



Maven: Lead Surveillance System

USER GUIDE

January 2012



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Introduction

Welcome

Welcome to the Maven: Lead Surveillance System (LSS) – from this point forward, referred to as the LSS.

Purpose

The goal of this manual is to provide you with a thorough understanding of the Maven LSS as it pertains to a Case Worker's use of the system.

You will be given a User ID and Password with authorization to use the Maven LSS.

Objectives

Upon completion of this manual, you will be able to:

- Log in and out of the LSS application
- Navigate through the LSS application
- Create, find, and modify child and property events
- Enter data in LSS Question Packages
- Use Workflow Queues and Tasks
- View and print LSS reports
- View and print LSS letters/print templates

OVERVIEW

The outline for this manual is as follows:

Chapter	Purpose
Chapter 1: LSS System Overview	Explain the basic structure, purpose and benefits of the Lead Surveillance System (LSS) and demonstrate how to log into the LSS.
Chapter 2: LSS System Environment	Describe the basic operating environment of the LSS.
Chapter 3: Searching	Explain how to search for an existing event (Blood Lead – Child, Blood Lead – Not classified, or Property).
Chapter 4: Creating and Managing Events	Explain how to create and manage events in the LSS.
Chapter 5: Question Packages – General Operating Procedures	Describe the purpose and general operating procedures for all the predefined Question Packages.
Chapter 6: Question Package Specifics	Describe some of the extended features within the Question Packages of the LSS.
Chapter 7: Adding/Revising an Address for a Child Event	Describe how a user will add or revise an address in a child event.
Chapter 8: Workflows and Tasks	Explain how and why to use workflows and tasks in LSS.
Chapter 9: Print Templates	Describe the LSS Print Templates.
Chapter 10: Reports	Describe the LSS reports feature.

Chapter 1: Maven Lead Surveillance System Overview

OVERVIEW

Purpose

Explain the basic structure, purpose and benefits of the Lead Surveillance System (LSS) and demonstrate how to log into the LSS.

Objectives

- User Groups and Permissions
 - Main vs. Administration Applications
 - Log into the LSS
 - Log out of the LSS
 - Understand how system passwords work
 - Change system passwords
-

MAVEN: LEAD SURVEILLANCE SYSTEM OVERVIEW

Consilience Software Inc.'s Maven is a commercial-off-the-shelf, web-based business application. It provides interactive, automated information gathering and is compatible with state and national IT standards. It also complies with the Centers for Disease Control and Prevention (CDC) Public Health Information Network (PHIN) standards.

The LSS allows secure communication and coordination between the Department of Public Health and Local Health Employees. The LSS is a secure environment that only displays the data someone needs and is authorized to see. The LSS functions include:

- Storage of lead investigation data (does not replace the local hard copies)
- Submission of data to DPH as needed
- Electronic data exchange and workflow between different users
- Ability to effectively manage lead cases (child and environmental)
- Ability for reports to be generated and exported electronically

An “event” within the LSS is a:

- **“Blood Lead – Child” defined as a child with a venous blood lead level 10 µg/dL or higher,**
- **“Blood Lead – Not classified” defined as a child with a blood lead level less than 10 µg/dL or a child with an unconfirmed capillary test,**
- **Property investigation defined as a property requiring a lead inspection.**



The Maven software application has been designed and modified for use by several DPH areas. Although extensive modifications have been made to adapt it to meet the LSS needs, you will still see some functionality that will not be used by the LSS at this time.

USER GROUPS AND PERMISSIONS

Users will be assigned a username and password that will provide access to the system. Each username is connected to one or more roles and one or more groups, which give access to specific system features. The roles and groups to which a user is assigned depend on their job function. Permissions, roles, and groups are described in detail below.

- **Permission:** Permissions in the LSS provide the ability within the system to perform certain actions, such as “run a report” or “create a new user”.
- **Role:** A group of permissions makes up a role. For example, one role is a Case Worker. This role has permissions such as “view an event” or “update an event”. The role of an Administrator comes with additional permissions, such as the ability to assign logins, create events, and run reports. The Case Worker performs different job functions and therefore has a different set of permissions than an Administrator.
- **Group:** Users are members of groups based on the individual facility. Each department may only see that department’s events or transferred events that they have permissions to view.

MAIN vs. ADMINISTRATION APPLICATIONS

There are two major applications, or computer modes, of the LSS – Main and Administration. This manual will focus only on the Main application. The Main application is where all event data is accessed and edited. For example, users can search for a Blood Lead – Child case, Blood Lead – Not Classified case, Property case, and view reports within the LSS. The Main application is always the default setting when logging into the system.

Lead Surveillance System

Login

Login Name:

Password:

Application: ▼

The Administration application is used by the LSS administrators at the state level. The Administration application allows system administrators to assign roles and reset passwords.

LOGGING IN

The LSS can be accessed through Internet Explorer 6.0 or higher, Firefox 1.5 or higher, Safari 3 or higher and Chrome; however, the LSS is not supported by Netscape.

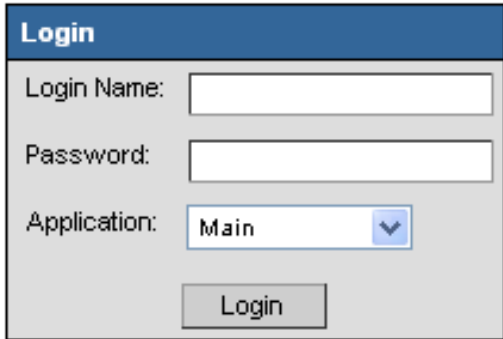
To log into the surveillance system, follow these steps:

Open an Internet browser and type the following **URL**:

<https://www.dphapps1.ct.gov/site/login.do>

Click the **Go** button *or* press the **Enter** key.

The following Login screen will appear:



The screenshot shows a login form with a blue header labeled "Login". Below the header, there are three input fields: "Login Name:" with a text box, "Password:" with a text box, and "Application:" with a dropdown menu showing "Main". At the bottom of the form is a "Login" button.

Enter your assigned **Username** and **Password** in the appropriate text boxes.

Verify that the Application is set to **Main**.



Caution: Username and Password are case sensitive so be sure to enter them exactly as they were provided. For example, XYZ123 is not the same password as xyz123.

Chapter 1: Lead Surveillance System Overview

Click the **Login** button.

The Main LSS dashboard will display:

Main LSS Dashboard

The screenshot displays the 'Connecticut Electronic Lead Surveillance System' interface. At the top, there is a header with the system name, a search bar, and buttons for 'Open', 'Help', and 'Logout'. Below the header is a navigation bar with icons for home, search, settings, and user profile, along with the text '[No event loaded] Logged in as mccarthyt'.

The main content area is divided into several sections:

- Event Summary:** A table with two columns: 'Basic Information' and 'Notes'. The 'Basic Information' column contains fields for Event ID, Event Type, Primary Person, Address, Dates, Investigation Status, Linked Events, and Attachments. Below the table is an 'Edit Event Properties' button.
- Event Information:** A tabbed interface with tabs for 'Event Data', 'Lab Results', 'Concerns', 'Persons', 'Tasks', and 'Event History'. The 'Event Data' tab is currently selected.
- Question Packages:** A table with columns: QUESTION PACKAGE, NAME, LAST UPDATE, UPDATED BY, and STATUS. Below the table is a 'View Question Package' button.
- Question Package - Details:** A table with fields for Name, Description, Name, Status, Number of Questions, Incomplete Required Questions, Last Update, and Updated By.

This is where users are able to access functions such as searching for a Blood Lead – Child case, Blood Lead – Not Classified case, Property case, reports, and much more.

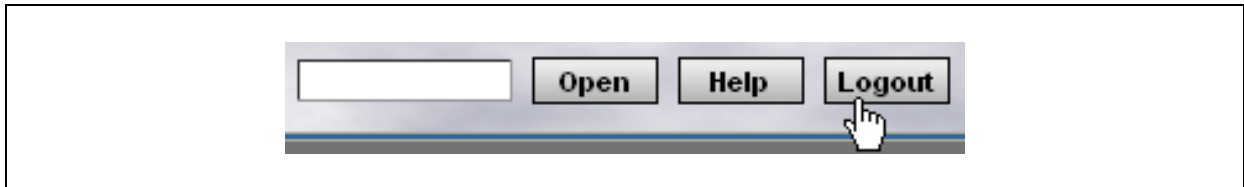
LOGGING OUT

Because of the sensitive nature of the data in the LSS, each user should exercise care when using the system. The LSS system is only as secure as the person using it. Therefore:

- Never share a password or use another user's password or login name
- Always log out of the system whenever you leave your computer

To log out of the LSS, follow these steps:

1. Click the **Logout** button in the upper right corner of the LSS dashboard.



This action logs the user out of the system and takes the user back to the sign-in page. At this point, it is safe to close the browser window.

OPERATING IN THE MAVEN LSS ENVIRONMENT

While the LSS is a very intuitive environment, there are a few general operating rules that a user must know to use the system efficiently and avoid problems

- Always use the command buttons and links provided by the LSS
- Use the Tab key or the mouse to navigate between data fields
- **Do not** use the Enter key to navigate between data fields
- **Do not** use the web Browser's Back button
- The LSS will time-out after twenty minutes of inactivity

SYSTEM PASSWORDS

Note that passwords do expire every 120 days. The system will begin to warn the user that the password will expire 15 days before it actually expires. If the password does expire before it has been reset, the user will need to contact a system administrator to regain access to the system. The system will allow up to five login attempts.

The LSS requires users to establish passwords with the following requirements:

- Must be 6-12 characters in length
- Must contain at least one number
- Must contain at least one alpha character
- Must contain at least one symbol
- Are case sensitive
- The system will not allow the re-use of the password that is expiring

To change the password before it has expired:

1. Click the **User Information** button in the LSS dashboard toolbar.



The Edit User Information screen will display.



Fields that are grayed out in this screen cannot be modified.

Chapter 1: Lead Surveillance System Overview

User Information			
First Name:	<input type="text" value="Krista"/>	Last Name:	<input type="text" value="Veneziano"/>
Title:	<input type="text"/>	Gender:	<input type="text" value=""/>
Email:	<input type="text"/>		
Login Credentials			
Login Name:	<input type="text" value="venezianok"/>		
Please fill out password field only if you want to change your password			
Password:	<input type="text"/>	Confirm Password:	<input type="text"/>
Contact Information			
Street 1:	<input type="text"/>		
Street 2:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text" value="CT"/>
Zip Code:	<input type="text"/>	Country:	<input type="text" value="USA"/>
Home Phone:	<input type="text"/>	Work Phone:	<input type="text"/>
Mobile Phone:	<input type="text"/>	Pager:	<input type="text"/>
Fax:	<input type="text"/>		

Type the new **Password** using the LSS requirements for a strong password.

Type the new password in the **Confirm Password** text box.

Click the **Save** button.

Chapter 2: The Lead Surveillance System Environment

OVERVIEW

Purpose

Describe the basic operating environment of the LSS

Objectives

- Explain the four elements of the LSS environment
 - The LSS Dashboard
 - Shortcuts Bar
 - Event Summary
 - Event Information
-

THE LEAD SURVEILLANCE SYSTEM ENVIRONMENT

The LSS environment is divided into four separate areas:

1. **Dashboard:** has icons that perform the majority of the functions within the product. Depending on a user's role, the number of buttons in the toolbar may vary. For example, one user might see a trashcan icon which is used to delete an event, while another user may not see a trashcan because the assigned role doesn't permit that action
2. **Shortcuts Bar:** has some buttons that users might use to quickly perform an action (such as Open a case, get Help, or Logout of the application) within Maven
3. **Event Summary:** contains summary information specific to each event
4. **Event Information:** contains the detailed information about the Child or Property event.

An “event” in the LSS is a Blood Lead – Child, Blood Lead – Not classified, or Property.

Connecticut Electronic Lead Surveillance System [Open] [Help] [Logout]

Dashboard **Shortcut Bar**

Event Summary

Basic Information	Notes
Event ID:	
Event Type:	
Primary Person:	
Address:	
Dates:	
Investigation Status:	
Linked Events:	
Attachments:	

[Edit Event Properties](#)

Event Information

Event Data | Lab Results | Concerns | Persons | Tasks | Event History

Question Packages

QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS

[View Question Package](#)

Question Package - Details

Name:	
Description:	
Name:	
Status:	
Number of Questions:	
Incomplete Required Questions:	
Last Update:	
Updated By:	

THE DASHBOARD

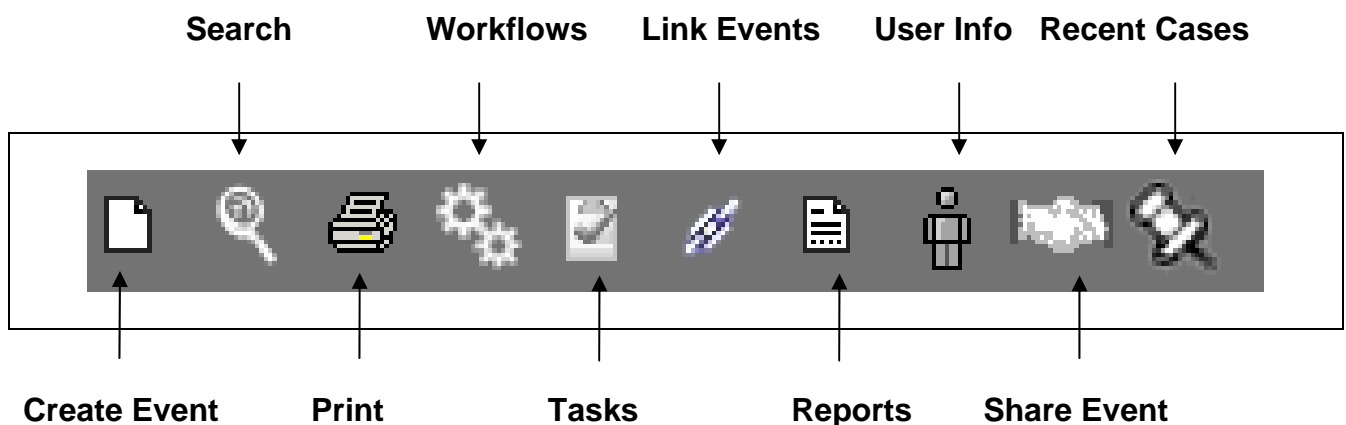
The LSS Dashboard is the point from which most actions take place. Here are some examples of what users can access from this screen:

- Create a Blood Lead - Child or Property event
- Search for an existing event
- Utilize question packages to enter data.
- Run and view reports
- Print letters

The design of LSS is “context-sensitive”. This means that the content of toolbars, screens, and dialog boxes will change according to the current login role. For example, when you first log in and before a LSS event is loaded the following generic Dashboard will display:



When a LSS event is loaded, the following Dashboard will display:



SHORTCUTS BAR



The Shortcut buttons allow the user to quickly:

- **Open:** To locate an event by its ID, enter the Event ID in the textbox and click the Open button.



- **Help:** To obtain general help, click the Help button.
- **Logout:** To logout of the system, click the Logout button. This action will take the user back to the login screen.



The Help facility is generic. Because it has not been customized for the LSS application, much of its content does not match the current application's functionality. Use it with caution!

EVENT SUMMARY

The Event Summary section is divided into two smaller sections:

- Basic Information
- Notes

Additionally, there are two command buttons in this section:

- Edit Event Properties, which takes the user to the Edit Event Properties dialog box.
- Copy Event, which will copy the current event to a new event with a new Event ID.

Basic Information	
Event ID:	100000162
Event Type:	Blood Lead - Child
Primary Person:	Jane Doe Birth Date: 07/07/2007 (2 yrs Female) Phone: (860) 555-5555
Address:	45 High St, Willimantic, CT 06226 (Edit)
Dates:	Create Date: 04/16/2010
Investigation Status:	Open
Linked Events:	1 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Relevant Address(es) on 07/07/2008: <ul style="list-style-type: none"> • Home - 45 High St, Willimantic, CT 06226 Linked cases: <ul style="list-style-type: none"> • 100000163 - 45 High St, Willimantic, CT 06226 * (Link)

→
Edit Event Properties
Copy Case
←

Basic Information	
Event ID:	100000163
Event Type:	Property
Name:	45 High St, Willimantic, CT 06226 * Phone:
Address:	45 High St, Willimantic, CT 06226 (Edit)
Dates:	Create Date: 04/16/2010
Investigation Status:	Open
Linked Events:	1 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Linked cases: <ul style="list-style-type: none"> • 100000162 - Jane Doe - 45 High St, Willimantic, CT 06226 (Link)

Edit Event Properties
Copy Case

EVENT SUMMARY: BASIC INFORMATION

The Basic Information section highlights the following subjects for every event.

Blood Lead – Child and Not classified Event

Basic Information	
Event ID:	100000162
Event Type:	Blood Lead - Child
Primary Person:	Jane Doe Birth Date: 07/07/2007 (2 yrs Female) Phone: (860) 555-5555
Address:	45 High St, Willimantic, CT 06226 (Edit)
Dates:	Create Date: 04/16/2010
Investigation Status:	Open
Linked Events:	1 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Relevant Address(es) on 07/07/2008: <ul style="list-style-type: none"> • Home - 45 High St, Willimantic, CT 06226 Linked cases: <ul style="list-style-type: none"> • 100000163 - 45 High St, Willimantic, CT 06226 * (Link)

Edit Event Properties
Copy Case

Property Event

Basic Information	
Event ID:	100000163
Event Type:	Property
Name:	45 High St, Willimantic, CT 06226 * Phone:
Address:	45 High St, Willimantic, CT 06226 (Edit)
Dates:	Create Date: 04/16/2010
Investigation Status:	Open
Linked Events:	1 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Linked cases: <ul style="list-style-type: none"> • 100000162 - Jane Doe - 45 High St, Willimantic, CT 06226 (Link)

Edit Event Properties
Copy Case

Event ID	The unique event number automatically assigned by LSS is displayed here.
Event Type	Blood Lead – Child, Blood Lead – Not Classified, Property
Name	For Blood Lead – Child or Blood Lead – Not Classified it will display the name of the child For Property it will display the address of the property linked to a Child Event

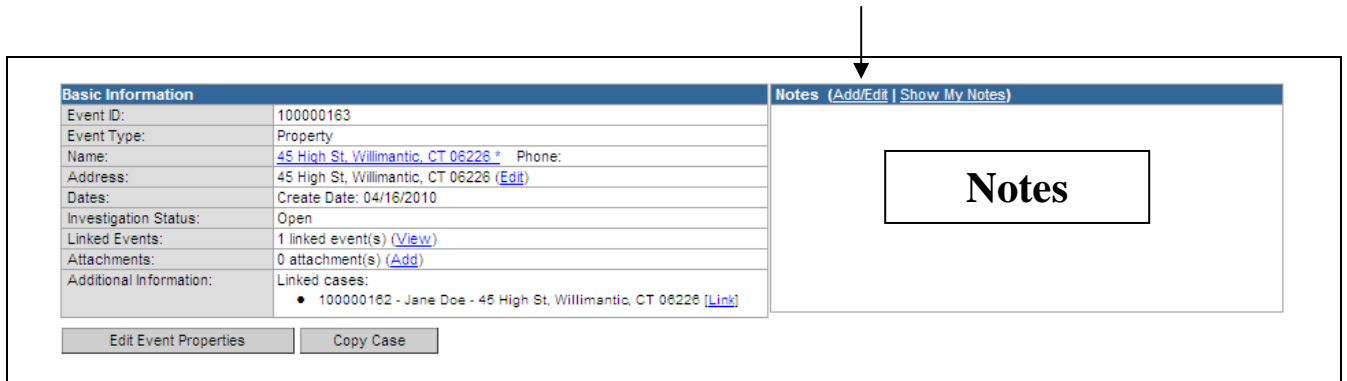
Address	For Blood Lead – Child or Blood Lead – Not Classified it will display the address of the child associated with a blood test For Property it will display the address of the property linked to a Child Event
Dates	This contains the date that the event was created in the LSS.
Type	This indicates how the event was entered into LHMS: interactive (manually created), batch (automatically created), conversion (created from a previously existing database).
Investigation Status	The current status of the event will be displayed: Open or Closed.
Linked Events	This displays the number of other events that are linked to this event. To view all linked events click on the (View) icon and all linked events will be listed. You will have the ability to open a linked event from this screen.
Attachments	Displays the number of files that are attached to this event. This is also the link used to access the attachments. Any file, such as a report or letter can be attached to an event.
Additional Information	Information about linked cases will be displayed. To view the linked event click on the [Link] hyperlink and the linked event will be opened.



Critical Notifications will be displayed in red.

EVENT SUMMARY: NOTES

The Notes section displayed in the Event Summary section of the LSS dashboard allows users to view case specific notes that are retained with the event. Case Workers and Administrators have permissions to add and edit notes.

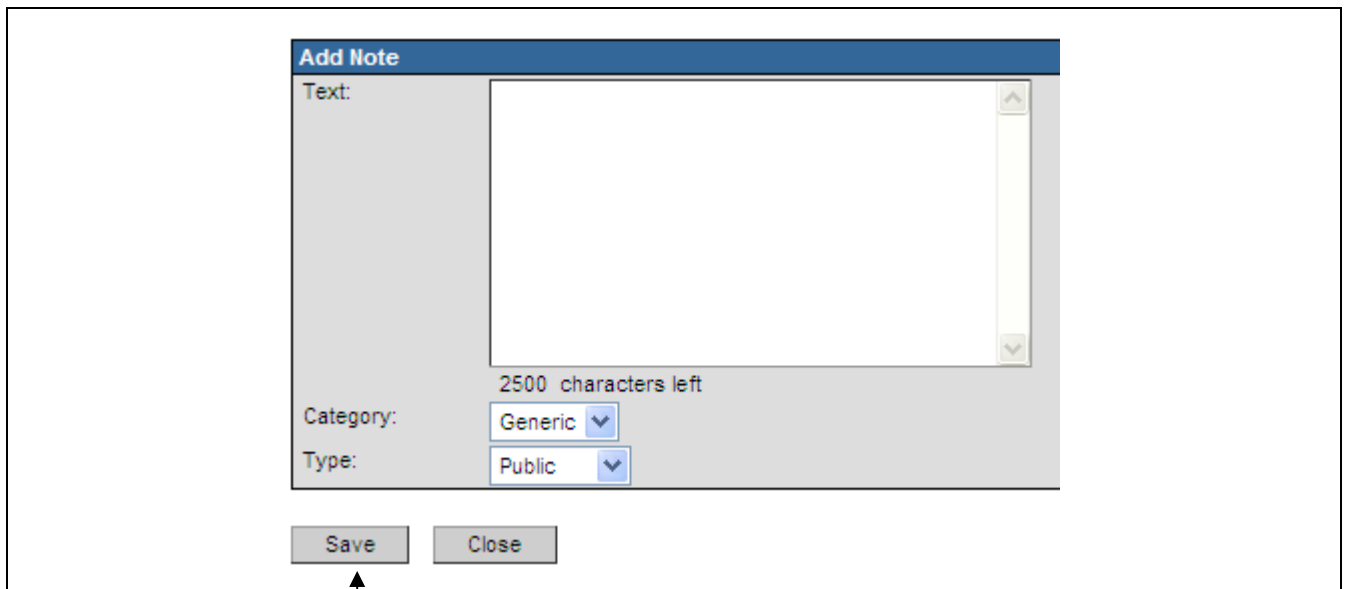


The screenshot shows the 'Event Summary' interface. On the left is a 'Basic Information' table with the following data:

Basic Information	
Event ID:	100000163
Event Type:	Property
Name:	45 High St, Willimantic, CT 06226 * Phone:
Address:	45 High St, Willimantic, CT 06226 (Edit)
Dates:	Create Date: 04/16/2010
Investigation Status:	Open
Linked Events:	1 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Linked cases: • 100000162 - Jane Doe - 45 High St, Willimantic, CT 06226 (Link)

Below the table are two buttons: 'Edit Event Properties' and 'Copy Case'. To the right of the table is a 'Notes' section with a header 'Notes (Add/Edit | Show My Notes)' and a large empty box labeled 'Notes'. An arrow points from the text above to the 'Add/Edit' link in the header.

1. To add a note click on **Add/Edit** in the Notes field



The screenshot shows the 'Add Note' dialog box. It has a title bar 'Add Note' and a 'Text:' label next to a large text area. Below the text area, it says '2500 characters left'. There are two dropdown menus: 'Category:' with 'Generic' selected and 'Type:' with 'Public' selected. At the bottom are two buttons: 'Save' and 'Close'. An arrow points from the text below to the 'Save' button.

2. Enter notes in the text box and click on the Save button

3. Multiple users can enter notes into one event (just not at the same time)

Basic Information		Notes (Add/Edit Show My Notes)
Event ID:	100000150	04/16/2010 09:02 AM (Generic) - Tina McCarthy Testing notes section again with a different user.
Event Type:	Blood Lead - Child	
Primary Person:	Krista Legg Birth Date: 09/12/2008 (1 yrs Female) Phone: (860) 444-4444	04/16/2010 09:01 AM (Generic) - Krista Veneziano Testing the notes section.
Address:	37 High St, Thomaston, CT 06787 (Edit)	
Dates:	Create Date: 04/14/2010	
Investigation Status:	Open	
Linked Events:	1 linked event(s) (View)	
Attachments:	0 attachment(s) (Add)	
Additional Information:	Testing Due Date: 12/11/2009 Relevant Address(es) on 09/12/2009: <ul style="list-style-type: none"> Home - 122 D Welton Way, Thomaston, CT 06787 Linked cases: <ul style="list-style-type: none"> 100000161 - 122 D Welton Way, Thomaston, CT 06787 * (Link) 	

[Edit Event Properties](#) [Copy Case](#)

Notes ([Add/Edit](#) | [Show My Notes](#))

[04/16/2010 09:02 AM \(Generic\) - Tina McCarthy](#) ←
Testing notes section again with a different user.

[04/16/2010 09:01 AM \(Generic\) - Krista Veneziano](#) ←
Testing the notes section.



The Notes link toggles between “**Show My Notes**” and “**Show All Notes**”.

“Show My Notes” will display only those notes entered by the current user.

EVENT INFORMATION

The Event Information section is divided into two smaller sections:

- Tabs
- Basic Information or Details

The Basic Information/Details will change based on which of the Event Tabs is activated. An Event Tab is activated by clicking on it.

Blood Lead – Child Event

Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History																																																																																											
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Tabs</div>																																																																																																	
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="7">Question Packages</th> </tr> <tr> <th>QUESTION PACKAGE</th> <th>NAME</th> <th>LAST UPDATE</th> <th>UPDATED BY</th> <th colspan="3">STATUS</th> </tr> </thead> <tbody> <tr> <td>Administrative</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>Demographics</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>PCP Information</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>Medical Status</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>Residency History and Information</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>Lead Hazards</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>Current Housekeeping Practices</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>Occupational/ Do-It-Yourself/Hobby Lead Hazards</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>Educational Materials</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>Interim Measures</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> <tr> <td>Social Service & Other Referrals</td> <td>Jane Doe</td> <td>04/16/2010</td> <td>venezianok</td> <td colspan="3">Incomplete</td> </tr> </tbody> </table>							Question Packages							QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS			Administrative	Jane Doe	04/16/2010	venezianok	Incomplete			Demographics	Jane Doe	04/16/2010	venezianok	Incomplete			PCP Information	Jane Doe	04/16/2010	venezianok	Incomplete			Medical Status	Jane Doe	04/16/2010	venezianok	Incomplete			Residency History and Information	Jane Doe	04/16/2010	venezianok	Incomplete			Lead Hazards	Jane Doe	04/16/2010	venezianok	Incomplete			Current Housekeeping Practices	Jane Doe	04/16/2010	venezianok	Incomplete			Occupational/ Do-It-Yourself/Hobby Lead Hazards	Jane Doe	04/16/2010	venezianok	Incomplete			Educational Materials	Jane Doe	04/16/2010	venezianok	Incomplete			Interim Measures	Jane Doe	04/16/2010	venezianok	Incomplete			Social Service & Other Referrals	Jane Doe	04/16/2010	venezianok	Incomplete		
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Property Event

Event Data	Lab Results	Concerns	Property Information	Tasks	Event Properties	Event History
------------	-------------	----------	----------------------	-------	------------------	---------------

Tabs ←

Question Packages					
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS	
Administrative	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete	
Property Information	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete	
Environmental Lead Inspection	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete	
Lead Hazards	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete	
Lead Remediation & Abatement	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete	

Basic Information/Details

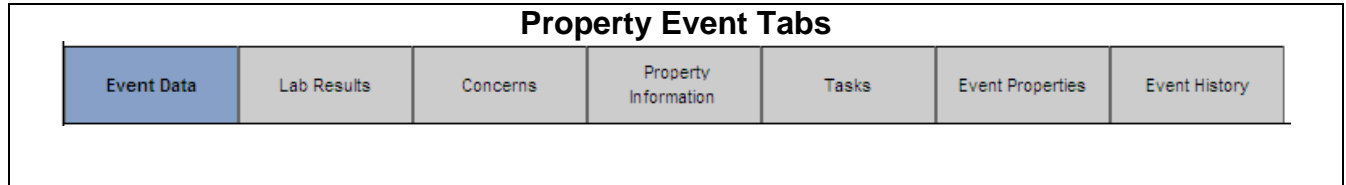
Question Package - Details	
Name:	Administrative
Description:	
Name:	45 High St, Willimantic, CT 06226 *
Status:	Incomplete
Number of Questions:	5
Incomplete Required Questions:	2
Last Update:	04/16/2010
Updated By:	venezianok

EVENT INFORMATION: TABS

The Tabs section has seven tab buttons:

Blood Lead – Child and Blood Lead – Not classified Events Tabs						
Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History

Event Data	Clicking the Event Data tab presents the user with the question packages specific to the event
Lab Results	Clicking on the Lab Results tab allows the user to see all blood lead levels associated with the child at the associated address.
Concerns	Clicking the Concerns tab allows the user to see possible issues with data entry. Concerns can also be used as a type of pre-established data validation.
Persons	Clicking the Persons tab allows the user to view demographic information for the person involved in this particular event.
Tasks	Clicking the Tasks tab will provide the user with information about all the tasks associated with the open event. Event tasks will display here regardless of who is assigned the task.
Event Properties	Clicking the Event Properties tab will provide the user with high level, basic information about the open event. (Not visible for all users.)
Event Audit Trail	Clicking the Event Audit Trail tab will display a list of changes that have been applied to the current event.



Event Data	Clicking the Event Data tab presents the user with the question packages specific to the event
Lab Results	Clicking on the Lab Results tab allows the user to see all environmental sample results for a Property event.
Concerns	Clicking the Concerns tab allows the user to see possible issues with data entry. Concerns can also be used as a type of pre-established data validation.
Property Information	Clicking the Property Information tab allows the user to view demographic information for the property involved in this particular event.
Tasks	Clicking the Tasks tab will provide the user with information about all the tasks associated with the open event. Event tasks will display here regardless of who is assigned the task.
Event Properties	Clicking the Event Properties tab will provide the user with high level, basic information about the open event. (Not visible for all users.)
Event Audit Trail	Clicking the Event Audit Trail tab will display a list of changes that have been applied to the current event.

EVENT INFORMATION: EVENT DATA

The Event Data section is further divided into two sections:

- Question Packages
- Question Package – Details

Blood Lead – Child and Blood Lead - Not-classified Events

Event Information

Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History
------------	-------------	----------	---------	-------	------------------	---------------

Question Packages

QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS
Administrative	Jane Doe	04/16/2010	venezianok	Incomplete
Demographics	Jane Doe	04/16/2010	venezianok	Incomplete
PCP Information	Jane Doe	04/16/2010	venezianok	Incomplete
Medical Status	Jane Doe	04/16/2010	venezianok	Incomplete
Residency History and Information	Jane Doe	04/16/2010	venezianok	Incomplete
Lead Hazards	Jane Doe	04/16/2010	venezianok	Incomplete
Current Housekeeping Practices	Jane Doe	04/16/2010	venezianok	Incomplete
Occupational/ Do-It-Yourself/Hobby Lead Hazards	Jane Doe	04/16/2010	venezianok	Incomplete
Educational Materials	Jane Doe	04/16/2010	venezianok	Incomplete
Interim Measures	Jane Doe	04/16/2010	venezianok	Incomplete
Social Service & Other Referrals	Jane Doe	04/16/2010	venezianok	Incomplete

View Question Package

Question Package – Details

Name:	Administrative
Description:	Administrative
Name:	Jane Doe
Status:	Incomplete
Number of Questions:	16
Incomplete Required Questions:	3
Last Update:	04/16/2010
Updated By:	venezianok

Property Event

Event Information																																															
Event Data	Lab Results	Concerns	Property Information	Tasks	Event Properties	Event History																																									
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #0056b3; color: white;"> <th colspan="6">Question Packages</th> </tr> <tr style="background-color: #e0e0e0;"> <th style="width: 35%;">QUESTION PACKAGE</th> <th style="width: 30%;">NAME</th> <th style="width: 10%;">LAST UPDATE</th> <th style="width: 10%;">UPDATED BY</th> <th style="width: 10%;">STATUS</th> <th style="width: 5%;"></th> </tr> </thead> <tbody> <tr style="background-color: #ffff00;"> <td>Administrative</td> <td>45 High St, Willimantic, CT 06226 *</td> <td>04/16/2010</td> <td>vezianok</td> <td>Incomplete</td> <td></td> </tr> <tr> <td>Property Information</td> <td>45 High St, Willimantic, CT 06226 *</td> <td>04/16/2010</td> <td>vezianok</td> <td>Incomplete</td> <td></td> </tr> <tr> <td>Environmental Lead Inspection</td> <td>45 High St, Willimantic, CT 06226 *</td> <td>04/16/2010</td> <td>vezianok</td> <td>Incomplete</td> <td></td> </tr> <tr> <td>Lead Hazards</td> <td>45 High St, Willimantic, CT 06226 *</td> <td>04/16/2010</td> <td>vezianok</td> <td>Incomplete</td> <td></td> </tr> <tr> <td>Lead Remediation & Abatement</td> <td>45 High St, Willimantic, CT 06226 *</td> <td>04/16/2010</td> <td>vezianok</td> <td>Incomplete</td> <td></td> </tr> </tbody> </table> <p style="text-align: center; font-size: 1.2em; font-weight: bold; border: 1px solid black; padding: 5px; display: inline-block;">Question Packages</p> <p style="text-align: center; margin-top: 5px;"><input type="button" value="View Question Package"/></p>						Question Packages						QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS		Administrative	45 High St, Willimantic, CT 06226 *	04/16/2010	vezianok	Incomplete		Property Information	45 High St, Willimantic, CT 06226 *	04/16/2010	vezianok	Incomplete		Environmental Lead Inspection	45 High St, Willimantic, CT 06226 *	04/16/2010	vezianok	Incomplete		Lead Hazards	45 High St, Willimantic, CT 06226 *	04/16/2010	vezianok	Incomplete		Lead Remediation & Abatement	45 High St, Willimantic, CT 06226 *	04/16/2010	vezianok	Incomplete	
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Last Update:	04/16/2010																																														
Updated By:	vezianok																																														

A Question Package is a group of questions that share a common theme. The number and type of Question Packages may vary according to the login role and the type of event.

System users with the role of Case Worker will see the following Question Packages:

Type of Event	Question Packages	
Blood Lead - Child	<ul style="list-style-type: none"> Administrative Demographics PCP Information Medical Status Residency History and Information Lead Hazards 	<ul style="list-style-type: none"> Current Housekeeping Practices Occupational/"Do-It-Yourself"/Hobby Lead Hazards Educational Materials Interim Measures Social Service and Other Referrals
Blood Lead – Not classified	<ul style="list-style-type: none"> Administrative Demographic PCP Information 	
Property	<ul style="list-style-type: none"> Administrative Property Information Environmental Lead Inspection Lead Hazards Lead Remediation and Abatement 	

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The Question Package table is divided into five columns. Those columns are:

Question Package	Identifies the title of the question packages
Person	Indicates the name of the person involved in the event
Last Update	Displays the date that each question package was last updated
Updated By	Identifies the user that made the last update or modification to the question package
Status	Refers to the completeness of the required questions within the question package. The question package is considered complete if all required (asterisked [*]) questions have been answered. The status of a question package will be marked as complete by default if it does not contain any required questions

The Question Package – Details section will display summary information about the selected Question Package. For example, if the user clicks the Administrative Question Package, the Details section will display the information specific to that package.

Question Package - Details	
Name:	Administrative
Description:	Administrative
Name:	Jane Doe
Status:	Incomplete
Number of Questions:	16
Incomplete Required Questions:	3
Last Update:	04/16/2010
Updated By:	venezianok

The Question Package - Details table is divided into eight rows. Those rows are:

Name	Identifies the title of the question package
Description	Describes the question package
Person	Indicates the name of the person involved in the event
Status	Refers to the completeness of the required questions within the question package. The question package is considered complete if all required (asterisked [*]) questions have been answered. The status of a question package will be marked as complete by default if it does not contain any required questions
Number of Questions	Indicates the total number of questions in a question package


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Incomplete Required Questions	Indicates the total number of <i>required</i> questions in a question package that have not yet been filled in
Last Update	Displays the date that each question package was last updated
Updated By	Identifies the user that made the last update or modification to the question package

The entire question package may be viewed by selecting it and then clicking on the View Question Package button. Or by double clicking the highlighted question package.

Question Packages				
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS
Administrative	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete
Property Information	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete
Environmental Lead Inspection	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete
Lead Hazards	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete
Lead Remediation & Abatement	45 High St, Willimantic, CT 06226 *	04/16/2010	venezianok	Incomplete

View Question Package



EVENT INFORMATION: LAB RESULTS

The Lab Results tab is used to list all blood lead lab results that have been submitted to DPH. If a blood lead level result is clicked on additional details for that lab result are highlight in the Details section below.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Event Data, Lab Results (selected), Concerns, Persons, Tasks, Event Properties, and Event History. Below the navigation bar is a table with the following data:

LAB	LAST UPDATE
Draw Date: 07/07/2008 Spec Number: 95874 Test: Venous Result: 30	04/29/2010

Below the table are three buttons: Add Lab Result, Update Lab Result, and Delete Lab Result. A callout box labeled "Blood Lead Lab Results" points to the first row of the table. Below the buttons is a "Details" section with the following information:

Details

Lab Results: Draw Date: 07/07/2008 Spec Number: 95874 Test: Venous Result: 30
 Last Update: 04/29/2010
 Updated By: venezianok
 Results: Details

SpecimenInfo 95874, 07/07/2008, 07/07/2008, 07/08/2008
 Test Venous, 30, ug/dL
 LabFacility State PH Laboratory
 DrawingProvider DARDICK, KENNETH | MANSFIELD FAM PRAC | 34 MANSFIELD PROF. PARK RD. (STORRS, CT 06268)(860)4870100(860)4874525, Kenneth Dardick, Mansfield Fam Prac, 34 Mansfield Prof. Park Rd., Storrs, CT 06268, (860) 487-0100, (860) 487-4525
 OrderingProvider Yes, 145_DARDICK_KENNETH, Kenneth Dardick, Mansfield Fam Prac, 34 Mansfield Prof. Park Rd., Storrs, CT 06268, (860) 487-0100, (860) 487-4525
 Misc Notes in the notes field

The Lab Results table is divided into two columns. Those columns are:

Lab	Displays the basic information of a lab result (draw date, specimen number, test type: venous or capillary, and the test result)
Last Update	Displays the date that the lab result was last updated

The Details section is divided in to four rows. Those rows are:

Lab Results	Displays the basic information of a lab result (draw date, specimen number, test type: venous or capillary, and the test result)
Last Update	Displays the date that the lab result was last updated
Updated By	Displays the user name of the person who last updated the result
Results	Displays the following information: Specimen Info: test ID#, draw date, received date, tested date Test: Venous/Capillary, numeric result, units Lab Facility: analysis lab Drawing Provider: name, practice name, address, telephone #, fax # Ordering Provider: name, practice name, address, telephone #, fax # Misc: Any notes that were entered in the notes field on the lab screen

EVENT INFORMATION: CONCERNS

The Concerns tab is used to highlight potential data entry issues that may need to be addressed. For example, if the Abatement Plan Approval date is AFTER the Lead Abatement Start Date, the system would generate a "concern". Concerns can only be added or edited by the DPH Administrator role; they can only be viewed by the Case Worker role.

The Concerns section is further divided into two sections:

- Concerns
- Concern – Details

Concerns					
CONCERN	DESCRIPTION	NAME	LAST UPDATE	SEVERITY	STATUS
ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN	Abatement Plan Approved Date must be on or before Abatement Start Date	45 High St, Willimantic, CT 06226 *	04/20/2010	Medium	Active

Concern - Details	
Concern:	ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN
Description:	Abatement Plan Approved Date must be on or before Abatement Start Date
Name:	45 High St, Willimantic, CT 06226 *
Status:	Active
Severity:	Medium
Create Date:	04/19/2010
Last Update:	04/20/2010
Updated By:	venezianok
Notes:	Working on getting the correct date to resolve this concern.

The Concerns table is divided into six columns. Those columns are:

Concern	Unique name of the concern in the database
Description	Describes the concern in plain English
Name	Indicates the name of the person or property (depending on event type) involved in the concern
Last Update	Displays the date that the concern status was last updated
Severity	Identifies the severity of the concern: Very Low, Low, Medium, High, Very High
Status	Refers to the current status of the concern - either Active or Resolved

The Concerns table is divided into nine rows. Those rows are:

Concern	Unique name of the concern in the database
Description	Describes the concern in plain English
Name	Indicates the name of the person or property (depending on event type) involved in the concern
Status	Refers to the current status of the concern - either Active or Resolved
Severity	Identifies the severity of the concern: Very Low, Low, Medium, High, Very High
Create Date	Date that the concern was created
Last Update	Displays the date that the concern status was last updated
Updated By	User who last updated the event
Notes	Notes related to the concern entered by the user

The full list of concerns is as follows:

Lead Hazards Package:

Renovation start date ≤ end date

Dust Hazard: Date Identified ≤ Date Corrected

Lead Remediation & Abatement Package:

Order date ≤ plan received date

Plan receipt date ≤ plan approval date

Plan review date ≤ plan approval date

Plan approval date ≤ start of abatement/remediation date

Start date ≤ Reoccupancy inspection

Reoccupancy inspection ≤ Compliance letter

Reinspection ≤ Post abatement/remediation Report date

Child:

Address must be complete

Non-numeric blood lead result will not be accepted

Draw Date must be ≤ Received Date must be ≤ Date Tested

EVENT INFORMATION: PERSONS

Information about the child involved in the event may change over the course of the event or over time. The Persons tab is used to update address or name information as well as to view other historical demographic information.

The Persons section is further divided into three sections:

- Persons Table
- Persons Tabs
- Tab-specific Information

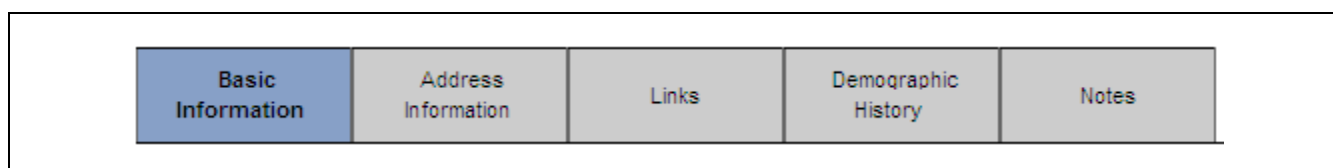
Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History
Persons						
NAME	GENDER	BIRTH DATE	ADDRESS	STATUS		
Jane Doe	Female	07/07/2007	45 High St, Willimantic, CT 06226	Active		
Persons Table						
<input type="button" value="Edit"/>						
Basic Information	Address Information	Links	Demographic History	Notes	Persons Tabs	
Basic Information						
Name:	Jane Doe					
Birth Date:	07/07/2007					
Death Date:						
Age:	2					
Gender:	Female					
Social Security Number:						
External ID:	10000382					
Street Address:	45 High St					
City:	Willimantic					
State:	CT					
Zip Code:	06226					
County:	Windham County					
Country:	USA					
Home Phone:	(860) 555-5555					
Mobile Phone:						
Contact Method:						
GIS Info:	Pending					
Tab specific information						

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The Persons table is divided into five columns. Those columns are:

Persons	Indicates the name of the child involved in the event
Gender	Male or Female
Birth Date	Child's birth date
Address	Displays the address of the child involved in the event
Status	Refers to the current status of the child: Active, Inactive

The Persons Tabs section has five tabs: Basic Information, Address Information, Links, Demographic History, and Notes.



Basic Information	Contains information such as Full Name, Age, Birth Date, City, State, and Zip
Address Information	Contains current and historical information for the primary and other address(es)
Links	Contains other events that are associated to the event the user is viewing Example: If you are viewing a Blood Lead – Child event the Links tab will display the Property event associated with the Blood Lead - Child
Demographic History	Contains information such as the Start Date, End Date, First Name, Last Name, and Middle Name
Notes	Contains notes information that was entered by a user

Basic Information Data:

Basic Information	Address Information	Links	Demographic History	Notes
-------------------	---------------------	-------	---------------------	-------

Basic Information	
Name:	Jane Doe
Birth Date:	07/07/2007
Death Date:	
Age:	2
Gender:	Female
Social Security Number:	
External ID:	100000382
Street Address:	45 High St
City:	Willimantic
State:	CT
Zip Code:	06226
County:	Windham County
Country:	USA
Home Phone:	(860) 555-5555
Mobile Phone:	
Contact Method:	
GIS Info:	Pending

Address Information Data:

Basic Information	Address Information	Links	Demographic History	Notes
Address Information				
TYPE	ADDRESS			PHONE
Home	45 High St, Willimantic, CT 06226			(H) (860) 555-5555
<input type="button" value="Add Address"/> <input type="button" value="Edit Address"/> <input type="button" value="Remove Address"/>				
Address History				
Start Date:	01/01/1900			
End Date:	01/01/2030			
Street Address:	45 High St			
City:	Willimantic			
State:	CT			
Zip Code:	06226			
County:	Windham County			
Country:	USA			
Home Phone:	(860) 555-5555			
Mobile Phone:				
Contact Method:				
GIS Info:	Pending			

Links:

Basic Information	Address Information	Links	Demographic History	Notes	
Links					
RELATIONSHIP	NAME	BIRTH DATE	ADDRESS	PHONE	EXTERNAL ID
Other	45 High St, Willimantic, CT 06226 *		45 High St, Willimantic, CT 06226		100000383
<input type="button" value="Add Link"/> <input type="button" value="Remove Link"/>					

Note: Property event always associated with the Child event.

Demographic History Data:

Basic Information	Address Information	Links	Demographic History	Notes
Demographic History				
Start Date:		01/01/1900		
End Date:		01/01/2030		
First Name:		Jane		
Middle Name:				
Last Name:		Doe		
Birth Date:		07/07/2007		
Death Date:				
Gender:		Female		
Social Security Number:				
Mother's Maiden Name:				
External ID:		PBEDAGLNFTFP		

If changes are made to the Demographic History data, historical information will be displayed along with the current information.

Notes Data:

Basic Information	Address Information	Links	Demographic History	Notes
Notes				
04/20/2010 - Krista Veneziano				
To add a note click on the Add Notes button below.				
<input type="button" value="Add Note"/>				

EVENT INFORMATION: PROPERTY INFORMATION

The Property Information tab provides information about the Property associated with the open event.

The Property Information section is further divided into three sections:

- Property Information Table
- Property Information Tabs
- Tab-specific Information

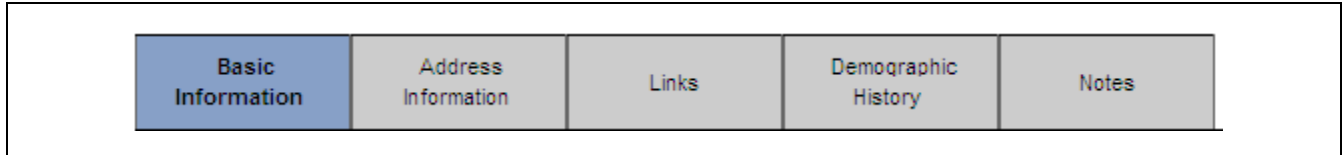
The screenshot shows a web interface for Property Information. At the top is a navigation bar with tabs: Event Data, Lab Results, Concerns, **Property Information**, Tasks, Event Properties, and Event History. Below this is a table with columns: FACILITY NAME, ADDRESS, and STATUS. The first row contains: 45 High St, Willimantic, CT 06226 *, 45 High St, Willimantic, CT 06226, and Active. A box labeled 'Property Information Table' is overlaid on the table. Below the table is an 'Edit' button. Underneath are five tabs: **Basic Information**, Address Information, Links, Demographic History, and Notes. A box labeled 'Property Information Tabs' is overlaid on these tabs. Below the tabs is a detailed form for 'Basic Information' with fields for Facility Name, External ID, Street Address, City, State, Zip Code, Country, Work Phone, Contact Method, and GIS Info. A box labeled 'Tab specific information' is overlaid on the right side of this form.

The Property Information table is divided into three columns. Those columns are:

Facility Name	Indicates the name of the facility (if entered) involved in the event Examples: Child day care facility or an Apartment complex name
Address	Displays the address involved in the event
Status	Refers to the current status of the address: Active, Inactive

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The Property Information section has five tabs: Basic Information, Address Information, Links, Demographic History, and Notes.



Basic Information	Contains information such as Facility Name (if applicable), Street, City, State, and Zip
Address Information	Contains current and historical information for the address
Links	Contains other events that are associated to the event the user is viewing Example: If you are viewing a Property event the Links tab will display the Blood Lead – Child event associated with the Property event
Demographic History	Contains information such as the Start Date, End Date, Name, and External ID
Notes	Contains notes information that was entered by a user

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Basic Information Data:

Basic Information	Address Information	Links	Demographic History	Notes
Basic Information				
Facility Name:	45 High St, Willimantic, CT 06226 *			
External ID:	100000383			
Street Address:	45 High St			
City:	Willimantic			
State:	CT			
Zip Code:	06226			
County:	Windham County			
Country:	USA			
Work Phone:				
Contact Method:				
GIS Info:	Pending			

Address Information Data:

Basic Information	Address Information	Links	Demographic History	Notes
Address Information				
TYPE	ADDRESS			PHONE
Company	45 High St, Willimantic, CT 06226			
<input type="button" value="Add Address"/> <input type="button" value="Edit Address"/> <input type="button" value="Remove Address"/>				
Address History				
Start Date:	01/01/1900			
End Date:	01/01/2030			
Street Address:	45 High St			
City:	Willimantic			
State:	CT			
Zip Code:	06226			
County:	Windham County			
Country:	USA			
Work Phone:				
Contact Method:				
GIS Info:	Pending			

Links:

Basic Information	Address Information	Links	Demographic History	Notes
Links				
RELATIONSHIP	NAME	ADDRESS	PHONE	EXTERNAL ID
Other	Doe, Jane	45 High St, Willimantic, CT 06226	(H) (860) 555-5555	100000382

Note: Child event associated with the Property event

Demographic History Data:

Basic Information	Address Information	Links	Demographic History	Notes
Demographic History				
Start Date:	01/01/1900			
End Date:	01/01/2030			
Name:				
External ID:	100000383			

Notes Data:

Basic Information	Address Information	Links	Demographic History	Notes
-------------------	---------------------	-------	---------------------	--------------

Notes

04/20/2010 - Krista Veneziano
Notes can be added by clicking on the Add Notes button below.

Add Note

EVENT INFORMATION: TASKS

The Tasks tab provides information about the tasks associated with the open event.

The Tasks section is further divided into two sections:

- Tasks Table: The tasks associated with the open event will display in the table at the top of the section
- Details: Details about a selected task will display in the bottom of the section

The Tasks table is divided into seven columns. Those columns are:

Type	Displays the type of task
Status	Displays the current status of the task: Pending, In Progress, Completed
Priority	Indicates the task priority as set by the task creator: Very Low, Low, Medium, High, Very High
Due Date	Displays the date that the task is due to be completed
Description	Displays the short description of the task
Assigned To	Indicates the user assigned to perform the task

Assigned To Group	Indicates the group assigned to perform the task
--------------------------	--

The Details section will display summary information about the selected Task.

Details	
Type:	Assignment
Status:	In Progress
Priority:	Medium
Description:	Contact provider about follow up testing
Assigned To:	Tina McCarthy
Assigned To Group:	
Create Date:	04/20/2010
Created By:	Krista Veneziano
Last Update:	04/20/2010
Updated By:	Krista Veneziano
Due Date:	04/22/2010
Start Date:	04/20/2010
Complete Date:	
Notes:	

Type	Displays the type of task
Status	Displays the current status of the task: Pending, In Progress, Completed
Priority	Indicates the task priority as set by the task creator: Very Low, Low, Medium, High, Very High
Description	Displays the short description of the task
Assigned To	Indicates the user assigned to perform the task
Assigned To Group	Indicates the group assigned to perform the task
Create Date	Displays the date that the task was created
Created By	Identifies the user that created the task
Last Update	Displays the date that the task was last updated
Updated By	Identifies the user that made the last update or modification to the task information
Due Date	Displays the date that the task is due to be completed

Start Date	Displays the date that the task is due to be started
Completion Date	Displays the date that the task was completed
Notes	Displays any notes attached to the task

EVENT INFORMATION: EVENT PROPERTIES

The Event Properties tab provides basic information about the open event.

The change information will be displayed in chronological order with the oldest change at the top of the list.

Note: Case Workers will not have access to this Event tab.

Property Event

Event Data	Lab Results	Concerns	Property Information	Tasks	Event Properties	Event History																																				
Event Properties																																										
Event ID:	100000163																																									
Event Type:	Property																																									
Status:	Open																																									
Model:	InvestigationModel																																									
Rule Outputs:	<table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4">45 High St, Willimantic, CT 06226 *</td> <td colspan="2"></td> </tr> <tr> <td>ABATEMENT_REOCCUPANCY_INSPECTION_DONE</td> <td></td> <td></td> <td></td> <td>False</td> <td></td> </tr> <tr> <td>ABATEMENT_REOCCUPANCY_INSPECTION_REQUIRE</td> <td></td> <td></td> <td></td> <td>True</td> <td></td> </tr> <tr> <td>LBOHD</td> <td></td> <td></td> <td></td> <td>406</td> <td></td> </tr> <tr> <td>LBOHName</td> <td></td> <td></td> <td></td> <td>North Central Health District</td> <td></td> </tr> <tr> <td>LPPCRegion</td> <td></td> <td></td> <td></td> <td>1</td> <td></td> </tr> </table>						45 High St, Willimantic, CT 06226 *						ABATEMENT_REOCCUPANCY_INSPECTION_DONE				False		ABATEMENT_REOCCUPANCY_INSPECTION_REQUIRE				True		LBOHD				406		LBOHName				North Central Health District		LPPCRegion				1	
45 High St, Willimantic, CT 06226 *																																										
ABATEMENT_REOCCUPANCY_INSPECTION_DONE				False																																						
ABATEMENT_REOCCUPANCY_INSPECTION_REQUIRE				True																																						
LBOHD				406																																						
LBOHName				North Central Health District																																						
LPPCRegion				1																																						
<input type="button" value="Edit Event Properties"/>																																										

Blood Lead – Child Event

Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History																																																												
Event Properties																																																																		
Event ID:	100000162																																																																	
Event Type:	Blood Lead - Child																																																																	
Status:	Open																																																																	
Model:	ChildLeadModel																																																																	
Rule Outputs:	<table style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4">Jane Doe</td> <td colspan="2"></td> </tr> <tr> <td>BLL_DECLINE</td> <td></td> <td></td> <td></td> <td>False</td> <td></td> </tr> <tr> <td>EnableEpiForm</td> <td></td> <td></td> <td></td> <td>True</td> <td></td> </tr> <tr> <td>FirstElevatedDate</td> <td></td> <td></td> <td></td> <td>07/07/2008</td> <td></td> </tr> <tr> <td>Jurisdiction</td> <td></td> <td></td> <td></td> <td>Enfield</td> <td></td> </tr> <tr> <td>LBOHD</td> <td></td> <td></td> <td></td> <td>406</td> <td></td> </tr> <tr> <td>LBOHName</td> <td></td> <td></td> <td></td> <td>North Central Health District</td> <td></td> </tr> <tr> <td>LBOHPhone</td> <td></td> <td></td> <td></td> <td>(860) 745-0383</td> <td></td> </tr> <tr> <td>LPPCRegion</td> <td></td> <td></td> <td></td> <td>1</td> <td></td> </tr> <tr> <td>TestingDueDate</td> <td></td> <td></td> <td></td> <td>08/06/2008</td> <td></td> </tr> </table>						Jane Doe						BLL_DECLINE				False		EnableEpiForm				True		FirstElevatedDate				07/07/2008		Jurisdiction				Enfield		LBOHD				406		LBOHName				North Central Health District		LBOHPhone				(860) 745-0383		LPPCRegion				1		TestingDueDate				08/06/2008	
Jane Doe																																																																		
BLL_DECLINE				False																																																														
EnableEpiForm				True																																																														
FirstElevatedDate				07/07/2008																																																														
Jurisdiction				Enfield																																																														
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LBOHName				North Central Health District																																																														
LBOHPhone				(860) 745-0383																																																														
LPPCRegion				1																																																														
TestingDueDate				08/06/2008																																																														
<input type="button" value="Edit Event Properties"/>																																																																		

The Event Properties table is divided into five rows. Those rows are:

Event ID	The unique event number automatically assigned by LSS is displayed here
Event Type	This will be Blood Lead – Child, Blood Lead – Not classified, or Property
Status	The current status of the event will be displayed: Open, Closed, Invalid
Model	This will be InvestigationModel for Property Events and ChildLeadModel for Child Events

Rule Outputs

This displays some details of the event (such as Name of the child associated with event, address associated with the Property event, LHD responsible for the event)

The Event Properties may be edited by clicking on the Edit Event Properties button.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Event Data, Lab Results, Concerns, Persons, Tasks, **Event Properties**, and Event History. The 'Event Properties' tab is active and displays the following information:

Event Properties																					
Event ID:	100000162																				
Event Type:	Blood Lead - Child																				
Status:	Open																				
Model:	ChildLeadModel																				
Rule Outputs:	<table border="0"><tr><td>Jane Doe</td><td></td></tr><tr><td>BLL_DECLINE</td><td>False</td></tr><tr><td>EnableEpiForm</td><td>True</td></tr><tr><td>FirstElevatedDate</td><td>07/07/2008</td></tr><tr><td>Jurisdiction</td><td>Enfield</td></tr><tr><td>LBOHID</td><td>406</td></tr><tr><td>LBOHName</td><td>North Central Health District</td></tr><tr><td>LBOHPhone</td><td>(860) 745-0383</td></tr><tr><td>LPPCRRegion</td><td>1</td></tr><tr><td>TestingDueDate</td><td>08/08/2008</td></tr></table>	Jane Doe		BLL_DECLINE	False	EnableEpiForm	True	FirstElevatedDate	07/07/2008	Jurisdiction	Enfield	LBOHID	406	LBOHName	North Central Health District	LBOHPhone	(860) 745-0383	LPPCRRegion	1	TestingDueDate	08/08/2008
Jane Doe																					
BLL_DECLINE	False																				
EnableEpiForm	True																				
FirstElevatedDate	07/07/2008																				
Jurisdiction	Enfield																				
LBOHID	406																				
LBOHName	North Central Health District																				
LBOHPhone	(860) 745-0383																				
LPPCRRegion	1																				
TestingDueDate	08/08/2008																				

Below the table is a button labeled "Edit Event Properties". An arrow points to this button from below.

EVENT INFORMATION: EVENT HISTORY

The Event History tab provides information about changes that have been applied to the open event.

The change information will be displayed in chronological order with the oldest change at the top of the list.

Blood Lead – Child Event

Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History
------------	-------------	----------	---------	-------	------------------	---------------

Event History			
TIME	EVENT	MESSAGE	USER
04/16/2010 08:22 AM	Case Created	Case created	venezianok
04/16/2010 08:23 AM	Investigation Updated	Added investigation: Draw Date: 07/07/2008 Spec Number: Test: Venous Result: 30 [Jane Doe]	venezianok

Property Event

Event Data	Lab Results	Concerns	Property Information	Tasks	Event Properties	Event History
------------	-------------	----------	----------------------	-------	------------------	---------------

Event History			
TIME	EVENT	MESSAGE	USER
04/16/2010 08:23 AM	Case Created	Case created	venezianok
04/19/2010 01:04 PM	Question Package Updated	Updated question package: Lead Remediation & Abatement [45 High St, Willimantic, CT 06226 *]	mccarthyt
04/20/2010 07:08 AM	Concern Updated	Updated concern: ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN [45 High St, Willimantic, CT 06226 *]	venezianok

The Event Audit Trail table is divided into four columns. Those columns are:

Time	Displays the date and time that the change was applied
Event	Displays the type of change that was applied
Message	Displays more specific information about the change that was applied
User	Displays the login ID of the user who made the change

Chapter 3: Searching

OVERVIEW

Purpose

Explain how to search for an existing event (Blood Lead – Child, Blood Lead – Not classified, or Property)

Objectives

- Enter Search criteria
 - Search Recent Events
 - Use Wildcard searches
-

SEARCHING

Often it is necessary to view an existing event for informational purposes or to find an existing event to add or change information. There are many different ways to search for open/closed events. To search for an existing event, follow the steps below:

1. Click the **Search Event** button on LSS Dashboard toolbar.



The generic Search Event screen will display.

Search Case

Search Criteria

Event ID:

Last Name:

First Name:

Birth Date: (inexact)

Gender:

Street Address:

City:

State:

Zip Code:

County:

Event Type:

Search Results

Event ID	Name	Birth Date	Status	Event Type	Create Date	Person ID

No search done

Search Options

Sort By:

Sort Order:

Search History:

Search Soundex:

Search Options

Sort By:

Sort Order:

Search History:

Search Options

Sort By:

Sort Order:

Search History:

Event Type:

Search Options

Sort By:

Sort Order:

Search History:

This same screen will be displayed if Blood Lead – Child or Blood Lead – Not classified is selected from the Event Type drop down menu.

If you are searching for a specific address/Property Event select the Property option from the Event Type drop down menu. The following property specialized search screen will be displayed.

The screenshot shows a search interface with two main sections: Search Criteria and Search Results.

Search Criteria:

- Event ID:
- Name:
- Street Address:
- City:
- State:
- Zip Code:
- County:
- Event Type:

Search Options:

- Sort By:
- Sort Order:
- Search History:

Buttons: Search, Clear, Use selected case, Cancel

Search Results:

Search Results				
Event ID	Name	Status	Event Type	Create Date

No search done

If searching for a specific Property Event when you have the address:

2. Select Property from the Event Type drop down menu.
3. Enter the appropriate **Search Criteria** (street address, city, state, zip code, etc)

The screenshot shows the search interface with the following search criteria filled in:

Search Criteria:

- Event ID:
- Name:
- Street Address:
- City:
- State:
- Zip Code:
- County:
- Event Type:

Search Options:

- Sort By:
- Sort Order:
- Search History:

Buttons: Search, Clear

4. Click on the **Search** button

The results screen will return all cases that fit the criteria entered.

The screenshot shows a search interface with two main sections: Search Criteria and Search Results.

Search Criteria:

- Event ID:
- Name:
- Street Address:
- City:
- State:
- Zip Code:
- County:
- Event Type:

Search Options:

- Sort By:
- Sort Order:
- Search History:

Search Results:

Event ID	Name	Status	Event Type	Create Date
100000163	45 High St, Willimantic, CT 06226 *	Open	Property	04/16/2010

Displaying result(s) 1...1

<< First < Prev 1 / 1 Next > Last >>

Buttons: Search, Clear, Use selected case, Cancel

If no selection is made from the Event Type drop down menu and no other search criteria are entered, the search will return an error message stating that “Minimum search criteria not specified”.

The screenshot shows a search interface with search criteria and search results.

Search Criteria:

- Event ID:
- Last Name:
- First Name:
- Birth Date:
- Gender:
- Street Address:
- City:

Search Results:

Event ID	Name	Birth Date

Minimum search criteria not specified

If searching for a specific Child Event when you have the child’s name:

5. Select **Blood Lead – Child** or **Blood Lead – Not classified** from the **Event Type** drop down menu. If you are not sure do not select either.
6. Enter the appropriate **Search Criteria** (such as Name, Birth Date, Gender)

Search Criteria

Event ID:

Last Name:

First Name:

Birth Date:
(Inexact)

Gender:

Street Address:

City:

State:

Zip Code:

County:

Event Type:

Search Options

Sort By:

Sort Order:

Search History:

Search Soundex:

7. Click the **Search** button to perform the search.

If an address is entered and no Event Type is selected both Child and Property Events associated with that property will be included in the Search results:

Search Criteria

Event ID:

Last Name:

First Name:

Birth Date:
(Inexact)

Gender:

Street Address:

City:

Search Results

Search Results						
Event ID	Name	Birth Date	Status	Event Type	Create Date	Person ID
100000163	45 High St, Willimantic, CT 06226 *		Open	Property	04/16/2010	100000383
100000162	Jane Doe	07/07/2007	Open	Blood Lead - Child	04/16/2010	100000382

Displaying result(s) 1...2

 << First < Prev 1 / 1 Next > Last >>

The LSS provides multiple search criteria to find events. The user can use one or many of the search criteria to find a specific events. Please note: the more search criteria provided; the fewer results will display. In most cases, it is better to enter a small amount of criteria first and then add more criteria to narrow the search.

Wildcard searches

Searching within the LSS system supports wildcard characters. To use a wildcard, type an asterisk (*) wherever there are characters about which you are unsure.

To use a wildcard, at least two characters must be specified in the search field in addition to the asterisk (*).

In the example below, entering “do*” in the Last Name criteria returned one matching record.

Search Criteria		Search Results						
Event ID:	<input type="text"/>	Search Results						
Last Name:	<input type="text" value="Do*"/>	Event ID	Name	Birth Date	Status	Event Type	Create Date	Person ID
First Name:	<input type="text"/>	100000162	Jane Doe	07/07/2007	Open	Blood Lead - Child	04/16/2010	100000382
Birth Date:	<input type="text"/>							
(Inexact)								
Gender:	<input type="text" value="v"/>							
Street Address:	<input type="text"/>							
...		Displaying result(s) 1...1						
		<< First < Prev 1 / 1 Next > Last >>						



Event searching is also tied to security. Search results will only yield events that the user has permissions to see.

If the search yields more results than will fit in the results table, the scroll bar or the navigation bar can be used to find a result. Click the appropriate navigation link (<<**First**, <**Prev**, **Next**, **Last**>>) to find the correct results record.

8. If the search *does not* find the event that you want, click the **Clear** button to re-set the search criteria to do a new search.
9. If the search *does* find the event that you want, either:
 - **double-click** the results record
 - or
 - **click** the results record and then click the **Use Selected Event** button to open the event in the Maven LSS Dashboard screen.

The user can now review the event information as desired.

RECENT EVENTS

A simple alternative to the regular Search is to use the Recent Events button on the LSS toolbar. This option is a quick method of locating the thirty most recent events on which the user has worked.

1. Click the **Recent Events** button on the LSS Dashboard toolbar.



The Recent Events can display up to thirty event results.

Recent Cases				
Event ID	Name	Status	Event Type	Access Time
100000161	122 D Welton Way, Thomaston, CT 06787 *	Open	Property	04/20/2010 01:05 PM
100000144	Persis, Drumweller	Open	Blood Lead - Not classified	04/20/2010 01:05 PM
100000145	Persis, Tina	Closed	Blood Lead - Not classified	04/20/2010 01:05 PM
100000147	Persis, Amy	Open	Blood Lead - Not classified	04/20/2010 01:03 PM
100000140	Brydson, Janet	Open	Blood Lead - Child	04/20/2010 12:56 PM
100000162	Doe, Jane	Open	Blood Lead - Child	04/20/2010 10:49 AM
100000163	45 High St, Willimantic, CT 06226 *	Open	Property	04/19/2010 01:04 PM
100000150	Legg, Krista	Open	Blood Lead - Child	04/16/2010 12:51 PM

Dashboard Help

Event ID	Displays the Event ID of the Event
Name	The full name of the Child or Property
Status	The investigation status of the event (Open or Closed).
Event Type	Blood Lead – Child, Blood Lead – Not classified, Property
Access Time	The date and time the event was last accessed by any user

2. Click the **Event ID** link of the event to be opened. This action will close the Recent Events window and will open the event in the LSS Dashboard.
3. To close the Recent Events window without selecting and opening an event, click the **Dashboard** button at the bottom of the screen to return to the LSS Dashboard.

Chapter 4: Creating and Managing Events

OVERVIEW

Purpose

Explain how to create and manage events in the LSS

Objectives

- Create a Blood Lead – Child event, Blood Lead – Non-Classified event, or a Property Event
 - Enter and edit event information
 - Change properties and persons information for existing events
 - Close and reopen events
-

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CONCERNS

A Concern is used to indicate potential data entry issues that may need to be addressed. Concerns may be automatically generated by the LSS (for example, if the city is not entered) or manually created by the user. **Users with the Role of Supervisor are the only individuals that can manually create or edit concerns.**

Event Data	Lab Results	Concerns	Property Information	Tasks	Event History
Concerns					
CONCERN		DESCRIPTION	NAME	LAST UPDATE	SEVERITY STATUS
ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN		Abatement Plan Approved Date must be on or before Abatement Start Date	45 High St, Willimantic, CT 06226 *	04/20/2010	Medium Active
Add Concern		Update Concern			
Concern - Details					
Concern:	ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN				
Description:	Abatement Plan Approved Date must be on or before Abatement Start Date				
Name:	45 High St, Willimantic, CT 06226 *				
Status:	Active				
Severity:	Medium				
Create Date:	04/19/2010				
Last Update:	04/20/2010				
Updated By:	venezianok				
Notes:	Working on getting the correct date to resolve this concern.				

Edit a Concern

1. Select a concern by clicking it in the Concerns table.

Concerns					
CONCERN	DESCRIPTION	NAME	LAST UPDATE	SEVERITY	STATUS
ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN	Abatement Plan Approved Date must be on or before Abatement Start Date	45 High St, Willimantic, CT 06226 *	04/20/2010	Medium	Active
Add Concern		Update Concern			

- Click the **Update Concern** button

Concerns					
CONCERN	DESCRIPTION	NAME	LAST UPDATE	SEVERITY	STATUS
ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN	Abatement Plan Approved Date must be on or before Abatement Start Date	45 High St, Willimantic, CT 06226 *	04/20/2010	Medium	Active

Add Concern Update Concern ←

The Edit Concern – Concern Information screen will display.

Edit Concern - 45 High St, Willimantic, CT 06226 * - Property

Concern Information	
Concern:	ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN
Description:	Abatement Plan Approved Date must be on or before Abatement Start Date
Name:	45 High St, Willimantic, CT 06226 *
Create Date:	04/19/2010
Last Update:	04/20/2010
Updated By:	venezianok
Status:	Active ▼
Notes:	Working on getting the correct date to resolve this concern.

Save Cancel Help


- Enter the appropriate information.
- Click the **Save** button to complete the process.

The updated Concern information will be displayed in the Concerns and Concerns – Details tables.

Manually Adding a Concern

1. Click the **Add Concern** button at the bottom of the Concerns table.

Concerns					
CONCERN	DESCRIPTION	NAME	LAST UPDATE	SEVERITY	STATUS
ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN	Abatement Plan Approved Date must be on or before Abatement Start Date	45 High St, Willimantic, CT 06226 *	04/20/2010	Medium	Active



The Add Concern screen will display.

Add Concern - 45 High St, Willimantic, CT 06226 * - Property

Concern Information

Description:

Name:

Severity:

Status:

Notes:

The fields in the Add Concern screen are:

Description	Describes the concern
Name	Indicates the name of the person or property address described in the concern
Severity	Indicates the severity of the concern: Very Low, Low, Medium, High, Very High
Status	Indicates the status of the concern: Active, Resolved

Notes

Displays any notes regarding the concern

2. Enter the appropriate information.
3. Click the **Save** button.
4. The concern will be applied and the system will return to the LSS Dashboard window. The concern will be displayed in Event Information.

Concerns					
CONCERN	DESCRIPTION	NAME	LAST UPDATE	SEVERITY	STATUS
Testing the Add Concern function	Testing the Add Concern function	45 High St, Willimantic, CT 06226 *	04/21/2010	Medium	Active
ABATEMENT_RULE_START_ABATEMENT_ANY_ITERATION_CONCERN	Abatement Plan Approved Date must be on or before Abatement Start Date	45 High St, Willimantic, CT 06226 *	04/20/2010	Medium	Active

Add Concern

Update Concern

CLOSING AN EVENT BY EDITING EVENT PROPERTIES

To close an event:

1. **Open** the event
2. Open the **Administrative Question Package**

Question Packages				
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS
Administrative	Jane Doe	04/16/2010	venezianok	Incomplete
Demographics	Jane Doe	04/16/2010	venezianok	Incomplete

3. **Complete** the questions: Case closure reason and Closure date

* Case closure reason

Closure date:

4. Click the **Save** button

Note: The following steps must also be completed in order to close an event.

5. Click the **Edit Event Properties** button in the Event Summary section

Basic Information	
Event ID:	100000162
Event Type:	Blood Lead - Child
Primary Person:	Jane Doe Birth Date: 07/07/2007 (2 yrs Female) Phone: (860) 555-5555
Address:	45 High St, Willimantic, CT 06226 (Edit)
Dates:	Create Date: 04/16/2010
Investigation Status:	Open
Linked Events:	1 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Relevant Address(es) on 07/07/2008: <ul style="list-style-type: none"> • Home - 45 High St, Willimantic, CT 06226 Linked cases: <ul style="list-style-type: none"> • 100000163 - 45 High St, Willimantic, CT 06226 * (Link)

[Edit Event Properties](#)

The Edit Event Properties screen will display.

Edit Event Properties - Jane Doe - Blood Lead - Child

Event Information

Event ID: 100000162

Change Type To: [dropdown]

Status: Open

Change Status To: [dropdown menu with 'Open' and 'Closed' options]

Note: [text area with '2500 characters left']

Category: Generic [dropdown]

Note Type: Public [dropdown]

Replace Previous Note: No [dropdown]

Deduplication Status: Done [dropdown]

[Save] [Cancel] [Help]

6. Select **Closed** from the **Change Status To** drop down menu
7. Click the **Save** button to apply the change
8. The changes will be applied and the system will return to the LSS Dashboard window

To open an event that is closed so a revision can be made in the event:

1. **Open** the event
2. Click the **Edit Event Properties** button in the Event Summary section
3. Select **Open** from the **Change Status To** drop down menu

The screenshot shows the 'Edit Event Properties' window for an event titled 'Jane Doe - Blood Lead - Child'. The window has a blue header bar with the title. Below the header is a form with several fields and dropdown menus. The 'Event ID' is 100000162. The 'Change Type To' dropdown is empty. The 'Status' is 'Closed'. The 'Change Status To' dropdown is open, showing 'Open' and 'Closed' options, with 'Open' selected. An arrow points to this dropdown. The 'Note' field is empty. Below the note field is a character count: '2500 characters left'. The 'Category' dropdown is 'Generic'. The 'Note Type' dropdown is 'Public'. The 'Replace Previous Note' dropdown is 'No'. The 'Deduplication Status' dropdown is 'Done'. At the bottom of the form are three buttons: 'Save', 'Cancel', and 'Help'.

4. Click the **Save** button to apply the change
5. The changes will be applied and the system will return to the LSS Dashboard window
6. Revisions can now be made to the event (e.g., entry of additional blood lead test results or the addition of notes)

Other Edit Event Properties that may be changed are:

Change Type to	The type of event can be changed between: Blood Lead – Child and Blood Lead – Not classified
Change Status To	The status of the event: Open, Closed
Note	Any comments entered by the user. These Notes will display in the Notes section of the Event Summary.
Deduplication Status	Indicates if person deduplication has been performed: Pending, Done, Merged (Typically a case worker will not have to change this Status.)

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Chapter 5: Question Packages – General Operating Procedures

OVERVIEW

Purpose

Describe the purpose and general operating procedures for all the predefined Question Packages

Objectives

- Define Question Packages
 - Describe fields in the Question Package table
 - Explain how to view and edit individual Question Packages
 - Discuss required fields and Notifications
-

QUESTION PACKAGES

A Question Package is a set of information (questions) that is to be filled out for each event. They include critical information about the Blood Lead – Child, Blood Lead – Not classified, and Property events. The number and type of Question Packages varies according to the event and user’s login role.

Question Packages are displayed in the Event Data section of Event Information.

Blood Lead - Child

Event Information						
Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History
Question Packages						
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS		
Administrative	Talulah Bell	05/07/2010	venezianok	Incomplete		
Demographics	Talulah Bell	05/07/2010	venezianok	Incomplete		
PCP Information	Talulah Bell	05/07/2010	venezianok	Incomplete		
Medical Status	Talulah Bell	05/07/2010	venezianok	Incomplete		
Residency History and Information	Talulah Bell	05/07/2010	venezianok	Incomplete		
Lead Hazards	Talulah Bell	05/07/2010	venezianok	Incomplete		
Current Housekeeping Practices	Talulah Bell	05/07/2010	venezianok	Incomplete		
Occupational/Do-It-Yourself/Hobby Lead Hazards	Talulah Bell	05/07/2010	venezianok	Incomplete		
Educational Materials	Talulah Bell	05/07/2010	venezianok	Incomplete		
Interim Measures	Talulah Bell	05/07/2010	venezianok	Incomplete		
Social Service & Other Referrals	Talulah Bell	05/07/2010	venezianok	Incomplete		
View Question Package						

Blood Lead – Not classified

Event Information						
Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History
Question Packages						
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS		
Administrative	John Lennon	03/19/2010	hungt	Incomplete		
Demographics	John Lennon	03/19/2010	hungt	Incomplete		
PCP Information	John Lennon	03/19/2010	hungt	Incomplete		
View Question Package						

Property																																																
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Event Data	Lab Results	Concerns	Property Information	Tasks	Event Properties	Event History																																										
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View Question Package																																																

The columns in the Question Package table are:

Question Package	Identifies the title of the question package
Name	Indicates the name of the LSS child or property address in the event
Last Update	Displays the date that each question package was last updated
Updated By	Identifies the user that made the last update or modification to the question package
Status	Refers to the completeness of the required questions within the question package. The question package is considered complete if all required (asterisked [*]) questions have been answered.

To view a Question Package:

1. Open a LSS event.
2. The Question Packages should already be displayed. If they are not displayed, click the **Event Data** tab in the Event Information section.

Event Information																																																
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View Question Package																																																

Chapter 5: Question Packages – General Operating Procedures

The Question Packages for the event type (Blood Lead - Child, Blood Lead – Not classified, or Property) and the user role will display.

- To display Details information for a specific Question Package, click the name of the Question Package in the Question Package table. The Question Package – Details information will then display below.

Property

Question Packages				
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS
Administrative	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete
Property Information	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete
Environmental Lead Inspection	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete
Lead Hazards	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete
Lead Remediation & Abatement	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete

Question Package - Details	
Name:	Property Information
Description:	
Name:	782 Hawaii Ave, Southington, CT 06489 *
Status:	Incomplete
Number of Questions:	21
Incomplete Required Questions:	13
Last Update:	05/07/2010
Updated By:	venezianok

Blood Lead - Child

Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History
------------	-------------	----------	---------	-------	------------------	---------------

Question Packages				
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS
Administrative	Talulah Bell	05/07/2010	venezianok	Incomplete
Demographics	Talulah Bell	05/07/2010	venezianok	Incomplete
PCP Information	Talulah Bell	05/07/2010	venezianok	Incomplete
Medical Status	Talulah Bell	05/07/2010	venezianok	Incomplete
Residency History and Information	Talulah Bell	05/07/2010	venezianok	Incomplete
Lead Hazards	Talulah Bell	05/07/2010	venezianok	Incomplete
Current Housekeeping Practices	Talulah Bell	05/07/2010	venezianok	Incomplete
Occupational/Do-It-Yourself/Hobby Lead Hazards	Talulah Bell	05/07/2010	venezianok	Incomplete
Educational Materials	Talulah Bell	05/07/2010	venezianok	Incomplete
Interim Measures	Talulah Bell	05/07/2010	venezianok	Incomplete
Social Service & Other Referrals	Talulah Bell	05/07/2010	venezianok	Incomplete

Question Package - Details	
Name:	PCP Information
Description:	PCP General Information
Name:	Talulah Bell
Status:	Incomplete
Number of Questions:	2
Incomplete Required Questions:	1
Last Update:	05/07/2010
Updated By:	venezianok

The fields in the Question Package – Details are:

Name	Identifies the title of the question package
Description	Short description of the purpose of the question package
Name	Indicates the name of the child or property address in the event
Status	Refers to the completeness of the required questions within the question package. The question package is considered complete if all required (asterisked [*]) questions have been answered. The status of a question package will be marked as complete by default if it does not contain any required questions
Number of Questions	Indicates the total number of questions in a question package
Incomplete Required Questions	Indicates the total number of <i>required</i> questions in a question package that have not yet been filled in
Last Update	Displays the date that each question package was last updated
Updated By	Identifies the user that made the last update or modification to the question package

4. To view the entire question package, either **double-click** the question package name in the Question Packages table

or

Click the question package name in the Question Packages table and then click the **View Question Package** button.

The screenshot shows a table titled "Question Packages" with the following data:

QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS
Administrative	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete
Property Information	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete
Environmental Lead Inspection	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete
Lead Hazards	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete
Lead Remediation & Abatement	782 Hawaii Ave, Southington, CT 06489 *	05/07/2010	venezianok	Incomplete

Below the table is a button labeled "View Question Package". An arrow points from this button to a detailed view titled "Question Package - Details" for the "Property Information" package:

Name:	Property Information
Description:	
Name:	782 Hawaii Ave, Southington, CT 06489 *
Status:	Incomplete
Number of Questions:	21
Incomplete Required Questions:	13
Last Update:	05/07/2010
Updated By:	venezianok

Property Information Package, [782 Hawaii Ave, Southington, CT 06489](#) * Property

Status: Incomplete (Number of Questions:21, Incomplete Required Questions:13) Save Cancel

Property Information			
Street address	<input type="text" value="782 Hawaii Ave"/>	* Floor	<input type="text"/>
City	<input type="text" value="Southington"/>	State	<input type="text" value="CT"/> Zip code <input type="text" value="06489"/>
County	<input type="text"/>		
* Telephone	<input type="text"/>		
* If Apartment, Number of Units	<input type="text"/>	* Year Property Built	<input type="text"/>
* Is address in a high-risk area (i.e. Pre 1950 neighborhood of a city/older mill row housing in a rural town)?	<input type="text"/>		
Official City:	<input type="text" value="Southington"/>		

Owner Information

To start, enter date and hit the tab button. Enter owner information. If owner information changes, click on the Add New link, enter a new date, and then enter the new owner information.

* Date [Add New](#)

5. After viewing and editing the questions in the question package, click the **Save** button to save changes and return to the Maven LSS Dashboard

or

Click the **Cancel** button to return to the Maven LSS Dashboard without saving any changes.

Save Cancel Help



Remember: If you do not click the Save button, any changes will be discarded.

Chapter 6: Question Package Specifics

OVERVIEW

Purpose

Describe some of the extended features within the Question Packages of the LSS.

Objectives

- How to view the Question Packages
 - Required Questions
 - Add New
 - Dates
 - Drop Down Menu
-

VIEWING A QUESTION PACKAGE

To view a Question Package within an Event:

Either **double-click** Question Package, or click once on Question Package table and then click the **View Question Package** button. The Question Package will display.

Blood Lead – Not classified

Event Information						
Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History
Question Packages						
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS		
Administrative	John Lennon	03/19/2010	hungt	Incomplete		
Demographics	John Lennon	03/19/2010	hungt	Incomplete		
PCP Information	John Lennon	03/19/2010	hungt	Incomplete		
View Question Package						

Blood Lead – Child

Event Information						
Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History
Question Packages						
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS		
Administrative	Krista Legg	04/27/2010	mccarthy	Complete		
Demographics	Krista Legg	04/27/2010	venezianok	Incomplete		
PCP Information	Krista Legg	04/26/2010	venezianok	Incomplete		
Medical Status	Krista Legg	04/26/2010	venezianok	Incomplete		
Residency History and Information	Krista Legg	04/26/2010	venezianok	Incomplete		
Lead Hazards	Krista Legg	04/27/2010	venezianok	Incomplete		
Current Housekeeping Practices	Krista Legg	04/26/2010	venezianok	Incomplete		
Occupational/Do-It-Yourself/Hobby Lead Hazards	Krista Legg	04/26/2010	venezianok	Incomplete		
Educational Materials	Krista Legg	04/26/2010	venezianok	Incomplete		
Interim Measures	Krista Legg	04/26/2010	venezianok	Incomplete		
Social Service & Other Referrals	Krista Legg	04/26/2010	venezianok	Incomplete		
View Question Package						

Chapter 6: Question Package Specifics

Administrative Question Package

Administrative Package, [John Lennon](#) Blood Lead - Not classified

Status: Incomplete (Number of Questions:15, Incomplete Required Questions:3) Save Cancel

Administrative	
* New Case Acknowledged	<input type="checkbox"/>
* Is an Epidemiological Investigation Form required?	<input type="checkbox"/>
Reporting Source:	Lab Import <input type="checkbox"/>
Date Reported to CDC:	<input type="text"/>
Date of Contact:	<input type="text"/>
Has the child's physician explicitly put the child in Late Follow-Up Venous Testing?	<input type="checkbox"/>
* Case closure reason	<input type="text"/>
Closure date:	<input type="text"/>
Force property investigation, even if child does not meet blood level criteria	No <input type="checkbox"/>
EBLL Case open date	<input type="text"/>
Relevant Address Date	05/01/2001
Primary Relevant Address	101 Main Road, North Canton, CT 06059
Workflow Related	
Date Letter printed for child with a non-confirmed BLL > 10:	<input type="text"/>
Date that reminder test letter sent:	<input type="text"/>
Date letter for overdue blood lead test sent:	<input type="text"/>

* Indicates required field

Save Cancel Help

Lead Remediation and Abatement Package

Lead Remediation & Abatement Package, [782 Hawaii Ave., Southington, CT 06489](#) * Property

Status: Incomplete (Number of Questions:13, Incomplete Required Questions:12) Save Cancel

Remediation	
* Does this property require remediation?	<input type="checkbox"/>
Abatement	
* Does this property require an abatement? <input type="checkbox"/>	Yes <input type="checkbox"/> Add New
* Date Lead Abatement Order issued:	<input type="text"/>
* Date Lead Abatement Plan received:	<input type="text"/>
* Date Lead Abatement Plan reviewed and notification of plan status sent to property owner:	<input type="text"/>
* Date Lead Abatement Plan was approved:	<input type="text"/>
* Date for start of Lead Abatement:	<input type="text"/>
* Reoccupancy Inspection conducted by:	<input type="text"/>
* Reoccupancy Inspection Date:	<input type="text"/>
* Date Letter of Compliance issued:	<input type="text"/>
* Reinspection Date (Code Enforcement Agency):	<input type="text"/>
* Date Post Abatement Inspection Report issued:	<input type="text"/>
* Is a Lead Management Plan required?	<input type="checkbox"/>

* Indicates required field

Save Cancel Help

Required Questions:

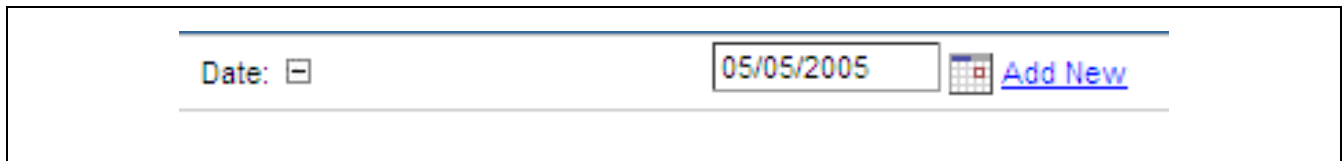
Required questions are indicated by an asterisk ("*"); answering all of these will result in a question package status of Complete. If all required questions in a package are not answered, the status will be Incomplete and a message will display in the Notifications section of the Event Summary. A case cannot be closed until all Question Packages have a status of Complete.

Click the **Save** button to save changes and return to the Maven LSS Dashboard. Click the **Cancel** button to return to the Maven LSS Dashboard without saving any changes.

Add New:

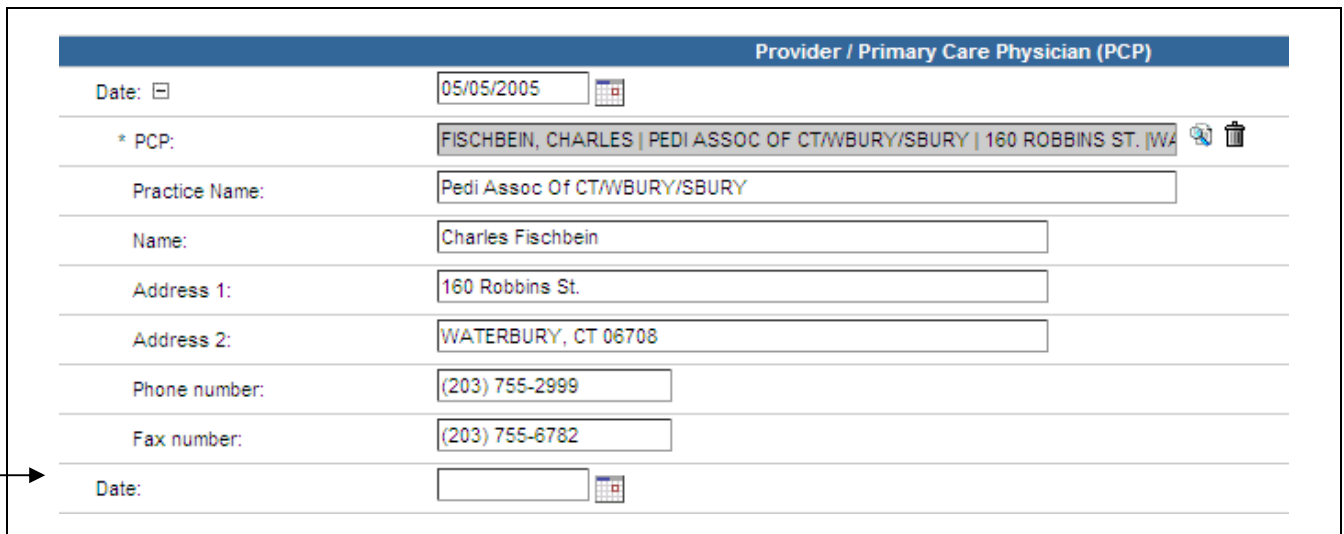
Many questions have the option of "Add New" where if the information in the question's answer has changed the user can add the new information along with keeping the original answer for record history.

1. To enter an additional answer or information to a question, click the **Add New** link to the right of the question field.



A screenshot of a form field. On the left, there is a label "Date:" followed by a calendar icon. To the right is a text input box containing the date "05/05/2005" and a calendar icon. Further to the right is a blue text link labeled "Add New".

An additional question or set of questions will be displayed.







A screenshot of a form titled "Provider / Primary Care Physician (PCP)". The form contains several fields: "Date:" with a calendar icon and the value "05/05/2005"; "* PCP:" with a dropdown menu showing "FISCHBEIN, CHARLES | PEDI ASSOC OF CT/WBURY/SBURY | 160 ROBBINS ST. [WA]"; "Practice Name:" with the value "Pedi Assoc Of CT/WBURY/SBURY"; "Name:" with the value "Charles Fischbein"; "Address 1:" with the value "160 Robbins St."; "Address 2:" with the value "WATERBURY, CT 06708"; "Phone number:" with the value "(203) 755-2999"; "Fax number:" with the value "(203) 755-6782"; and a final "Date:" field with a calendar icon. A black arrow points from the left edge of the page to the "Date:" field at the bottom of the form.






2. Complete the newly added question(s).

Chapter 6: Question Package Specifics

3. Repeat the process to add additional information as necessary.

Provider / Primary Care Physician (PCP)	
Date: <input type="text" value="05/05/2005"/>	<input type="text" value="05/05/2005"/>
* PCP:	FISCHBEIN, CHARLES PEDI ASSOC OF CT/WBURY/SBURY 160 ROBBINS ST. WA  
Practice Name:	Pedi Assoc Of CT/WBURY/SBURY
Name:	Charles Fischbein
Address 1:	160 Robbins St.
Address 2:	WATERBURY, CT 06708
Phone number:	(203) 755-2999
Fax number:	(203) 755-6782
Date: <input type="text" value="01/01/2007"/>	<input type="text" value="01/01/2007"/> Add New
* PCP:	DARDICK, KENNETH MANSFIELD FAM PRAC 34 MANSFIELD PROF'L. PARK RD. S  
Practice Name:	Mansfield Fam Prac
Name:	Kenneth Dardick
Address 1:	34 Mansfield Prof'l. Park Rd.
Address 2:	STORRS, CT 06268
Phone number:	(860) 487-0100
Fax number:	(860) 487-4525

4. To delete an "Add New" set of questions the user must delete or empty the information from the first "Add New" question. Above it would be the Date (01/01/07). Deleting that date will delete the set of questions.

Provider / Primary Care Physician (PCP)	
Date: 	<input type="text" value="05/05/2005"/> 
* PCP:	<input type="text" value="FISCHBEIN, CHARLES PEDI ASSOC OF CT/WBURY/SBURY 160 ROBBINS ST. WA"/>  
Practice Name:	<input type="text" value="Pedi Assoc Of CT/WBURY/SBURY"/>
Name:	<input type="text" value="Charles Fischbein"/>
Address 1:	<input type="text" value="160 Robbins St."/>
Address 2:	<input type="text" value="WATERBURY, CT 06708"/>
Phone number:	<input type="text" value="(203) 755-2999"/>
Fax number:	<input type="text" value="(203) 755-6782"/>
Date:	<input type="text"/> 

Chapter 6: Question Package Specifics

5. Some “Add New” questions require information from a **drop down menu**. To add an answer click on “Add New”. Select answer from drop down menu and click on the Save button. To delete the added question scroll to the top of the list and select the “empty” item. Then click on the Save button.

The screenshot displays a list of four questions, each with a dropdown menu and an 'Add New' button. The questions are:

- Question 1: * Race: American Indian or Alaskan Native. The dropdown menu is open, showing options: American Indian or Alaskan Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, Other, and Unknown. An arrow points to the 'Add New' button.
- Question 2: * Race: American Indian or Alaskan Native. The dropdown menu is open, showing the same options as Question 1. A callout box labeled 'Question answer choices' points to the dropdown menu.
- Question 3: Race: Black or African American. The dropdown menu is open, showing the same options as Question 1. An arrow points to the 'Add New' button.
- Question 4: * Race: American Indian or Alaskan Native. The dropdown menu is open, showing the same options as Question 1. An arrow points to the 'Add New' button.

Chapter 7: Adding/Revising an Address for a Child Event

OVERVIEW

Purpose

Describe how a user will add or revise an address in a child event.

Objectives

- Familiarize the user with the four scenarios for adding/revising an address that they may encounter
 - Child Event → Same Address → Enter Blood Test Result
 - Child Event → Has Blood Test Result in LSS → New Address (child moved) → Copy Case → Edit Address → Enter Blood Test Result
 - Child Event (not classified) → No Blood Test Result in LSS (Vital Import) → Edit Address → Enter Blood Test Result
 - Child → No Event in LSS → Create Event and Enter Blood Test Result
 - Instruct the user on how to add or revise an address
-

For local health departments – if a child moves contact your State case manager and he/she will create any necessary events.

Remember to make a note in the child's event for all pertinent information, i.e., 1) that the child moved, 2) if there is no blood lead test, and/or 3) if the child moved out of your jurisdiction.

Adding/Revising an Address for a Child Event



Do this VERY carefully. If you have any questions or concerns please contact Tracy Hung or Jimmy Davila for assistance.

Scenario 1: Blood Lead – Not classified or Blood Lead – Child event
Blood test result has been received
Child’s address has not changed (child has not moved)

1. Receive a blood lead test result for a child with an existing **Child** event in the LSS
2. Open Child event

Note: If the Child event is “closed” it will need to be reopened

Event Summary	
Basic Information	
Event ID:	100000001
Event Type:	Blood Lead - Not classified
Primary Person:	First Child Birth Date: 02/01/2008 (2 yrs Male) Phone:
Address:	8 Devonshire Ct, Avon, CT 06001 (Edit)
Dates:	Create Date: 02/04/2010
Investigation Status:	Open
Linked Events:	0 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Testing Due Date: N/A Relevant Address(es) on 02/04/2010: <ul style="list-style-type: none">• Home - 8 Devonshire Ct, Avon, CT 06001
Edit Event Properties Copy Case	

Chapter 7: Adding/Revising An Address For A Child Event

3. Add the blood test result to that event under the Lab Results tab

Labs	
LAB	LAST UPDATE
Draw Date: 02/01/2009 Spec Number: Test: Venous Result: 4	04/26/2010

4. If event was closed previously close the child's event.

Basic Information	
Event ID:	100000001
Event Type:	Blood Lead - Not classified
Primary Person:	First Child Birth Date: 02/01/2008 (2 yrs Male) Phone:
Address:	8 Devonshire Ct, Avon, CT 06001
Dates:	Create Date: 02/04/2010
Investigation Status:	Closed
Linked Events:	0 linked event(s) (View)
Attachments:	0 attachment(s)
Additional Information:	Testing Due Date: N/A Relevant Address(es) on 02/01/2009: <ul style="list-style-type: none"> • Home - 8 Devonshire Ct, Avon, CT 06001
<input type="button" value="Edit Event Properties"/> <input type="button" value="Copy Case"/>	

Chapter 7: Adding/Revising An Address For A Child Event


Scenario 2: Blood Lead – Not classified or Blood Lead – Child event
Blood test result has been received
Child’s address **has** changed (child has moved)

1. Receive a blood lead test result for a child with an existing **Child** event in the LSS
2. Open Child event

Note: If the Child event is “closed” it will need to be reopened

Basic Information	
Event ID:	100000150
Event Type:	Blood Lead - Child
Primary Person:	Krista Legg Birth Date: 09/12/2008 (1 yrs Female) Phone: (860) 444-4444
Address:	37 High St, Thomaston, CT 06787 (Edit)
Dates:	Create Date: 04/14/2010
Investigation Status:	Open
Linked Events:	1 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Testing Due Date: 12/11/2009 Relevant Address(es) on 09/12/2009: <ul style="list-style-type: none">• Home - 122 D Welton Way, Thomaston, CT 06787 Linked cases: <ul style="list-style-type: none">• 100000161 - 122 D Welton Way, Thomaston, CT 06787 * (Link)

[Edit Event Properties](#) [Copy Case](#)



3. Click on the **Copy Case** button – the following screen will appear

Copy Case - Krista Legg - Blood Lead - Child

Source Case	
Event ID:	100000150
Event Type:	Blood Lead - Child
Dates:	Create Date: 04/14/2010
Investigation Status:	Open
Linked Events:	1 linked event(s)
Linked Clinics:	0 linked clinic(s)
Attachments:	0 attachment(s)
Name:	Krista Legg
Gender:	Female
Birth Date:	09/12/2008
Social Security Number:	
Address:	37 High St, Thomaston, CT 06787
County:	
Country:	USA

Target Case	
Copy Mode:	Copy to new case <input type="button" value="v"/>
Event Type:	Blood Lead - Child <input type="button" value="v"/>
Status:	Open <input type="button" value="v"/>
Notes:	<input type="text"/>
Copy Question Packages:	<input checked="" type="checkbox"/> Administrative <input checked="" type="checkbox"/> Demographics <input checked="" type="checkbox"/> PCP Information
Copy Fields:	<input type="checkbox"/> Copy attachments <input type="checkbox"/> Copy lab results <input type="checkbox"/> Copy concerns (manual only) <input type="checkbox"/> Copy case notes <input type="checkbox"/> Copy case links
Link to Source as:	<input type="text"/> <input type="button" value="v"/>

4. Click on **Save**

Note: Do not check any other boxes

5. Click on the **Persons** tab

The screenshot shows a web interface with a main header 'Event Information' and a row of tabs: 'Event Data', 'Lab Results', 'Concerns', 'Persons', 'Tasks', 'Event Properties', and 'Event History'. The 'Persons' tab is highlighted in blue. Below the tabs is a table with the following data:

NAME	GENDER	BIRTH DATE	ADDRESS	STATUS
Krista Legg	Female	09/12/2008	37 High St, Thomaston, CT 06787	Active

6. Click on the **Address Information** tab

The screenshot shows a sub-interface with tabs: 'Basic Information', 'Address Information', 'Links', 'Demographic History', and 'Notes'. The 'Address Information' tab is highlighted in blue. Below the tabs is a table with the following data:

TYPE	ADDRESS	PHONE
Home	37 High St, Thomaston, CT 06787	(H) (860) 444-4444

7. Click on **Edit Address**

The screenshot shows the 'Address Information' table from the previous step. Below the table are three buttons: 'Add Address', 'Edit Address', and 'Remove Address'. The 'Edit Address' button is highlighted in blue, and an arrow points to it from below.

8. Revise the **Start Date** to reflect the draw date of the blood test result
9. Revise the **Street/City/Zip Code** to reflect the child's new address

The screenshot shows the 'Edit Address' form with the following fields and values:

- Address Type: Home
- Start Date: 03/01/2009
- End Date: 01/01/2030
- Street Address: 75 Court St
- City: Windham
- State: CT
- Zip Code: 06280
- County: (empty)
- Country: USA
- Home Phone: (860) 444-4444
- Mobile Phone: (empty)
- Contact Method: (empty)

Buttons at the bottom: Save, Cancel, Help

10. Click on the **Save** button

Note: Do not worry about the Pending [Deduplicate](#) alert found in the child's Event Summary/Basic Information section

The screenshot shows the 'Event Summary' section with the following information:

- Event ID: 10000223
- Deduplication Status: Pending [Deduplicate](#)

Chapter 7: Adding/Revising An Address For A Child Event

11. This will revise the child's address found in the Event Summary/Basic Information section
12. The new blood test result can now be added under the Lab Results tab

Event Summary	
Basic Information	
Event ID:	100000223 Deduplication Status: Pending Deduplicate
Event Type:	Blood Lead - Child
Primary Person:	Krista Leqq Birth Date: 09/12/2008 (1 yrs Female) Phone: (860) 444-4444
Address:	75 Court St, Windham, CT 06280 (Edit)
Dates:	Create Date: 04/26/2010
Investigation Status:	Open
Linked Events:	0 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Testing Due Date: 12/11/2009 Relevant Address(es) on 04/26/2010: <ul style="list-style-type: none"> • Home - 75 Court St, Windham, CT 06280
<div style="display: flex; justify-content: space-around;"> Edit Event Properties Copy Case </div>	

13. Administratively close the **previous** event by clicking on the Administrative question package under the Event Data tab and selecting **Child relocated (within state)** or **Child relocated (out of state)** for the closure reason and today's date as the closure date.
14. Click on **Edit Event Properties** under Event Summary. Select **Closed** in the "Change Status To" field.

Scenario 3: Blood Lead – Not classified event (Vital Record Import)
No previous blood test results
Blood test result has been received
Child's address **has** changed (child has moved)

1. Open Child Event

Event Summary	
Basic Information	
Event ID:	100000145
Event Type:	Blood Lead - Not classified
Primary Person:	Tina Persis Birth Date: 02/14/2008 (2 yrs Female) Phone:
Address:	17111 Flat Top Gulch, Grosvenordale, CT 06246 (Edit)
Dates:	Create Date: 03/19/2010
Investigation Status:	Open
Linked Events:	0 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Testing Due Date: N/A
	Relevant Address(es) on 03/19/2010: <ul style="list-style-type: none">● Home - 17111 Flat Top Gulch, Grosvenordale, CT 06246
Edit Event Properties Copy Case	

2. **IMPORTANT** – Click in the **Lab Results** tab to verify that the child's event does not have a blood lead level entered
3. If one is displayed **STOP** and go use Scenario 2 above
4. If no blood test result is found continue with this scenario

To check if a child's address is a Vital Record Import:

- Click on the Administrative question package under the Event Data tab and review Reporting Source question.

Administrative Package, [Evan Daniel Legg](#) Blood Lead - Not classified

Status: Incomplete (Number of Questions:15, Incomplete Required Questions:3)

Administrative	
* New Case Acknowledged	<input type="checkbox"/>
* Is an Epidemiological Investigation Form required?	<input type="checkbox"/>
Reporting Source:	Vital Records <input type="text"/>
Date Reported to CDC:	<input type="text"/> <input type="button" value="Calendar"/>
Date of Contact:	<input type="text"/> <input type="button" value="Calendar"/>

- To update the event to reflect the child's current address click on the **Persons** tab and then the **Address Information** tab

Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History																																																		
<table border="1"> <thead> <tr> <th colspan="5">Persons</th> </tr> <tr> <th>NAME</th> <th>GENDER</th> <th>BIRTH DATE</th> <th>ADDRESS</th> <th>STATUS</th> </tr> </thead> <tbody> <tr> <td>Tina Persis</td> <td>Female</td> <td>02/14/2008</td> <td>17111 Flat Top Gulch, Grosvenordale, CT 06246</td> <td>Active</td> </tr> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p><input type="button" value="Edit"/></p> <table border="1"> <thead> <tr> <th>Basic Information</th> <th>Address Information</th> <th>Links</th> <th>Demographic History</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td colspan="5"> <table border="1"> <thead> <tr> <th colspan="3">Address Information</th> </tr> <tr> <th>TYPE</th> <th>ADDRESS</th> <th>PHONE</th> </tr> </thead> <tbody> <tr> <td>Home</td> <td>17111 Flat Top Gulch, Grosvenordale, CT 06246</td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p> <input type="button" value="Add Address"/> <input type="button" value="Edit Address"/> <input type="button" value="Remove Address"/> </p> </td> </tr> </tbody> </table>							Persons					NAME	GENDER	BIRTH DATE	ADDRESS	STATUS	Tina Persis	Female	02/14/2008	17111 Flat Top Gulch, Grosvenordale, CT 06246	Active											Basic Information	Address Information	Links	Demographic History	Notes	<table border="1"> <thead> <tr> <th colspan="3">Address Information</th> </tr> <tr> <th>TYPE</th> <th>ADDRESS</th> <th>PHONE</th> </tr> </thead> <tbody> <tr> <td>Home</td> <td>17111 Flat Top Gulch, Grosvenordale, CT 06246</td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p> <input type="button" value="Add Address"/> <input type="button" value="Edit Address"/> <input type="button" value="Remove Address"/> </p>					Address Information			TYPE	ADDRESS	PHONE	Home	17111 Flat Top Gulch, Grosvenordale, CT 06246							
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- Click on **Edit Address**

The screenshot shows a software window titled "Edit Address". The form contains the following fields and values:

- Address Type: Home (dropdown)
- Start Date: 04/26/2010 (calendar icon)
- End Date: 01/01/2030 (calendar icon) ←
- Street Address: 17111 Flat Top Gulch
- City: Grosvenordale
- State: CT (dropdown)
- Zip Code: 06246
- County: (dropdown)
- Country: USA (dropdown)
- Home Phone: (text input)
- Mobile Phone: (text input)
- Contact Method: (dropdown)

At the bottom of the form are three buttons: Save, Cancel, and Help.

8. Use the blood lead **collection date as the Start Date** and **01/01/2030 as the end date**
9. Revise the **Street/City/Zip Code**

Edit Address

Address Type: Home

Start Date: 04/26/2010

End Date: 01/01/2030

Street Address: 29 Flower St

City: Hartford

State: CT

Zip Code: 06134

County:

Country: USA

Home Phone:

Mobile Phone:

Contact Method:

Save Cancel Help

10. Click on **Save**

Chapter 7: Adding/Revising An Address For A Child Event

Note: Both the child's Vital Record address and the child's current address are listed in the Person tab under the Address Information tab

Address History	
Start Date:	04/26/2010
End Date:	01/01/2030
Street Address:	29 Flower St
City:	Hartford
State:	CT
Zip Code:	06134
County:	
Country:	USA
Home Phone:	
Mobile Phone:	
Contact Method:	
GIS Info:	Pending
Start Date:	01/01/1900
End Date:	04/26/2010
Street Address:	17111 Flat Top Gulch
City:	Grosvenordale
State:	CT
Zip Code:	06246
County:	
Country:	USA
Home Phone:	
Mobile Phone:	
Contact Method:	
GIS Info:	Pending

11. Add the blood test result under the **Lab Results** tab

Basic Information	
Event ID:	100000145
Event Type:	Blood Lead - Not classified
Primary Person:	Tina Persis Birth Date: 02/14/2008 (2 yrs Female) Phone: Deduplication Status: Pending Deduplicate
Address:	29 Flower St, Hartford, CT 06134 (Edit)
Dates:	Create Date: 03/19/2010
Investigation Status:	Open
Linked Events:	0 linked event(s) (View)
Attachments:	0 attachment(s) (Add)
Additional Information:	Testing Due Date: N/A Relevant Address(es) on 04/26/2010: <ul style="list-style-type: none"> • Home - 29 Flower St, Hartford, CT 06134

Edit Event Properties

Copy Case

Note: The child's relevant address has been updated to reflect the child's current address.

Scenario 4: No party information is in the LSS (Child does not exist in the LSS)

1. Refer to **Chapter 4 – Creating and Managing Events**
2. Create Child Event
3. Add blood test result (Property event, if necessary, will be created automatically)

Chapter 8: Workflows and Tasks

OVERVIEW

Purpose

Explain how and why to use workflows and tasks in LSS

Objectives

- Explain the importance of the Workflow Queue
 - Demonstrate how to use the Workflow Queue
 - Explain the importance of tasks
 - View an existing task
-

WORKFLOWS

Workflow Queues are important in the LSS because they allow users to keep up with events and the work that needs to be done on them. Events are placed in workflow queues automatically based on what has happened or what has to happen with the event. For example, if the required questions in the Blood Lead - Child question package(s) have not been completed, the event will display in the “Childhood Lead Cases with Missing Required Questions” workflow queue. Also, events can be placed in workflow queues manually in the form of a task.

On the Workflow Queues screen, workflow queues are differentiated from one another as **Case Specific Monitors** or **Task Specific Monitors**.

The primary difference between the **Case Specific Monitors** and the **Task Specific Monitors** is that:

- Case Specific monitors are triggered **automatically** by something in the system (such as missing data) and don't have a specified due date.
- Task Specific monitors usually have a due date and are **manually** created.

Workflow Queues are all based on custom requirements. The queues in an actual implementation may vary. They will also differ by user according to group and role.

To display the Workflows Queue:

1. Click the **Workflow** button on the LSS Dashboard toolbar.



The Workflow Queue window will display.

Workflow Queues

Workflow Queues <small>(Hide empty workflows)</small>		
Workflow Queue	Total Count (Assigned to me)	Details
Childhood Lead		
Childhood Lead Cases missing Required Questions (01/10/2012 02:32 PM)	155 (0)	Details
More than one Childhood Lead Cases open for child (01/10/2012 01:37 PM)	0 (0)	
Open Childhood Lead Cases (01/10/2012 02:32 PM)	155 (0)	Details
Open Not Classified Events when an open Blood Lead Case exists for child (01/10/2012 02:25 PM)	0 (0)	
Confirming Capillary		
1. Requiring Confirmed Venous Blood Lead Immediately (01/10/2012 02:27 PM)	0 (0)	
2. Requiring Confirmed Venous Blood Lead within 24 Hours (01/10/2012 02:27 PM)	0 (0)	
3. Requiring Confirmed Venous Blood Lead within 48 Hours (01/10/2012 02:27 PM)	0 (0)	
4. Requiring Confirmed Venous Blood Lead within 1 Month (01/10/2012 02:27 PM)	2 (0)	Details
5. Requiring Confirmed Venous Blood Lead within 3 Months (01/10/2012 01:37 PM)	40 (0)	Details
Early Follow-up Venous Required		
Requiring Early Follow-up Venous Within 1 Month (01/10/2012 02:25 PM)	3 (0)	Details
Requiring Early Follow-up Venous Within 3 Months (01/10/2012 02:25 PM)	96 (0)	Details
Requiring Early Follow-up Venous and Chelation Immediately (01/10/2012 02:32 PM)	0 (0)	
Late Follow-Up Venous		
Requiring Late Follow-Up Venous Within 1 Month (01/10/2012 02:25 PM)	0 (0)	
Requiring Late Follow-Up Venous Within 3 Months (01/10/2012 11:51 AM)	0 (0)	
Requiring Late Follow-Up Venous Within 6 Months (01/10/2012 11:51 AM)	0 (0)	
Requiring Late Follow-Up Venous Within 9 Months (01/10/2012 11:51 AM)	2 (0)	Details
Letters		
Initial Letter To Parent of Child with Confirmed BLL (01/10/2012 02:32 PM)	23 (0)	Details
Initial Letter to Parent of Child with Non-Confirmed BLL 10+ (01/10/2012 02:32 PM)	12 (0)	Details
Lead Abatement Order (01/10/2012 02:32 PM)	2 (0)	Details
Lead Inspection Report (01/10/2012 02:32 PM)	32 (0)	Details
Letter To Parent of Child with Decreasing BLLs (01/10/2012 02:25 PM)	1 (0)	Details
Overdue Testing Reminder Letter (01/10/2012 12:59 PM)	76 (0)	Details
Test Reminder Letter (01/10/2012 11:30 AM)	55 (0)	Details
Overdue Venous Tests		
Childhood Lead Cases with Overdue Venous Tests (01/10/2012 02:32 PM)	75 (0)	Details
Unclassified Childhood Lead Cases with Overdue Venous Tests (01/10/2012 01:35 PM)	43 (0)	Details
Property Abatement		
1. Properties Requiring Lead Abatement Orders (01/10/2012 02:27 PM)	2 (0)	Details
2. Lead Abatement plans have not been Received (01/10/2012 02:27 PM)	24 (0)	Details
3. Lead Abatement Plan has not been Approved (01/10/2012 02:27 PM)	3 (0)	Details
4. Properties Requiring Reoccupancy Inspection (01/10/2012 02:27 PM)	3 (0)	Details
5. Properties Requiring Letter of Compliance (01/10/2012 02:27 PM)	0 (0)	
6. Properties Requiring Abatement Reinspection (01/10/2012 02:27 PM)	2 (0)	Details
7. Properties Requiring Post Abatement Inspection Reports (01/10/2012 02:27 PM)	0 (0)	
8. Properties Requiring Lead Management Plans (01/10/2012 02:27 PM)	7 (0)	Details

Property Investigations

Open Environmental Cases (01/10/2012 02:25 PM)	46 (0)	Details
Open Environmental Cases with no Inspection (01/10/2012 02:25 PM)	11 (0)	Details
Properties Missing Drinking Water Testing (01/10/2012 02:25 PM)	5 (0)	Details
Properties Missing Dust Testing (01/10/2012 02:25 PM)	6 (0)	Details
Properties Missing Soil Testing (01/10/2012 02:25 PM)	1 (0)	Details
Properties Missing XRF Testing (01/10/2012 02:25 PM)	2 (0)	Details
Properties with Missing Required Questions (01/10/2012 02:25 PM)	45 (0)	Details

Property Remediation

1. Properties Requiring Lead Hazard Remediation Orders (01/10/2012 02:27 PM)	0 (0)	
2. Lead Hazard Remediation plans have not been Received (01/10/2012 02:27 PM)	0 (0)	
3. Lead Hazard Remediation Plan has not been Approved (01/10/2012 02:27 PM)	0 (0)	
4. Properties Requiring Remediation Reoccupancy Inspection (01/10/2012 02:27 PM)	0 (0)	
5. Properties Requiring Remediation Letter of Compliance (01/10/2012 02:27 PM)	0 (0)	
6. Properties Requiring Lead Hazard Remediation Reinspection (01/10/2012 02:27 PM)	0 (0)	
7. Properties Requiring Post Remediation Inspection Reports (01/10/2012 02:27 PM)	0 (0)	
8. Properties Requiring Lead Hazard Remediation Management Plans (01/10/2012 02:27 PM)	0 (0)	

Task Specific Monitors [\(Add Task\)](#)

My Groups' Open Tasks (01/10/2012 02:43 PM)	0 (0)	
My Open Tasks (01/10/2012 02:43 PM)	0 (0)	
My Overdue Tasks (01/10/2012 02:43 PM)	0 (0)	
Open Tasks Created by Me (01/10/2012 02:43 PM)	1 (0)	Details
Overdue Tasks Created by Me (01/10/2012 02:43 PM)	0 (0)	

[Dashboard](#)

[Help](#)

The fields in the Workflow Queue window are:

Workflow Queue	Indicates the name of the Queue. Workflows are organized in two sections: Case Specific Monitors (automatically generated) and Task Specific Monitors (manually created by the user)
Total Count (Assigned to me)	Indicates two counts. The first number is the total number of events that have been triggered by the monitor by all users. The second number is the total number of events in the queue that have been assigned to the user that is currently logged in to the system.
Details	This is a link that will display a table with all the events in the selected workflow queue.

To display the events in a workflow queue:

1. Click the **Details** link for the queue that is to be displayed.



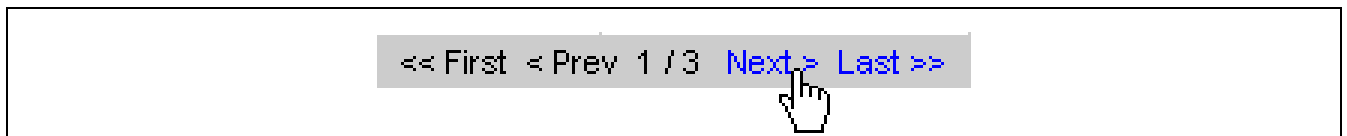
The list of events in the selected queue will be displayed.

The fields in the Workflow Queue list window are:

Event	The unique event number automatically assigned by the LSS is displayed here.
Name	The child's name or property address associated with the event
Status	The status of the event in the queue: Open or Closed
Create Date	The date the event was entered in the LSS system
Event Type	Blood Lead – Not Classified, Blood Lead – Child, or Property
Last Update	Displays the date that the event was last updated
Assigned To	Identifies the user responsible for updating the item identified by the workflow
Assigned To Group	Identifies the user group responsible for updating the item identified by the workflow

The headings on the Case Specific Monitors screens are clickable. Clicking one of them will reorder the data below alphabetically in either ascending or descending order.

The right side of the status bar will display information regarding the number of screens with events in the queue. To navigate through the queue, click the <<**First**, <**Prev**, **Next**>, and **Last**>> navigation links.



Chapter 8: Workflows and Tasks

- To open an event, point to its **Event ID** and click.

<input type="checkbox"/>	100000260	Bell, Talulah (Southington, CT)	Open	05/07/2010	Blood Lead - Child	05/07/2010
--------------------------	---------------------------	---------------------------------	------	------------	--------------------	------------

The selected event will be opened and displayed in the LSS Dashboard window.

Event Summary

Basic Information		Notes (Add/Edit Show My Notes)
Event ID:	100000260	
Event Type:	Blood Lead - Child	
Primary Person:	Talulah Bell Birth Date: 02/16/2008 (2 yrs Female) Phone:	
Address:	782 Hawaii Ave, Southington, CT 06489 (Edit)	
Dates:	Create Date: 05/07/2010	
Investigation Status:	Open	
Linked Events:	1 linked event(s) (View)	
Attachments:	0 attachment(s) (Add)	
Additional Information:	Testing Due Date: 03/18/2009	
	Relevant Address(es) on 02/16/2009:	
	<ul style="list-style-type: none"> Home - 782 Hawaii Ave, Southington, CT 06489 	
	Linked cases:	
	<ul style="list-style-type: none"> 100000261 - 782 Hawaii Ave, Southington, CT 06489 * (Link) 	

Event Information

Event Data	Lab Results	Concerns	Persons	Tasks	Event Properties	Event History
------------	-------------	----------	---------	-------	------------------	---------------

Question Packages				
QUESTION PACKAGE	NAME	LAST UPDATE	UPDATED BY	STATUS
Administrative	Talulah Bell	05/07/2010	venezianok	Incomplete
Demographics	Talulah Bell	05/07/2010	venezianok	Incomplete
PCP Information	Talulah Bell	05/07/2010	venezianok	Incomplete
Medical Status	Talulah Bell	05/07/2010	venezianok	Incomplete
Residency History and Information	Talulah Bell	05/07/2010	venezianok	Incomplete
Lead Hazards	Talulah Bell	05/07/2010	venezianok	Incomplete
Current Housekeeping Practices	Talulah Bell	05/07/2010	venezianok	Incomplete



LSS runs queries intermittently throughout a 24 hour period. Some workflow queries run 1 time in 24 hours, where others may run as frequently as every 5 minutes. The frequency with which the workflow query runs is based on the criticality of the workflow as well as the burden on the system. Some queries look at more data and therefore take longer to run than those that look at only one or two pieces of information. The time stamp on the workflow will show the last time a workflow has been updated. If you have made changes to an Event and it is still showing in the workflow, the workflow has probably not had time to refresh.

To close the Workflows Queue window without viewing an event, click the **Dashboard** button.

Workflow Queues - Open Environmental Cases

[Select all](#) [Clear all](#)

Open Environmental Cases (Type: Case) 04/15/2010 12:44 PM

Event	Name	Status	Create Date	Event Type	Last Update	Assigned To	Assigned To Group
<input type="checkbox"/> 100000151	122 D Welton Way, Thomaston, CT 06787 *	Open	04/14/2010	Property	04/14/2010		
<input type="checkbox"/> 100000117	267 Vine Street, Hartford, CT 06112 *	Open	02/18/2010	Property	04/12/2010		
<input type="checkbox"/> 100000116	248 Franklin Ave, Hartford, CT 06114 *	Open	02/11/2010	Property	04/12/2010		

Displaying result(s) 1...3 << First < Prev 1 / 1 Next > Last >>

Assign selected items to user: Assign selected items to group:

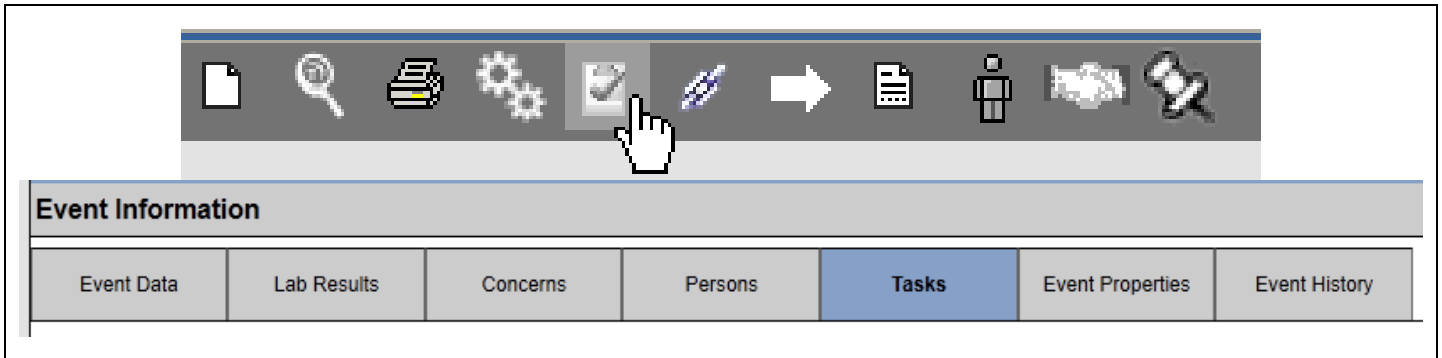
TASKS

Similar to the items in the Workflows, a task within the LSS is another technique for users to delegate assignments or work to others or themselves. Tasks are accessed in three places: from the Dashboard page 1) Tasks tab or 2) Task button and from the 3) Workflow Queues page (Task Specific Monitors). All provide similar information but offer slightly different views and functionality.

Task creation can be different depending upon where the user initiated the create task action. If the user clicked the Add Task link from the Workflow Queues page (next to Task Specific Monitors), the task will automatically not be assigned to a specific event but if the user clicks the Tasks button on the Dashboard, the task can either be associated with the currently active event or it can be non-event specific.

To View Tasks from the Dashboard window:

1. Click the **Tasks** button on LSS Dashboard toolbar or the **Tasks** tab in an Event under the Event Information.



If an event is loaded, tasks for that current event (if any) will be displayed.

All tasks assigned to the current user will also be displayed.

Tasks

Tasks for the selected event									
Type	Priority	Due Date	Description	Status	Created By	Event	Assigned To	Assigned To Group	Action
Assignment	Medium	11/16/2011	Testing Tasks	In Progress	CLPPP Migration (07/07/2009)	CT000000077756 - Blood Lead - Child - Linda Smith	Krista Veneziano		Edit Delete
My tasks (specifically assigned to me)									
Type	Priority	Due Date	Description	Status	Created By	Event	Assigned To	Assigned To Group	Action
Assignment	Medium	11/16/2011	Testing Tasks	In Progress	CLPPP Migration (07/07/2009)	CT000000077756 - Blood Lead - Child - Linda Smith	Krista Veneziano		Edit Delete
Other	Very Low		QC	In Progress	Audery Gain (08/16/2011)	101030623 - Blood Lead - Child - Evan L Legg	Krista Veneziano		Edit Delete

The fields in the Tasks list window are:

Type	This should always be Assignment for LSS
Priority	Indicates the Task priority: Very Low, Low, Medium, High, Very High
Due Date	Displays the date that the Task is scheduled for completion
Description	Describes briefly the task to be accomplished
Status	The status of the task in the queue: Pending, In Progress, Completed
Created By	Displays the name of the user who created the event. Also displays date of creation
Last Update	Displays the date that the event was last updated
Event	The unique event number automatically assigned by LSS is displayed here.
Disease or Condition	Always displays as Local Health Employee, Local Health Department, or Local Health Annual Report
Assigned To	Identifies the user responsible for updating the Task identified by the workflow
Assigned To Group	Identifies the user group responsible for updating the Task identified by the workflow
Action	Displays link to Edit the Task

- To load the event associated with a Task, click the **Event ID** in the Tasks list.

Tasks

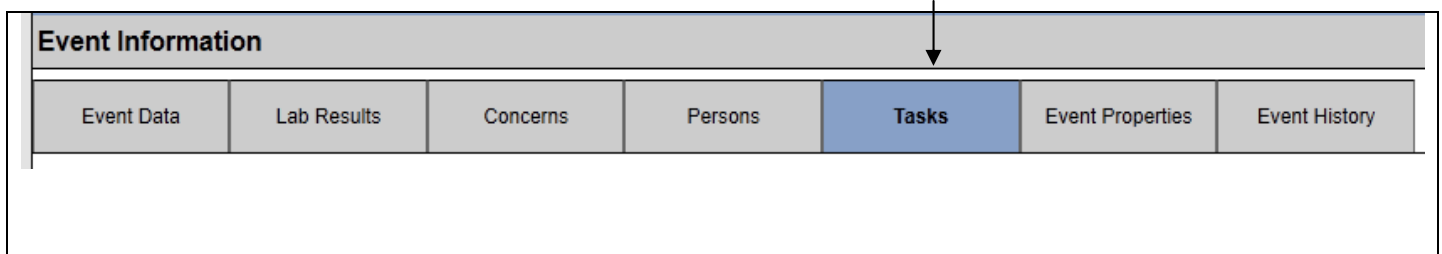
Tasks for the selected event									
Type	Priority	Due Date	Description	Status	Created By	Event	Assigned To	Assigned To Group	Action
Assignment	Medium	12/30/2011	Contact provider for test result	In Progress	Krista Veneziano (12/12/2011)	101118735 - Blood Lead - Not classified - Evan Daniel Legg	Krista Veneziano		Edit Delete

My tasks (specifically assigned to me)									
Type	Priority	Due Date	Description	Status	Created By	Event	Assigned To	Assigned To Group	Action
Assignment	Medium	12/30/2011	Contact provider for test result	In Progress	Krista Veneziano (12/12/2011)	101118735 - Blood Lead - Not classified - Evan Daniel Legg	Krista Veneziano		Edit Delete

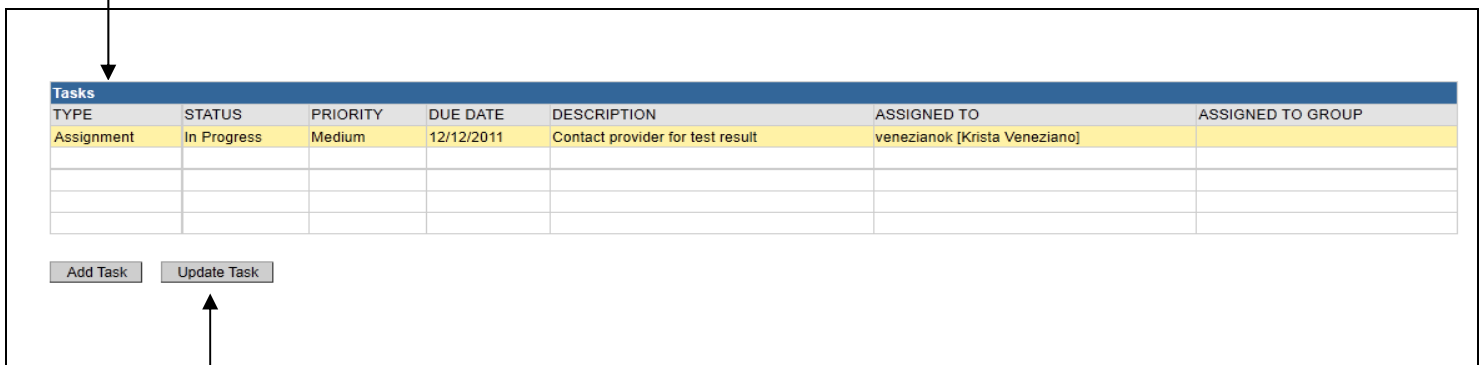
- To view the full Task information, click the **Edit** link in the Tasks list. (see above)

Chapter 8: Workflows and Tasks

4. You can also click on the Tasks tab in an open Event to view the task.



5. To open the Task you must click on the Task (it will highlight in yellow) then click on the Update Task button.



The Edit Tasks dialog box will display.

Edit Task

Task Information
Event: [101118735 - Blood Lead - Not classified - Evan Daniel Legg](#)
Type:
Status:
Created By: venezianok [Krista Veneziano]
Create Date: 12/12/2011
Last Update: 12/12/2011
Priority:
Due Date:
Start Date:
Complete Date:
Description:
Notes:
Assign to user:
Assign to group:

- Update Task as needed (i.e., add notes, input completion date, change Status) and click on the Save button this will bring you back to the LSS Dashboard. If no changes are made you can click on the Cancel button and return to the LSS Dashboard.

Tasks may also be viewed from the Workflow Queues

1. Click the **Workflows** button on the LSS Dashboard toolbar.



The Workflow Queue window will display and the Tasks can be found at the bottom of the list.

Task Specific Monitors (Add Task)		
My Groups' Open Tasks (12/12/2011 02:12 PM)	0 (0)	
My Open Tasks (12/12/2011 02:10 PM)	1 (1)	Details
My Overdue Tasks (12/12/2011 02:10 PM)	0 (0)	
Open Tasks Created by Me (12/12/2011 02:10 PM)	120 (1)	Details
Overdue Tasks Created by Me (12/12/2011 02:10 PM)	0 (0)	

[Dashboard](#) [Help](#)

2. Click the on any one of the workflows under the **Task Specific Monitors** to view the list of events associated with the workflow.
3. To open the event with an associated Task click on the event ID number.

My Open Tasks (Type: Task) Realtime 12/12/2011 02:10 PM										
Type	Due Date	Description	Status	Created By	Last Update	Event	Assigned To	Event Type	Assigned To Group	Action
<input type="checkbox"/> Assignment	12/12/2011	Contact provider for test result	In Progress	Krista Veneziano (12/12/2011)	12/12/2011	101118735 Legg, Evan Daniel (Thomaston, CT)	Krista Veneziano	Blood Lead - Not classified		Edit

Assign selected items to user:

[Workflows](#) [Dashboard](#) [Help](#)

Tasks can now be viewed in the same manner as when accessed using the Tasks button in the LSS Dashboard toolbar.

Creating a Task for a Specific Event

1. In the open Event click on the Tasks tab and click on the Add Task button.

The screenshot shows the 'Event Information' interface with the 'Tasks' tab selected. Below the tabs is a table with the following columns: TYPE, STATUS, PRIORITY, DUE DATE, DESCRIPTION, ASSIGNED TO, and ASSIGNED TO GROUP. The table is currently empty. Below the table are two buttons: 'Add Task' and 'Update Task'. An arrow points to the 'Add Task' button.

2. The Add Task screen will appear for the Event you were in.

The screenshot shows the 'Add Task' screen. It has a title bar 'Add Task' and a section 'Task Information'. The fields are: Event: 101118735 - Blood Lead - Not classified - Evan Daniel Legg; Type: dropdown; Status: Pending; Priority: Very Low; Due Date: date picker; Start Date: date picker; Complete Date: date picker; Description: text field; Notes: text area; Assign to user: search field with a magnifying glass icon; Assign to group: search field with a magnifying glass icon. At the bottom are buttons for Save, Cancel, and Help. An arrow points to the magnifying glass icon in the 'Assign to user' field.

3. Fill out the Type, Status, Priority, Due Date, Start Date, Description, Notes field.
4. Assign the task by clicking on the Search field to the right of the Assign to user field.

Search User

User Details:

Login Name:

Last Name:

First Name:

User Status: Active

Role:

Group:

Search Results

Login Name	Name	Status	Last Login

No search done

5. Fill out the Last and First name of the person you would like to assign the task to and then click the Search button.

Search User

User Details:

Login Name:

Last Name: Veneziano

First Name: Krista

User Status: Active

Role:

Group:

Search Results

Login Name	Name	Status	Last Login
venezianok	Krista Veneziano	Active	12/12/2011

Displaying result(s) 1...1, (maximum 50)

↑

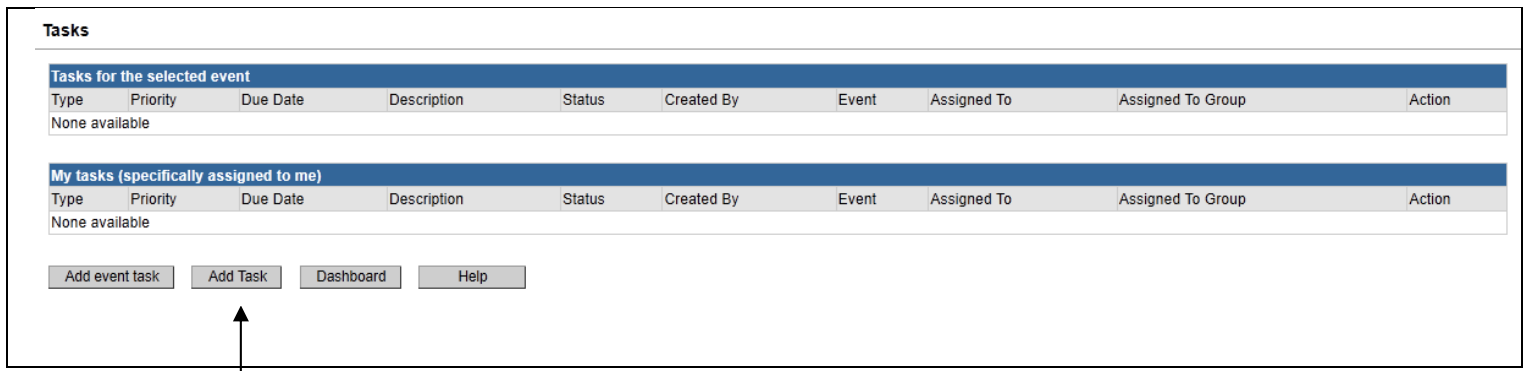
6. Click on the name of the person under the Search Results and then click on the Use selected user button.

Creating a Task NOT for a Specific Event

1. Click on the Task icon at the top of the Dashboard.



2. Click on the Add Task button. (If you click on the “Add event task” button that will add a task to the event on your dashboard.)



3. The Add Task screen will appear (as in #2 from the example above). Follow steps from above example.

Chapter 9: Print Templates

OVERVIEW

Purpose

Describe the LSS Print Templates.

Objectives

- Demonstrate how to use a Print Template
 - Print template workflow
 - Print template within an event
-

PRINT TEMPLATES

Print Templates are important in the LSS because they allow users automatically print “letters” with pre-populated information from within the LSS. The LSS will automatically populate information within letters to provide the user with letters for parents of children with elevated blood tests, environmental orders and lead inspection report summaries.

“Letters” can be print two different ways within the LSS.

To Print Letters using the Workflows Queue:

1. Open the **Workflow Queue** by clicking on the Workflow icon on the LSS Dashboard
2. Scroll down to the **Letters** workflows

Letters
Initial Letter To Parent of Child with Confirmed BLL (05/25/2010 09:00 AM)
Initial Letter To Parent of Child with Confirmed EBLL in Extended Testing (05/25/2010 09:00 AM)
Initial Letter to Parent of Child with Non-Confirmed BLL 10+ (05/25/2010 09:00 AM)
Lead Abatement Order (05/25/2010 09:00 AM)
Lead Inspection Report (05/25/2010 09:00 AM)
Overdue Testing Reminder Letter (05/25/2010 09:04 AM)
Test Reminder Letter (05/25/2010 09:00 AM)

3. Open the selected Workflow by clicking **Details** on the right
4. The list of children/properties that fall within the requirements of the Workflow will be displayed

Workflow Queues - Initial Letter To Parent of Child with Confirmed EBLL in Extended Testing

[Select all](#) [Clear all](#)

Initial Letter To Parent of Child with Confirmed EBLL in Extended Testing (Type: Case) 05/25/2010 12:13 PM							
Event	Name	Status	Create Date	Event Type	Last Update	Assigned To	Assigned To Group
<input type="checkbox"/> 100000243	Veneziano, Kerry Ann (Willimantic, CT)	Open	04/29/2010	Blood Lead - Child	05/25/2010		

Displaying result(s) 1...1 << First < Prev 1 / 1 Next > Last >>

Assign selected items to user: Assign selected items to group:

5. **Select all** the child/property events that you would like to print the letter for by clicking on the check box to the left of the Event ID (**multiple events can be selected**)

6. Click on Print Template

Initial Letter To Parent of Child with Confirmed EBLI in Extended Testing (Type: Case) 05/25/2010 12:13 PM

Event	Name	Status	Create Date	Event Type	Last Update	Assigned To	Assigned To Group
<input checked="" type="checkbox"/> 100000243	Veneziano, Kerry Ann (Willimantic, CT)	Open	04/29/2010	Blood Lead - Child	05/25/2010		

Displaying result(s) 1...1 << First < Prev 1 / 1 Next > Last >>

Assign selected items to user: Assign selected items to group:

7. The following screen will appear

File Download

Do you want to open or save this file?

Name: ...Extended_Testing_Letter_for_Decreasing_BLLs.rtf
Type: Rich Text Format, 9.90KB
From: 10.28.0.179

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

8. Click on **Open**

9. The selected letter(s) will open in Microsoft Word, the letter can be printed and/or saved and the letter can then be closed (close as you would any other Microsoft Word document)



If there is pre-populated data that is missing or incorrect in the print document, the user **MUST** go back into LSS to make changes. The LSS information will not be changed if changes are made directly to the word document. After making changes in the LSS, reprint the document from either the workflow or the Print Documents screen and the information will be updated.

10. Once back at the Workflow screen click on **Mark as Sent**

Initial Letter To Parent of Child with Confirmed EBLL in Extended Testing (Type: Case) 05/25/2010 12:13 PM

Event	Name	Status	Create Date	Event Type	Last Update	Assigned To	Assigned To Group
<input checked="" type="checkbox"/> 100000243	Veneziano, Kerry Ann (Willimantic, CT)	Open	04/29/2010	Blood Lead - Child	05/25/2010		

Displaying result(s) 1...1 << First < Prev 1 / 1 Next > Last >>

Assign selected items to user: Assign selected items to group:

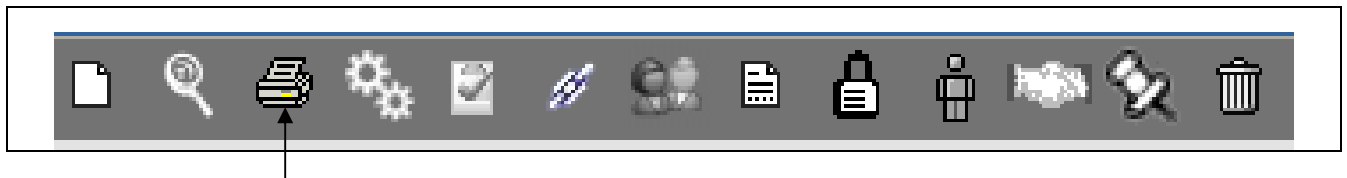
Clicking **Mark as Sent** will auto-populate the question package (in this case the **Administrative Question Package**) with the date that the letter was printed from the Workflow (see below)

Workflow Related

Date initial letter printed for a child with an elevated blood lead result:	<input type="text"/>	<input type="button" value="Calendar"/>
Date that reminder test letter sent:	<input type="text"/>	<input type="button" value="Calendar"/>
Date letter printed for child with a confirmed EBLL in extended testing:	05/25/2010	<input type="button" value="Calendar"/>
Date letter for overdue blood lead test sent:	<input type="text"/>	<input type="button" value="Calendar"/>

To Print Letters directly from the Event:

1. **Open** Event (child or property)
2. Click on the **Print Case** icon on the LSS Dashboard



- The available letters for the event will be displayed

Blood Lead - Child Event

Print Documents			
Document	Description	Name	Action
Lead_Test_Reminder_Letter.rtf	Test Reminder Letter	Kerry Ann Veneziano	Open
Letter_for_Decreasing_BLLs.rtf	First letter for confirmed follow-up testing	Kerry Ann Veneziano	Open
Letter_for_Initial_Venous_BLL_Testing.rtf	First Letter to Confirmed Children 10-19 bll	Kerry Ann Veneziano	Open
Letter_for_Overdue_Lead_Test.rtf	Overdue Lead Test Letter	Kerry Ann Veneziano	Open
Event_Print.xsl	Generic Event Template	Kerry Ann Veneziano	Open

Property Event

Print Documents	
Document	Description
Event_Print.xsl	Generic Event Template
LeadInspectionSummaryForm.rtf	Lead Inspection Report Summary
Lead_Abatement_Order.rtf	Lead Abatement Order

- Click **Open** for the letter to be printed
- The following screen will appear

File Download ✕

Do you want to open or save this file?

Name: ...000243_Letter_for_Initial_Venous_BLL_Testing.rtf

Type: Rich Text Format, 11.1KB

From: 10.28.0.179

→

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

- Click on **Open**
- The selected letter(s) will open in Microsoft Word, the letter can be printed and/or saved and the letter can then be closed (close as you would any other Microsoft Word document)



If there is pre-populated data that is missing or incorrect in the print document, the user **MUST** go back into LSS to make changes. The LSS information will not be changed if changes are made directly to the word document. After making changes in the LSS, reprint the document from either the workflow or the Print Documents screen and the information will be updated.



If the letter is printed directly from the Event the date will NOT be auto-populated in the corresponding question package



Here is a list of Workflow and corresponding letters:

Child Event Workflow & Letters	
Workflow	Letters
Initial Letter to Parents of Child with Confirmed BLL	Letter for Initial Venous BLL
Initial Letter to Parent of Child with Confirmed EBLL in Extended Testing	Letter for decreasing BLL
Initial Letter to Parent of Child with Non-Confirmed BLL 10+	Letter for Unconfirmed Capillary 10 or higher
Overdue Testing Reminder Letter	Letter for Overdue Lead Test
Test Reminder Letter	Lead Test Reminder
	Event Print – summary of event
Environmental Event Workflow & Letters	
Workflow	Letter
Lead Abatement Order Note: In the Lead Remediation/Abatement question package the question: “Does this property require an abatement” must be answered Yes for this to show up in the workflow/print documents	Lead Abatement Order
Lead Inspection Report Note: The Environmental Lead Inspection question package needs to be completed for this to show up in workflow/print documents	Lead Inspection Summary Form
	Event Print

Chapter 10: Reports

OVERVIEW

Purpose

Describe the LSS reports feature.

Objectives

- View and describe the pre-defined LSS reports
 - Print the pre-defined LSS reports
-

REPORTS

Currently, the LSS has thirteen pre-defined reports that are available for viewing and printing for caseworkers:

The screenshot displays the 'Maven Reporting' interface. At the top, there is a blue header bar with the text 'Maven Reporting'. Below this, there are two main sections. The first section is labeled 'Category:' and contains a dropdown menu currently set to 'Childhood Lead'. The second section is labeled 'Select Report:' and contains a dropdown menu that is open, showing a list of thirteen report options. To the left of the 'Select Report:' dropdown is a 'Run Report' button.

Category	Select Report
Childhood Lead	Case Counts - Child and Environmental
	Case Counts - Child and Environmental with Case Status Option
	Child - All BLLs
	Child Case Notes
	Child Cases - All BLLs
	Child Cases - Initial BLLs
	Child Chelation Report
	Environmental Case Notes
	Environmental Cases - Basic Information
	Environmental Cases - Comprehensive Report (Abatement)
	Environmental Cases - Comprehensive Report (Inspection)
	Environmental Cases - Comprehensive Report (Remediation)
	Environmental Cases - Confidential Information

- **Case Counts: Child and Environmental:** This report will provide the user with environmental and child case counts within the criteria selected. Just a number will be listed for environmental and child cases...no names or addresses.

The screenshot displays the 'Maven Reporting' interface with the following fields and options:

- Category:** Childhood Lead
- Select Report:** Case Counts - Child and Environmental
- Start Date [creation / first elevated date]:** [Empty text box] [Calendar icon]
- End Date [creation / first elevated date]:** [Empty text box] [Calendar icon]
- Official Town:** Andover, Ansonia, Ashford, Avon, Barkhamsted
- Local Health Department:** Bethel Health Department, Bridgeport Health Department, Bristol-Burlington Health District, Brookfield Health Department, CT River Area Health District
- LPPCP Region:** Region 1, Region 2, Region 3, Region 4, Unknown

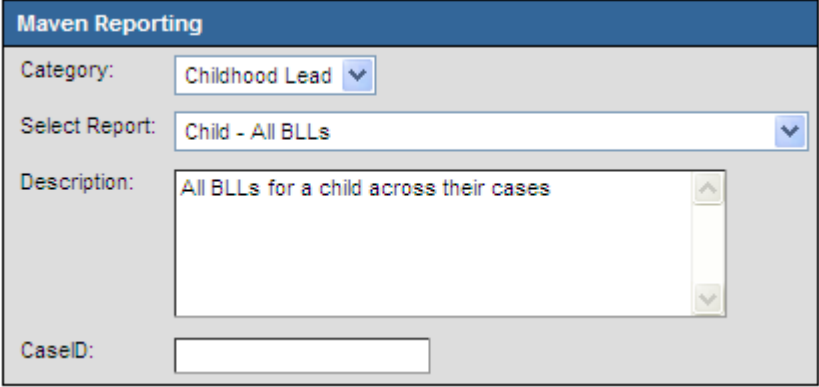
- **Case Counts – Child and Environmental with Case Status Option:** This report will provide the user with **OPEN** environmental and child case counts for the criteria selected within the time period selected. Just a number will be listed for environmental and child cases...no names or addresses.

The screenshot displays the 'Maven Reporting' interface with the following fields and options:

- Category:** Childhood Lead
- Select Report:** Case Counts - Child and Environmental with Case Status Option
- Description:** Option to choose only current OPEN cases created during the selected period
- Start Date [creation / first elevated date]:** [Empty text box]
- End Date [creation / first elevated date]:** [Empty text box]
- Case Status:** Open (selected), Closed
- Official Town:** Andover, Ansonia, Ashford, Avon
- Local Health Department:** Bethel Health Department, Bridgeport Health Department, Bristol-Burlington Health District, Brookfield Health Department
- LPPCP Region:** Region 1, Region 2, Region 3, Region 4

At the bottom of the interface are four buttons: Run Report, Export Results, Dashboard, and Help.

- **Child All BLLs:** A listing of all BLLs for a single child and address's associated with the testing.



The screenshot displays the 'Maven Reporting' interface. It features a blue header bar with the text 'Maven Reporting'. Below the header, there are four input fields: 'Category:' with a dropdown menu set to 'Childhood Lead', 'Select Report:' with a dropdown menu set to 'Child - All BLLs', 'Description:' with a text area containing 'All BLLs for a child across their cases', and 'CaseID:' with an empty text box.

Note: To run this report from the reports screen the child's CaseID is needed.

Note: This report can be run directly from any one of the child's cases. To do this open the child's case, click on the report icon, select this report from the drop down list, and the CaseID will be pre-populated.

- **Child Case notes:** This report will provide the user with child case notes from cases that were created during the selected time frame.

The screenshot shows the 'Maven Reporting' interface. At the top, there is a blue header with the text 'Maven Reporting'. Below this, the interface is divided into several sections for filtering data:

- Category:** A dropdown menu with 'Childhood Lead' selected.
- Select Report:** A dropdown menu with 'Child Case Notes' selected and highlighted in yellow.
- Start Date [create date]:** A text input field with a calendar icon to its right.
- End Date [create date]:** A text input field with a calendar icon to its right.
- Case Status:** A dropdown menu with 'Open' and 'Closed' options.
- Official Town:** A list box containing 'Andover', 'Ansonia', 'Ashford', and 'Avon'.
- Local Health Department:** A list box containing 'Bethel Health Department', 'Bridgeport Health Department', 'Bristol-Burlington Health District', and 'Brookfield Health Department'.
- LPPCP Region:** A list box containing 'Region 1', 'Region 2', 'Region 3', and 'Region 4'.

At the bottom of the interface, there are four buttons: 'Run Report', 'Export Results', 'Dashboard', and 'Help'.

Chapter 10: Reports

- **Child Cases - All BLLs:** This report will provide the user with a list of children that had a BLL draw date within the date range specified. Additionally, all BLLs within the child's case will also be listed.

The screenshot displays the 'Maven Reporting' interface with the following configuration:

- Category:** Childhood Lead
- Select Report:** Child Cases - All BLLs
- Start Date [BLL Draw Date]:** [Empty text box]
- End Date [BLL Draw Date]:** [Empty text box]
- Test Type:** Capillary, Venous
- Minimum BLL:** [Empty text box]
- Maximum BLL:** [Empty text box]
- Case Status:** Open, Closed
- Official Town:** Andover, Ansonia, Ashford, Avon, Barkhamsted
- Local Health Department:** Bethel Health Department, Bridgeport Health Department, Bristol-Burlington Health District, Brookfield Health Department, CT River Area Health District
- LPPCP Region:** Region 1, Region 2, Region 3, Region 4, Unknown

Chapter 10: Reports

- **Child Cases - Initial BLLs:** This report will provide the user with a list of children and their initial BLLs within the date range specified. All subsequent BLL will also be listed if they fall within the selected date range.

The screenshot displays the 'Maven Reporting' interface. At the top, the title 'Maven Reporting' is shown in a blue header. Below this, several configuration fields are visible:

- Category:** A dropdown menu set to 'Childhood Lead'.
- Select Report:** A dropdown menu set to 'Child Cases - Initial BLLs'.
- Description:** A text area containing the text: 'Lists children whose initial BLL within the BLL Range falls in the date range'.
- Start Date [BLL Draw Date]:** A date input field with a calendar icon.
- End Date [BLL Draw Date]:** A date input field with a calendar icon.
- Test Type:** A list box containing 'Capillary' and 'Venous'.
- Minimum initial BLL:** An empty text input field.
- Maximum initial BLL:** An empty text input field.
- Case Status:** A list box containing 'Open' and 'Closed'.
- Official Town:** A list box containing 'Andover', 'Ansonia', 'Ashford', 'Avon', and 'Barkhamsted'.
- Local Health Department:** A list box containing 'Bethel Health Department', 'Bridgeport Health Department', 'Bristol-Burlington Health District', 'Brookfield Health Department', and 'CT River Area Health District'.
- LPPCP Region:** A list box containing 'Region 1', 'Region 2', 'Region 3', 'Region 4', and 'Unknown'.

- **Environmental Case Notes:** This report will provide the user with environmental case notes from cases that were created during the selected time frame.

The screenshot shows the 'Maven Reporting' interface. At the top, there is a blue header with the text 'Maven Reporting'. Below this, the interface is divided into several sections for filtering data:

- Category:** A dropdown menu with 'Childhood Lead' selected.
- Select Report:** A dropdown menu with 'Environmental Case Notes' selected and highlighted in yellow.
- Start Date [create date]:** A text input field with a calendar icon to its right.
- End Date [create date]:** A text input field with a calendar icon to its right.
- Case Status:** A dropdown menu with 'Open' and 'Closed' options.
- Official Town:** A list box containing 'Andover', 'Ansonia', 'Ashford', and 'Avon'.
- Local Health Department:** A list box containing 'Bethel Health Department', 'Bridgeport Health Department', 'Bristol-Burlington Health District', and 'Brookfield Health Department'.
- LPPCP Region:** A list box containing 'Region 1', 'Region 2', 'Region 3', and 'Region 4'.

At the bottom of the interface, there are four buttons: 'Run Report', 'Export Results', 'Dashboard', and 'Help'.

- **Child Chelation Report:** This report will provide the user with a list of children who have been chelated within the date range selected.

The screenshot shows the 'Maven Reporting' interface. It features a blue header bar with the text 'Maven Reporting'. Below the header, there are several input fields and dropdown menus:

- Category:** A dropdown menu with 'Childhood Lead' selected.
- Select Report:** A dropdown menu with 'Child Chelation Report' selected.
- Start Date [chelation date]:** A text input field with a calendar icon to its right.
- End Date [chelation date]:** A text input field with a calendar icon to its right.
- Official Town:** A list box containing 'Andover', 'Ansonia', 'Ashford', 'Avon', and 'Barkhamsted'. It has up and down arrow icons on the right side.
- Local Health Department:** A list box containing 'Bethel Health Department', 'Bridgeport Health Department', 'Bristol-Burlington Health District', 'Brookfield Health Department', and 'CT River Area Health District'. It has up and down arrow icons on the right side.
- LPPCP Region:** A list box containing 'Region 1', 'Region 2', 'Region 3', 'Region 4', and 'Unknown'.

Note: Report will only provide the chelation information if it has been manually entered in to the child's case in the Medical Status question package.

Environmental Cases – Basic Information: This report will provide the user with a line list of basic information for environmental cases (Case ID, Case Status, Address, Create date, Last Update Date, Lead inspector company/department, Lead inspector name, LHD, Official town, LPPCP region).

The screenshot displays the 'Maven Reporting' interface with the following filters and options:

- Category:** Childhood Lead
- Select Report:** Environmental Cases - Basic Information
- Start Date [creation date]:** [Empty text box with calendar icon]
- End Date [creation date]:** [Empty text box with calendar icon]
- Case Status:** Open, Closed
- Official Town:** Andover, Ansonia, Ashford, Avon, Barkhamsted
- Local Health Department:** Bethel Health Department, Bridgeport Health Department, Bristol-Burlington Health District, Brookfield Health Department, CT River Area Health District
- LPPCP Region:** Region 1, Region 2, Region 3, Region 4, Unknown

Note: Report will only provide the information if it has been manually entered in to the case through the question packages.

Environmental Cases – Comprehensive Report (Abatement): This report will provide the user with a list of environmental cases created within the date range selected requiring abatement and all information associated with that case.

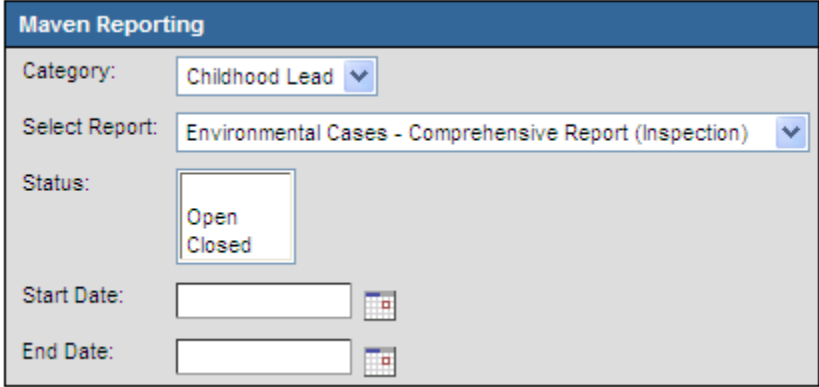
(E.g., Case ID, Case Status, Address, Date LIRF Printed, Order Issue Date, Abatement Required, Remediation Required, Plan Received Date, Date Lead Abatement Plan reviewed and notification of plan status sent to property owner, ect.)

The screenshot displays the 'Maven Reporting' interface with the following fields and options:

- Category:** Childhood Lead (dropdown)
- Select Report:** Environmental Cases - Comprehensive Report (Abatement) (dropdown)
- Start Date [creation date]:** [Empty text box] [Calendar icon]
- End Date [creation date]:** [Empty text box] [Calendar icon]
- Case Status:** Open, Closed (checkboxes)
- Official Town:** Andover, Ansonia, Ashford, Avon, Barkhamsted (dropdown list)
- Local Health Department:** Bethel Health Department, Bridgeport Health Department, Bristol-Burlington Health District, Brookfield Health Department, CT River Area Health District (dropdown list)
- LPPCP Region:** Region 1, Region 2, Region 3, Region 4, Unknown (checkboxes)

Note: Report will only provide the information if it has been manually entered in to the case through the question packages.

Environmental Cases – Comprehensive Report (Inspection): This report will provide the user with a list of all environmental cases requiring abatement and an excerpt of information entered in to the Environmental Lead Inspection package.



The screenshot displays the 'Maven Reporting' interface with the following fields and options:

- Category:** A dropdown menu set to 'Childhood Lead'.
- Select Report:** A dropdown menu set to 'Environmental Cases - Comprehensive Report (Inspection)'.
- Status:** A list box containing 'Open' and 'Closed'.
- Start Date:** A text input field with a calendar icon to its right.
- End Date:** A text input field with a calendar icon to its right.

Chapter 10: Reports

- **Environmental Cases – Comprehensive Report (Remediation):** This report will provide the user with a list of environmental cases created within the date range selected requiring remediation and all information associated with that case.

(E.g., Case ID, Case Status, Address, Date LIRF Printed, Order Issue Date, Abatement Required, Remediation Required, Plan Received Date, Date Lead Remediation Plan reviewed and notification of plan status sent to property owner, ect.)

The screenshot displays the 'Maven Reporting' interface with the following filters and options:

- Category:** Childhood Lead
- Select Report:** Environmental Cases - Comprehensive Report (Remediation)
- Start Date [creation date]:** [Empty text box with calendar icon]
- End Date [creation date]:** [Empty text box with calendar icon]
- Case Status:** Open, Closed
- Official Town:** Andover, Ansonia, Ashford, Avon, Barkhamsted
- Local Health Department:** Bethel Health Department, Bridgeport Health Department, Bristol-Burlington Health District, Brookfield Health Department, CT River Area Health District
- LPPCP Region:** Region 1, Region 2, Region 3, Region 4, Unknown

Note: Report will only provide the information if it has been manually entered in to the case through the question packages.

Environmental Cases – Confidential Information: This report will provide the user with a list of environmental cases created within the date range selected with basic information (e.g., creation date, when case was last updated, LHD and LHD inspector) **AND** the child and child's BLLs associated with the environmental case.

The screenshot displays the 'Maven Reporting' interface with the following filters and options:

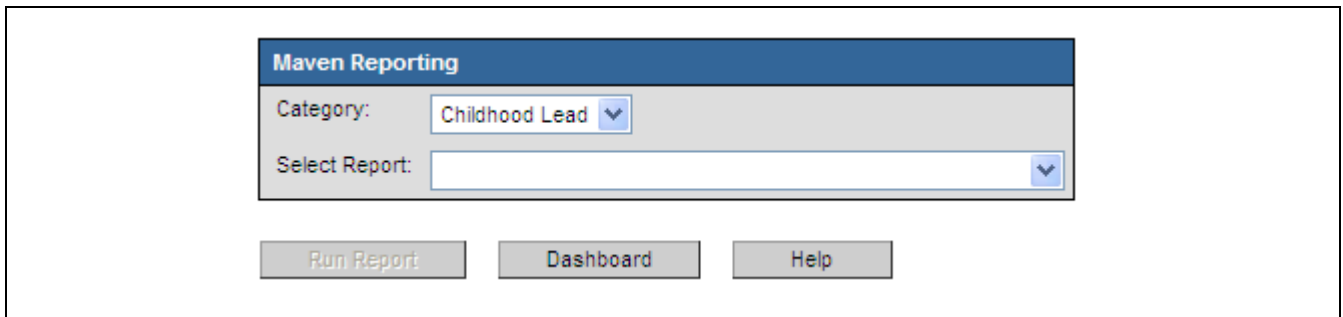
- Category:** Childhood Lead
- Select Report:** Environmental Cases - Confidential Information
- Start Date [creation date]:** [Empty text box with calendar icon]
- End Date [creation date]:** [Empty text box with calendar icon]
- Case Status:** Open, Closed
- Official Town:** Andover, Ansonia, Ashford, Avon, Barkhamsted
- Local Health Department:** Bethel Health Department, Bridgeport Health Department, Bristol-Burlington Health District, Brookfield Health Department, CT River Area Health District
- LPPCP Region:** Region 1, Region 2, Region 3, Region 4, Unknown

To view the LSS reports:

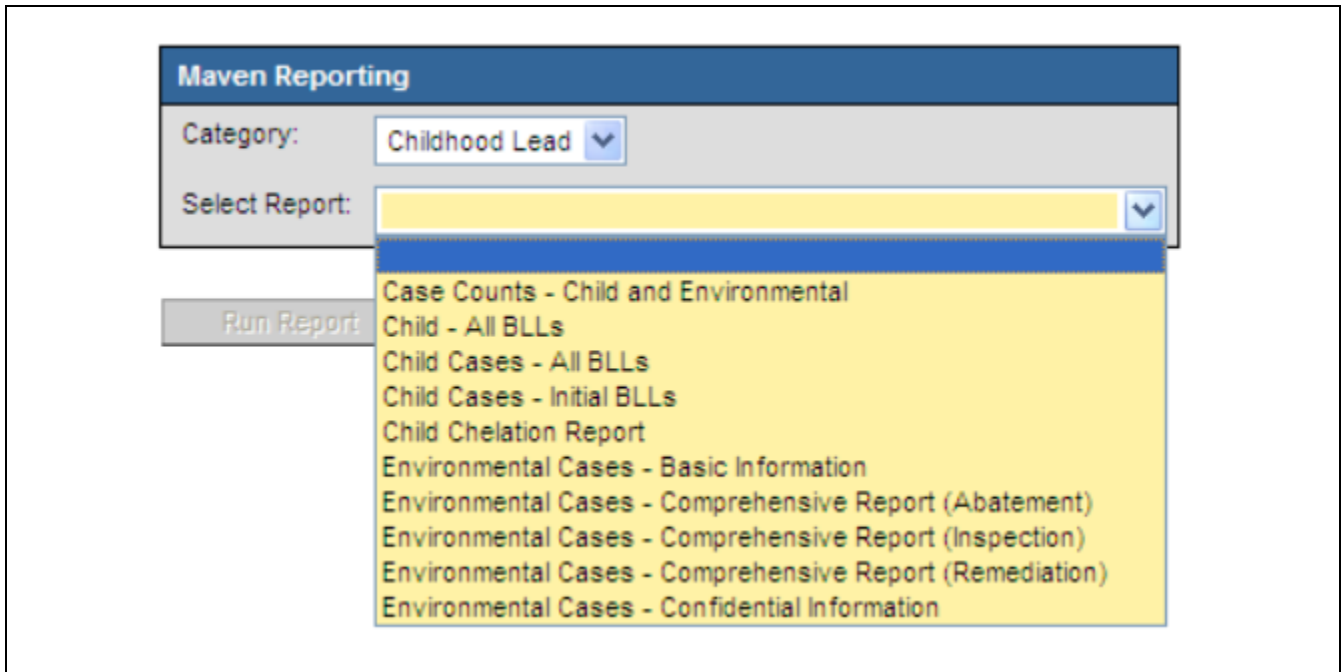
1. Click the **Reports** button on the LSS Dashboard toolbar.



The Reporting screen will display.

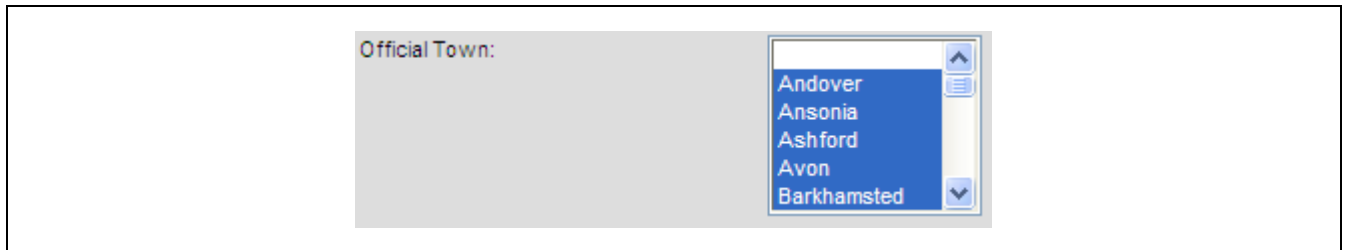


2. Select a report from the **Select Report** list.



3. **Input** the criteria for that report.

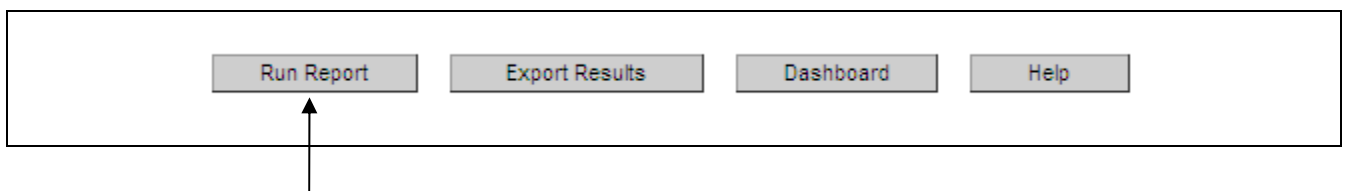
Note: To select a **range** of Official Towns, Local Health Departments, and/or Regions the user must hold down the shift key. Example: If Andover and Barkhamstead is selected while holding down the shift key all towns between Andover and Barkhamstead will be included in the report.



Note: To select **specific** Official Towns, Local Health Departments, and/or Regions the user must hold down the Control (Ctrl) key. Example: Hold Ctrl key down and click on Bethel Health Department, Bristol-Burlington Health District, and CT River Area Health District. Only these three departments will be included in the report.



4. Click the **Run Report** button.

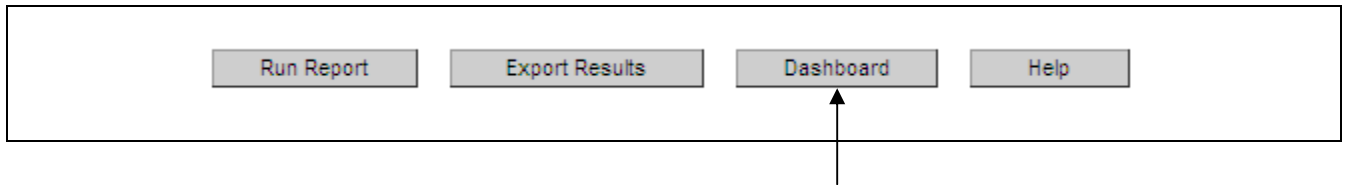


The selected report will be displayed in preview mode.

5. To print the report, click the **Print** button in your browser. (Note: The Print button and its location will vary according to the browser that is being used)

Note: If the report is large in size (many columns or rows) it will not be printed fully in preview mode. It can be printed if **Export Results** is selected. See directions below.

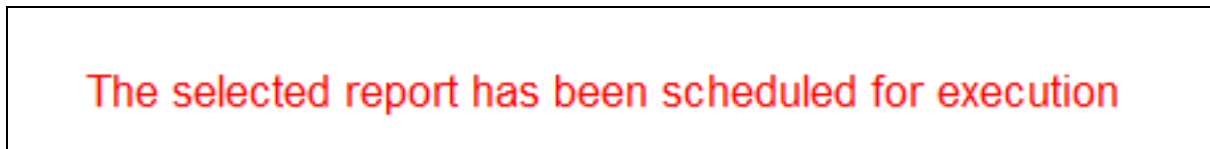
6. Close the Print window to return to the Reporting screen.
7. Click the **Dashboard** button to return to the LSS Dashboard.



Reports Queue

Because the “Child Cases – All BLLs” and the “Child Cases – Initial BLLs” reports have so much data to sort through they are placed in to a reports queue while the data is being compiled. To generate and print these two reports follow the steps above through Step 4 then:

1. Once you click on the Run Report button the following statement will appear at the top of the screen:



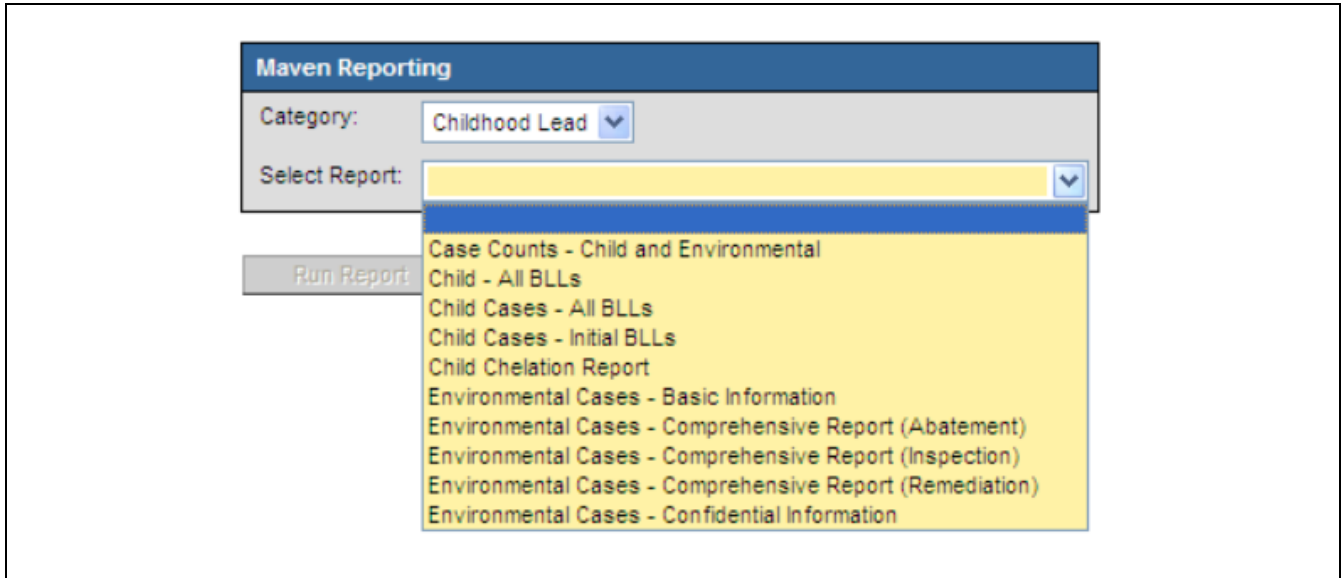
2. The Report Schedule (see below) will appear at the bottom of the screen. This shows when the report was placed in the queue, by whom, its status. If the **Action** column says “Refresh”, the report is not complete. Click on the “Refresh” link periodically to see if the report has completed.
3. Once the report is complete the Action column will change to “**Download**”. Click on the download to open in Excel.

Report Schedule				
Scheduled Time	Frequency	Created By	Status	Action
12/16/2011 01:39 PM	Queued	hungt [Tracy Hung]	Pending	Refresh

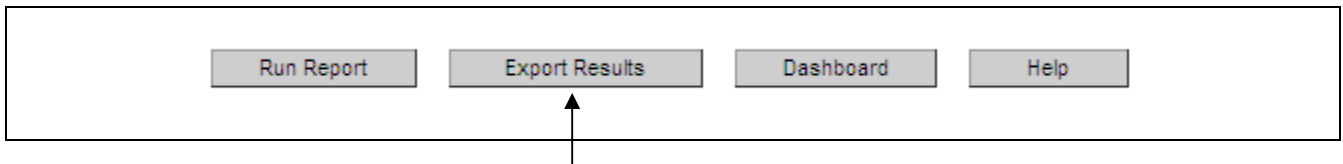
Available Reports			
Create Date	Created By	File	Action
07/01/2011 12:06 PM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110701120657.html	Download
07/13/2011 12:00 PM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110713120001.xls	Download
07/13/2011 12:15 PM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110713121550.xls	Download
07/13/2011 01:29 PM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110713132922.html	Download
07/13/2011 01:32 PM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110713133231.html	Download
07/19/2011 10:43 AM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110719104346.xls	Download
07/22/2011 09:11 AM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110722091153.xls	Download
07/26/2011 04:02 PM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110726160243.xls	Download
07/27/2011 09:11 AM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110727091139.xls	Download
07/27/2011 09:58 AM	hungt [Tracy Hung]	CHILD_CASES_ALL_BLLS_hungt_20110727095809.xls	Download

To export a report to Excel:

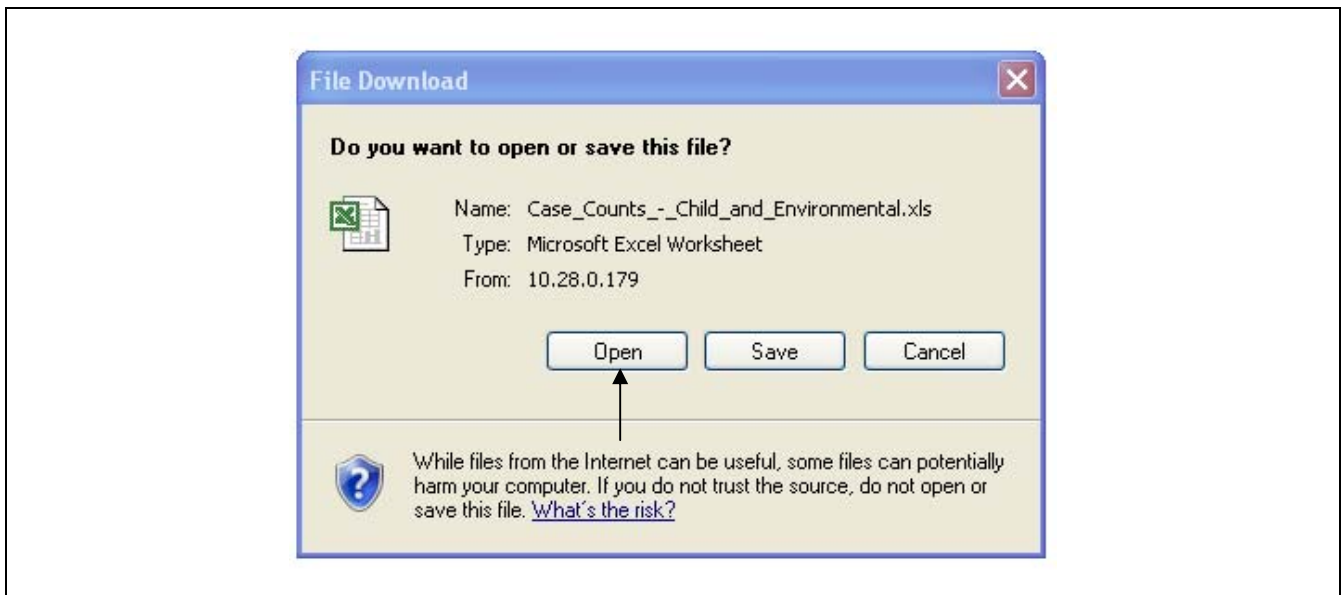
1. Select a report from the **Select Report** list.



2. Click the **Export Results** button.



The File Download dialog box will display



- Click the **Open** button.

The Microsoft Excel application will open and a workbook file with the report data will be created.

Case Counts - Child and Environmental			
Report period [creation date]: 01/01/01 - 04/13/10			
Local Health Department	Official Town	Number of Child Cases	Number of Environmental Cases
Bethel Health Department	Bethel	1	0
	Total	1	0
Bridgeport Health Department	Bridgeport	124	184
	Total	124	184
Bristol-Burlington Health District	Bristol	2	12
	Total	2	12
CT River Area Health District	Deep River	0	2
	Total	0	2
Central Connecticut Health District	Berlin	4	2
	Rocky Hill	0	2
	Wethersfield	1	1
	Total	5	5

The Microsoft Excel workbook file can be modified in the normal Excel manner.

Appendix A: Contact Information

Overview

For technical support and related questions, contact the following support staff:














Contact Person – LSS	Phone	E-mail
Tracy Hung	(860) 509-8030	tracy.hung@ct.gov
Jimmy Davila	(860) 509-7277	jimmy.davila@ct.gov
Or contact your individual case manager for assistance	(860) 509-7299	
Fax	(860) 509-7295	

Contact	Phone
State of Connecticut Department of Public Health – Lead and Healthy Homes Program	(860) 509-7299

Appendix B: LSS Dashboard Icons

Overview

The icons in the generic Maven LSS Dashboard for the user are:

	Create Event	Used to create a child (Blood Lead – Child or Blood Lead – not classified) or property case
	Search Event	Used to search for an child or property case
	Print Event	Used to print the event case report, letters or other forms specific to the open event
	Workflow	Used to view user specified workflow queues
	Tasks	Used to assign and update status of specific tasks
	Linked Events/Contacts	Displays linked events/contacts and provides the ability to manually link events
	Import Roster	Batch data importing (Laboratory Data, Vital Records, & Medicaid)
	Reports	Users can view and print reports from data entered in to the LSS
	Lock Event	Locks event so no changes can be made
	User Information	Used to update user information and change log in password
	Share Event	Provides the user the ability to share a case with someone who would not ordinarily have permissions to see it
	Recent Events	Provides easy access to the previous 30 cases that have been worked on by the current user
	Delete Event	Delete child or property event

Appendix C: Glossary of LSS Terminology

Overview

Some of the commonly used terms and abbreviations in LSS are:

Term	Meaning
CDC	Centers for Disease Control
DPH	Department of Public Health
Event	Child or Property case
LHD	Local Health Department
LSS	Lead Surveillance System
Permission	Pre-defined rules in the LSS that allow a user the ability to perform certain actions, such as “create an event”, “run a report” or “create a new user”
Print Template	Automatically print letters with pre-populated information from within the LSS
Question Package	An organized set of information about an event
Role	A group of permissions
User	A person who uses the LSS
Task	A mechanism for users to delegate assignments or work to others; may be related to a specific event or may be event-independent
Workflow	An internally-monitored mechanism within LSS to identify events and tasks that require user attention

Appendix D: Print Templates

Overview

Copies of the Print Templates that are available in the LSS are below.

Note: If you input the required information in the system, the fields that say “Insert...” will be automatically completed.

Letter for Unconfirmed Capillary 10 or higher:

{Insert Date}

To the Parents/Guardians of {Insert Child Name}
{Insert Child's Address}

Dear Parents/Guardians of {Insert Child's Name},

It has been reported to the {Insert Local Health Department Name} that your child {Insert Child Name} has a capillary blood lead level of {Insert Lead Test Result} $\mu\text{g}/\text{dL}$ from blood test taken on {Insert Date of Collection}. {Insert Child Name} has a blood lead level that needs further care by their doctor. Your doctor should retest your child with a venous test (blood sample from the arm) by {Due Date of Next Test}. The guidelines for retesting are as follows:

Capillary Test Results	Venous Test Needed
10-19 $\mu\text{g}/\text{dL}$	within 3 months
20-44 $\mu\text{g}/\text{dL}$	1 month to 1 week
45-59 $\mu\text{g}/\text{dL}$	within 48 hours
60-69 $\mu\text{g}/\text{dL}$	within 24 hours
$\geq 70\mu\text{g}/\text{dL}$	immediately

Information about lead poisoning and how you can reduce your child's exposure to lead hazards are enclosed. You can find additional lead poisoning prevention information at the Connecticut Department of Public Health Lead Poisoning Prevention and Control Program's website at: www.ct.gov/dph/lead.

By following the advice of your child's doctor and using the information in this packet, you can help to improve your child's health and reduce his/her blood lead level. If you have any questions or concerns, please do not hesitate to contact me at {Insert Local Health Department Telephone Number}.

I wish you and your child good health.

Sincerely,

{Insert Person's Name}
{Insert Local Health Department Name}
Childhood Lead Poisoning Prevention Program

Lead Test Reminder Letter:

{*Insert Date*}

To the Parents/Guardians of {*Insert Child Name*}
{*Insert Child's Address*}

Dear Parents/Guardians of {*Insert Child's Name*},

I would just like to remind you that your child {*Insert Child's Name*} is due for a follow-up venous blood lead test by {*Due Date of Test*} because of his/her most recent blood lead test taken on {*Insert Date of Most Recent Collection*} with a result of {*Insert Lead Level*} µg/dL. Please contact your doctor's office to schedule a time to get your child retested. If your child has had blood taken recently, contact his/her doctor to check on their blood lead test result.

Thank you in advanced for your time. Contact me at {*Insert Local Health Department Telephone Number*} with any questions or concerns.

Sincerely,

{*Insert Person's Name*}
{*Insert Local Health Department Name*}
Childhood Lead Poisoning Prevention Program

Letter for Overdue Lead Test:

{*Insert Date*}

To the Parents/Guardians of {*Insert Child Name*}
{*Insert Child's Address*}

Dear Parents/Guardians of {*Insert Child's Name*},

It is extremely important that you contact your child's doctor and take {*Insert Child Name*} for a venous blood lead test (blood sample taken from the arm). The last blood lead test I have on record for your child was {*Insert Lead Level*} µg/dL from a blood test done on {*Insert Date of Collection*}. Your child is {*Insert # of months/weeks over due for testing*} month(s) over due for testing. You, as a parent, have an obligation to follow through with the appropriate health care needs of your child.

If you have already scheduled or had a retest done please disregard this reminder. Please contact me as soon as possible to let me know you have followed through and provide me with the updated information. Your child's health is of great concern to us.

Sincerely,

{*Insert Person's Name*}
{*Insert Local Health Department Name*}
Childhood Lead Poisoning Prevention Program

_____ **First Reminder**

_____ **Second Reminder**

_____ **Third Reminder / DCF Referral**

Letter for Initial Venous BLL Testing:

{*Insert Date*}

To the Parents/Guardians of {*Insert Child Name*}
{*Insert Child's Address*}

Dear Parents/Guardians of {*Insert Child's Name*},

It has been reported to the {*Insert Local Health Department Name*} that your child {*Insert Child Name*} has a venous blood lead level of {*Insert Lead Level*} µg/dL from a blood test done on {*Insert Date of Collection*}. Your child has a blood lead level that concerns us and it needs to be monitored by your child's doctor and us. Your doctor should retest your child with a venous test (blood sample from the arm) by {*Due Date of Next Test*}. The guidelines for retesting are as follows:

1 st Venous Test Results	2 nd Venous Test Needed
10-14µg/dL	3 months
15-19µg/dL	1-3 months
20-24µg/dL	Within 1-3 months
25-44µg/dL	2 weeks-1 month
≥ 45µg/dL	As soon as possible

Information about lead poisoning and how you can reduce your child's exposure to lead hazards are enclosed. You can find additional lead poisoning prevention information at the Connecticut Department of Public Health Lead Poisoning Prevention and Control Program's website at: www.ct.gov/dph/lead.

By following the advice of your child's doctor and using the information in this packet, you can help to improve your child's health and reduce his/her blood lead level. If you have any questions or concerns, please do not hesitate to contact me at {*Insert Local Health Department Telephone Number*}.

I wish you and your child good health.

Sincerely,

{*Insert Person's Name*}
{*Insert Local Health Department Name*}
Childhood Lead Poisoning Prevention Program

Letter for Decreasing BLLs:

{Insert Date}

To the Parents/Guardians of *{Insert Child Name}*
{Insert Child's Address}

Dear Parents/Guardians of *{Insert Child's Name}*,

It has been reported to the *{Insert Local Health Department Name}* that your child *{Insert Child Name}*'s blood lead level of *{Insert Lead Level}* µg/dL from a blood lead test done on *{Insert Date of Collection}* has been decreasing. Your child's doctor may decide to test the blood lead level less often. If so, your doctor should retest your child with a venous test (blood sample from the arm) by *{Due Date of Next Test}*. The guidelines for retesting are as follows:

1st Venous Test Results	2nd Venous Test Needed
10-14µg/dL	6-9 months
15-19µg/dL	3-6 months
20-24µg/dL	1-3 months
25-44µg/dL	1 month

Information about lead poisoning and how you can reduce your child's exposure to lead hazards have been previously sent to you. You can find additional lead poisoning prevention information at the Connecticut Department of Public Health Lead Poisoning Prevention and Control Program's website at: www.ct.gov/dph/lead.

By following the advice of your child's doctor you can help to improve your child's health and reduce his/her blood lead level. If you have any questions or concerns, please do not hesitate to contact me at *{Insert Local Health Department Telephone Number}*.

I wish you and your child good health.

Sincerely,

{Insert Person's Name}
{Insert Local Health Department Name}
Childhood Lead Poisoning Prevention Program

Lead Inspection and Summary Report:



STATE OF CONNECTICUT
DEPARTMENT OF PUBLIC HEALTH

LEAD INSPECTION AND TESTING SUMMARY FORM

This lead inspection and testing summary form must be completed and sent to the property owner of the property in accordance with Section 19a-111c-3(g) of the regulations of Connecticut State Agencies concerning Lead Poisoning Prevention and Control. A Comprehensive Lead Inspection is one performed to satisfy CGS 19a-111 (epidemiological investigation) and CGS 19a-110(d) (on-site inspection). Bare soil areas, dust and water are required to be tested for the presence of lead as part of a comprehensive lead inspection.

PROPERTY INSPECTED/TESTED

(Check): Residence Child Day Care Center/Group Day Care Home Family Day Care Home
Name: _____ Name: _____

(Check One): Comprehensive Lead Inspection* Limited Testing

Street Address: _____ Apt.# _____ Floor: _____

City/Town: _____ Zip Code: _____ Telephone: _____

If Apartment, Number of Units: _____ Year Property Built: _____

PROPERTY OWNER

Name: _____

Street Address: _____ City: _____

State: _____ Zip Code: _____ Telephone: _____

INSPECTING ENTITY

A. If Consultant Contractor:

Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Consultant License Number: _____

Inspector's Name: _____ Telephone: _____

Inspector's Certification Number: _____

B. If Code Enforcement Agency:

Department Name: _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Inspector's Name: _____ Telephone: _____

Appendix

Date of Inspector's Initial Training: ___/___/___ Date of Latest Refresher Training: ___/___/___

INSPECTION INFORMATION Beginning and End Date(s) of Inspection: ___/___/___

For each day that the inspection was conducted consent was given by an adult occupant of the dwelling unit to enter and inspect all areas of the dwelling that are under the control of that individual or to which that individual has legitimate access.

Yes No

Name of person 18 years of age or older who granted consent: _____ Age: _____ Date: _____

Name of person 18 years of age or older who granted consent: _____ Age: _____ Date: _____

A. Were Lead-Based Surfaces Identified? (Check One) Yes No

If yes, complete the tables below. Data in tables may not indicate all identified lead-based surfaces.

EXTERIOR Lead-Based Surfaces	Foundation	Siding &/or Trim	Stairs &/or Stair Components	Porch &/or Porch Components	Doors &/or Trim	Windows &/or Trim	Garage &/or Garage Components
Deteriorated							
Intact							

(X = positive location)

INTERIOR Lead-Based Surfaces	Floors	Baseboards	Walls	Ceilings	Stairs &/or Stair Components	Doors &/or Trim	Windows &/or Trim	Closet/Cabinet Components
Deteriorated								
Intact								

(X = positive location)

Were rooms, areas or components inaccessible during inspection? (Check One) Yes No

List any inaccessible locations: _____

B. Indicate Potential Lead Hazards Identified:

(Check All That Apply)

Was drinking water tested for lead?

Yes No

Was dust tested for lead?

Yes No

Was bare soil tested for lead?

Yes No N/A If yes, complete the adjacent table.

Lead Hazard Locations	Floors	Window Sills	Window Wells	Soil	Water	Paint (XRF)	Paint Chip
(Enter highest result for each)							

Per section 19a-111c-4(a) or 19a-111c-5(a) and 19a-111c-2(e) of the Lead Poisoning Prevention and Control Regulations:

A lead abatement plan is required for this property: Yes No

A lead management plan is required for this property: Yes No

A lead hazard remediation plan is required for this property: Yes No

A lead management plan is required for this property: Yes No

Inspector's Signature: _____ Date: ___/___/___

The federal Residential Lead-Based Paint Hazard Reduction Act, 42 U.S.C. 4852d, requires sellers and landlords of most residential housing built before 1978 to disclose all available records and reports concerning lead-based paint and/or lead-based paint hazards, including the test results contained or referenced in this notice, to purchasers and tenants at the time of sale or lease or upon lease renewal. This disclosure must occur even if hazard reduction or abatement has been completed. Failure to disclose these test results is a violation of the U.S. Department of Housing and Urban Development and the U.S. Environmental Protection Agency regulations at 24 CFR Part 35 and 40 CFR Part 745 and can result in a fine of up to \$11,000 per violation. To find out more information about your obligations under federal lead-based paint requirements, call 1-800-424-LEAD.

I have received a copy of this summary report from my landlord/property manager and have been informed that I can obtain further information about the testing results from the report by contacting the property owner listed above.

Resident's Signature: _____ Date: ___/___/___

Lead Abatement Order:

LEAD ABATEMENT ORDER

ISSUED TO: _____

Following an inspection conducted on _____ of a dwelling and the adjoining premises owned by you, or under your charge and located at _____, it has been determined that there exist toxic levels of lead in or on the dwelling and/or on the premises surrounding said dwelling. It has also been determined that at least one child less than six (6) years of age resides in the dwelling. Moreover, there has been reported an elevated blood lead level in at least one child residing in the dwelling located at _____.

Pursuant to Connecticut General Statutes Section 19a-111 *et seq.* and its accompanying regulations, the owner of any dwelling in which the paint, plaster or other materials contain toxic levels of lead and in which children under the age of six reside, shall abate or manage the dangerous materials in a manner consistent with the regulations. Sections 19a-111-2(a), (b), (c) and (d) of the Connecticut regulations governing lead poisoning prevention and control provide that:

When a child resides in a dwelling unit all defective lead-based surfaces shall be abated.

When a child resides in a dwelling all defective exterior surfaces and all defective surfaces in common areas containing toxic levels of lead shall be abated.

When a child has an elevated blood lead level then abatement shall include all lead-based chewable surfaces whether or not that surface is defective and all lead-based movable parts of windows and surfaces that rub against movable parts of windows.

When a child resides in a dwelling requiring lead abatement, interior dust, drinking water and exterior soil shall be assessed. When soil or sand areas that are not covered by grass, sod, other live ground covers, wood chips, gravel, artificial turf, or similar covering are found to contain lead concentrations in excess of 400 parts per million, such bare soil or sand areas shall be abated. When lead dust hazards are found to be a source or a potential source of elevated blood lead in a child, lead dust shall be reduced to a safe level using appropriate cleaning methods. When lead in drinking water is determined to be a source or potential source of elevated blood lead in a child, appropriate remedial action approved by the local director of health shall be implemented.

Pursuant to Section 19a-111-3(f) of the regulations, authority is vested in the local code enforcement agency to issue an order to correct all defective lead-based surfaces requiring abatement and soil areas identified as a source, or potential source for elevated blood lead.

YOU ARE THEREFORE, HEREBY ORDERED PURSUANT TO SECTION 19a-111 OF THE CONNECTICUT GENERAL STATUTES AND SECTIONS 19a-111-2(e), 19a-111-3(f), AND 19a-111-4(c) OF THE REGULATIONS TO:

Appendix

Adequately abate by proper preparation, containment, abatement, clean-up, and waste disposal ALL DEFECTIVE PAINT, PLASTER OR OTHER MATERIAL CONTAINING TOXIC LEVELS OF LEAD on both the interior and exterior surfaces and soil of said property as more specifically described in the attached document.

Adequately abate by proper preparation, containment, abatement, clean-up, and waste disposal ALL INTACT LEAD-BASED CHEWABLE SURFACES AND ALL LEAD-BASED MOVABLE PARTS OF WINDOWS AND SURFACES THAT RUB AGAINST MOVABLE PARTS OF WINDOWS as more specifically described in the attached document.

Eliminate LEAD DUST HAZARDS that were found to be a source or a potential source of elevated blood lead in a child using appropriate cleaning methods.

Address the LEVEL OF LEAD IN DRINKING WATER that was determined to be a source or potential source of elevated blood lead in a child utilizing appropriate remedial action that has been approved by me.

Adequately manage ALL INTACT SURFACES CONTAINING TOXIC LEVELS OF LEAD THAT WILL REMAIN AND NOT BE ABATED AT THIS TIME as more specifically described in the attached document. (These surfaces may be abated as opposed to managed in place at your discretion, but must then be addressed within the lead abatement plan - see below).

FURTHER, IT IS HEREBY ORDERED, that:

You are to submit a written lead abatement plan to me within _____ days of this order pursuant to Sections 19a-111-4 and 19a-111-5 of the regulations.

You are to prepare a written lead management plan addressing intact lead-based surfaces that will remain and not be abated at this time. This management plan will be prepared within 60 days of the date that inspection results were received pursuant to Section 19a-111-2(e) of the regulations. This plan shall be transferred with ownership upon transfer of title.

Dated at _____, Connecticut this _____ day of _____, 200 ____.

Director of Health

For (town, city, borough or health district)

AUTHORITY: Connecticut General Statutes Sections 19a-111 et seq. and 19a-206 et seq.; Regulations of Connecticut State Agencies Section 19a-111-1 et seq.

PENALTY: Connecticut General Statutes Sections 19a-206(b)(2) and (e) and 19a-230.

The federal Residential Lead-Based Paint Hazard Reduction Act, 42 U.S.C. 4852d, requires sellers and landlords of most residential housing built before 1978 to disclose all available records and

reports concerning lead-based paint and/or lead-based paint hazards, including the test results contained or referenced in this notice, to purchasers and tenants at the time of sale or lease or upon lease renewal. This disclosure must occur even if hazard reduction or abatement has been completed. Failure to disclose these test results is a violation of the U.S. Department of Housing and Urban Development and the U.S. Environmental Protection Agency regulations at 24 CFR Part 35 and 40 CFR Part 745 and can result in a fine of up to \$11,000 per violation. To find out more information about your obligations under federal lead-based paint requirements, call 1-800-424-LEAD.

RIGHT OF APPEAL: Connecticut General Statutes Sec. 19a-229 states “Any person aggrieved by an order issued by a town, city or borough director of health may appeal to the Commissioner of Public Health not later than three business days after the date of such person’s receipt of such order, who shall thereupon immediately notify the authority from whose order the appeal was taken, and examine into the merits of such case, and may vacate modify, or affirm such order.”

There are **two** ways to appeal this order; both methods require action **not later than three business days after you receive the order**.

- (1) You may appeal the order by delivering your written appeal to the Department **not later than three business days** after you receive the order. You may deliver it to the Department either in person or by facsimile. The Department’s address and facsimile number are:

**Department of Public Health
Public Health Hearing Office
410 Capitol Avenue MS 13 PHO
P.O. Box 340308
Hartford, CT 06134-0308
Facsimile: (860) 509-7553**

If you chose this method of appeal, you need do nothing more to perfect your appeal, unless instructed otherwise by the Department.

- (2) You may also appeal the order by *calling the Department not later than three business days after receipt of the order* at one of the following numbers: **(860) 509-7648 or (888) 891-9177**. It is sufficient to leave a message with your name, number and a description of the order you are appealing.

If you appeal the order by calling one of the telephone numbers listed above, *the telephone call must be followed up with a written notice of appeal that must be received by the Department within ten days of the telephonic notice.*

PLEASE NOTE: It is *not* sufficient that the written notification be postmarked within ten days. It must be *received by the department within ten days*. Delays caused by the Post Office will not excuse failure to comply with this requirement.

The written notice of appeal following the telephonic notice may be delivered to the Department in person, by facsimile, or by first class or certified mail. The Department’s

Appendix

address and facsimile number are provided above. If you chose to send the written notice of appeal by first class mail or certified mail, please use the address provided below.

**Department of Public Health
Public Health Hearing Office
410 Capitol Avenue MS 13 PHO
P.O. Box 340308
Hartford, CT 06134-0308**

The Regulations of Connecticut State Agencies provide:

Sec. 19a-9-8: Date due when due date falls on a date the department is closed. If the last day of any statutory or regulatory time frame falls on a day on which the department is closed, any paper may be filed or any required action may be taken on the next business day the department is open. Such filing or action shall be deemed to have the same legal effect as if done prior to the expiration of the time frame.

Sec. 19a-9-14: Appeals of orders issued by a town, city, borough, or district director of health. [Subsections (a), (c), (d), (e) and (f)]

- (a) Any person aggrieved by an order issued by a local director of health may appeal said order to the commissioner.
- (c) The notice of appeal shall state:
 - (1) the name, address, and telephone number of the person claiming to be aggrieved;
 - (2) the name of the issuing authority;
 - (3) the way in which the order adversely affects the person claiming to be aggrieved;
 - (4) the order being appealed; and
 - (5) the grounds for appeal.
- (d) ***Telephonic notice of appeal to the office of the commissioner shall be satisfactory as the initial notice of appeal, provided written notice of appeal from the person claiming to be aggrieved is received by the department within ten (10) days of the telephonic notice.***
- (e) An appeal from an order issued by a town, city, borough, or district director of health shall be a *de novo* proceeding in accordance with the regulations governing contested cases as set forth in sections 19a-9-1 through 19a-9-29 of the Regulations of Connecticut State Agencies.
- (f) Any order issued by a town, city, borough, or district director of health shall include a notice of the right to appeal which shall indicate the name and telephone number of the commissioner or the commissioner's designee, and shall be accompanied by copies of sections 19a-9-8 and 19a-9-14 of the Regulations of Connecticut State Agencies.

Orderfr10
10/23/2003