NBS Lead Case Management Module Training

Sue Henry, BSN, RN

Lead and Healthy Homes Health Educator

Indiana State
Department of Health

Items to Cover

- What Will NBS Mean for Lead Case Management?
- What Will NBS Include for Lead?
  - Case Investigations
  - Notifications
- NBS Transition
- Questions

NBS Overview

- Patient-centered system
- Shared among all jurisdictions and most conditions
  - STD/hepatitis
  - TB
  - General communicable diseases

What Will NBS Mean
for Lead Case Management?

- NBS is single place for the reporting and documenting of all case management services that are provided.

- Same guidance and requirements for the process of reporting and medical and case management actions will be in place.

- Change is only in the mechanism of documenting and reporting of case management activities.

Terminology

NBS Terminology	Definition
Documents Requiring Review	List of labs for your review and action (*In Lead, you will be using DRR)
Jurisdiction	County of residence for the case
Case Investigation	The gathering of information regarding the incidence/diagnosis and management of a child with an EBLL, AND The tool to document information that is gathered
Activity Notification (a.k.a. 'Notification')	A step in the process of communication with ISDH concerning designated case management related activities
Case Notes	Location for documentation by case manager of notes related to the progress of a case, located in the "Case Management" tab of the CI
Case Status	Indicates whether case meets a medical/case management definition – field in CI must be entered regardless of case status

NBS Tips

- Always search using "Patient Search" NOT "Data Entry"
- "Submit" = "Save" - Data is not saved until "Submit" button is pushed
- Session will time out after 30 minutes of no activity (must click "submit" to qualify as activity)
- DO NOT use the Internet Browser "back" button
- Blue lettering = hyperlinks to help you navigate the system

What will NBS Include for Lead?

- Lab results of blood lead level testing (replacing emailed manifests)
- Case Investigation: Single location for documentation of all case management activities:
  - Contact information – parent/guardian, physician
  - Lab information
  - Home visit form/documentation
  - Assessments – developmental, nutritional
  - Referrals – i.e. WIC, Headstart, environmental
  - Case Status – open/closed
  - Case Notes/nurses notes
  - Address history
  - Supplemental information

Reporting Test Results

- Reporting will stay the same

- Labs/M.D./Clinics/Hospitals/ELR data ➡ Lead Data Flow (LDF) ➡ NBS

- LHD will not have access to enter labs if receive from physician/clinic, etc.
  - Send to ISDH, by fax or secure email, and we will add to NBS

When to Open an Investigation

- Guidelines for when to investigate an EBLL remain the same:
  - <u>Required</u>: $\geq$10 µg/dL, require confirmatory testing, retesting at designated intervals, etc.
  - <u>Use your Department policy for >5-9.9 µg/dL</u>: recommended minimum of education, suggested confirmatory testing, contact M.D., **retesting at designated intervals required**

- All patients requiring investigation/case management activities, require a Case Investigation to be opened to provide a place to document activities
  - Will include cases 5 µg/dL and higher to document activities connected with the case

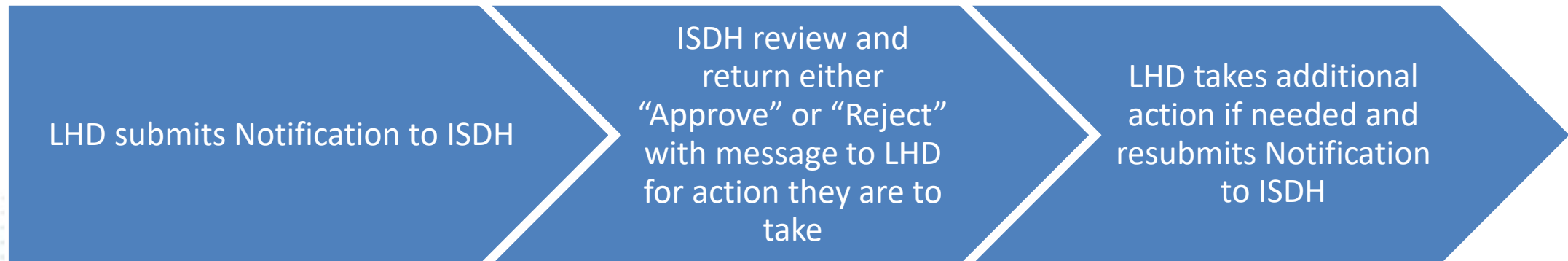# Completing Case Investigation: Important Points

- "Next PbB" field (Case Info tab)

  – Important date to complete, use Rainbow Chart to determine date

- Completed Home Visit Form

  – Attach to CI in "Attachments" located in "Supplemental Info" tab

  – Do not use periods, dashes, underscores, etc. in attachment file names

- "Case Notes" (Case Mgmt. tab)

  – Used for all documentation/nurse's notes of CM activities

  – Begin each entry with date of action

Activity Notifications:
What Are They?

What Is a "Activity Notification"(aka "Notification")?

- An "Alert" to notify ISDH case coordinators of LHD activity in cases for designated items

Activity Notification Process:

| LHD submits Notification to ISDH | ISDH review and return either "Approve" or "Reject" with message to LHD for action they are to take | LHD takes additional action if needed and resubmits Notification to ISDH |

Activity Notifications:
When Do I Submit Them? How Do I Document?

When Do I Submit a Notification?	How Do I Document?
Home visit is concluded and completed *Home Visit Report Form* **is attached to the CI**	1)Attach *Form* in "Attachments" (Supplemental Info tab of CI); 2)Document in "Case Notes" that visit is concluded, and the *Form* is attached; 3)Document in Notification General Comments box that visit complete and *Form* attached
Follow up activities related to each "Next PbB" (aka. Blood Lead Level) due date (e.g. next PbB is 1/13/20, letter sent to home 1/9/20 as reminder of due date)	1)Document activity taken in the "Case Notes" (e.g. "Reminder letter sent home); 2)Document activity that was taken in the Notification General Comments box
Transferring Jurisdiction	1)Document case transfer activities in "Case Notes", including a notation of contact made (i.e. call, secure email or fax) to the receiving jurisdiction; 2)Document case transfer activities in the Notification General Comments box

Activity Notifications:
When Do I Submit Them? How Do I Document?

When Do I Submit a Notification?	How Do I Document?
Case Closure - For activities according to the requirements listed in 410 IAC 29; "Case Complete", "Administratively Closed"	1)Document all case closure activities and attempts according to requirements listed in 410 IAC 29 in "Case Notes"; 2)Document activities that were taken in the Notification General Comments box and submit the case for review by ISDH
Initial contact made with family to notify of need for confirmation BLL test (For patients with $\geq$10 µg/dL, capillary, awaiting confirmation)	1)Document activity taken in the "Case Notes"; 2)Document activity that was taken in the Notification General Comments box
Results received for patients with initial $\geq$10 µg/dL capillary test, confirming them as a case	1)Document activity taken in the "Case Notes" including status change to now being a confirmed case; 2)Document activity that was taken in the Notification General Comments box
Case Investigation closed as "Not a Case" following confirmed BLL <10 µg/dL for patients with initial $\geq$10 µg/dL, capillary test	1)Document activity in CI, in "Case Notes"; 2)Document activities that were taken in the Notification General Comments box and submit the case for review by ISDH

NBS Transition

Go live date is Feb. 3

- Those currently with NBS accounts, your access to Lead Module will be "turned on" 2/3/2020
- Those with no NBS account will be receiving an email by end of Jan. with needed information

NBS Transition

What labs will be in NBS on Feb. 3?

– For historical labs**:

- Children in case management who have CEBLLs (CEBLL=≥10): All lab results, regardless of level
- Children with EBLL but not CEBLL: Only labs with results 5 µg/dL and above, and child age 0-7 as of 12/31/19 will be loaded.

– For new labs:

- Only those at 5 ug/dL or above will go into DRR. All others will be "marked as reviewed" and be placed in "Patient File"

** It's important to note that we consider historical labs to be test results of 5 µg/dL and above from the past 7 years, for children younger than age 7, unless the child is in case management.

NBS Transition

What case investigations will be in NBS on Feb 3?

- **CIs have been opened for confirmed cases BLL $\geq$10 µg/dL**

  a. Only info in CI will be dates we know about that we have received from home visit form, RA, Nut. Assess., Dev. Assess. that were faxed/emailed to ISDH, or info from Stellar (for those Cos. that were using Stellar)

  b. A general information report will be attached containing info from Stellar for all counties

  c. LHDs should enter any additional case information from existing local records, including information from Stellar, into Case Investigations to complete patient records

NBS Transition

What case investigations will be in NBS on Feb 3?

- **CIs have been opened for non confirmed patients with BLL ≥10 µg/dL (high capillaries awaiting confirmation)**

  a. Will have case open date and attachment of Stellar report of any information that we have

  b. LHDs should enter any additional case information from existing local records, including information from Stellar, into Case Investigations to complete patient records

NBS Transition

Communication

- Watch for emails for updates and new information

Problems and questions?

- NBS Helpdesk - Link found in "Notices" tile of NBS dashboard
  - Contact for technical support
- Teresa Kirby – tkirby@isdh.in.gov
  - Contact for program/content related support
- Sue Henry – shenry@isdh.in.gov
  - Contact for program related support

Questions?

Questions and Contact Information

Sue Henry, BSN, RN

Lead and Healthy Homes Health Educator

SHenry@isdh.IN.gov

317-232-8608

Indiana State
Department of Health