

## How To Do An Advanced Search

Advanced Search can be used when the complete basic search criteria is not readily available or is unknown (e.g., only the last name is known). It was created to search for patients known to be in the system when the basic search criteria is not sufficient information to find them.

① Click on “Advanced Search”

The screenshot shows the SDIR Search Page in Microsoft Internet Explorer. The page title is "SDIR - Search Page - Microsoft Internet Explorer". The navigation bar includes "SEARCH", "DEMOGRAPHICS", "IMMUNIZATION", "SCREENINGS", "ACTIVITY LOG", "SAVE", "UTILITY", and "LOGOUT". The user is logged in as "Admin | CS SDIR | Standard | Training Clinic". There are "RESET" and "ADVANCED SEARCH" buttons. The "ADVANCED SEARCH" button is circled in red with a red "1" next to it. Below the buttons are input fields for "Last", "First", "Middle", "DOB", "Mother Maiden", "Gender" (with a dropdown menu), and "Med Rec # starts with" (with a dropdown menu). A "SEARCH" button is at the bottom right. The main content area is labeled "\*\* Search Results Area \*\*" and is currently empty.

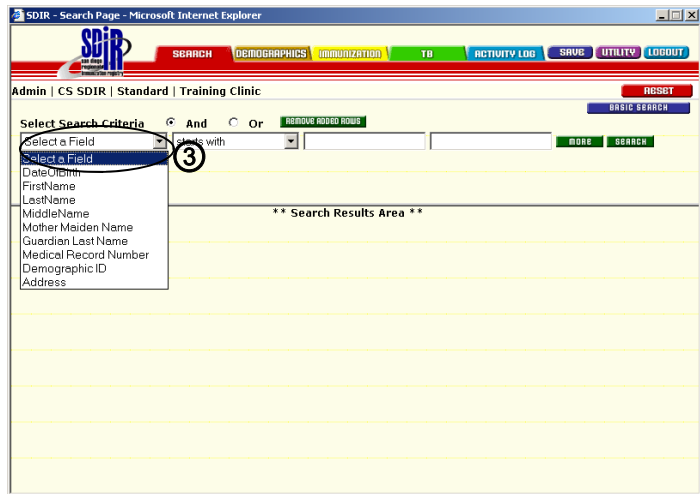
② Click on “And” or “Or”

Using “**And**” means that you are able to search for many variables combined; e.g., you may know the patient’s first name is Jose AND his DOB equals 02-02-2000. If you search using these variables, your outcome should be ALL patients with a first name of Jose and DOB of 02-02-2000. If there are no patients with these criteria in the Registry, a message indicating this will be shown in the “Search Results Area.”

Using “**Or**” will list all patients with any OR all of the variables. If there are no matches, a message indicating this will be shown.

The screenshot shows the SDIR Search Page in Microsoft Internet Explorer. The page title is "SDIR - Search Page - Microsoft Internet Explorer". The navigation bar includes "SEARCH", "DEMOGRAPHICS", "IMMUNIZATION", "SCREENINGS", "ACTIVITY LOG", "SAVE", "UTILITY", and "LOGOUT". The user is logged in as "Admin | CS SDIR | Standard | Training Clinic". There are "RESET" and "BASIC SEARCH" buttons. Below the buttons are radio buttons for "And" and "Or", which are circled in red with a red "2" next to them. Below the radio buttons is a "REMOVED ADDED ROWS" button. Below that are input fields for "Select Search Criteria" (with a dropdown menu), "starts with" (with a dropdown menu), and "MORE" and "SEARCH" buttons. The main content area is labeled "\*\* Search Results Area \*\*" and is currently empty.

③ Select a field

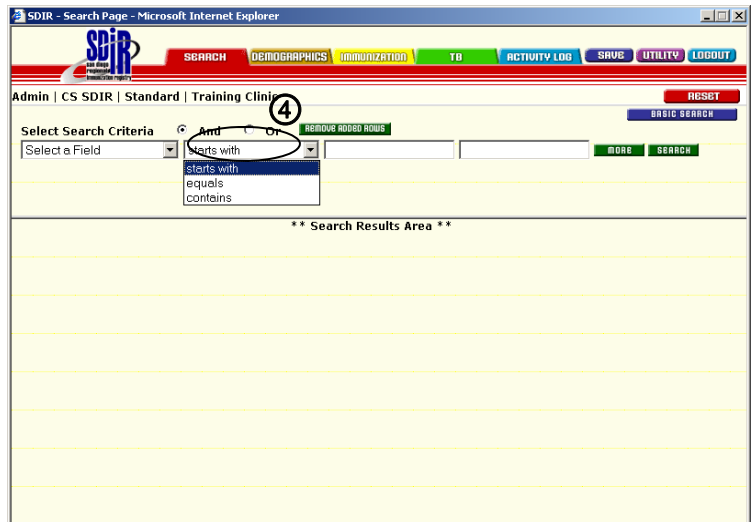


④ Select “starts with,” “equals.”  
“contains”

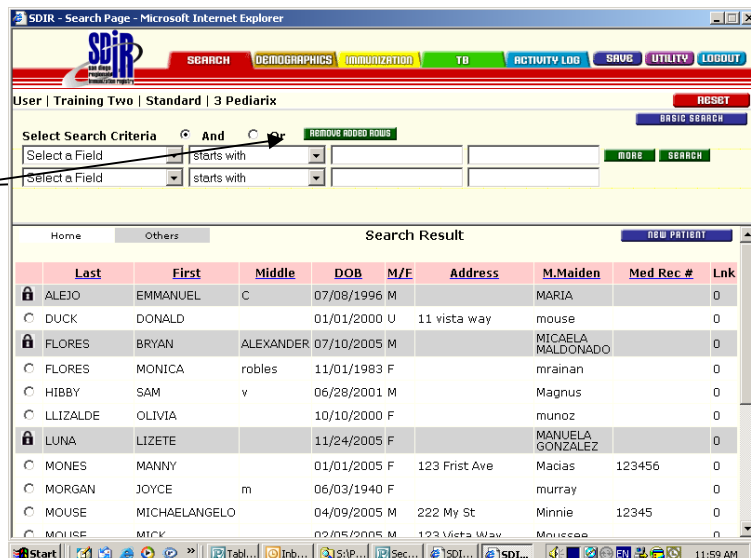
Starts with: what letters or numbers does your query start with (e.g., “Mar” or “01”)

Equals: what exact letters or numbers are in your query (e.g., “Maria” or “01/01/03”)

Contains: what letters or numbers does Your query contain (“Ma or “03”)



You can refine additional search criteria by adding more row with fields to select. Click the “Add More Rows” to insert rows,; to remove them, click on “Remove Added Rows”.

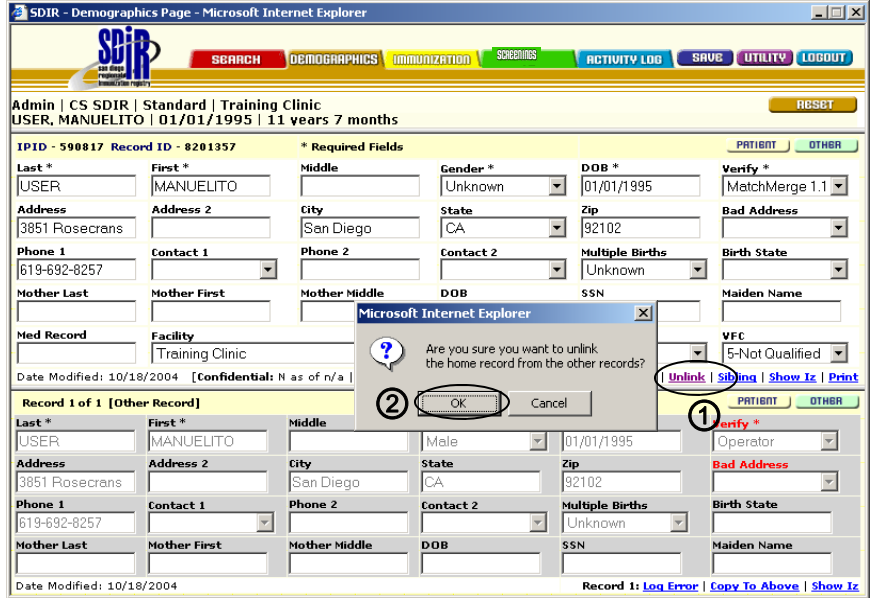


## How To Unlink a Patient Record

① Click on “Unlink”

**Note:** Unlinking will unlink all records that are linked together

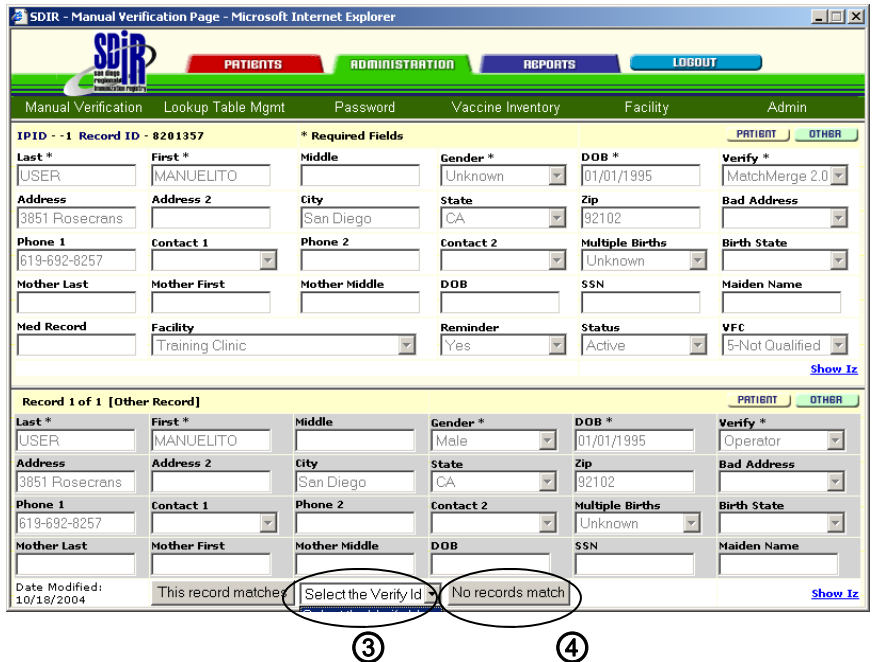
② Click on “OK”



You will now be taken into manual verification.

③ Select who (the operator of the computer or the patient/ parent) verified the records should be unlinked

④ Click on the “No Records Match” button.



⑤ Click on “OK” to verify you are creating a new record

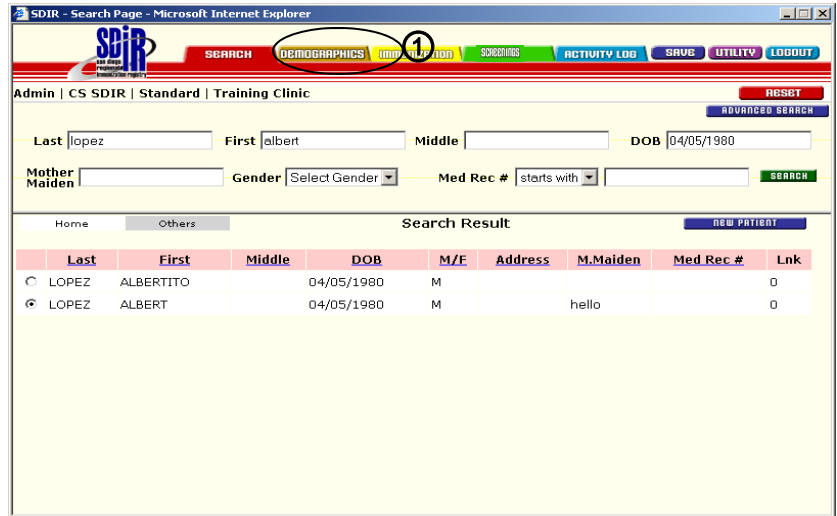
The screenshot shows the 'SDIR - Manual Verification Page' in a Microsoft Internet Explorer browser. The page has a navigation bar with 'PATIENTS', 'ADMINISTRATION', 'REPORTS', and 'LOGOUT'. Below this is a sub-menu with 'Manual Verification', 'Lookup Table Mgmt', 'Password', 'Vaccine Inventory', 'Facility', and 'Admin'. The main form is titled 'IPID - 1 Record ID - 8201357' and contains various fields for patient information. A dialog box titled 'Microsoft Internet Explorer' is overlaid on the form, displaying the message 'You are creating new Record' and two buttons: 'OK' (circled in red) and 'Cancel'. A circled '5' is placed next to the 'OK' button. The form fields include: Last \* (USER), First \* (MANUELITO), Middle, Gender \* (Unknown), DOB \* (01/01/1995), Verify \* (MatchMerge 2.0), Address (3851 Rosecrans), Address 2, City (San Diego), State (CA), Zip (92102), Bad Address, Phone 1 (619-692-8257), Contact 1, Phone 2, Contact 2, Multiple Births (Unknown), Birth State, Mother Last, Mother First, Mother Middle, DOB, SSN, Maiden Name, Med Record, Facility (Training Clinic), Reminder (Yes), Status (Active), VFC (5-Not Qualified), and a 'Show It' link.

You will then be given your home record back without the link record attached.

The screenshot shows the 'SDIR - Demographics Page' in a Microsoft Internet Explorer browser. The page has a navigation bar with 'SEARCH', 'DEMOGRAPHICS', 'IMMUNIZATION', 'TB', 'ACTIVITY LOG', 'SAVE', 'UTILITY', and 'LOGOUT'. Below this is a sub-menu with 'Admin | CS SDIR | Standard | Training Clinic' and 'USER, MANUELITO | 01/01/1995 | 11 years 7 months'. A 'RESET' button is visible. The main form is titled 'IPID - 592106 Record ID - 8201357' and contains various fields for patient information. The fields are: Last \* (USER), First \* (MANUELITO), Middle, Gender \* (Unknown), DOB \* (01/01/1995), Verify \* (Operator), Address (3851 Rosecrans), Address 2, City (San Diego), State (CA), Zip (92102), Bad Address, Phone 1 (619-692-8257), Contact 1, Phone 2, Contact 2, Multiple Births (Unknown), Birth State, Mother Last, Mother First, Mother Middle, DOB, SSN, Maiden Name, Med Record, Facility (Training Clinic), Reminder (Yes), Status (Active), VFC (5-Not Qualified), and a 'Show It' link. At the bottom, there is a message: 'No Duplicate Records to Display'. The page also includes a 'Date Modified: 08/21/2006' and a list of links: '[Confidential: N as of 10/11/2004 | CHANGE | Home Record: Archive | Link | Unlink | Sibling | Show It | Print]'. A 'RESET' button is also present.

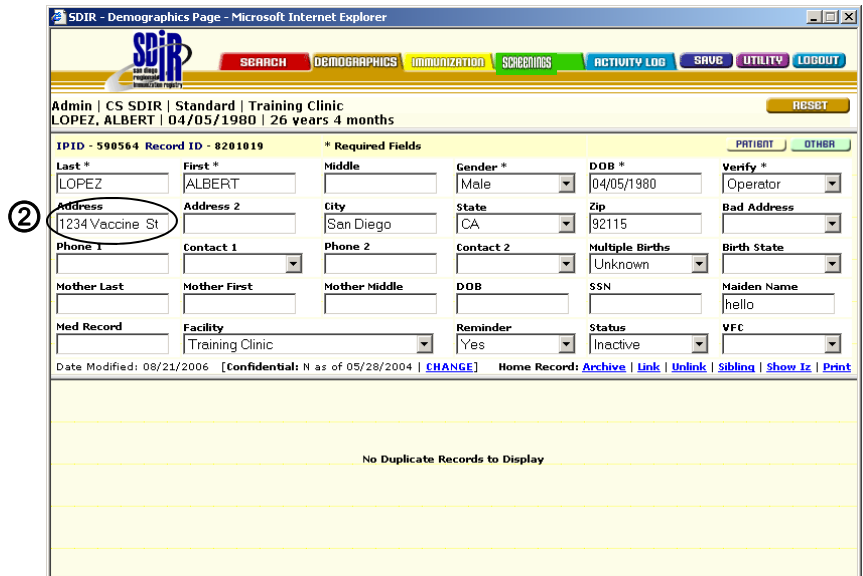
## How To Edit Demographics

- 1 Select Record then click on the DEMOGRAPHICS tab



- 2 Click on the field you want to edit

**Note:** The patient's record must be a home record (white record) in order for you to edit information



③ Highlight the field and type over your changes

Note: Some fields contain drop down menus only. After you click on the field, scroll down to choose the option you want.

SDIR - Demographics Page - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION TB ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | CS SDIR | Standard | Training Clinic  
 LOPEZ, ALBERT | 04/05/1980 | 26 years 4 months

IPID - 590564 Record ID - 8201019 \* Required Fields PATIENT OTHER

Last *	First *	Middle	Gender *	DOB *	Verify *
LOPEZ	ALBERT		Male	04/05/1980	Operator
Address	Address 2	City	State	Zip	Bad Address
1111Vaccine St		San Diego	CA	92115	
Phone 1	Contact 1	Phone 2	Contact 2	Multiple Births	Birth State
				Unknown	
Mother Last	Mother First	Mother Middle	DOB	SSN	Maiden Name
					hello
Med Record	Facility	Reminder	Status	VFC	
	Training Clinic	Yes	Inactive		

Date Modified: 08/23/2006 [Confidential: N as of 05/28/2004] CHANGE Home Record: Archive | Link | Unlink | Sibling | Show Iz | Print

No Duplicate Records to Display

④ To make changes that are located in the “Other” section click on “Other”

⑤ If no additional changes are needed, save the changes by clicking on the SAVE tab: Some fields contain drop down menus only. After you click on the field, scroll down to choose the option you want.

SDIR - Demographics Page - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION TB ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | CS SDIR | Standard | Training Clinic  
 LOPEZ, ALBERT | 04/05/1980 | 26 years 4 months

IPID - 590564 Record ID - 8201019 \* Required Fields PATIENT OTHER

Last *	First *	Middle	Gender *	DOB *	Verify *
LOPEZ	ALBERT		Male	04/05/1980	Operator
Address	Address 2	City	State	Zip	Bad Address
1111Vaccine St		San Diego	CA	92115	
Phone 1	Contact 1	Phone 2	Contact 2	Multiple Births	Birth State
				Unknown	
Mother Last	Mother First	Mother Middle	DOB	SSN	Maiden Name
					hello
Med Record	Facility	Reminder	Status	VFC	
	Training Clinic	Yes	Inactive		

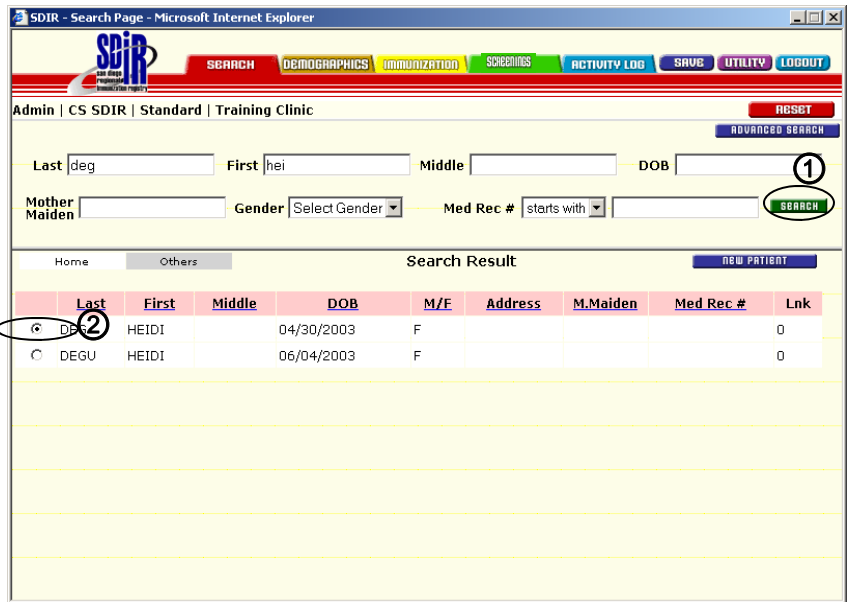
Date Modified: 08/23/2006 [Confidential: N as of 05/28/2004] CHANGE Home Record: Archive | Link | Unlink | Sibling | Show Iz | Print

No Duplicate Records to Display

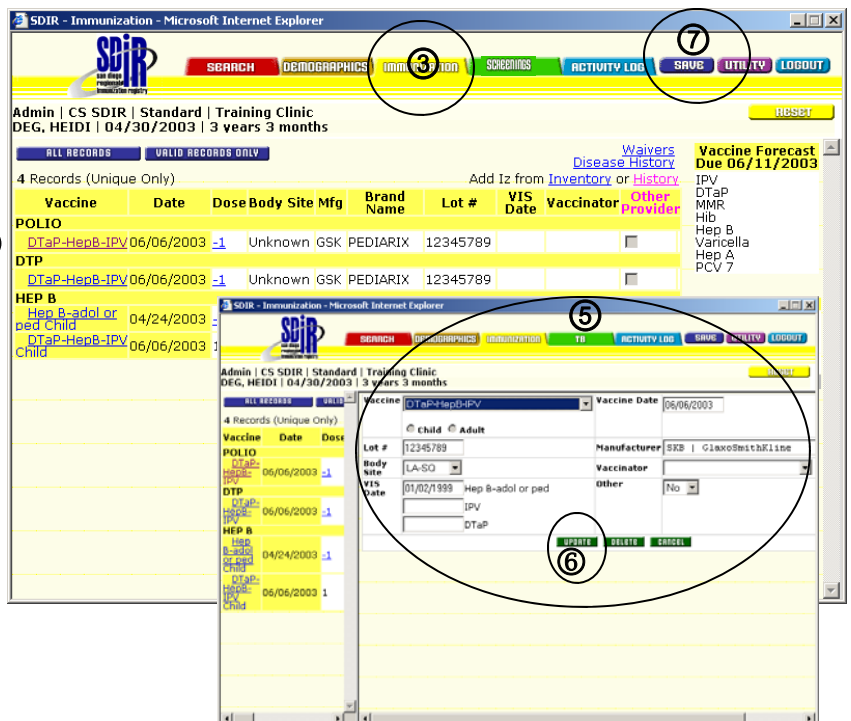
## How to Edit Immunizations

**Note:** You can only edit information for Home Records (white records).

- ① Do a patient search  
(refer to “How to Search for a Patient” in the Search section of this manual)
- ② Click in the circle next to the patient’s name



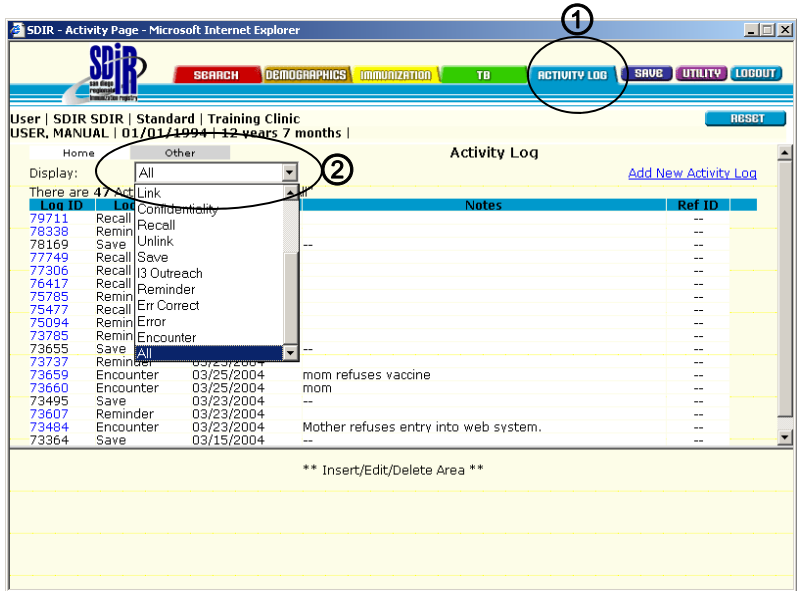
- ③ Click on the IMMUNIZATION tab
- ④ To edit immunizations that were entered by you (from inventory or historical records), click on the immunization link
- ⑤ Edit the necessary information
- ⑥ Click on the UPDATE button to update the information
- ⑦ Click on the SAVE tab to save changes



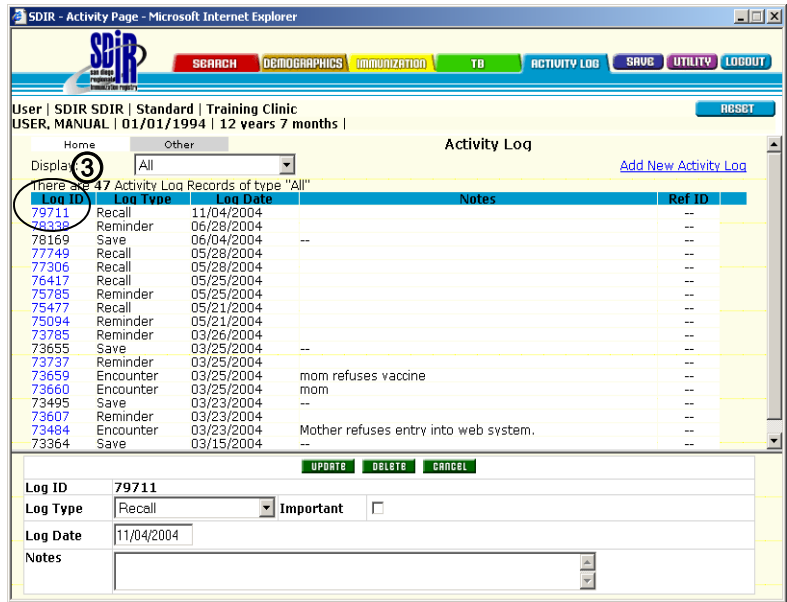
## How to Edit an Activity in the Activity Log

You can edit an entry you have made in the Activity Log if you are working on a home record.  
 (Note: activities automatically generated by the computer cannot be edited, e.g. Save)

- ① Click on the ACTIVITY LOG tab
- ② Click on arrow to choose an activity from the drop down menu



- ③ Click on "Log ID"



④ Edit the entry in "Notes"

⑤ Click on "Update"

The screenshot shows the SDIR Activity Log page. At the top, there are navigation tabs: SEARCH, DEMOGRAPHICS, IMMUNIZATION, SCREENINGS, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. Below the tabs, the user information is displayed: User | SDIR SDIR | Standard | Training Clinic, USER, MANUAL | 01/01/1994 | 12 years 7 months |. A RESET button is also present. The main content area is titled "Activity Log" and shows a table of 47 records. The table has columns for Log ID, Log Type, Log Date, Notes, and Ref ID. The record with Log ID 79711 is highlighted. Below the table, there is an edit form for this record. The form includes fields for Log ID (79711), Log Type (Recall), Log Date (11/04/2004), and Notes (Mother was called but phone number has been disconnected.). There are buttons for UPDATE, DELETE, and CANCEL. The UPDATE button is circled with a '5', and the Notes field is circled with a '4'.

### OUTCOME

The screenshot shows the SDIR Activity Log page after the update. The record with Log ID 79711 is now visible in the table with the updated Notes: "Mother was called but phone number has been disconnected.". Below the table, there is a section labeled "\*\* Insert/Edit/Delete Area \*\*".