

NCLEAD Childhood Lead Policies for System Use

Version 4.1

N.C. Children's Environmental Health Branch

7/6/2010

This document is divided into General Information, Environmental User Policies and Clinical User Policies.

It is intended as a supplement to the NCLEAD User Manual.

NCLEAD Business Rules are considered a "living" document. This document will be revised as necessary. Updated copies of this document can be found on the website for the N.C. Children's Environmental Health Branch at the following location:

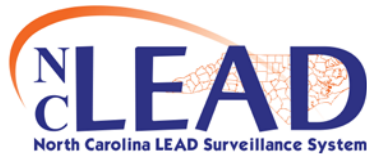
[http://www.deh.enr.state.nc.us/ehs/Children Health/NCLEAD/nclead.html](http://www.deh.enr.state.nc.us/ehs/Children_Health/NCLEAD/nclead.html)

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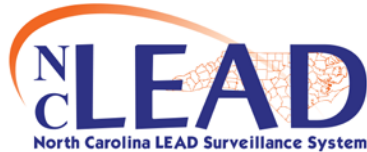
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Updates to Policy Document

Date	Original Text	Change, pg #
7/6/2010	2) Search for the child as a Person	Added additional steps to 2) Search for the child as a person... pg 14
7/6/2010	DELETED TEXT	Removed "How to determine the correct property to use"... pg 7
7/6/2010	2. c. ii: Click Save	...(This action *creates* a property event.), pg 7
7/6/2010	De-duplication of events will be the responsibility of Children's Environmental Health Branch (CEHB). If you notice suspected "duplicated" persons or events, please notify the CEHB or your State Regional Environmental Health Specialist.	If you notice suspected "duplicated" persons or events, please notify the CEHB or your State Regional Environmental Health Specialist. De-duplication of events will be the responsibility of Children's Environmental Health Branch (CEHB).... pg 5



Policies for System Use

General Guidelines

To avoid a system error that may log you out of the system, when going back to previously viewed pages, always use the “Back” button located within the NCLEAD screen rather than your browser’s “back” button.

When you are not actively working in NCLEAD, please unload your event and log out of the system.

Do not share your password or allow anyone log into the system using your account.

NCLEAD should only be accessed on a computer connected to a State or local health department IT system.

No sensitive information should be put into the “Person Notes” field. Person Notes can be viewed across all the programs. Please record “sensitive” notes in the “Event Summary” section.

It is the responsibility of the user to review assigned workflows to keep up with workload according to their office policy. At a minimum all workflows should be reviewed at least *weekly*.

If you notice suspected “duplicated” persons or events, please notify the CEHB or your State Regional Environmental Health Specialist. De-duplication of events will be the responsibility of Children’s Environmental Health Branch (CEHB).

It is the responsibility of the Clinical or Environmental Health user to notify CEHB-Raleigh staff regarding inaccurate information either entered by the user or discovered by the user that cannot be updated by the user.

N.C. State Laboratory of Public Health and Labcorp laboratory information will be entered into NCLEAD via electronic laboratory reporting (ELR). All other laboratory information will be submitted electronically from CEHB to NCLEAD. Eventually other laboratories will be submitting via ELR, but for the time being, CEHB-Raleigh will manually submit laboratory results from all other laboratories.



Policies for System Use

Environmental Health

General Information

For the person that is contacted regarding the offer of an environmental investigation, please enter “First Name, Last Name, and Relationship to the child”
Example: Jane Smith – mother

“Investigation of supplemental addresses completed for this child” question must be answered “YES” to complete the investigation process. Answer YES if the supplemental addresses investigations are complete OR if there are no supplemental addresses to investigate.

Wizards

Environmental Follow-Up Wizard

- In the Child Event.
- Used to locate Environmental related questions quickly.
 - Date Offered Environmental investigation.
 - Unable to locate patient.
 - Failure to respond.
 - Non paint lead sources.
 - Investigation of supplemental addresses completed for this child.

Sites/Properties

Updates/ Edits to Site Address for Child (new home address)

- Updated in the Child Event.

If the Child has moved to another address, add the new home address via the Persons tab on the Child event.

- Use the edit button to access the edit person screen.
- Scroll down to the Edit Address box.
- Change the start date and end date to reflect the dates for residence at the new address.
- Edit the address information.
- Click Save.

Supplemental Addresses

- Located in the Property Event, Environmental Activity Question Package.
- Depends on the Activity Type.
- Only addresses meeting the EH definition of “Supplemental Address” should be entered.

- Only the environmental health specialist can enter the supplemental address “sites”.

Current County of Residence

- Determines the jurisdiction of the child case.

Change county of residence in the Child Event

- Administrative package.
- Person tab.
- Edit county/address information.
- Enter the correct Start Date.
- Save.

Searching for a Site or Property

You must search for the address that you are going to perform an Environmental Activity on to determine whether the address is in the system as a Site, Property, or not in the system at all.

There are two types of searches.

Search first as a Property, then as a Site to avoid creating duplicates.

- 1) Search for the address as a Property
 - a) Click on Search Event icon in toolbar (the magnifying glass).
 - b) Enter search criteria.
 - c) If Property is located, click Use Selected Party Button.
 - d) If Property is not located, it may be a Site. Proceed with step 2 below.
- 2) Search for the address as a Site
 - a) Click on Create New Event.
 - b) Select PROPERTY for the event Type and click on the Select Site... button.
 - c) Enter search criteria.
 - i) If the Site is located, click Use Selected Party button.
 - ii) Click save. (This action *creates* a property event.)

Always first search for an existing PROPERTY before adding a new PROPERTY EVENT.

Searching Hints

When searching begin with a broad search and then limit the search if the return values are too numerous to search through manually.

Use the asterisk (*) to search for events or sites.

Search Criteria	Returns examples
MAIN	All addresses that contain "MAIN" anywhere in the address 123 MAINLY CURVY ST MAIN AVE APT 3
* MAIN *	All addresses that contain " MAIN " in the middle of the address 123 MAIN St 23 MAIN ST SOUTHWEST
12* MAIN *	12 MAIN ST 1234-5 MAIN AVE

Reports

To view ALL children associated with a SITE:

- Run the report "Childhood Lead Events by Address" under the Custom Reports category.
- If the SITE address is a PROPERTY Event, it will not appear on this list.

Linking

Linking Properties to Children

[Refer to Appendix E: Linking Property-Child Events in the NCLEAD User Manual](#)

- ONLY Environmental Health Specialists will link properties to children.
- DO NOT use the Add Link or Remove Link Buttons (located on the Persons tab, Links tab for Child Events) to link children to properties.
- Linking Properties to Children can ONLY occur under the Environmental Activity question package for the property.
- Environmental Activities that allow for linking:
 - Investigation
 - Abandonment Monitoring
 - Annual Monitoring
 - Attempt invest/Left info
 - Clearance
 - Consultation
 - Other
 - PMP Quality Assurance Monitoring
 - Pre-Certification Compliance Inspection
 - Research Samples

Environmental Lab Results

Do not enter environmental samples in an environmental event unless lab results (environmental) are selected.

Until environmental sample analysis results are imported electronically it is only necessary to enter the one highest lead result for each sample type. For Dust samples, enter the highest result for window sill, window well (trough) and floor.

Multiple Samples Collected on Same Day

Samples that are collected on the same day have the same Order Number and Collection Date. These results should be entered under the "TESTS" heading. Multiple sample results can be entered by clicking on the ADD button after each sample is entered. These results will have the same Order Number and different Lab Sample Numbers.

Multiple Samples Collected on Consecutive Days for Same Investigation

Samples that are collected on the same property but on consecutive days as part of the same environmental activity are entered based on the day the sample was collected. Each day's sample collection will have the same Order Number. The Collection Date should reflect the actual date the sample was collected.

Recomputed Result Field

This field is located in the TESTS Section of lab results screen. The environmental health specialist must manually calculate this result.

Searching for Laboratory Name

Recommended to use the name of the laboratory with wildcards (*) to narrow the search results list.

Lab Facility (Other) Field

If the lab facility name is not located in the search results for the Lab Facility, enter the facility name and address information in the Lab Facility (Other) field.

Searching for Ordering Facility Name

Recommended to use the name of the ordering facility with wildcards (*) to narrow the search results list.

Ordering Facility (Other) Field

If the ordering facility name is not located in the search results for the Ordering Facility, enter the facility name and address information in the Ordering Facility (Other) field.

Sample Units

- Water
mg/L (also referred to as parts per billion or ppb)
- Soil
mg/kg (also referred to as parts per million or ppm)

Non-Paint Source Hazards

The administrative question package in the child event should be updated when a non-paint source from traditional medicines, jewelry, pottery, hobby and occupation-related items indicate a source of lead exposure. (This can also be updated quickly through the environmental “wizard” in the Child Event.)

Do not enter unsubstantiated lead hazard information in the Non Paint Lead Sources section in the Child Event. Suspect hazards may be entered into the notes field.

XRF readings

Until XRF readings can be uploaded, it is only necessary to enter the one highest XRF reading for a painted surface.

Elevated Blood Lead Level cases

Date Referral Acknowledged by EH

- Should be filled out by Environmental Health Specialist.
- This is the date that the Environmental Health Specialist is notified of the referral.

Failure to Respond

- Two (2) attempts must be made.
- Failure to Respond Date is the date of the second attempt to gather a response from the child’s parent or guardian in regards to conducting an environmental investigation.
- Answer the Failure to Respond Date in the Child Event – Administrative Package. (Use the Environmental Follow-up Wizard.)

Unable to Locate Patient

- Two (2) attempts must be made.
- Unable to Locate Patient Date is the date of the second attempt to locate the child or child’s parent / guardian in regards to conducting an environmental investigation at locations provided by the clinician or environmental health specialist.

- Answer the Unable to Locate Date in the Child Event – Administrative Package. (Use the Environmental Follow-up Wizard.)

Conducting an investigation when it was previously refused

- The EHS should update the Child Event - Administrative Package. (Use the Environmental Follow-up Wizard.)
- Notes Field should be updated to indicate that the parent/guardian contacted Environmental Health and an EHS is going to perform an investigation on the property. (Use the Environmental Follow-up Wizard.)
- The contact person information should be included in the Notes field (first, last name – relationship to child). (Use the Environmental Follow-up Wizard.)

Confirmed Lead Poisoning Cases

When a CLP case involves a supplemental address across county lines, the county where the primary residence is located is responsible for updating the supplemental address question. But only after **ALL** supplemental addresses have been investigated.

When the primary or supplemental address is in another county, **BOTH** the Child and Property Event should be shared with both counties.

“Investigation of supplemental addresses complete...”

- Child Event – Administrative Package.
- Use the Environmental Follow-up Wizard.
- Should only be updated to “**Yes**” if either of the following are true:
 - **ALL** supplemental addresses for CLP child have been investigated, **OR**
 - There are **NO** supplemental addresses for the child.

Sharing Events

When an event is shared between jurisdictions (counties), state the reason for sharing in the events notes on the dashboard.

Always check “Allow Delegation” when sharing a case.

When a supplemental address for a CLP is in a different county both the child and property events should be shared.

Automatic Sharing of events (future implementation)

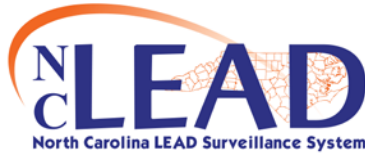
Occurs for children with blood lead results in one county (ie: Wake) and the child moves to another county (ie: Moore) and the child is confirmed elevated. In this example, the child event would be shared automatically with Wake and Moore counties.

Concerns

“High” and “Very High” concerns will be viewed on the dashboard of the event in the Additional Information box. They will be **bold and red**.

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http://www.deh.enr.state.nc.us/ehs/Children_Health/Lead/lead.html



Policies for System Use Clinical Users

General Information

Contact Person

On the Administration Question Package for the Child, the “Person Made Contact With” field should indicate: [First name, Last name – Relationship to child]. This is the initial person that the clinician has made contact with.

Example: Jane Smith - Mother

Wizards

Environmental Follow-Up Wizard (used by EHS only)

Other Wizards will be added in the future

Addresses (from the Clinical perspective)

Additional Addresses for Child

Additional addresses that are added to the Person tab for the Child under the Address Information tab. These addresses can include secondary home, daycare or daycare provider, and homes where the child spends a significant amount of time.

Updates to Site Address for Child (address correction)

Make corrections to the Address via the Persons tab on the Child event. Use the edit button to access the edit person screen. Scroll down to the Edit Address box and make necessary corrections to address information. Click Save.

Updates to Site Address for Child (new home address)

If the Child has moved to another address, add the new home address via the Persons tab on the Child event. Use the edit button to access the edit person screen. Scroll down to the Edit Address box and change the start date and end date (if necessary) to reflect the accurate dates for residence at the new address. Type over the address information to reflect the new address. Click Save.

Supplemental Addresses

Only addresses meeting the EH definition of “Supplemental Address” should be entered by the EHS.

Only the Environmental Health Specialist can enter the supplemental address “sites”.

Current County of Residence

- Determines the jurisdiction of the child case.

Change county of residence in the Child Event

- Administrative package
- Person tab
- Edit county/address information
- Enter the correct Start Date
- Save.

Searching for a Person or Child Event

You must search for the child to determine whether the child is in the system as a Person, Child Event, or not in the system at all.

There are 2 types of searches.

Search first as a Child Event, then as a Person to avoid creating duplicates.

- 1) Search for the child as a Child Event
 - a) Click on Search Event icon in toolbar
 - b) Enter search criteria
 - c) If child is located, click Use Selected Party Button
 - d) If child is not located, it may be a Person, proceed with step 2 below

- 2) Search for the child as a Person
 - a) Click on Create New Event.
 - b) Select Blood Lead – Child for the Event Type and click on the Select Person... button.
 - c) Enter search criteria
 - d) Click the Search button
 - i) If the child is located
 - ii) The Nurse needs to call the county where the child lives and request a share.

How to determine the correct child to use

This is determined after searching for a PERSON or CHILD EVENT.

Click on the PRINT EVENT link in the Action column to view information about the child.

- If it is the correct child then click on Use this Event link in the Action column adjacent to the property.
- If it is **not** the correct child then click on Proceed button to create a new Child Event.

Always first search for an existing CHILD EVENT before adding it as a new CHILD EVENT.

Searching Hints

When searching begin with a broad search and then limit the search if the return values are too numerous to search through manually.

Use the asterisk (*) to search for events or persons.

Search Criteria	Returns examples
CHAND	All children that contain "CHAND" anywhere in the name LACHANDRA CHANDLER
LA*	Begins with "LA" LACHANDRA LAVERNE

Reports

To view ALL children associated with a SITE:

- Run the report "Childhood Lead Events by Address" under the Custom Reports category.

If the SITE address is a PROPERTY Event, it will not appear on this list.

Linking

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- **ONLY** Environmental Health Specialists will link properties to children.
- **DO NOT** use the Add Link or Remove Link Buttons (located on the Persons tab, Links tab for Child Events).
- Linking Properties to Children can **ONLY** occur under the Environmental Activity question package for the property.
- Do not use the "add link" or "remove link" buttons.

Sharing Events

When an event is shared between jurisdictions (counties), state the reason for sharing in the events notes on the dashboard.

Always check "Allow Delegation" when sharing a case.

When a supplemental address for a CLP is in a different county both the child and property events should be shared.

Automatic Sharing of events (future implementation)

Occurs for children with blood lead results in one county (ie: Wake) and the child moves to another county (ie: Moore) and the child is confirmed elevated. The child event would be shared automatically with Wake and Moore counties.

Concerns

“High” and “Very High” concerns will be viewed on the dashboard of the event in the Additional Information box. They will be **bold and red**.

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