NCLEAD Childhood Lead Environmental Follow-Up Business Rules

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Purpose

The following document provides guidance to local environmental health staff on documenting information in the blood lead surveillance system, NCLEAD. It reviews requirements on how to follow-up on Confirmed Lead Poisoning (CLP), Elevated Blood Lead Level (EBL) and Pregnant Women cases.

An account is required to view cases in NCLEAD; contact the lead help desk for details at Dph.LeadHelpdesk@dhhs.nc.gov**.**

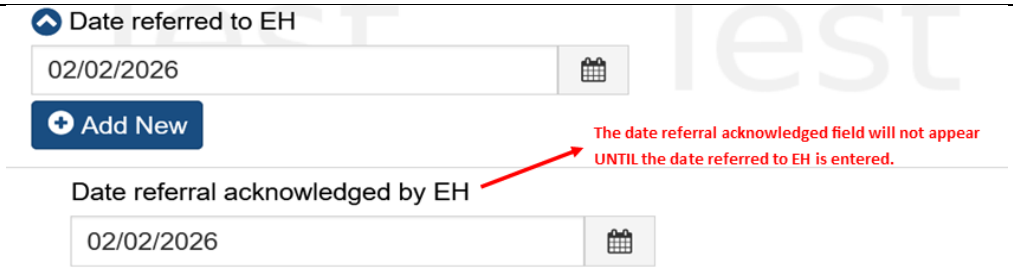
Case Referral

NCLEAD may assign a CLP or EBL case to a county Environmental Health (EH) Program via a workflow, via the NC Childhood Lead Poisoning Prevention Program staff or via a health care provider.

In the *Administrative* question package for the **CHILD** or **PREGNANT WOMAN**:

- Enter the date the case was referred to Environmental Health specialists in the field titled **Date referred to EH**.
- Enter the **Date referral acknowledged by EH.**
  - **Note**: The **Date referred to EH** must be entered first to see this field.
- Click **Save**.

Figure 1: Enter in the Date Referral acknowledged by EH



CLP Cases

For **Confirmed Lead Poisoning** cases, per G.S. § 130A-131.9 (please see G.S. below):

> From **North Carolina General Statute § 130A-131.9. Investigation to identify lead poisoning hazards.**
>
> (a) When the Department learns of confirmed lead poisoning, the Department shall conduct an investigation to identify the lead poisoning hazards to children and pregnant women. The Department shall investigate the residential housing unit where the child or pregnant woman with confirmed lead poisoning resides. The Department shall also investigate the supplemental addresses of the child or pregnant woman who has confirmed lead poisoning.

For Supplemental Address Definition, per G.S. § 130A-131.7 (please see G.S. below):

> From **North Carolina General Statute § 130A-131.7. Definitions.**
>
> (17) "Supplemental address" means a residential housing unit or child-occupied facility where a child with confirmed lead poisoning regularly visits or attends. Supplemental address also means a residential housing unit or child-occupied facility where the child resided, regularly visited, or attended within the six months immediately preceding the determination of confirmed lead poisoning.

In NCLEAD, there should be documentation of an investigation at the 1.) primary residence for all pregnant women and child events and 2.) all addresses meeting the definition of a Supplemental address (if any) for all child CLP cases.

NOTE: The definition of a supplemental address DOES NOT mention pregnant women; therefore, no investigation of supplemental addresses can occur for pregnant women.

1. **CHILD** events shall be linked to the primary address **PROPERTY** events as follows: (A) site visit(s) should be entered in the *Environmental Site Activity* question package of this **PROPERTY** Event. At least one site visit should serve as an investigation for the child, *and* the **CHILD** event should be linked to the(se) site visit(s).

2. **CHILD** events shall be linked to all supplemental address **PROPERTY** events as follows: (A) site visit(s) should be entered in the *Environmental Site Activity* question package of each supplemental address's **PROPERTY** event. Each supplemental address's **PROPERTY** event should have at least one site visit that serves as an investigation for the child, *and* the **CHILD** event should be linked to the(se) site visit(s).

a. Please list addresses that meet the definition of a supplemental address in the supplemental addresses notes box under the investigation of the primary residence in the **PROPERTY** Event. If there are NO addresses that meet the definition of a Supplemental address, please note this in the box by writing "none" or "N/A".

A **PROPERTY** event (i.e., address record) shall be created if one does not already exist for all primary and supplemental addresses associated with a CLP case. For instructions on how to create property event, look at the "**Creating Property Events**" segment of this document.

- **To link a CHILD event to a PROPERTY event,** review the "**Environmental Site Activity**" segment and the "**Linking A Child Event**" segment of this document.

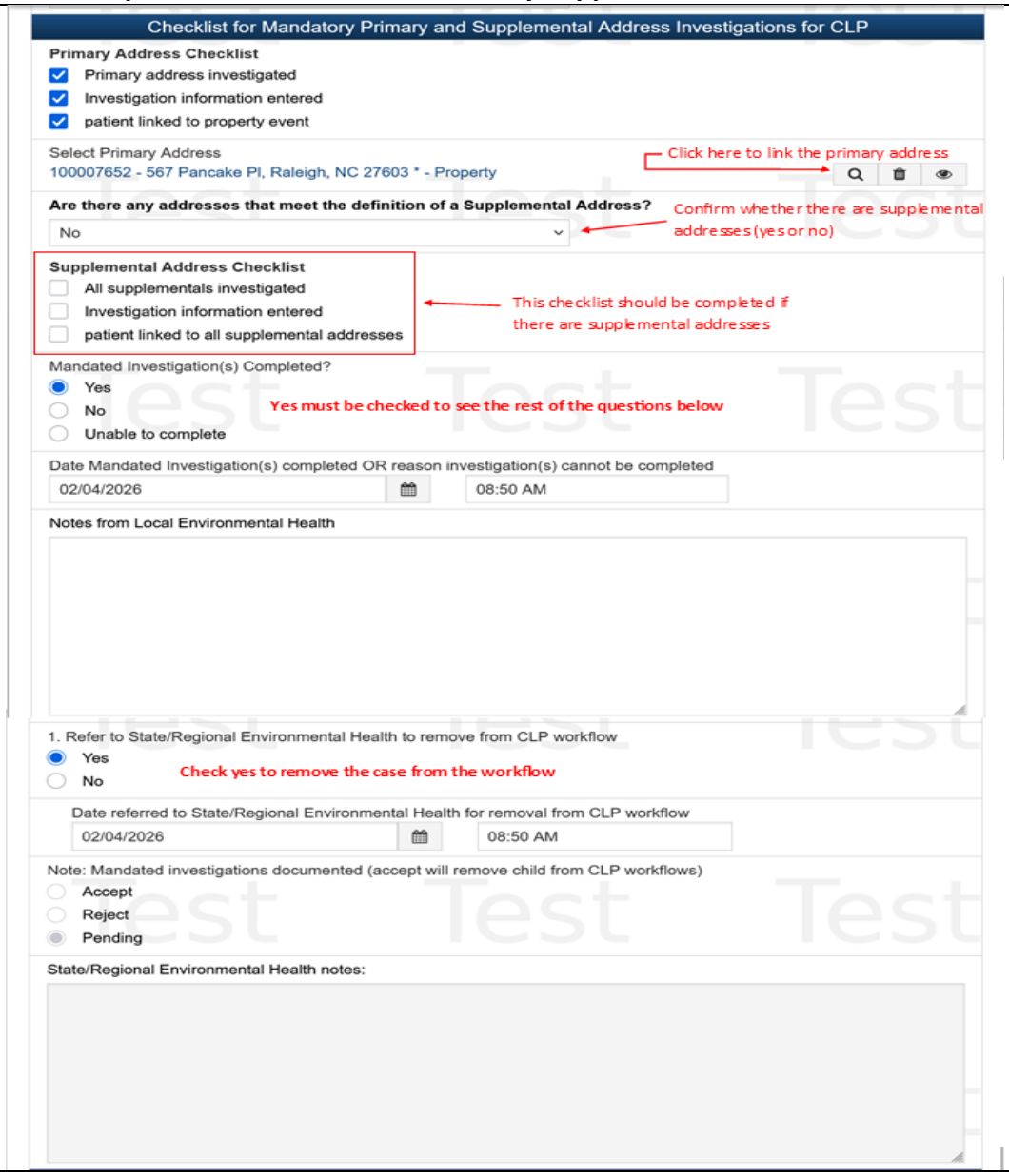
To ensure proper documentation of the required investigation in both the CHILD and PROPERTY events:

1. Add the required attachments to both the **CHILD** and **PROPERTY** events associated with the case. Instructions on how to add attachments are located in the "**Attachments**" segment of this document.
2. Enter the **Date offered environmental investigation** in the *Administrative* question package for the **CHILD**. Fill out the **EH / Clinical person making phone contact** field and the **Person made contact with.**

Once initial investigations for all primary and supplemental addresses have been conducted, and all information has been documented, the CHILD event can be removed from the *"01. CLP Child Cases in need of environmental follow up"* workflow. To remove the CLP case from the workflow:

- Complete the section Checklist for Mandatory Primary and Supplemental Address Investigations for CLP in the *Administrative* question package for the **CHILD** and refer the case to your Regional Environmental Health Specialist for removal from the workflow. **Figure 2** shows a complete checklist that has no supplemental addresses.

Figure 2: A Completed CLP Checklist without any Supplemental Addresses



NOTE: Some options you see in ***Figure 2*** only appear once items are checked off. For example: The option to "Refer to Regional Environmental Health Specialist for removal from workflow" only appears once "Mandated Investigations Completed" has been marked "yes."

EBL Cases

For **Elevated Blood Lead Level (EBL)** cases, per G.S. § 130A-131.9 (please see G.S. below):

> From **North Carolina General Statute § 130A-131.9. Investigation to identify lead poisoning hazards.**
>
> (a1) When the Department learns of an **elevated blood lead level**, the Department shall, upon informed consent, investigate the residential housing unit where the child or pregnant woman with the elevated blood level resides. When consent to investigate is denied, the child or pregnant woman with the elevated blood lead level cannot be located, or the child's parent or guardian fails to respond, the Department shall document the denial of consent, inability to locate, or failure to respond.

In NCLEAD, there should be documentation of at least one of the following for all EBL cases:

1. An Investigation
2. Denial of Consent/Investigation Refusal
3. Inability to Locate
4. Failure to Respond

1. An Investigation

Documenting an investigation requires entering in information within both the **CHILD** event and the **PROPERTY** event:

a. In the *Administrative* question package for the **CHILD**, enter the **Date offered environmental investigation.**
   i. Click **Add New** to enter additional dates the investigation was offered.
b. In the *Environmental Site Activity* question package of the **PROPERTY**, enter the **investigation date** in the **Environmental Activity Date** field**.**
   i. **NOTE**: A **PROPERTY** event (i.e., address record) should be created if one does not exist for all properties being investigated for a case. For instructions on how to create property event, look at the "**Creating Property Events**" segment of this document
   ii. To ensure proper documentation of an investigation and to link a **CHILD** event to a **PROPERTY** event, review the "**Environmental Site Activity**" and the **"Linking A Child Event**" segments of this document.

2. **Denial of Consent/Investigation Refusal**
    a. In the *Administrative* question package for the **CHILD**, enter the **date the environmental investigation was offered.**
    b. If the investigation was offered more than once, click **Add New** to enter additional date(s) the investigation was offered. If there is a refusal, enter the refusal date(s) in the field titled **Date investigation refused.**
        iii. **NOTE**: To see the refusal field, you must first enter the Date offered environmental investigation.
3. **Inability to locate**
    a. In the *Administrative* question package for the **CHILD**, enter the date of first attempt as the **date the environmental investigation was offered**. Then, enter the **date of the 2nd attempt you were unable to locate patient.**
    b. Document (in the unable to locate - Notes box that opens) at least two good faith attempts to locate the parent/guardian by contacting the health care provider and/or social services (e.g. Medicaid, WIC) for updated address/contact information.
    c. A property event should be created (if one does not already exist) and the site visit should be documented in the *Environmental Site Activity* question package of the **PROPERTY.** Document the site visit using the "07. Site Visit/Left Offer" activity.

4. **Failure to respond**
    a. In the *Administrative* question package for the **CHILD**, enter the date of first attempt as the **date the environmental investigation was offered.** This should include **at least one site visit** to the residence to reach out to the family to offer an investigation.
    b. If the parent/guardian still fails to respond, use **the Failure to respond (2nd attempt date)** field to enter the second date the investigation was offered. Add any notes in the failure to respond - Notes box.
    c. Similar to Inability to locate, a site visit should be documented if a visit was made to the property.

Users must request removal from EBL workflow after documenting an Investigation, Denial of consent, Inability to locate, or Failure to respond. This will remove the case from *03. EBL Cases in need of environmental follow-up (rev 02/15/2022)* workflow in NCLEAD.

- In the *Administrative* question package for the **CHILD** event**,** under the Request Removal from EBL Workflow section, select "Yes" to the field **Refer case for removal from EBL workflow.** This case will then go to your regional EHS for review.

Once documentation is completed in the *Administrative* question package, click **Save**.

Figure 3: Documenting the Date Offered Investigation

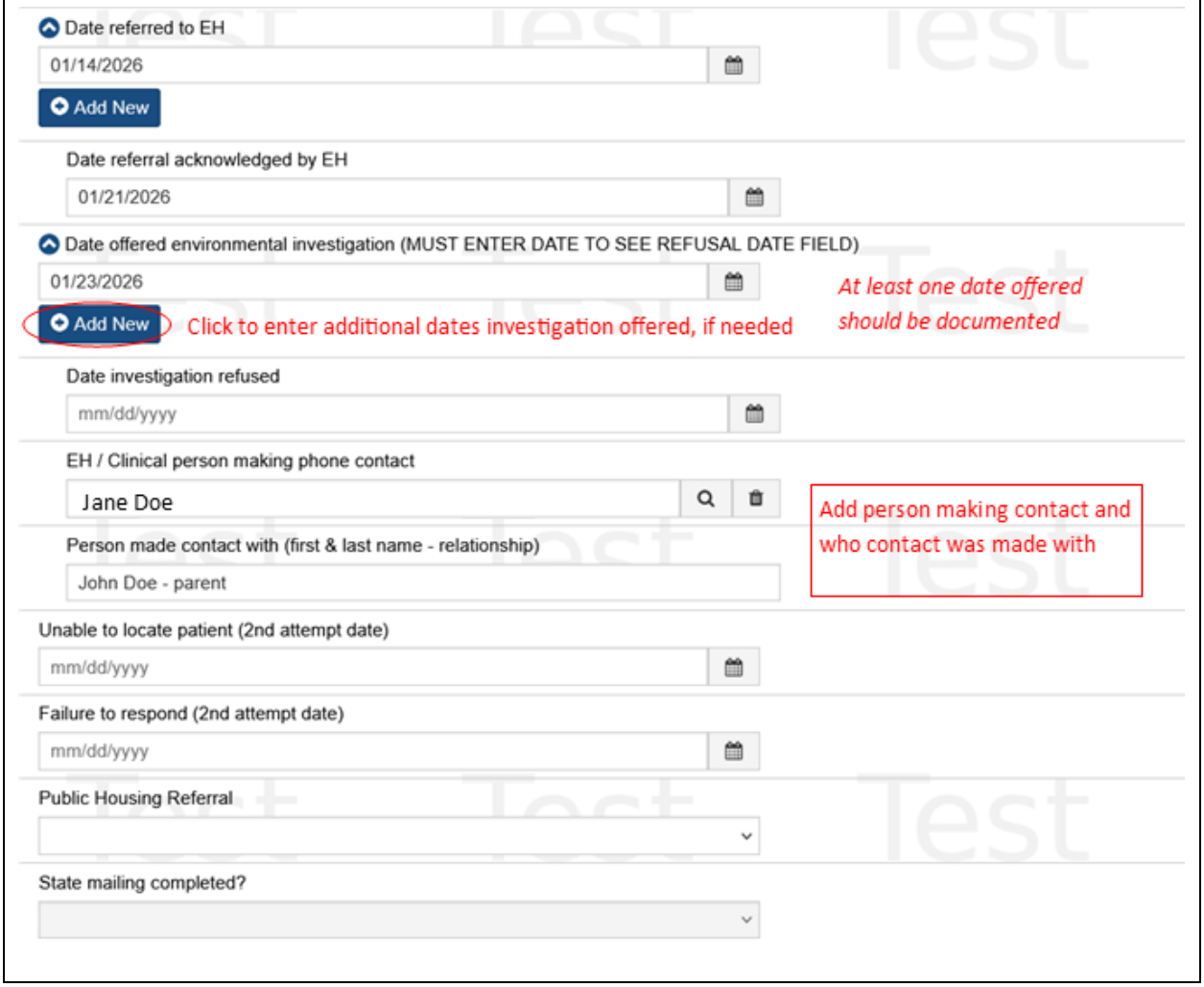


Figure 4: Documenting Denial of Consent: the Date Investigation Refused ONLY opens up once the Date offered environmental investigation is filled out

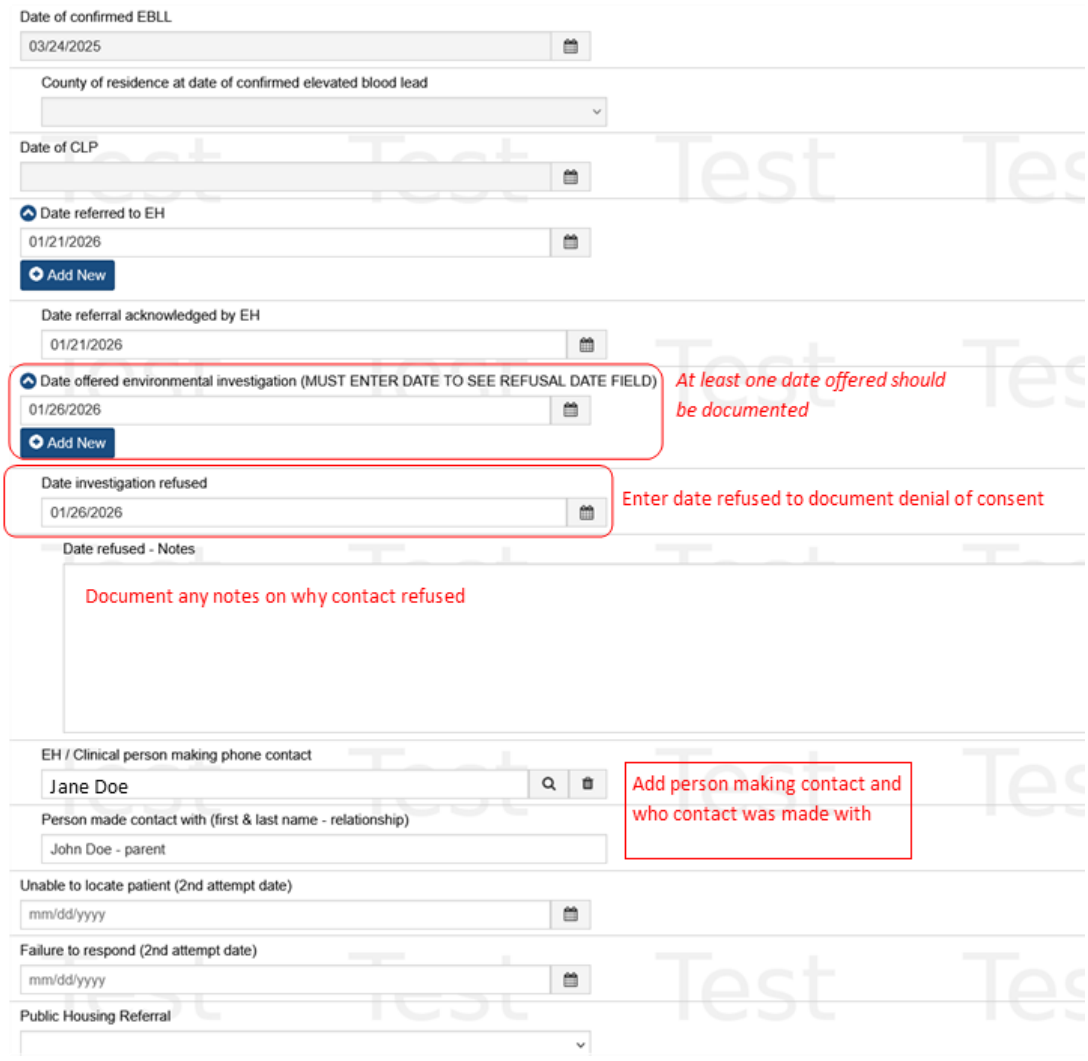


Figure 5: Documenting Inability to Locate. At least two attempts to locate must be made

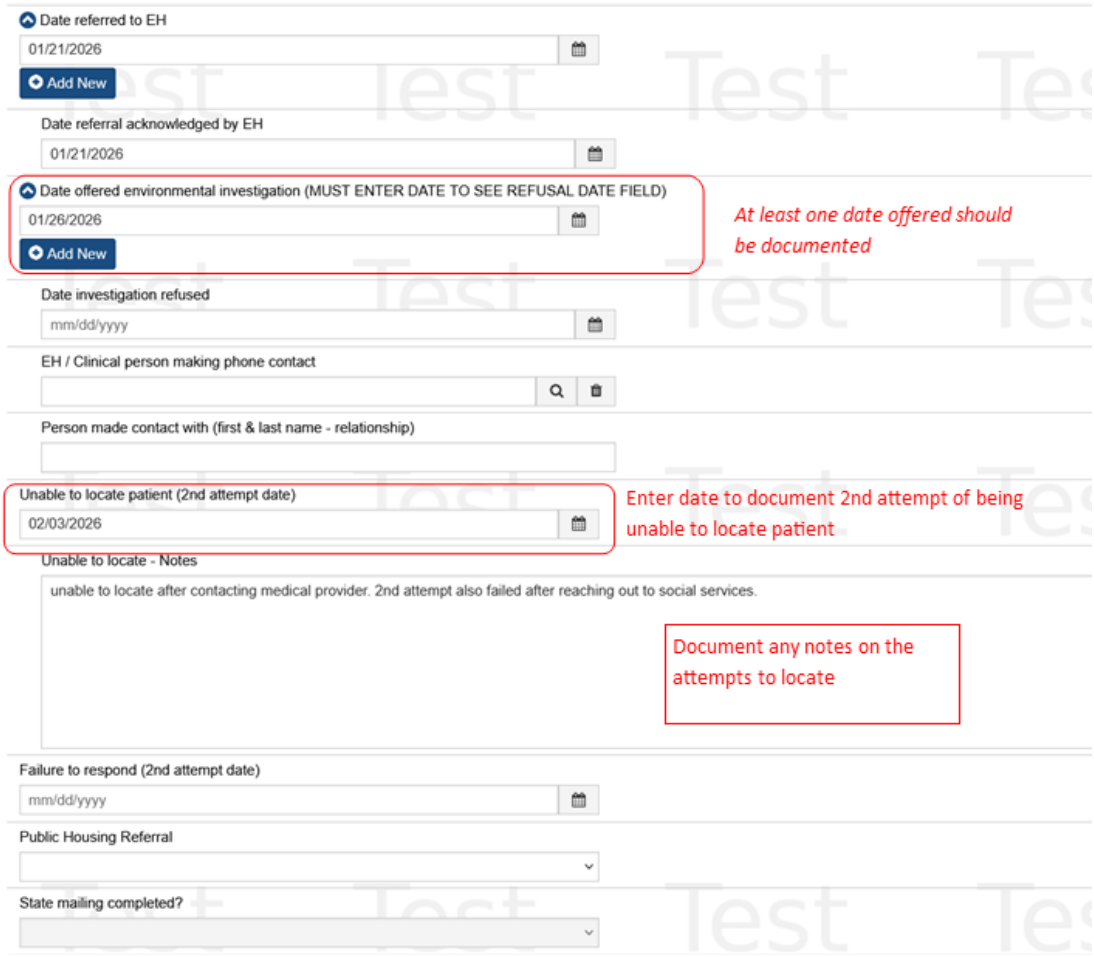


Figure 6: Documenting Failure to Respond. At least two attempts should be made

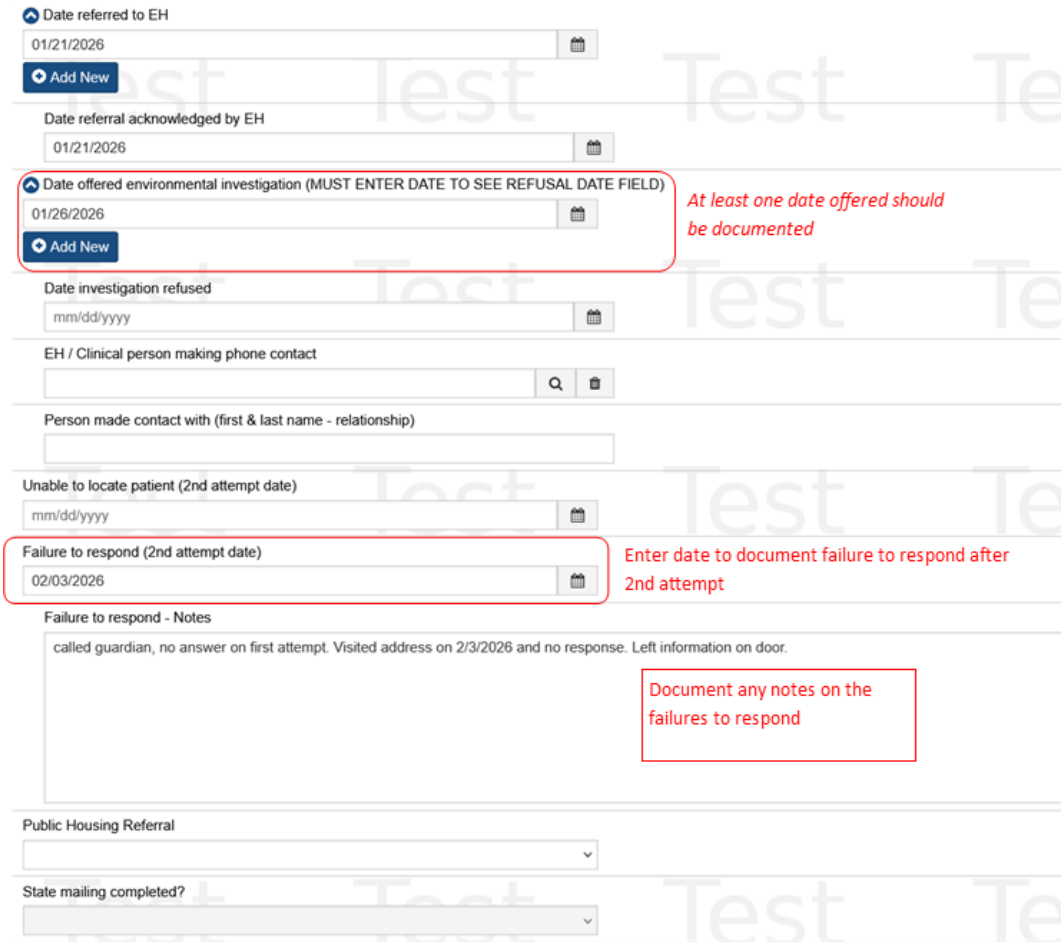
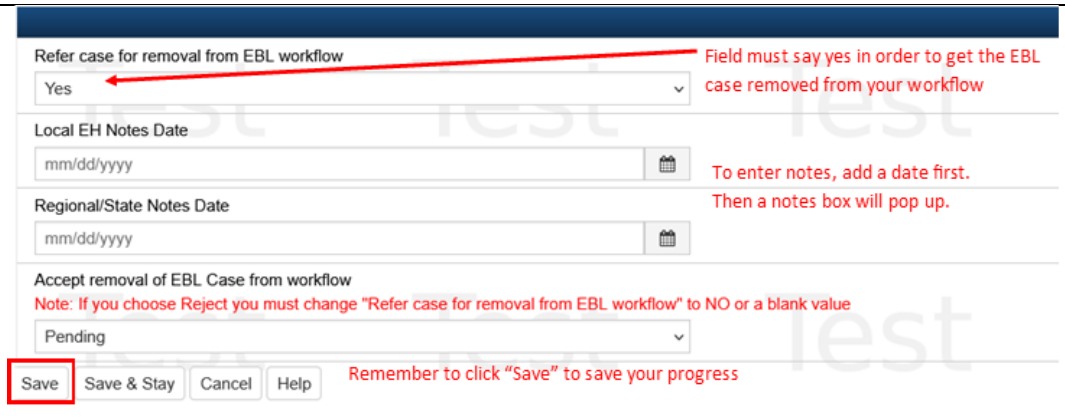


Figure 7: Removal from EBL Workflow



Creating Property Events

A PROPERTY EVENT MUST BE CREATED IF ONE DOES NOT ALREADY EXIST IN NCLEAD

A property event should exist for all primary and supplemental addresses that are associated with a CLP or EBL **CHILD** event. Once you visit a site for the first time, this needs to be documented in NCLEAD within a property event, even if an investigation has yet to occur. Before creating a property event, search for the address you are looking for associated with the **CHILD** event in NCLEAD. To begin the search, click the magnifying glass to open the search window.

- Search for the given address in the search window that appears. Use * to conduct a wildcard search. Using wildcards (*) improves the likelihood of finding a property event if one is already in NCLEAD.
  - Tip: Just include the street number and street name separated by asterisks (EXAMPLE: *567*pancake*)

If no results are found, no **PROPERTY** event for this address exists. You must create a **PROPERTY** event for it by clicking **Create New.**

- In the window that opens, choose “Property” as the Event Type. Search for the address again by clicking **Select Site** and entering the address in the appropriate fields.
- Once found, click **Select** to auto-populate the Site Information. Click **Save**.
  - If a site is not found, manually enter the address of the site in the Site Information section. Click **Save**.
  - **NOTE:** the majority of properties/addresses will already have a site created. It will be uncommon for you to manually enter in site information.

You will then be taken to the main dashboard page for the **PROPERTY** event.

NOTE: Property events should not be created UNTIL a visit has been made to the property.

Figure 8: Open Search Window

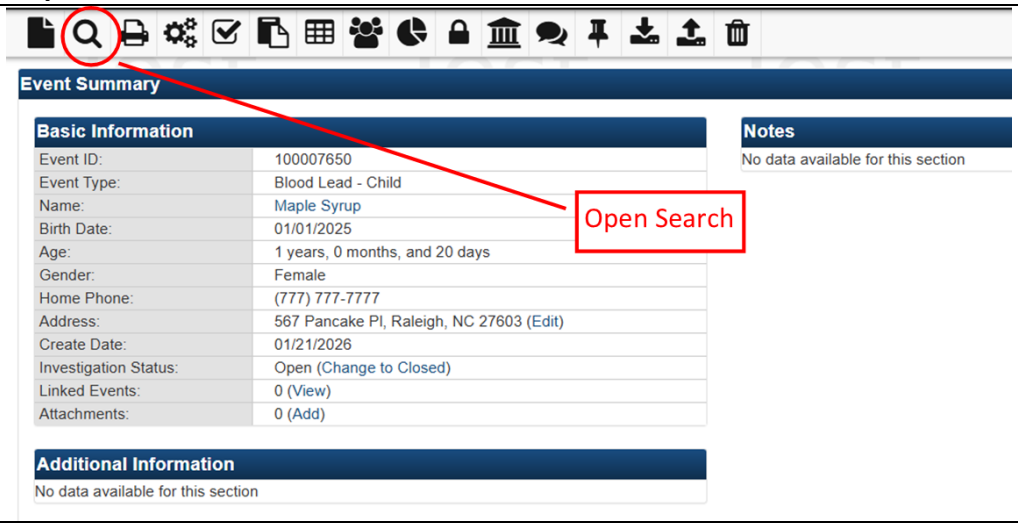


Figure 9: Search for property using wildcards. Select "Property" as event type. Identify that the property cannot be found. Select "Create New" to begin to create a new property.

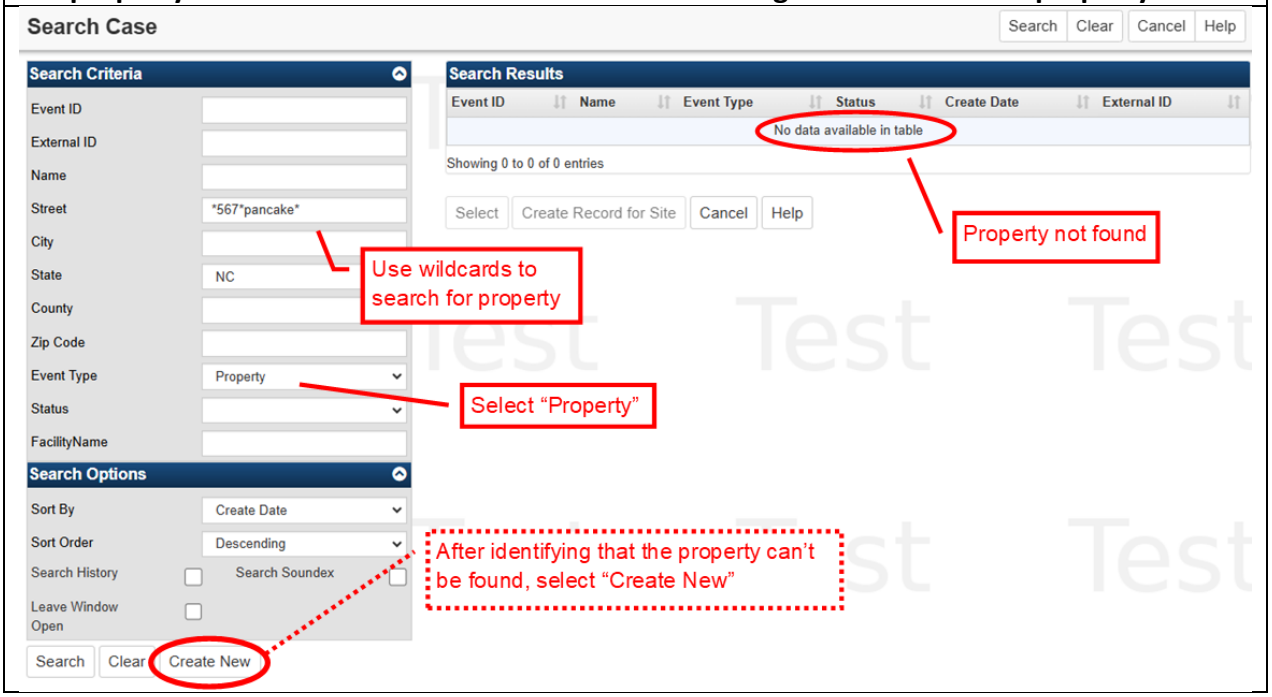


Figure 10: Choose "Property" as event type. Click select site. In new window, find address using wildcards. Click select.

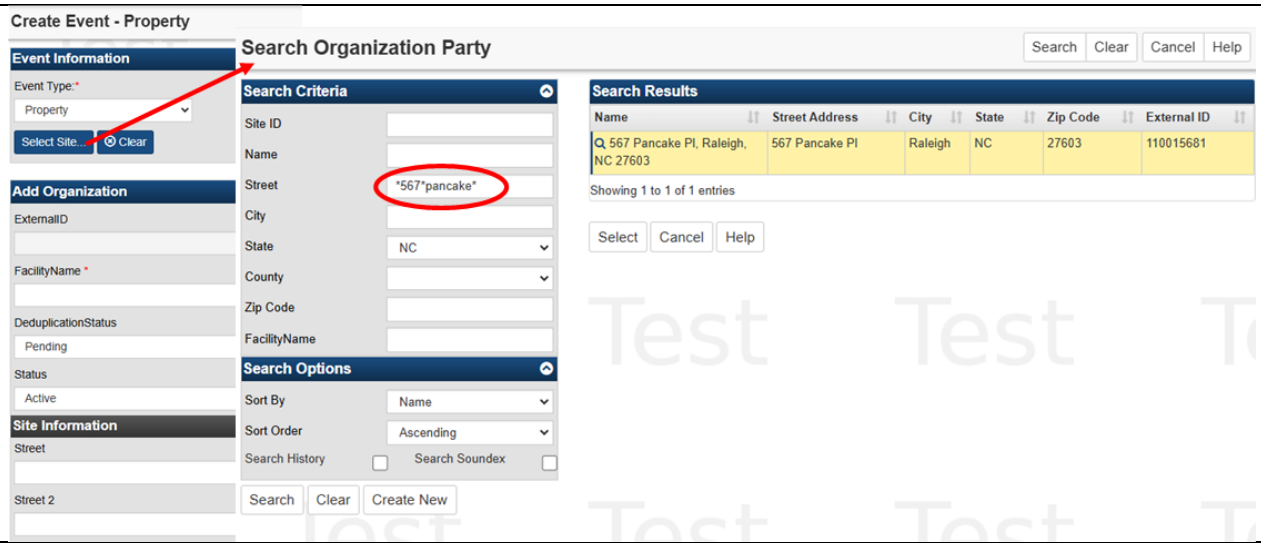


Figure 11: Clicking select auto-populates Site Information fields. Select save.

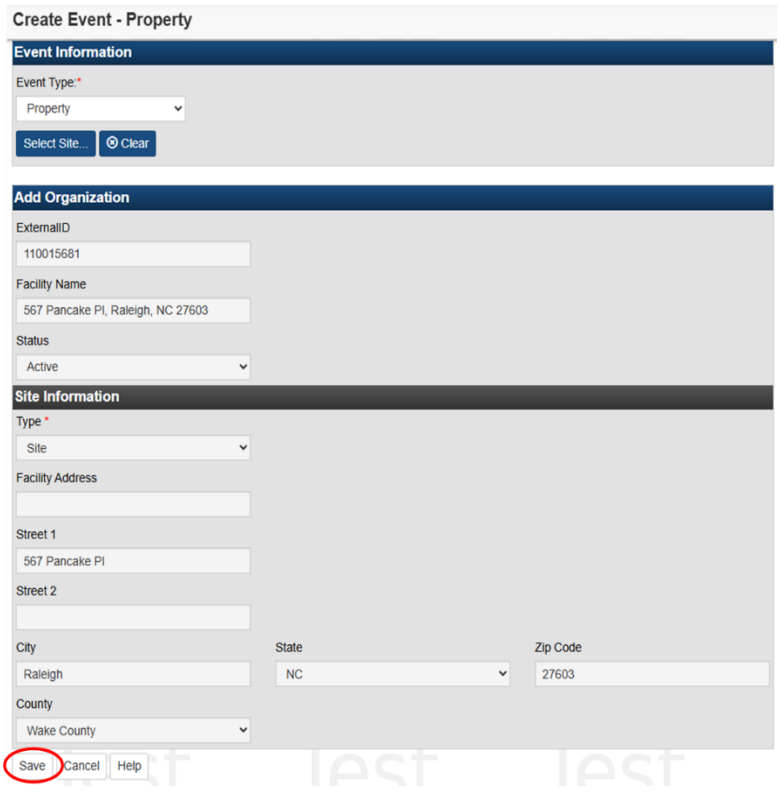
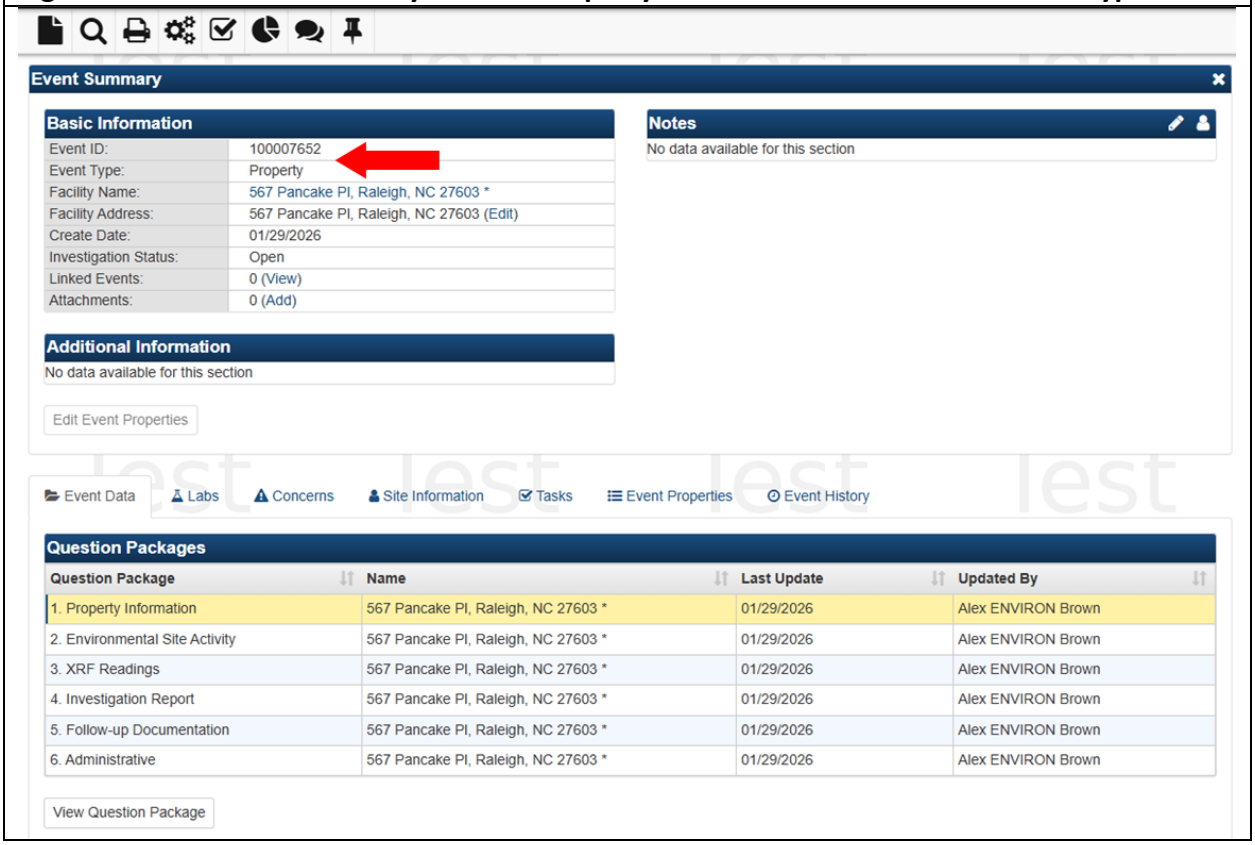


Figure 12: Dashboard of newly created Property Event. Note Event ID and Event Type.

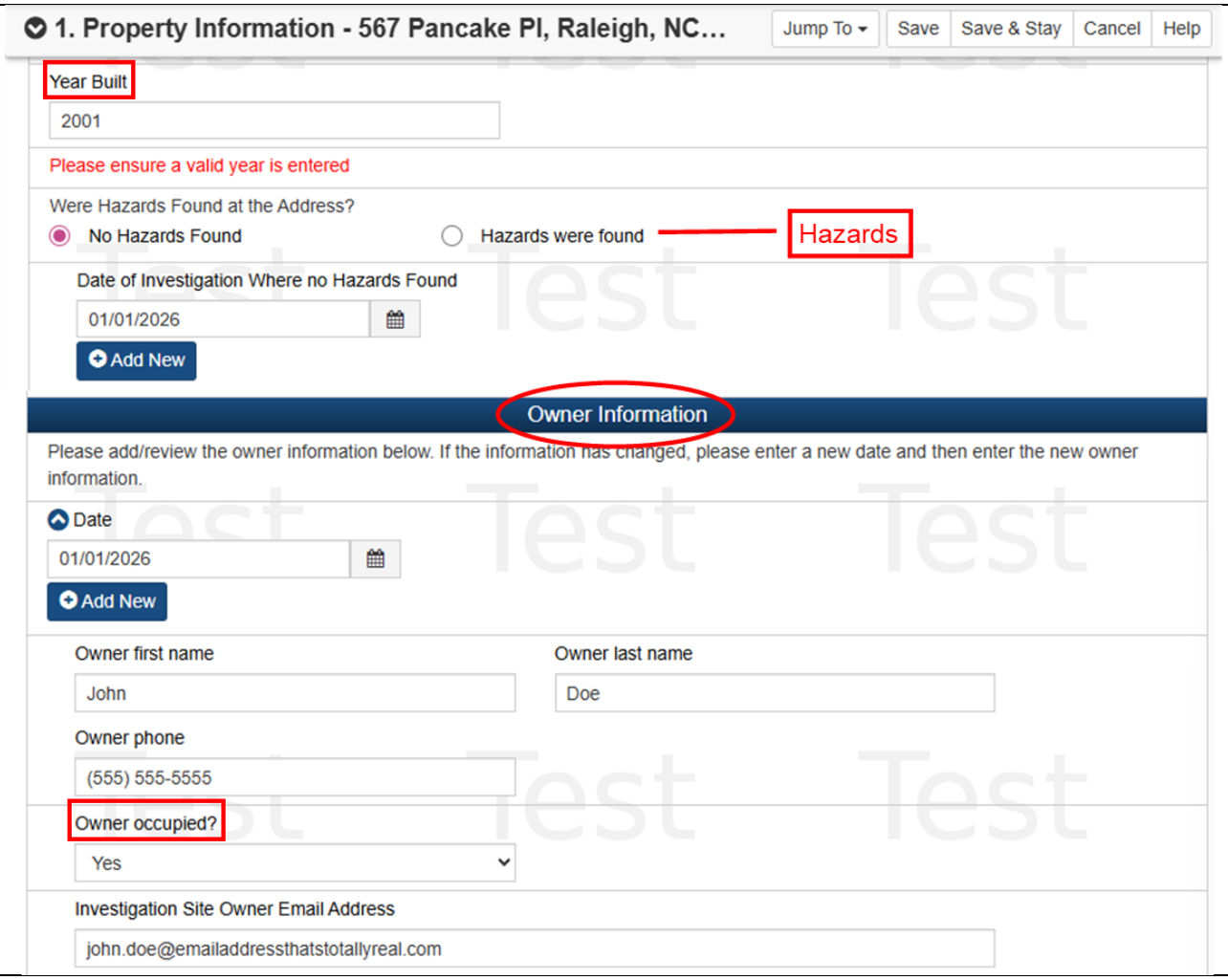


Property Information

The *Property Information* question package in the **PROPERTY** event should be used to document information about the property, any hazards found at the property, and owner or managing agent information.

- Open the *Property Information* question package and enter the **Year Built** for the property.
- Clearly document whether hazards were found at the property.
    - Information on how to document hazards are found in the **"Documentation of Lead Hazards"** segment of this document.
- Review and add any known owner or managing agent information. A date must be entered in the **Date** field for additional fields to appear.
    - Enter as much Owner Information as possible, particularly their first and last name and a form of contact information, if available.
        - Complete the **Owner Occupied** question.
    - Enter as much Managing Agent Information as possible, particularly the agency name, agent information, and any contact information, if available.
        - **NOTE:** If there are any new owners or managing agents, click **Add New** and enter a new date so that any previous information is not overwritten.
- Click **Save**

Figure 13: Example of Property Information



Documentation of Lead Hazards and Sources

Documenting Non-Property Lead Sources under the **CHILD** event

Lead poisoning sources NOT directly related to the primary or supplemental address (e.g. spices, food, candies, cosmetics, pottery, etc.), should be documented in the *Non-Property Lead Sources* question package under the **CHILD** event.

In the *Non-Property Lead Sources* question package:

- Enter the potential lead poisoning sources from any notes or conversations about environmental history under *Possible (Based on notes and environmental history).*
- A source is considered definite when confirmed through lab testing or XRF readings from an investigation. Once identified, enter the results under *Definite (Based on sample results from investigation)*

NOTE: It is important to fill out the *Non-Property Lead Sources QP* for proper documentation. See **Figure 14** on how to document definite hazards.

Reporting Food, Spice and Other Consumable Products

Note any potential lead exposure in food products in NCLEAD. A "food product" is any food, drink, flavoring (e.g. spices), alternative/traditional medicine, medicine, vitamin, herbal remedy, or herbal supplement intended to be consumed orally.

If sources were found, document them in the *Non-Property Lead Sources* question package of the **CHILD** event. For any sample, take pictures of the labels on the front and back of each product and upload them into the **CHILD** event, if possible.

It is required to fill out the Food, Spice, Cosmetics, and Medicines Survey and upload it to NCLEAD under the CHILD Event if any food product samples were taken. A copy of the survey can be found under the NC Division of Public Health Section of the NC Healthy Homes Website. **It is also required to upload all lab results for consumable products to the CHILD event.**

Documenting Lead Poisoning Hazards and Sources under the **PROPERTY** event

All lead poisoning hazards should be documented in the *Property Information* question package under the **PROPERTY** event.

- If **no lead poisoning hazards** were found during the investigation, answer "No Hazards Found" in the **Were Hazards Found at the Address** question.
    - Type in the **date of investigation where no hazards were found.**

- If **any lead poisoning hazards were found** during the investigation, answer "Hazards were found."
    - Then check off any hazards listed that were found during the investigation in the Hazards Identified at the address section.
    - For any hazards that are not listed in that section, please check the box for "Other Lead Sources." Specify the hazard in the text box that appears after.
        - "Other Lead Sources " includes Non-Property Sources identified in the **CHILD** event.
- See **Figures 15 and 16** for examples of how to document hazards and sources in the **PROPERTY** event.

Figure 14: Document Definite Lead Sources in the *Non-Property Lead Sources QP* in the CHILD event

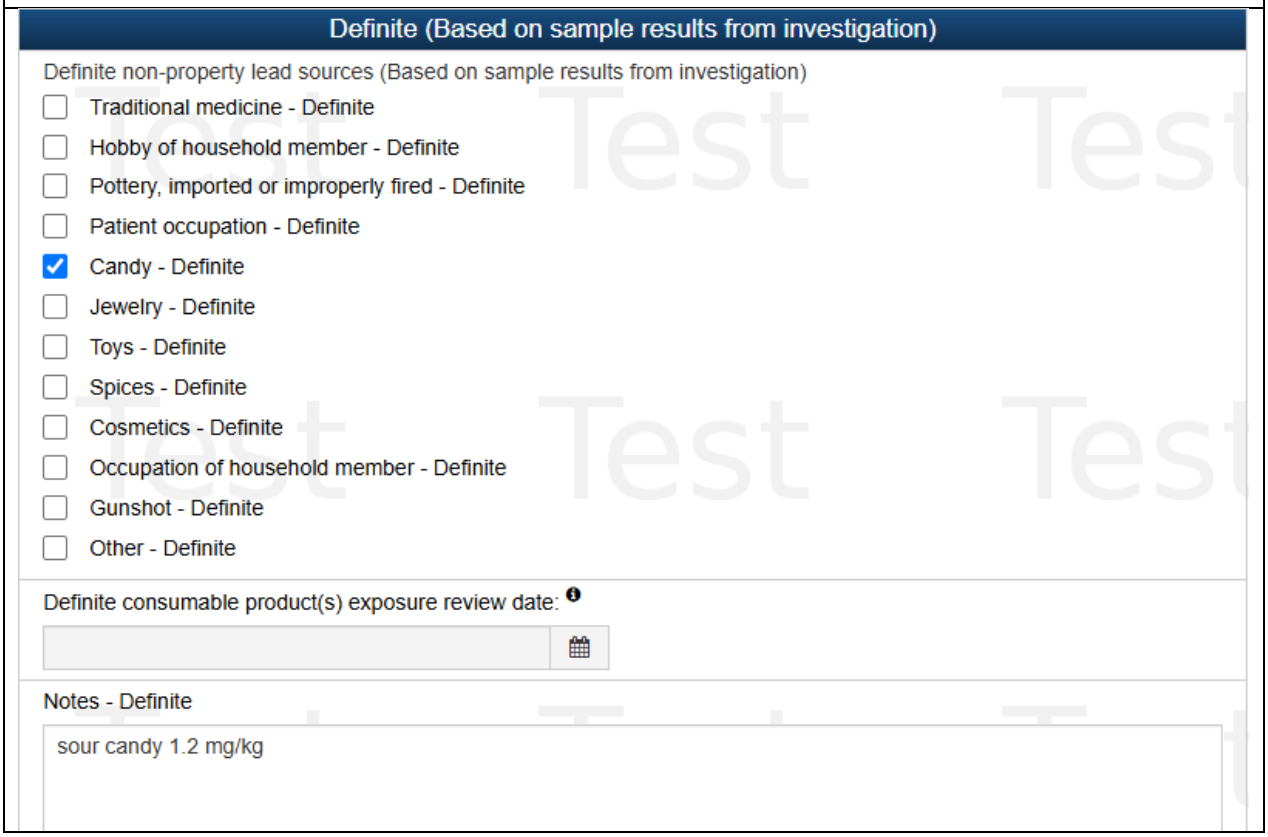


Figure 15: Document No Hazards Found in the *Property Information QP* in the Property event

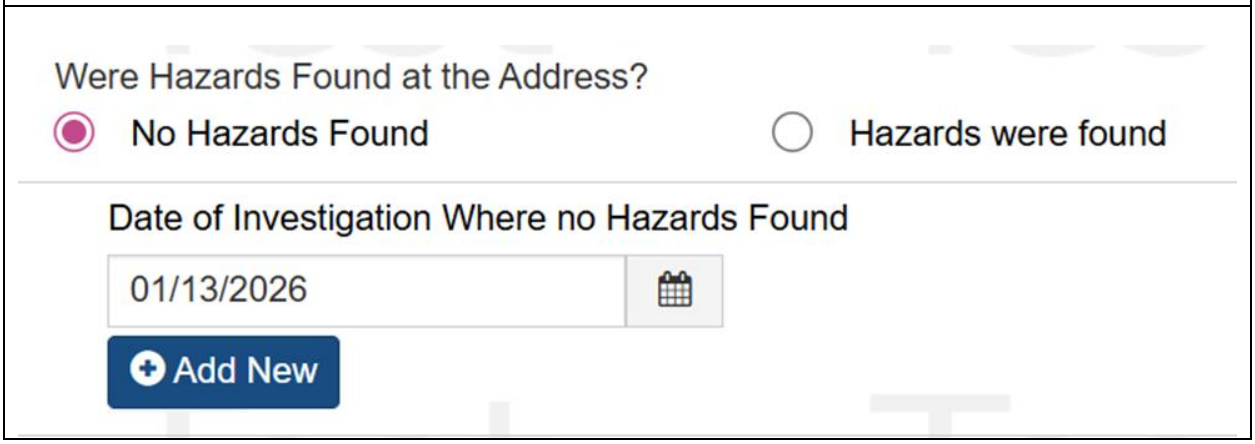
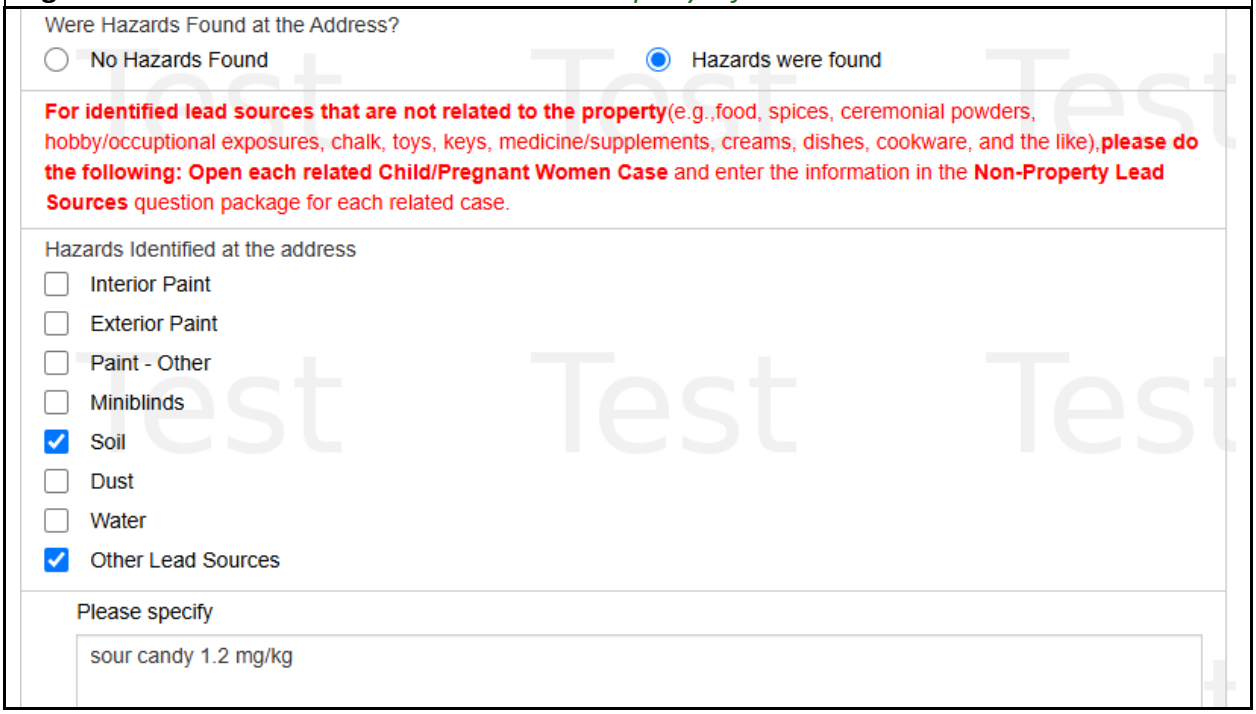


Figure 16: Document Hazards Found in the *Property Information QP* in the PROPERTY event



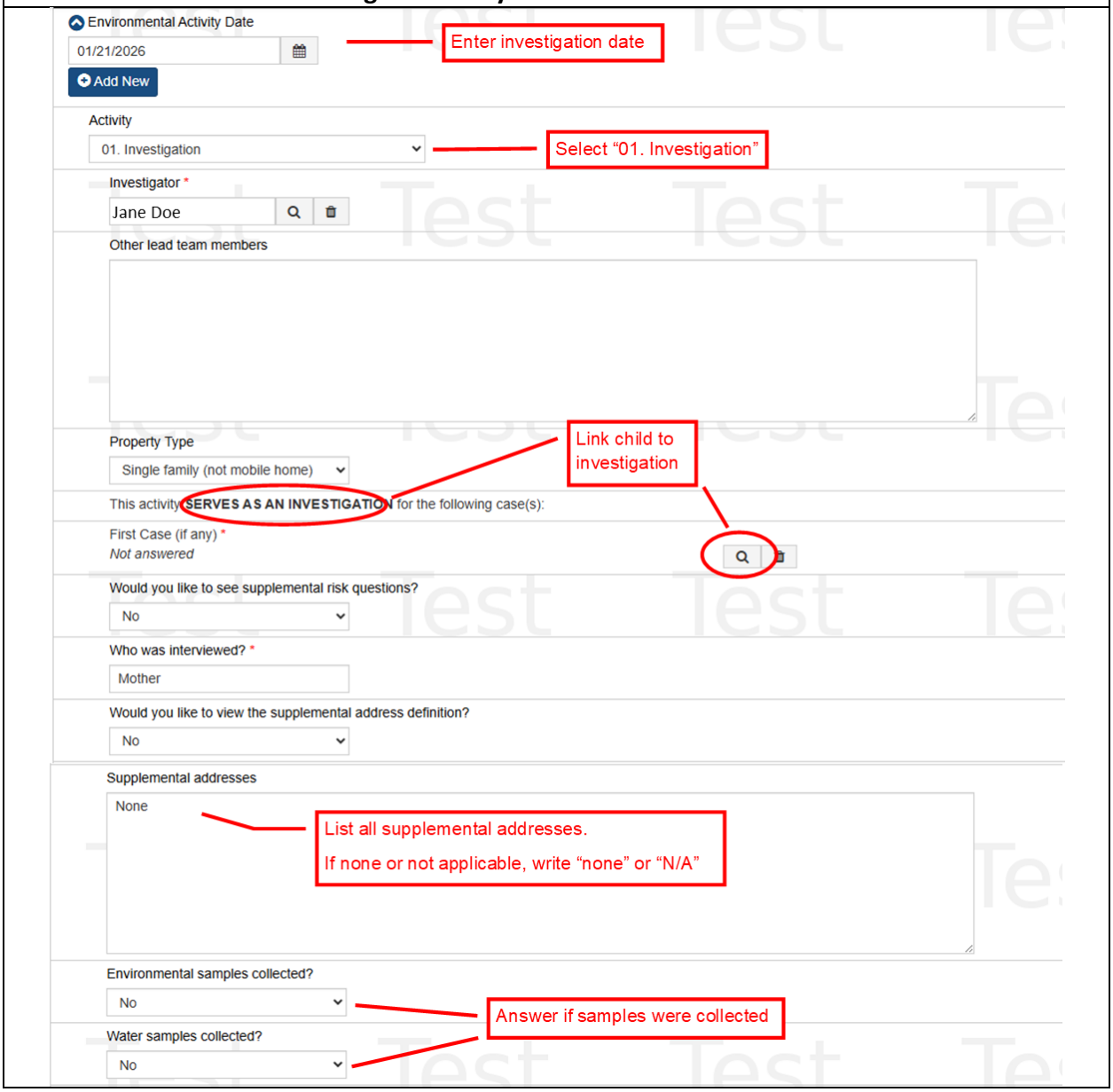
Environmental Site Activity

All site visits shall be documented in the *Environmental Site Activity* question package of the **PROPERTY** event in NCLEAD. This includes investigation, clearance, water sample only, preliminary site visits, annual monitoring visits, and many others. This also includes investigations and related site visits for child occupied and proposed child occupied facilities – even if not related to an elevated blood lead level.

Documenting an Investigation

- Open the *Environmental Site Activity* question package in the **PROPERTY** event
- Enter the date the investigation was completed into the **Environmental Activity Date** field
    - **NOTE**: If there is more than one site visit, click **Add New** to enter additional site visit dates. DO NOT overwrite an existing date box or all the related information will be lost.
- Select 01. Investigation
    - Select the Investigator
    - Enter the investigation details (i.e., other lead team members, Property Type)
    - Link the child to the investigation, completing the **Address Type** and **residence at time of confirmation** fields. Detailed instructions are found in the **"Linking a Child Event"** segment of this document.
    - List all addresses that meet the definition of a supplemental address in the supplemental addresses notes box. ***If there are NO addresses that meet the definition of a supplemental address, please note this in the box by writing "none" or "N/A".***
        - **NOTE**: Data entry of the supplemental risk questions is optional.
    - Indicate if environmental and water samples were collected.
- Click **Save**

FIGURE 17: Annotated Investigation entry in the PROPERTY event of NCLEAD



Linking A Child Event to an Investigation

To ensure all investigations for CLP and EBL cases are documented correctly in NCLEAD, it is important to link the **CHILD** event to the **PROPERTY** event. These **CHILD** events must be linked to all primary and supplemental addresses.

To link the **CHILD** to the **PROPERTY** event:

- Enter the **investigation date** (and any other **site visit dates**) in the *Environmental Site Activity* question package of the **PROPERTY**.
    - Once a date is entered, and the type of investigation is chosen, additional fields appear to record the details of the investigation. At least one site visit in the **PROPERTY** event should serve as an *investigation* for the child.
    - **NOTE**: If there is more than one site visit, click **Add New** to enter additional site visit dates. DO NOT overwrite an existing date box or all the related information will be lost.
- Once the investigation activity is chosen, click the magnifying glass next to **First Child's Name** under **"This activity serves as an investigation for the following case(s)"** to search for the child.
- Search for the child in the search window that appears using their name or NCLEAD Event ID. Use * to conduct a wildcard search with the child's name. Using wildcards (*) improves the likelihood of finding a child event if one is already in NCLEAD.
    - Tip: Just include part of the first and last name followed by asterisks (EXAMPLE: *map*syr*)
- Once found, click "Select."

The **CHILD** event should now be hyperlinked to the **PROPERTY** event.

- Click on the dropdown box to choose the **Address Type** and whether it was the child's **residence at time of confirmation**
- Click **Save**.
    - **NOTE**: You may not immediately see that the child and property are linked. But once you close out of the child or property record, and go back in, the link will exist.

Figure 18: Click magnifying glass to search for the child to attach to the investigation.

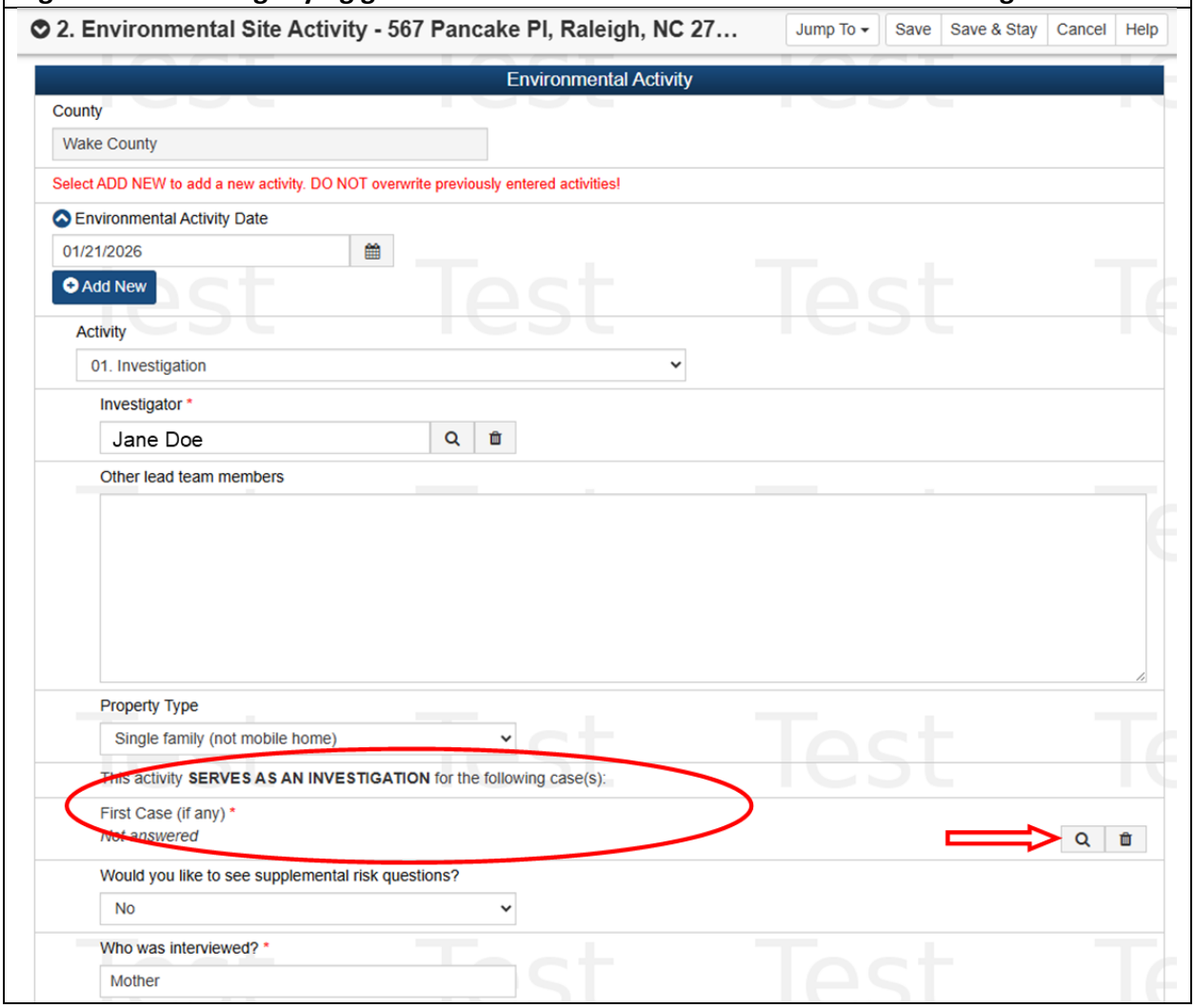


Figure 19: Use Wildcards to search for child. Click select when child has been identified.

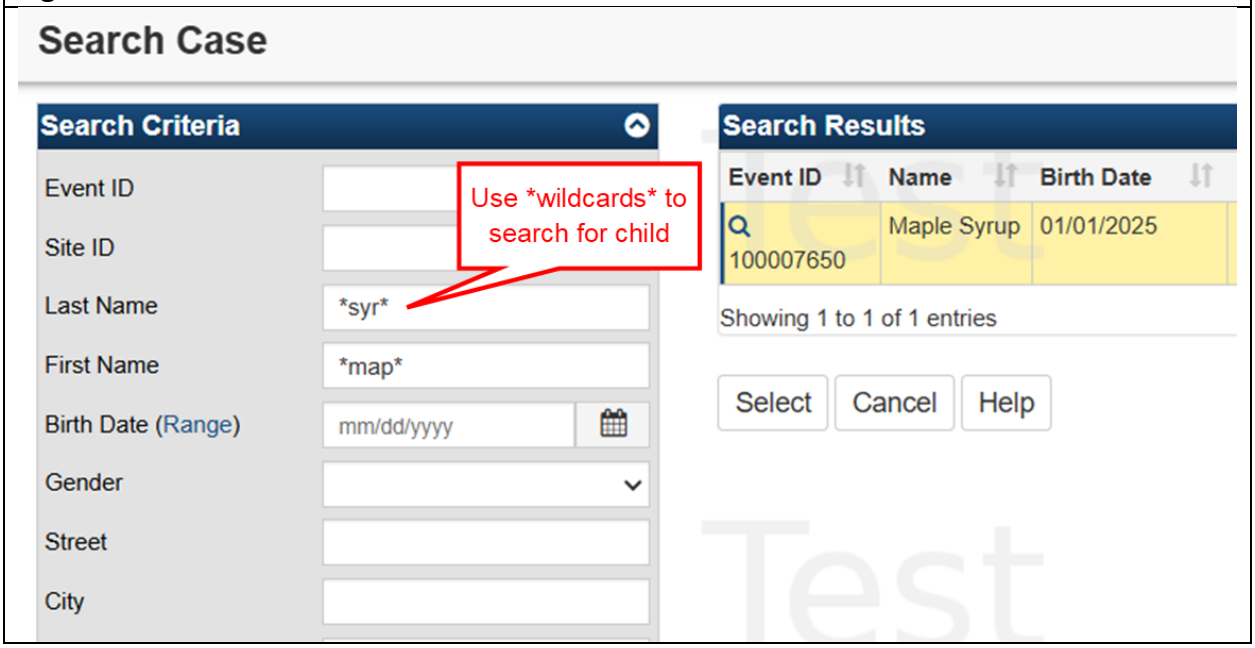


Figure 20: Child is now linked. Answer address type and residence at confirmation questions



Linking Events Not Tied to an Investigation

When an event needs to be linked to another event, child or property, but does not pertain to an investigation, please contact the NCLEAD Helpdesk: Dph.LeadHelpdesk@dhhs.nc.gov.

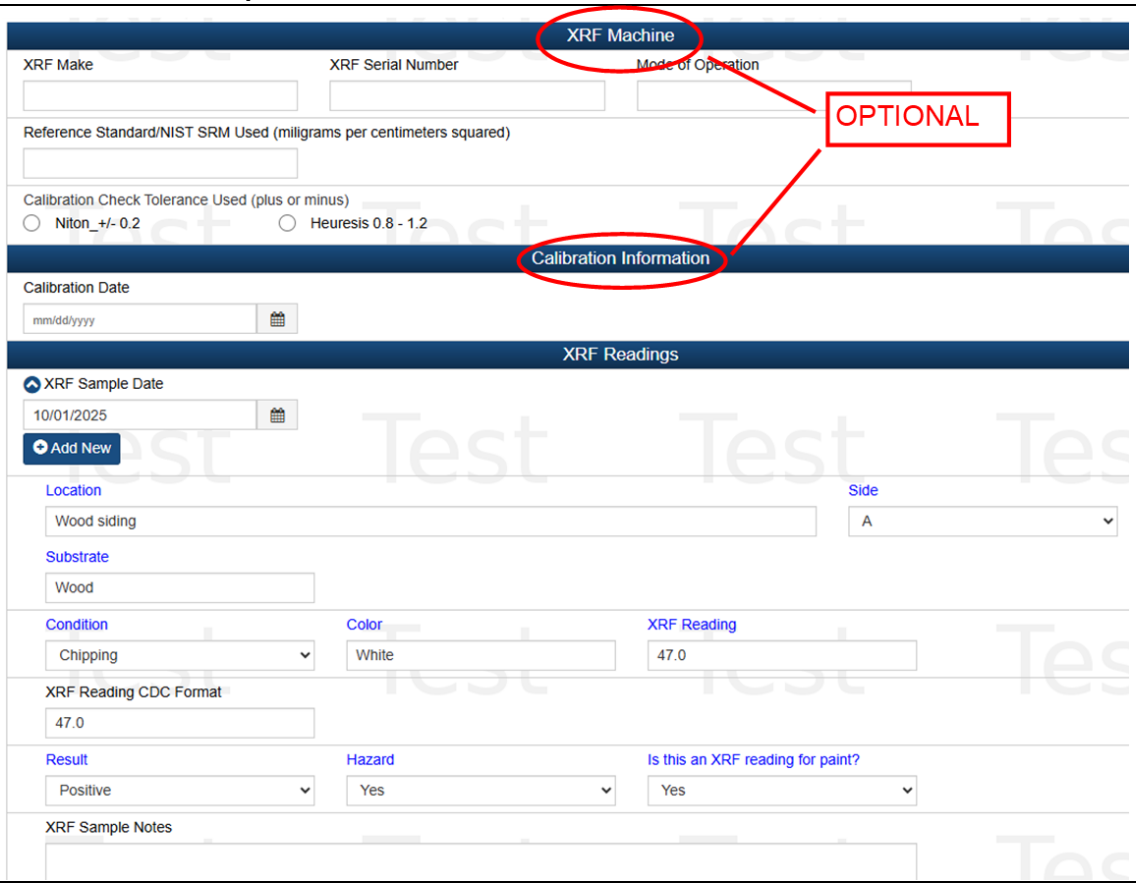
XRF Readings

The highest XRF reading for **paint** should be entered. Use the *XRF Readings* question package in the **PROPERTY** event to enter XRF results.

NOTE: Entry of information under the XRF Machine and Calibration Information sections are optional. Ensure that the calibration sheet is always attached to your XRF readings when uploaded.

- In the question package, under the XRF Readings section, enter the **XRF Sample Date.** After a date is entered, new fields will generate. Enter information into those new fields.
- If more XRF readings need to be added, click **Add New** so that any previous information is not overwritten.
- Click **Save**

FIGURE 21: XRF Example



Labs Tab (Environmental and Water Samples)

The one highest test result ever at any type of visit (investigation, clearance, annual monitoring, etc.) for each sample type below should be entered in the **Labs Tab** of NCLEAD**.**

- Dust (highest for each type below):
  - Window trough
  - Window sill
  - Floor
- Paint (chip)
- Soil
- Water
- Spices/Food Specimen

Click on the **Labs tab** of the **PROPERTY** event and **Add Lab Result** to enter sample results.

IMPORTANT NOTE: An **Order Number** must be entered. If not, additional water and environmental sample results may be overwritten. If you do not know the Order Number, please enter the sample collection date as yearmonthday (YYYYMMDD).

For inorganic chemistry results from the State Lab the first part (ES051916), is the Order Number. The second part (0117001, 0117002, and 0117003) is the Lab Sample Number:
ES051916-0117001
ES051916-0117002
ES051916-0117003

Please see examples showing entry of water and environmental sample analysis results below.

Water Sample Results

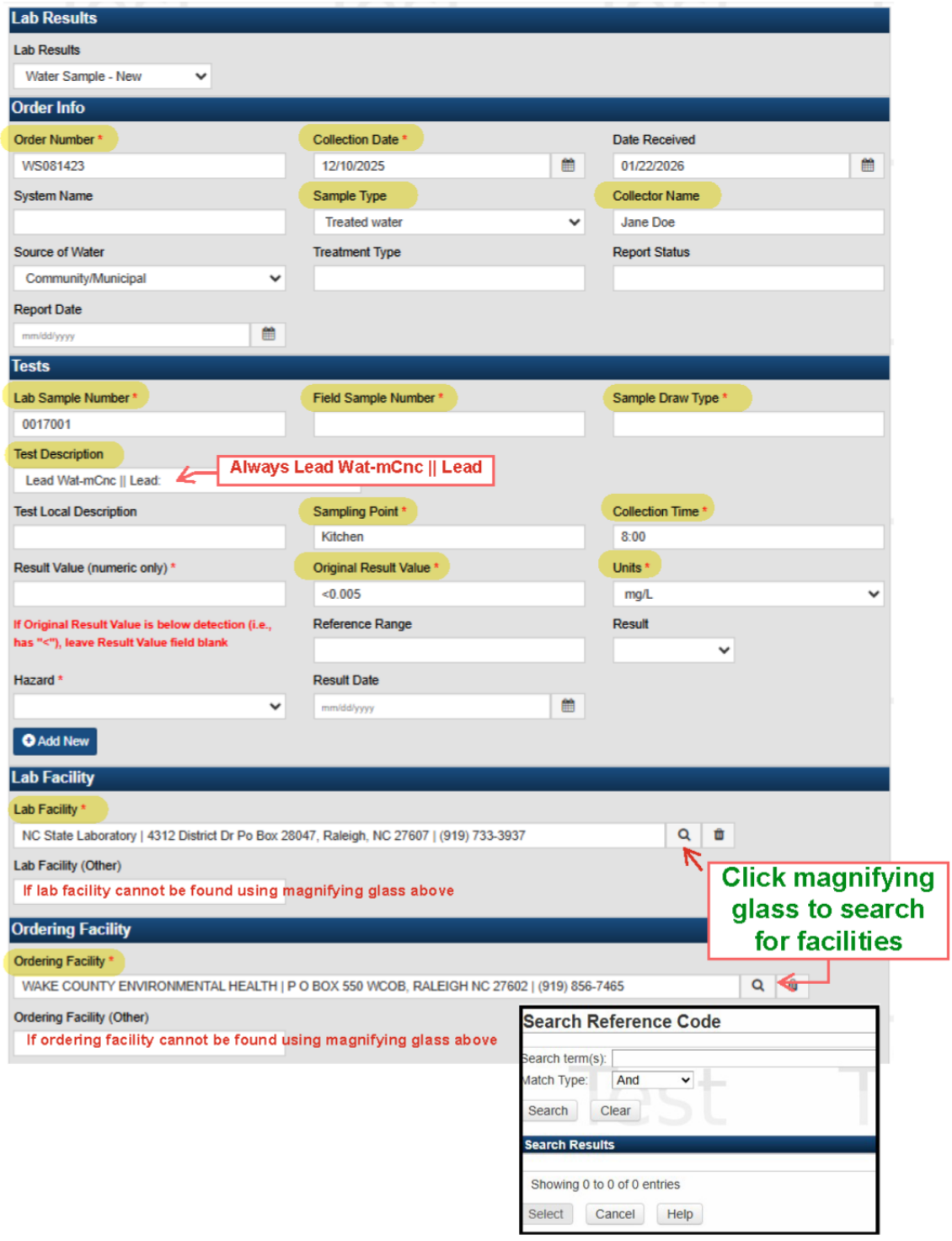
Choose "Water Sample-New" from the dropdown box labeled **Lab Results** at the top. At a minimum, please enter a value for all highlighted fields as shown in the screenshot below. Required fields are highlighted in yellow in **Figure 22.**

- To add additional water sample results, click **Add New**

To choose the lab and ordering facility, click the magnifying glass, enter search terms, and click **Search**. Once the right lab or ordering facility has been located, click **Select** to auto-populate the appropriate fields.

Once all required fields have been filled out, click **Save.**

FIGURE 22: Water sample lab result example with REQUIRED fields



Environmental Sample Results

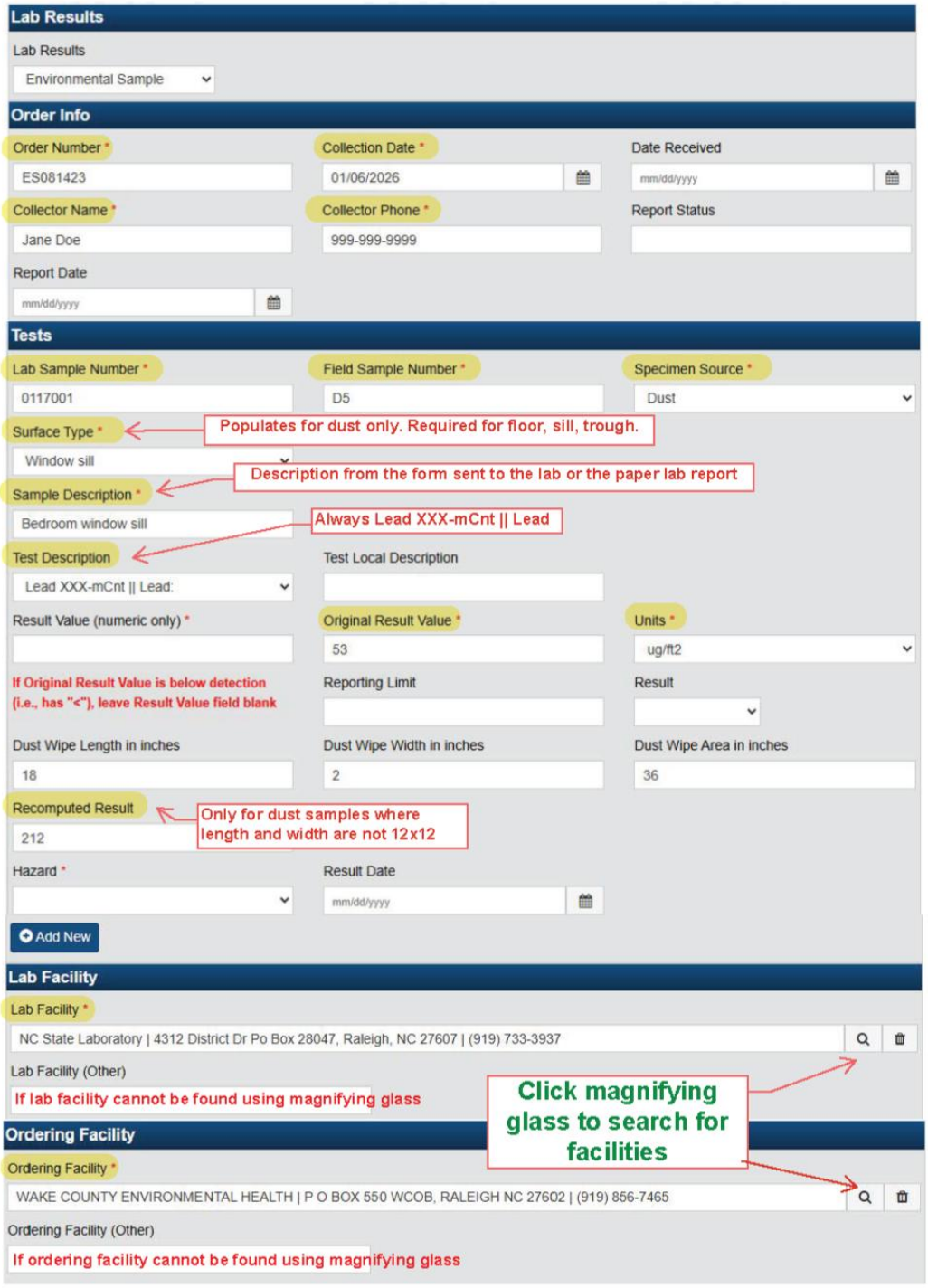
All non-water samples should be recorded by choosing “Environmental Sample” from the dropdown box labeled **Lab Results** at the top. At a minimum, please enter a value for all highlighted fields as shown in the screenshot below. Required fields are highlighted in yellow in **Figure 23.**

- To add additional environmental sample results, click **Add New**

To choose the lab and ordering facility, click the magnifying glass, enter search terms, and click **Search**. Once the right lab or ordering facility has been located, click **Select** to auto-populate the appropriate fields.

Once all required fields have been filled out, click **Save.**

Figure 23: Environmental Lab Results Example with REQUIRED fields



Attachments

Uploading Attachments to NCLEAD

Under the Basic Information section of the event dashboard, select **Add** next to Attachments to be taken to a page to upload files related to the **CHILD** or **PROPERTY** Event. When adding attachments, the description should clearly indicate the item being uploaded for review. Please do not upload all attachments into one file. Listed below are the minimum attachments required for each event type. Security level for all attachments is "None" or "Very Low" unless otherwise specified. **All uploads should be .pdf, .png or .jpg.**

Minimum **CHILD** event attachments:

- Form 3651 (Security Level: Very High)
- Form 3460 (Security Level: Very High)
- Consent/Refusal Form – **EBL** ONLY - (Security Level: Very High)
- If the investigation requires:
    - Food, Spice, Cosmetics, and Medicines Survey
    - Non-Property Hazards Lab Results
        - e.g., spices, food, candies, cosmetics, etc.

NOTE: More information on how to document spices and other products can be found in the "Reporting Food, Spice and Other Consumable Products" segment of this document.

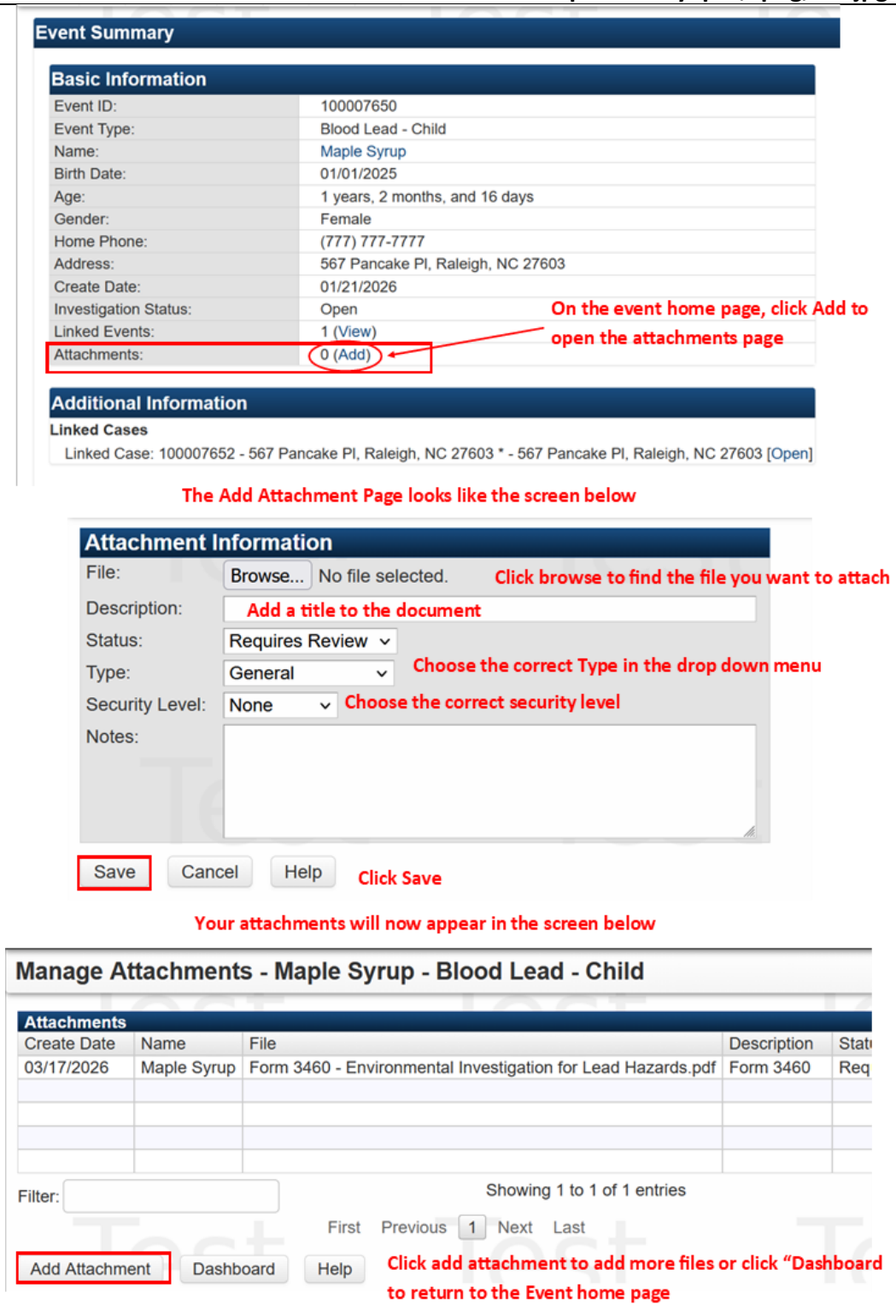
Minimum **PROPERTY** event attachments:

- Investigation Report(s)
- All Environmental Lab Results
    - e.g., dust, paint, soil
- All Water Lab Results
- XRF Readings and Calibration Information (Form 3279)
- Site Plan/Sketch
- All Notices to Tenants/Property owners
- If the investigation requires:
    - Remediation Plan(s)
    - Environmental sample analysis reports
    - Chain of Custody
    - Photos

Ensure that attachments are added to the right event type. If an attachment needs to be removed, please contact Dph.LeadHelpdesk@dhhs.nc.gov

To review copies of these attachments, view the Forms section of the Children's Environmental Health website.

Figure 24. How to add attachments to events. Please upload only .pdf, .png, or .jpg files



Investigation Report

The *Investigation Report* question package must be completed for all **PROPERTY** Events that have had an **investigation.**

- Once the report has been sent to owners/residents, check the box next to **"Investigation Report sent to Property Owner/Residents"**
    - Fill in the **Date report sent to Property Owners/Residents** that appears.
- Answer the **Remediation required** question.

These steps will remove you from the *"07. Active Property Investigations*" Workflow.

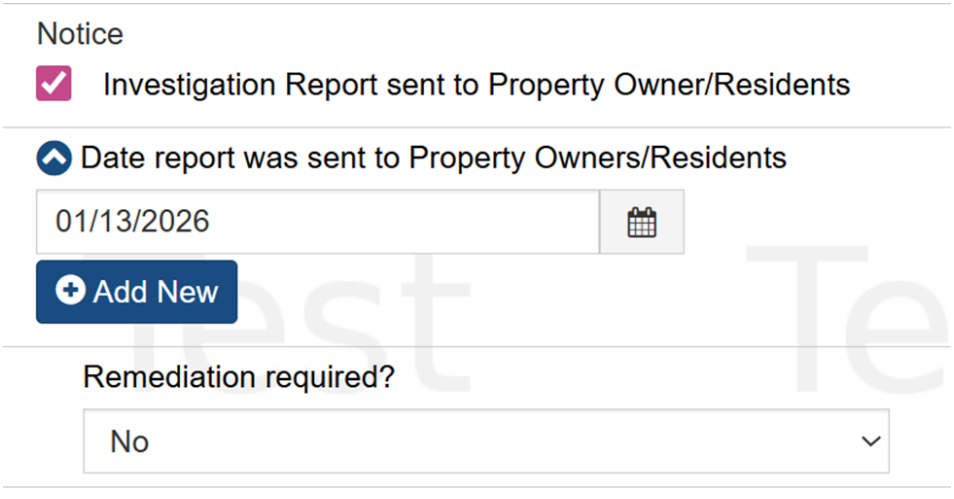
See **Figure 25** for completed investigation report section.

Reminder: Do not forget to upload the investigation report onto the **PROPERTY** event.

If remediation is required, additional fields will be generated. As the investigation evolves, this question package will need to be revisited until a **Passed Clearance Date,** and all prior fields are entered. See Figure 27.

- The completion of these fields will remove the property from the *"08. Remediation Incomplete*" workflow.

FIGURE 25: Completed Investigation Report question package for an Investigation that does not require remediation



Clearance Site Visits

Use NCLEAD to record all Clearance site visits in the *Environmental Site Activity* question package of the **PROPERTY** event.

- **NOTE**: If there is more than one site visit, click **Add New** to enter additional site visit dates. DO NOT overwrite an existing date box or all the related information will be lost.

For Activity = "04. Clearance", complete the following:

- Select Investigator
- Select Property Type
- Link Child Event to Activity
- Select Remediation Method
- Complete subsequent questions
- Click **Save**

If Remediation Method= "Maintenance Standard", two fields are generated.

- **Date Property Failed Clearance/Monitoring** is the date the lab samples were collected. You will not be able to enter this date until after the results are received showing a hazard.
- **Date Property Passed Clearance/Monitoring** is the date the lab samples were collected. You will not be able to enter this date until after the results are received showing no hazard.

Reminder: Do not forget to upload all attachments related to clearance visits onto the **PROPERTY** event.

Once a property passes a clearance visit, this must be documented in the *Investigation Report* question package on the **PROPERTY** event. After completing the prior fields, enter the **Passed Clearance Date.** This will remove the case from the *"08. Remediation Incomplete"* Workflow.

Figure 26: Example of Clearance Visit Activity. Select Remediation Method to Answer Subsequent Questions.

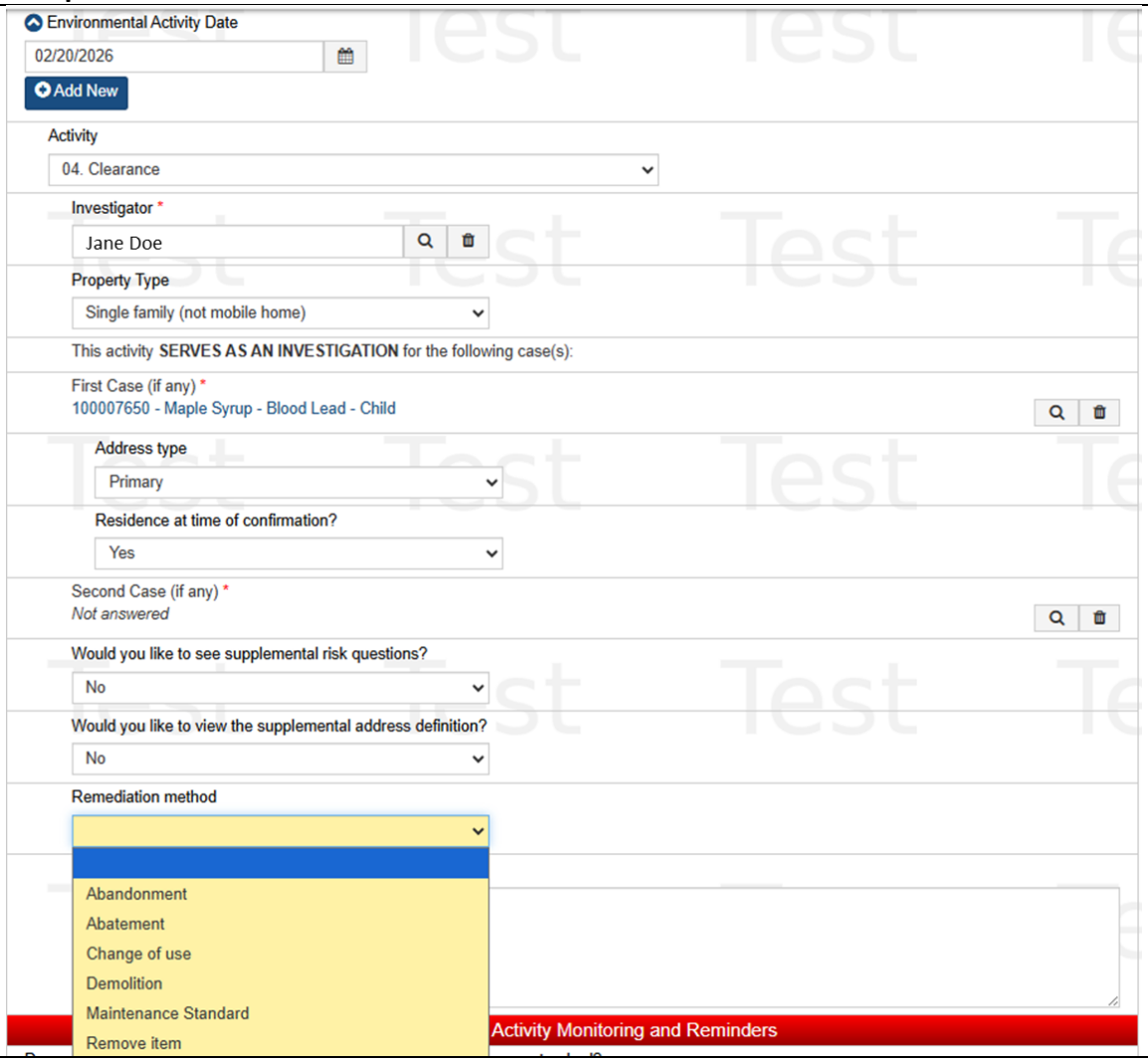
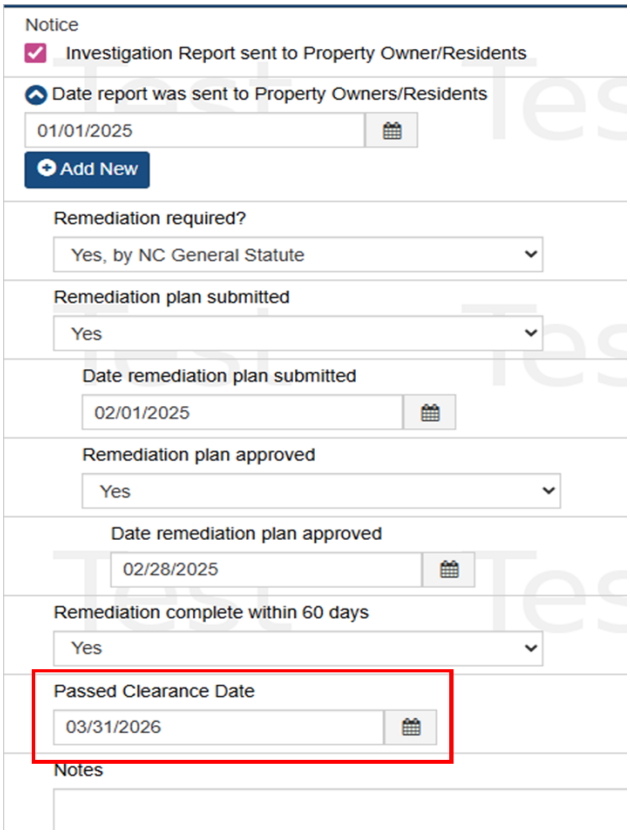


Figure 27: Example of Clearance Visit Entries in the Investigation Report Question Package



Maintenance Standard Monitoring

Use NCLEAD to record all Annual Monitoring site visits in the *Environmental Site Activity* question package of the **PROPERTY** event.

- **NOTE**: If there is more than one site visit, click **Add New** to enter additional site visit dates. DO NOT overwrite an existing date box or all the related information will be lost.

For Activity = 09. Monitoring – Maintenance Standard, complete the following:

- Select Investigator
- Select Property Type
- Link Child Event to Activity
- Select "Maintenance Standard" for Remediation Method
- Complete subsequent questions
- Click **Save**

If Remediation Method = "Maintenance Standard", two fields are generated.

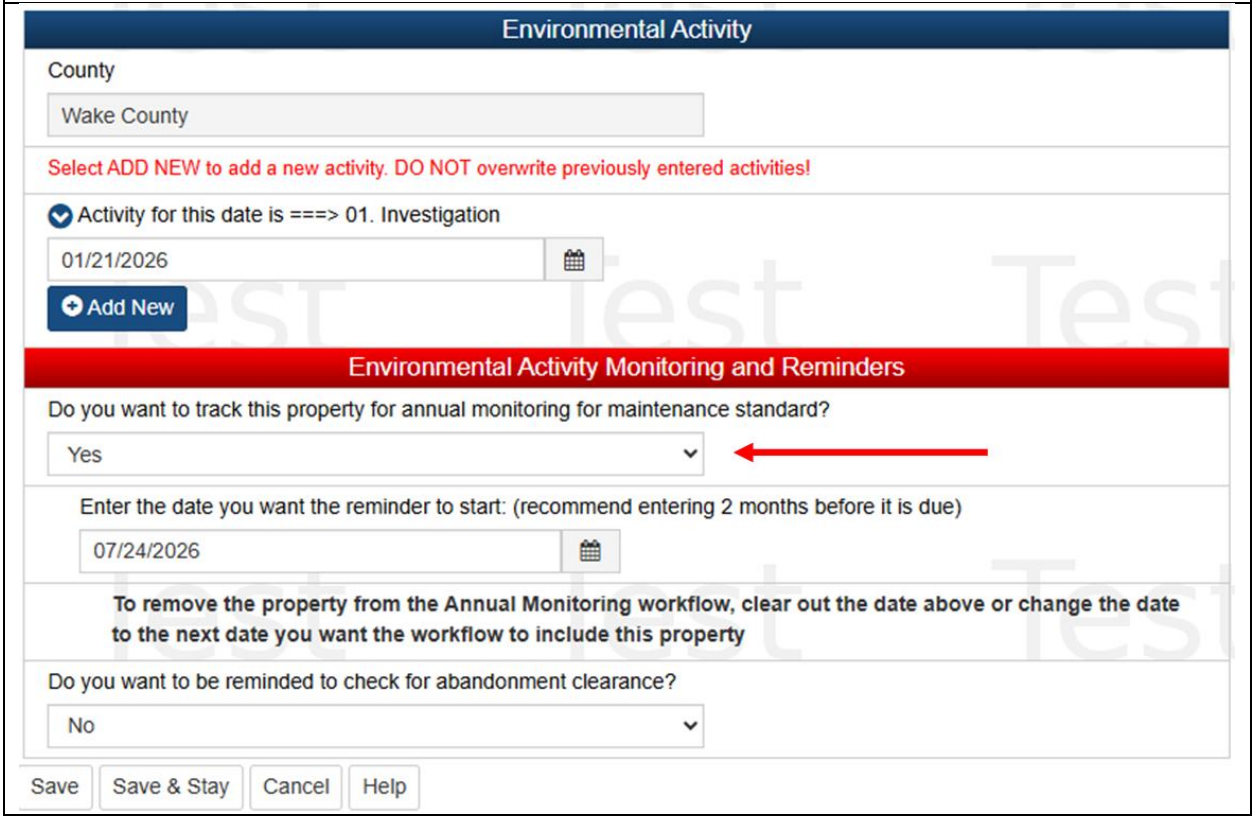
- **Date Property Failed Clearance/Monitoring** is the date the lab samples were collected. You will not be able to enter this date until after the results are received showing a hazard.
- **Date Property Passed Clearance/Monitoring** is the date the lab samples were collected. You will not be able to enter this date until after the results are received showing no hazard.

Reminder: Do not forget to upload all attachments related to annual monitoring onto the **PROPERTY** event.

Tracking Annual Monitoring Properties

- Reminder dates for monitoring should be set up in the **PROPERTY** event.
- To set up reminder dates, open the *Environmental Site Activity* question package of the **PROPERTY** event and scroll to the bottom of the page. It is recommended that you set the date two months before it is due.
- On the date you set a reminder, the **PROPERTY** event will enter the "10. Properties Due for Annual Monitoring" workflow. Continuously adjust the date between visits to ensure appropriate follow-up.

Figure 28: Tracking Maintenance Standard Properties in the *Environmental Site Activity QP*



Abandonment Monitoring

Use NCLEAD to record all Abandonment Monitoring site visits in the *Environmental Site Activity* question package of the **PROPERTY** event.

- **NOTE**: If there is more than one site visit, click **Add New** to enter additional site visit dates. DO NOT overwrite an existing date box or all the related information will be lost.

For Activity = 08. Monitoring – Abandonment, complete the following:

- Select Investigator
- Select Property Type
- Link Child Event to Activity
- Select "Abandonment" for Remediation method
- Respond to "Abandoned?"
- Enter Verified Date
- Click **Save**

Reminder: Do not forget to upload all appropriate attachments onto the **PROPERTY** event.

Tracking Abandonment Monitoring Properties

- Reminder dates for monitoring should be set up in the **PROPERTY** event. To set up reminder dates, open the *Environmental Site Activity* question package of the **PROPERTY** event and scroll to the bottom of the page. It is recommended that you set the date two months before it is due.
- On the date you set a reminder, the **PROPERTY** event will enter the *"09. Abandonment Monitoring"* workflow. Continuously adjust the date between visits to ensure appropriate follow-up.

Figure 29: Completed Abandonment Monitoring Activity

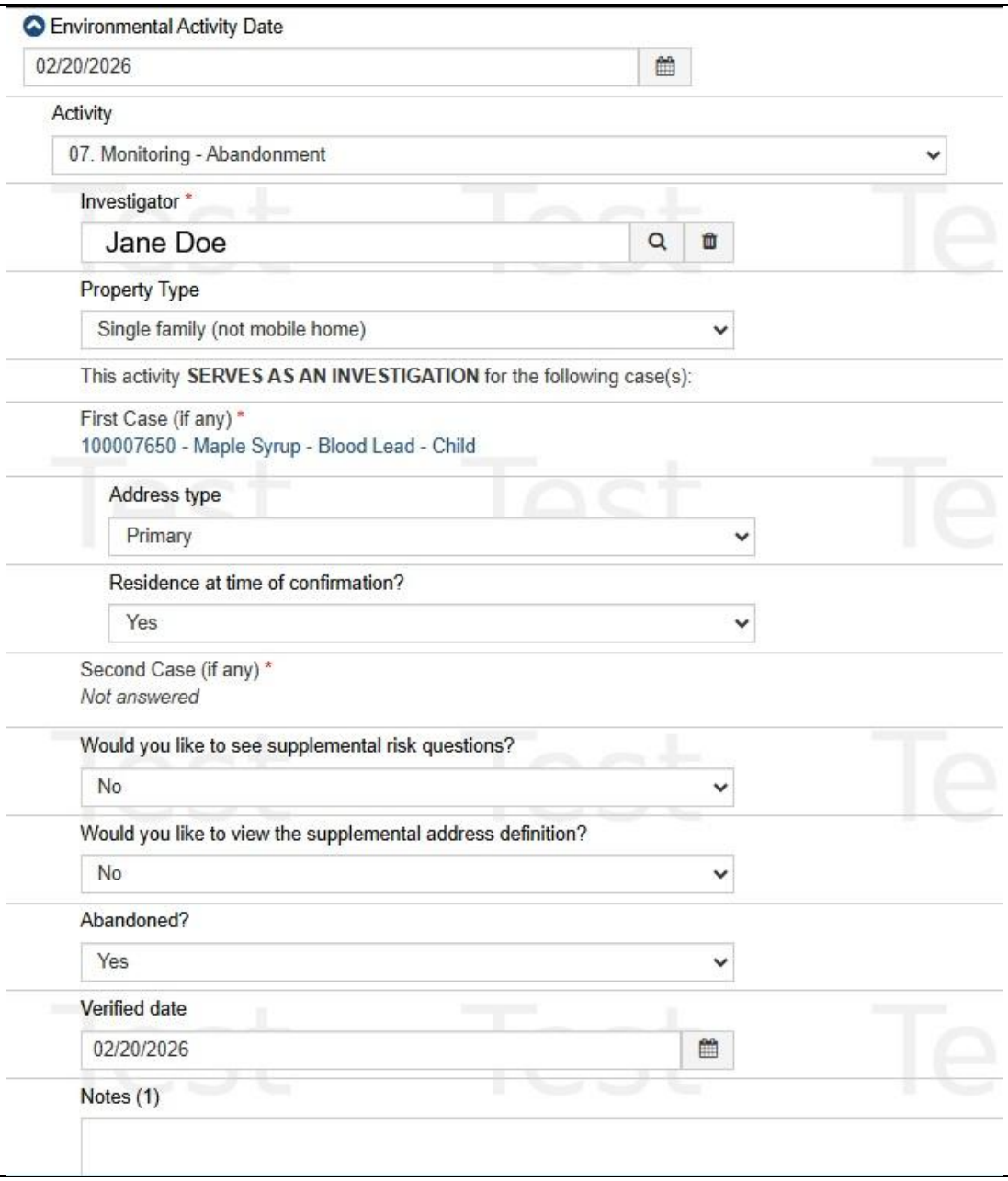
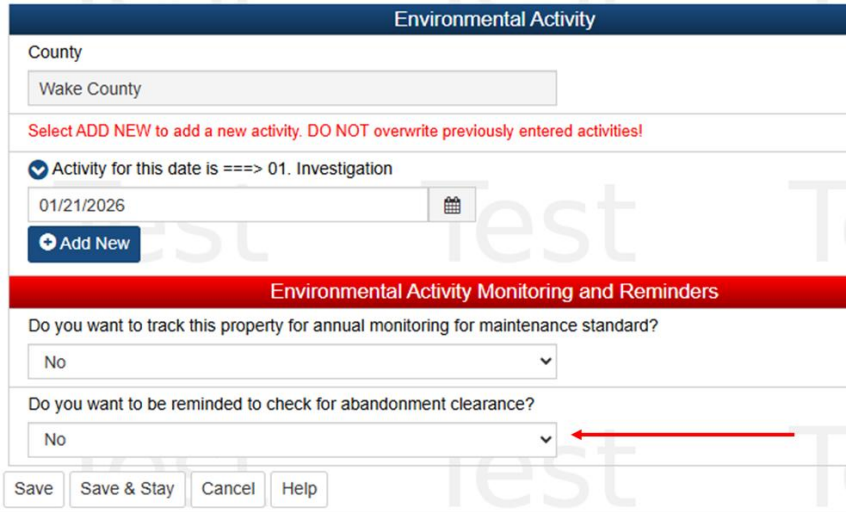


Figure 30: Tracking Abandonment Properties



Follow-Up Documentation

The **Follow-up Documentation** question package should be used to document additional information related to a case.

- Use the **CHILD** event *Follow-Up* documentation question package for information related to the child (Example: Child plays with fishing weights).
- Use the **PROPERTY** event *Follow-Up* documentation question package for information related to the **PROPERTY** (Example: On 12/05/2025, a phone consultation was conducted with the property owner regarding remediation).

NOTE: Please take care to use the appropriate event type for documentation notes.

- Enter the **Documentation Date** for the note. Then, additional fields will appear to add note details.
- Make sure to include your name in the "**Notes documented by (select NCLEAD User)**" section so we know who authored the note. You can either type your username or use the magnifying glass to search.
- Click **Add New** to add another note section and enter in additional details when needed.

Adding Tasks

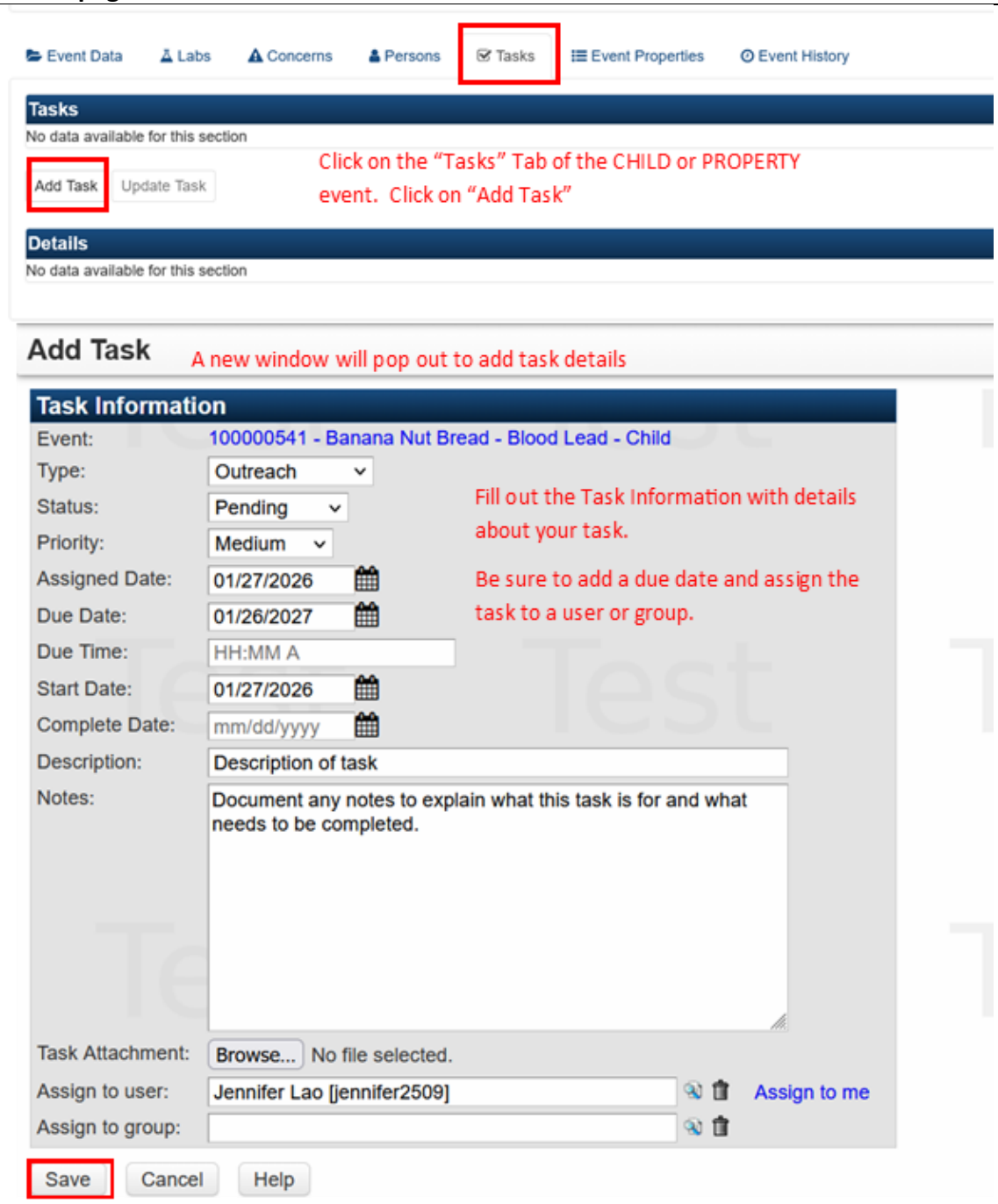
Tasks can be used to set reminders to check certain cases and complete activities. To add a task to a case, go to the **Tasks tab** on the dashboard page of a **CHILD** or **PROPERTY** event.

Click **Add Task** and fill out the Task Information section with any details that you require.

- There is a dropdown box for **Type** to describe the tasks that need to be completed.
- Fill out the assigned date and due date.
- Add a description and notes to describe the task.
- Assign the task to yourself or search for a user or a group to assign the task to someone else.
- Click **Save**.

All your tasks can be found under the **Tasks** section on the front page of NCLEAD.

Figure 31: Creating Tasks with a PROPERTY or CHILD event through using the Tasks tab on the event page.



Sharing NCLEAD Events with Other Counties

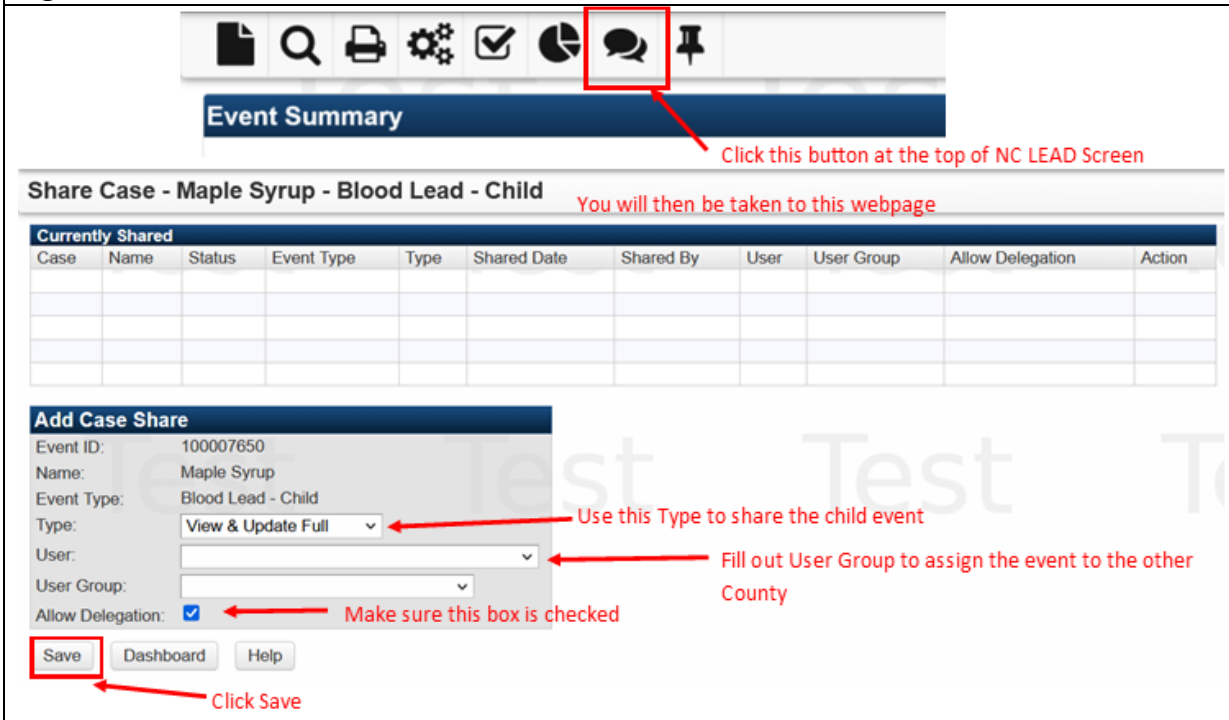
CHILD events can be shared to other counties in instances where an investigation must be done at a property located in a different county.

To share a child event with a county:

1. Go to the **CHILD** Event that needs to be shared.
2. Click on the icon that looks like two chat bubbles above the Event Summary section. It is between the pie chart and push pin icon.
3. Once on the Share Case page, in the Add Case Share box, fill in following details:
    a. For Type, choose View & Update Full
    b. For User Group: find the County you are sharing the case with and select them
    c. Check the box for "Allow Delegation"
4. Click **Save**

The **CHILD** Event should now be shared with the other county. See **Figure 32**

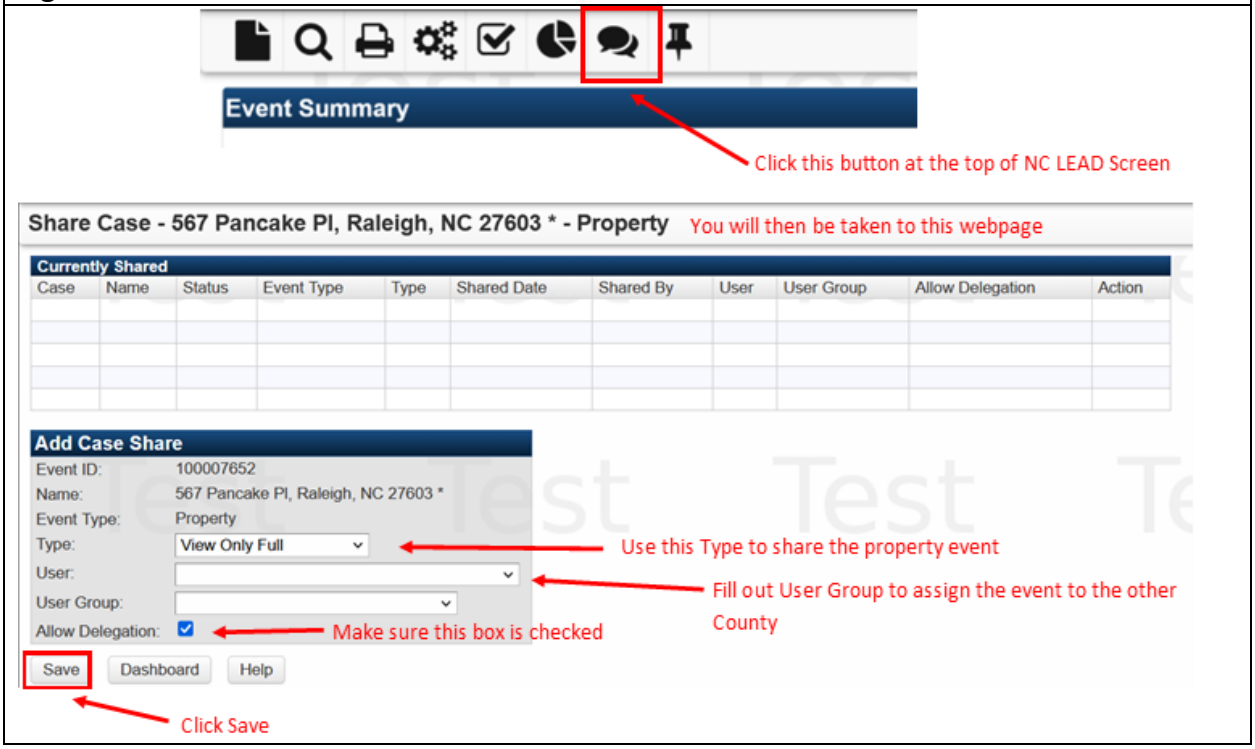
Figure 32: How to share CHILD events with other counties



PROPERTY events can also be shared with other counties. To share a property event with a county, follow the same steps, but change the Type.

Instead of View & Update Full, the Type for a property event should be “View Only Full”**.** See **Figure 33.**

Figure 33: How to share PROPERTY events with other counties



Pregnant Women (Prenatal Cases)

Note: General Statute investigation and remediation requirements apply to pregnant women as well as children who have elevated blood lead levels greater than or equal to 5 micrograms per deciliter (see below)

From North Carolina General Statute § 130A-131.9. **Investigation to identify lead poisoning hazards:**

> (b) The Department shall also conduct an investigation when it reasonably suspects that a lead poisoning hazard to children or pregnant women exists in a residential housing unit or child-occupied facility occupied, regularly visited, or attended by a child less than six years of age or a pregnant woman.

For **pregnant EBL cases**:

> (a1) When the Department learns of an elevated blood lead level, the Department shall, upon informed consent, investigate the residential housing unit where the child or pregnant woman with the elevated blood level resides. When consent to investigate is denied, the child or pregnant woman with the elevated blood lead level cannot be located, or the child's parent or guardian fails to respond, the Department shall document the denial of consent, inability to locate, or failure to respond.

For **pregnant CLP cases:**

> (a) When the Department learns of confirmed lead poisoning, the Department shall conduct an investigation to identify the lead poisoning hazards to children and pregnant women. The Department shall investigate the residential housing unit where the child or pregnant woman with confirmed lead poisoning resides. The Department shall also investigate the supplemental addresses of the child or pregnant woman who has confirmed lead poisoning.

From North Carolina General Statute § 130A-131.9C. **Abatement and Remediation**

> (a) Upon determination that a child less than six years of age or a pregnant woman has a confirmed lead poisoning of 10 micrograms per deciliter or greater and that child or pregnant woman resides in a residential housing unit containing lead poisoning hazards, the Department shall require remediation of the lead poisoning hazards. The Department shall also require remediation of the lead poisoning hazards identified at the supplemental addresses of a child less than six years of age or a pregnant woman with a confirmed lead poisoning of 10 micrograms per deciliter or greater.

The general statutes apply to both children and pregnant women and the instructions to follow-up on a CLP Case or an EBL case for children mostly apply for pregnant women as well.

NOTE: The definition of a supplemental address DOES NOT mention pregnant women; therefore, no investigation of supplemental addresses can occur for pregnant women.

See "CLP Cases" to document proper follow-up for **PREGNANT WOMEN** events.

See "EBL Cases" to document proper follow-up for **PREGNANT WOMEN** events.

Uploading Attachments to NCLEAD

Under the Basic Information section of the event dashboard, select **Add** next to Attachments to be taken to a page to upload files related to the **PREGNANT WOMAN** or **PROPERTY** Event. When adding attachments, the description should clearly indicate the item being uploaded for review. Please do not upload all attachments into one file. Listed below are the minimum attachments required for each event type. **All uploads should be .pdf, .png or .jpg.**

Minimum **PREGNANT WOMAN** event attachments:

- Form 3460P - including interviews at different addresses. (Security Level: Very High)
- Form 4116 - Lead and Pregnancy Risk Questionnaire DHHS (English/Spanish) (Security Level: Very High)
- Consent/Refusal Form - **EBL** Only (Security Level: Very High)
- If the investigation requires or if documentation is available:
    - Prenatal Referral (Security Level: Very High)
    - Food, Spice, Cosmetics, and Medicines Survey
    - Non-Property Hazards Lab Results
        - e.g., spices, food, candies, cosmetics, etc.

Minimum **PROPERTY** event attachments:

- Investigation Report
- Environmental Lab Results
    - e.g., dust, paint, soil
- Water Lab Results
- XRF Readings and Calibration Information
- Site Plan/Sketch
- All Notices to Tenants/Property Owners
- If the investigation requires:
    - Remediation Plan

- Environmental sample analysis reports
- Chain of Custody
- Photos

NOTE: If the investigation has been started before the baby has been born, then the investigation can be completed after the birth if the woman has the baby in the meantime.

- Note that a phone interview counts as the start of the investigation and should be recorded in NCLEAD.

Periodically check the following workflows (under the heading ***6. Environmental Health*** *in the Workflow Queues*) for prenatal cases that need follow-up. **Figure 34** demonstrates how to find the following workflows:

a. *02. CLP Pregnant Women Cases in need of environmental follow-up*

b. *04. EBL Pregnant Women Cases in need of environmental follow-up (rev 02/15/2022)*

Figure 34: Where to locate the Pregnant Women Cases Workflows

