

# HHLPSS EBL CASE MANAGEMENT CHECKLIST

## Environmental Case Management

 ▶ Address Info

1. Confirm and update address information.
2. Validate and save address information.

 ▶ Investigation Summary

1. Add EBL Inspector name.
2. Add investigation details and save information.
3. Click on "Add Event" to add event details.
4. Enter "Event Type", "Date Referred", "Date Due", "Date Completed", "Result", "Responsible Party", and "Comment".
5. Save Event Detail information.

 ▶ Property Owner Information

1. Add information on property owner.
2. Save property owner information.

## Clinical Case Management

 ▶ Patient Info

1. Confirm and update patient information.
2. Add "Ethnicity" and "Race" information.
3. Save information.

 ▶ Family Members

1. Add primary parent or guardian information.
2. Save information.
3. Add as "Primary" guardian.
4. Add phone number.
5. Save information.

 ▶ Blood Lead Tests

1. Confirm blood lead "Result" and "Sample Type" are correct.
2. Verify confirmatory test has been completed. If so, make sure "Confirmatory Test" box is checked.
3. Verify "Physician" and "Analyzing Laboratory" are present on most recent blood lead test.
4. Save all changes made on Blood Lead Tests page.

 ▶ Case Details  
▶ Case Initiation

1. Complete Case Initiation information.
2. Save information.

 ▶ Case Details  
▶ Case Information

1. Complete "Case Details" information.
2. Assign a clinical "Case Manager".
3. Add Case Events for patient contacts and follow-up activities completed.
4. Save events.

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## Clinical Case Management (Con't)

 ▶ Patient Address

1. Veirfy Patient Address.
2. Validate Address
3. Save Address
4. Dedup address, if necessary.

 ▶ Associated Persons

1. Add "Associated Persons" that are currently in HHLPSS. This includes siblings, parents, other current or former members of the household.

 ▶ Patient Attachments  
Upload Attachment

1. Upload documents pertinent to patients case. Documents may include lab results, doctor's notes, EBL inspection results, etc.

 ▶ Notes

1. Add additional notes to patient records.