

LeadCare® Reporting Software

Version 2.0

User's Guide

North Carolina



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Initial Set-up: LeadCare Reporting Software

Introduction: The LeadCare Reporting Software Program (Version 2.0) was developed to allow for data entry via keyboard alone or with a mouse. The software program offers flexibility to all physician office laboratories across the US utilizing the program and is compatible with Windows 7, 8 and 10.

North Carolina reporting requirements for blood lead test results:

Report all blood lead test results for children less than six years of age and for individuals whose age is unknown at the time of testing to the North Carolina Childhood Lead Poisoning Prevention Program within five (5) working days after the test is completed.



1. You have self-installed the LeadCare Report program from the website. Open the program by double clicking on the **LeadCare Report** icon found on the desktop.

2. Select Your **Reporting State** from the drop down:
North Carolina

3. Choose **Save Reporting State Settings**

The screenshot shows the 'Program Settings' dialog box with three tabs: 'Reporting State', 'Export Location', and 'Program Update'. The 'Reporting State' tab is active. It contains a dropdown menu for 'Select Your Reporting State' with 'North Carolina' selected. Below this is a text box for 'Default Value For Below-Detection Test Results' containing 'LOW'. At the bottom, there is a text box for 'Default Value for Results Above Upper Limit/High' containing '66'. At the very bottom of the dialog are two buttons: 'Save Reporting State Settings' and 'Cancel/Return'. Red arrows point from the text instructions to the dropdown menu and the 'Save Reporting State Settings' button.

4. **Users:** At least one user must be entered. If the facility has more than data entry person, additional users may be added.

Click **Save Reporter/User**

Records Settings

LeadCare
Lead (Pb) Reporting Software
Magellan Diagnostics, Inc.

State: **NC**
Facility: Product Support Lab
Recordset: **Thursday SEP 05, 2018**

User: LeadCare User
[Change User](#)

All Records Active Record Physicians / Facilities **Users**

New User Required Fields

User Name

Title

Note: The blue sidebar(s) designate Mandatory Fields.

[Save Reporter/User](#) [Reset Fields](#)

All Users (Click to Select, Click Header to Sort, Drag Border Above to Resize.)

Full Name	Last Name	First Name	Title
LeadCare User	User	LeadCare	Default User

5. Add the **Health Care Providers Information:** Select the Physician/Facilities tab, locate the Health Care Providers sub-tab and enter Provider information.

Click **Save Physician/ Facility**

Records Settings

LeadCare
Lead (Pb) Reporting Software
Magellan Diagnostics, Inc.

State: **NC**
Facility: Product Support Lab
Recordset: **Thursday SEP 05, 2018**

User: LeadCare User
[Change User](#)

All Records Active Record Physicians / Facilities Users

Health Care Providers Testing Labs Reporting Lab

New Health Care Provider Required Fields

Provider Phone Address
City
County
State
Zip

[Save Physician/Facility](#) [Reset Fields](#)

All Physicians / Facilities (Click to Select, Click Header to Sort, Drag Border Above to Resize.)

Resource Type	Physician / Contact	Facility	Phone Number	Address 1	Address 2	City	State
Reporting Lab		Product Support Lab					

6. Under the **Testing labs** tab, enter the **Testing Labs** information.

Note: CLIA Number is required for the state of North Carolina

Records Settings

LeadCare
Lead (Pb) Reporting Software
Magellan Diagnostics, Inc.

State: **NC**
Facility: Product Support Lab
Recordset: **Thursday SEP 05, 2018**

User: LeadCare User
[Change User](#)

All Records Active Record **Physicians / Facilities** Users

Health Care Providers **Testing Labs** Reporting Lab

New Testing Lab Required Fields

CLIA Number Testing Lab Address
Phone City
County
State
Zip

[Save Physician/Facility](#) [Reset Fields](#)

All Physicians / Facilities (Click to Select, Click Header to Sort, Drag Border Above to Resize.)

Resource Type	Physician / Contact	Facility	Phone Number	Address 1	Address 2	City	State
Reporting Lab		Product Support Lab					

7. Choose **Physicians/Facilities Tab** then **Reporting Lab** sub-tab and enter the **Reporting Lab** information.

Click **Save Reporting Facility**

Records Settings

LeadCare State: **NC** User: LeadCare User
Lead (Pb) Reporting Software Facility: Product Support Lab
Magellan Diagnostics, Inc. Recordset: **Thursday SEP 05, 2018**

All Records Active Record Physicians / Facilities Users

Health Care Providers Testing Labs Reporting Lab

Reporting Lab: Product Support Lab Required Fields

Reporting Facility

All Physicians / Facilities (Click to Select, Click Header to Sort, Drag Border Above to Resize.)

Resource Type	Physician / Contact	Facility	Phone Number	Address 1	Address 2	City	State
Reporting Lab		Product Support Lab					

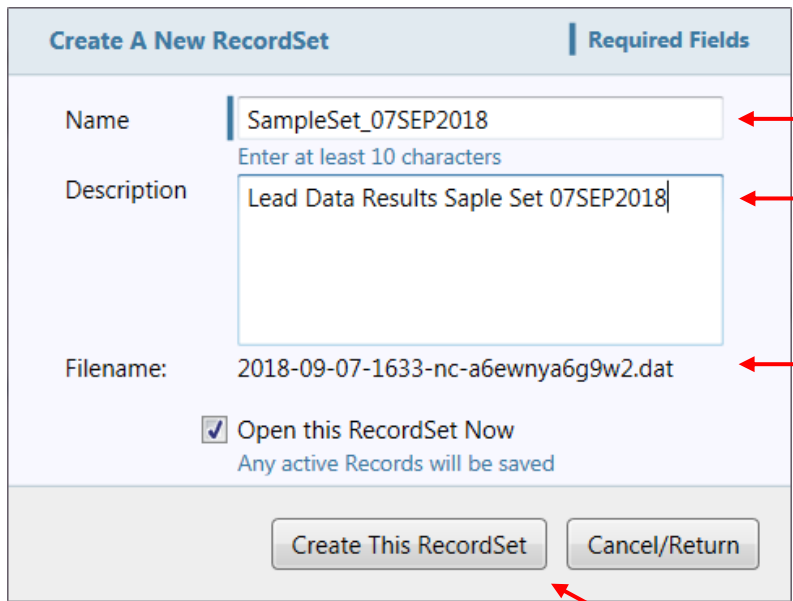
The Initial Setup is Complete!

Create RecordSet and Enter Data

Overview: Create a New RecordSet, a stored set of blood lead records created from data entered into the software. Once all patient information and blood lead results are entered into a RecordSet, create a report of this RecordSet for submission to the state. This report will have an automatically generated file name. Do not rename the file. Read through this entire chapter before entering data for the first time.

Creating a RecordSet Example:

1. Create a New **RecordSet** and give it a name. A description of the RecordSet may also be entered in the description field. Each RecordSet is automatically assigned a unique file name. A new RecordSet can be created daily or weekly depending on the needs of your facility and the requirements of the state.



← The RecordSet name is create by the **user**.

← The RecordSet description is created by the **user**.

← The FileName is automatically generated for each RecordSet. This is the file name that will ultimately be submitted to the state. ***DO NOT*** rename the file as it is a unique identifier.

← Click **Create This RecordSet**.

2. Select the appropriate User before beginning data entry. **Note:** The User info is located in the upper right hand corner of the record.
3. Create the first Active Record by completing all data entry in the **Active Record** tab. Complete each record fully before saving the lab record. RecordSets can be saved as incomplete active record to return to later to complete, but this is not recommended.

The Basics on Data Entry for North Carolina

Rules that apply to data in an individual record:

City, Counties, and Zip Code	Free text fields	The user can choose to utilize the drop-down menus or can manually type in the information. It will autofill when characters are entered into the field.
Street Number	Free text field	Allows for both numbers and characters (i.e. 5 ½). Do NOT input apartment information in this field.
Apt Number	Free text field	Do NOT use "#" or "APT" in this field. Only provide the number or letter of the apartment.
Calendar Date	Free text field	Type in the date or scroll through the calendar to enter the correct date. Date of Birth must be less than the Collection Date and Analysis Date . Collection Date must be on or before the Analysis Date.
Blood Lead Test Result	Only accepts numbers	If the Blood Lead result is Low or < 3.3 µg/dL use the radio button to select Result Below Detection . When this is selected the submission file will list <3.3 in the Pb (lead) result column.
Blood Lead Test Result	Only accepts numbers	All detectable Blood Lead results must have a number entered into the Reported Value field. The report will list the value to one decimal place. Do NOT use the "<" or ">" symbols at any time.
		If the result is High , select the radio button Result above the Upper Limit/High and the submission file will list 66 in the Pb result column. High results should be followed up immediately with an emergency lab test and shared with the physician.

Example of an NC record:

Records Settings

LeadCare
Lead (Pb) Reporting Software
Magellan Diagnostics, Inc.

State: **NC**
Facility: Product Support Lab
Recordset: **September 9, 2018**

User: LeadCare User
[Change User](#)

All Records Active Record Physicians / Facilities Users

New Lab Record Required Fields

Last Name	TEST	Parent LastName	TEST	Collection Date	9/12/2018 15
First Name	RECORD	Parent FirstName	RECORD	Analysis Date	9/12/2018 15
Middle Init		Phone		Specimen Type	Capillary
DOB	9/1/2017 15	Street Address	123 Main St	Sample Number	123456
Sex	Male	Apt Number		Test Result <input checked="" type="radio"/> Result Below Detection LOW <input type="radio"/> Reported Value <input type="text"/> <input type="radio"/> Result above Upper Limit/High 66	
Race	American Indian or Alaskan Na	County			
Ethnicity	Unknown	City	Wilmington		
SSN		State	North Carolina	Health Care Provider	Dr Smith
Medicaid#	<small>If Available</small>	ZipCode	28405	Testing Lab	Magellan Diagnostics

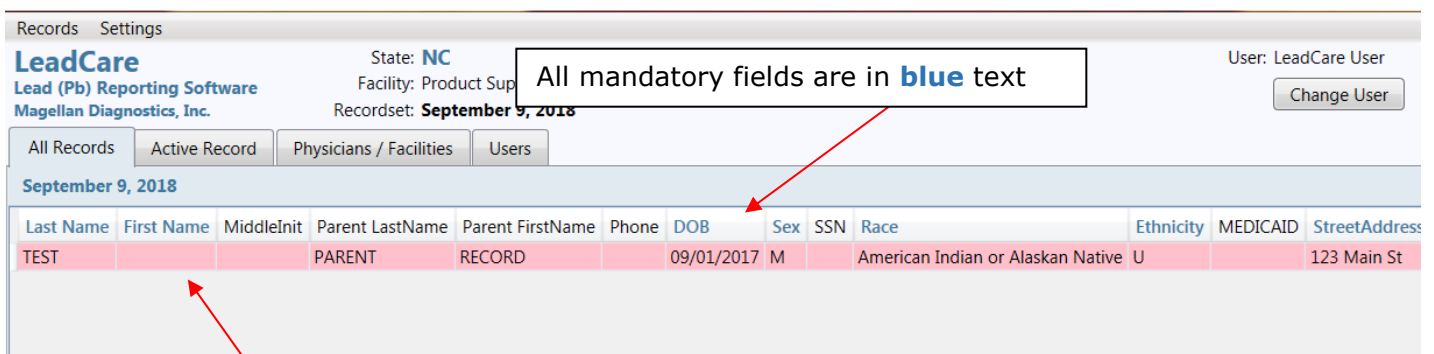
[Save Lab Record](#) [Reset Fields](#)

The county, city and zip code fields can be utilized as dropdowns or free text.

1. Fill out all necessary fields. Mandatory Fields are designated with a **blue** sidebar
2. How to fill out the Test Result field:
 - a. For patient results **<3.3 ug/dL**, choose Results Below Detection button
 - b. For patient result between **3.3 ug/dL and 65.0 ug/dL**, choose the Reported Value box and enter the numerical result.
 - c. For patient results **>65 ug/dL** choose. Results Above Upper Limit/High
3. In NC, the Medicaid Number is required, if applicable
4. How to use the Reset Fields button
 - a. If a record is being edited from an earlier SAVED version and the typist "gets lost" during editing, they can erase the newer information and restart by hitting the Reset button. The Reset button reverts back to the earlier Saved version of the record. If there is no saved version it will clear the record.

Complete a RecordSet and Fix Incomplete Records

1. Enter all Records for the reporting period, clicking **Save Lab Record** after each record entered. If a **red border** appears around a field when the record is saved, data may be incorrect or missing. Check the data carefully. Resolve the issue immediately by completing the mandatory field or correcting an erroneous Date of Birth, Collection Date, or Analysis Date. Resave the record after the correction. **ATTENTION: Although the presence of the blue sidebar is absent for the parent information section of the lab record, North Carolina requires the information to be included for all reported lead results.**
2. After entering all necessary information into the current RecordSet, review all data by clicking on the **All Records** tab. If any records are missing a mandatory field, the row will be highlighted in **red**.
3. To complete or fix a record, double-click on the row containing that record's data which will open the **Active Record** and allow for inserting missing information or fix incorrect data. NOTE: The software will not flag mistakes with the dates, for example: DOB comes after Date taken. Nothing else may be wrong with the record (no missing fields) and the row may not be highlighted in red in the All Records tab, but it is the user's responsibility to double check and fix any issues with the dates. Once the record is completed or fixed, click **Save Lab Record** to save the changes. Navigate to back to the **All Records** tab and observe that the record is no longer highlighted in red.
4. NOTE: From the **All Records** tab, mandatory fields are highlighted as **blue** text column headings. A record highlighted in red indicates there is missing data in one or more of the **blue** text column headings. If the record is highlighted in red from the **All Records** tab, there is no way to tell which blue column headings have missing data in it. Click on that particular record and fill in the missing data for those mandatory fields.



Records Settings

LeadCare
Lead (Pb) Reporting Software
Magellan Diagnostics, Inc.

State: NC
Facility: Product Sup
Recordset: September 9, 2018

User: LeadCare User
Change User

All Records Active Record Physicians / Facilities Users

September 9, 2018

Last Name	First Name	MiddleInit	Parent LastName	Parent FirstName	Phone	DOB	Sex	SSN	Race	Ethnicity	MEDICAID	StreetAddress
TEST			PARENT	RECORD		09/01/2017	M		American Indian or Alaskan Native	U		123 Main St

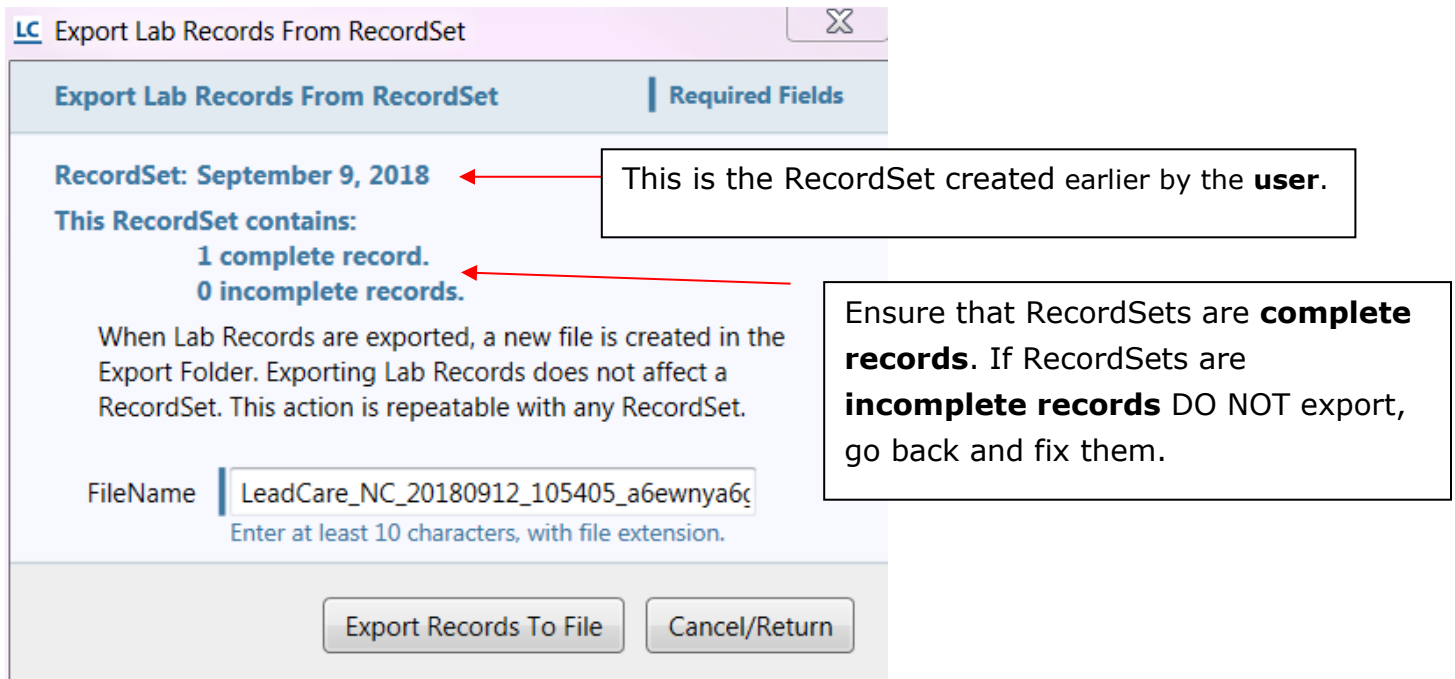
This record is highlighted in **red** because it is missing First Name, which is a mandatory field. Double clicking on this row will open up the Active Record tab where the missing data can be entered. Once corrected, save the updated record.

Export Completed RecordSet & Submit file to the State

1. Once the data has been reviewed for the current RecordSet, the RecordSet can be exported by clicking on **Records** in the upper left corner and selecting **Export Current RecordSet**.



2. Review the pop-up box for details on the RecordSet. Ensure that only completed RecordSet are submitted to the state. If data is incomplete, click **Cancel/Return** and go back to the **All Records** tab to review the data. Once files are complete, click **Export Records to File**.



3. Do NOT rename the FileName. This is a unique identifier.
4. The user may choose to export complete files only, or export all Lab Records, whether incomplete or complete. Note: This may create an incomplete file with blank mandatory fields.

If difficulties arise completing missing or incorrect data, please contact the state surveillance coordinator for help.

5. **Important!** The LeadCare Reporting Software does not automatically send the file to the state. The newly created file must be located on the computer and uploaded to the North Carolina LeadCare Report Uploads website:

<https://leadcare.ncpublichealth.com/>

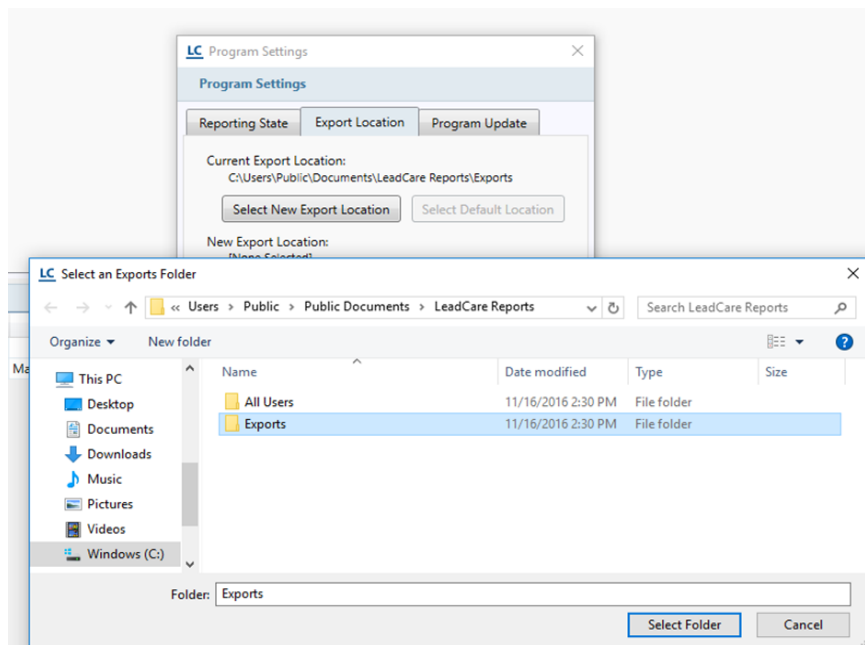
6. The default location on your computer of all exported data is here:

C:\Users\Public\Public Documents\LeadCare Reports\Exports.

To locate the most recent file, refer to the date and time stamp in the file name.

Tip: To quickly access the export location of the files, click on **Records**, and **Open Exports Folder** directly in the software.

The export location can be changed if required by the facilities IT department by going to **Settings → Program Settings → Export Location**.



Reporting Data for Out of State Children

If there is a need to report a blood lead test result for a child that lives in a state other than North Carolina, please reach out to that specific state's Childhood Lead Poisoning Prevention Program for details on how to deliver the blood lead test result.

If the state requires that the results be submitted as an electronic file, the LeadCare Reporting software can be modified to the other state's specifications and a RecordSet can be created and exported following the same instructions above.

The screenshot displays the LeadCare Reporting Software interface. At the top, it shows 'Records Settings', 'LeadCare Lead (Pb) Reporting Software', 'Magellan Diagnostics, Inc.', 'State: NC', 'Facility: Product Support Lab', 'Recordset: September 9, 2018', and 'User: LeadCare User'. Below this, there are tabs for 'All Records', 'Active Record', 'Physicians / Facilities', and 'Users'. The main area shows a table with columns for 'Last Name', 'First Name', 'MiddleInit', 'Parent LastNa', 'Ethnicity', 'MEDICAID', and 'StreetAddress'. A 'Program Settings' dialog box is open, showing options for 'Reporting State', 'Export Location', and 'Program Update'. The 'Reporting State' dropdown menu is highlighted with an orange box and shows 'Virginia' selected. Below the dropdown, there is a warning: 'Changing your reporting state may prevent you from working with Lab Results recorded for a different state.' There are also input fields for 'Default Value For Below-Detection Test Results' (set to <3.3) and 'Default Value for Results Above Upper Limit/High' (set to 66). At the bottom of the dialog box, there are 'Save Reporting State Settings' and 'Cancel/Return' buttons.

Go to **Settings** → **Program Settings** → and click on **drop-down menu** to change **Reporting State**

Childhood Blood Lead Test Submission Checklist

- To establish an electronic reporting account for the transfer of blood lead results, contact Kim Gaetz at the NC Children’s Environmental Health Unit by phone: (919)707-5953 or by email: kim.gaetz@dhhs.nc.gov

The program will:

- Obtain the practice’s unique provider (CLIA/NPI) code and collect contact information.
- Register the practice to gain access to a secure electronic submission portal.

Setting up the LeadCare Version 2.0 Reporting Software:

- Enter the provider code by clicking on the **Physicians/Facilities** tab, and then selecting the **Reporting Facility** tab. This step is very important. If it is not done, all data created will be rejected.
- Enter Reporting Facility (practice name) under the **Reporting Facility** tab.
- Enter provider names under the **Ordering Physicians** tab. Multiple physicians/providers can be added to meet the needs of the practice.
- User information is required by the program under the **Users** tab.
- Enter **Collection Site** required by the program under the **Collection Sites** tab. Multiple collection sites can be added.

Creating a data file:

- Create the first RecordSet by clicking **Records** at the top left, and then selecting **New RecordSet**. Add a RecordSet name, and then click **Create this RecordSet** when finished.
- Begin entering data by clicking on the **Active Record** tab. After each record is complete, click **Save Lab Record**. Open a new blank active record page by clicking **New Lab Record**. Continue doing this until each patient result has been entered into the RecordSet.
- Review records in the RecordSet by clicking on the **All Records** tab. **Red** highlighted rows have missing or incorrect data. Double Click on each **red** row to review the data and make corrections. Click **Save Lab Record** after making corrections.
- After all data has been reviewed and corrected, export the RecordSet to a file by clicking **Records** in the top left and selecting **Export Current RecordSet**. The exported file can be accessed by clicking **Records** and selecting **Open Exports Folder**.

Important Notes (Please Read):

- After you enter and save the results and required information for one child, please **make sure to Click "New Lab Record"** before entering results for the next child. If you do not do this, you will overwrite the previous child's results.
- After you upload a file, please select **"New Record Set"** under **"Records"** at the top of the software, otherwise the software will just keep adding your new results to the old record file that you already reported, and NC will have lots of duplicate test results in our system.
- Do not change the file type that is exported! **You should be sending NC .xml files**, which is what comes out of the software. Do not change the extension to .dat as shown in the instruction manual.

**For questions regarding result reporting or North Carolina law,
please contact Kim Gaetz at (919) 707-5953 or by email**

kim.gaetz@dhhs.nc.gov