45 years imported/created in HHPSS during the specified date range.

## **OTHER**

### **Lab Report Card**

This report returns statistics on blood lead test reporting by analyzing clinical laboratories to the Ohio Department of Health. In addition to number of tests reported, and most recent reporting date, the report gives details on the number of records missing required fields for each laboratory.

### **Medicaid Report**

This report retrieves the list of events that can be reimbursed by Medicaid funding in a specified date range. The report is limited to events with event dates within the specified date range/SFY quarter. Once the 'Mark Events as Billed' check box has been checked, all events included in the currently run report will be marked as 'Successfully Billed' and excluded from any future billing reports. This check box should only be checked if the user is confident that he/she will be running the final report that is sent to Medicaid.

### **User Activity**

This report returns statistics on user activity in HHPSS during a specified date range. This includes number of Fix ELR records cleared, addresses merged, patients merged, and risk assessments entered.