

How to Search for a Patient

After you have chosen your facility and click on Submit, the next screen will be the SEARCH tab.

- ① Enter the first 3 letters of the last name then press the “Tab” key
- ② Enter the first 3 letters of the first name
- ③ Click on “Search” or hit the enter key.

SDIR - Search Page - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | CS SDIR | Standard | 3 Pediarix

LAST FIRST MIDDLE DOB

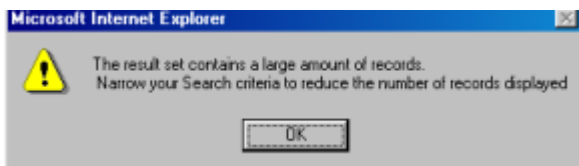
Mother Maiden Gender Select Gender Med Rec # starts with

SEARCH

** Search Results Area **

The results will display only 25 records.

You may see a screen that reads:



If you see this screen,

click on “OK” and enter the date of birth (DOB) or other pertinent information to help narrow your search. (If you do not have additional information, then proceed with reviewing the records shown on your screen.) (Note: for the DOB, you must use 2 digits for the month and day and 4 digits for the year.)

Display of Records

SDIR - Search Page - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION TB ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | CS SDIR | Standard | 3 Pediarix

RESET

ADVANCED SEARCH

Last record First Middle DOB

Mother Maiden Gender Select Gender Med Rec # starts with SEARCH

Home Others Search Result NEW PATIENT


	Last	First	Middle	DOB	M/F	Address	M.Maiden	Med Rec. #	Lnk
C	RECORD	CONFIDENTIAL		02/02/2002	F				0
B	RECORD	OTHER		02/02/2002	M	789 Front Ave			0
A	RECORD	HOME		01/01/2003	F	123 1st St.			0

A White Record = **home record**

This is a record that was created by your facility. There should only be one home record for each patient.

B Gray Record = **other facility's record**

This is a record that was created by another provider

C  Icon that looks like a lock = **confidential record**

A confidential record is a record that can be accessed only by the facility where the Registry patient information was obtained. If the patient/parent/legal guardian decides to share the record, the provider can change the confidentiality status of the patient. See page 2.19 for instructions on how to change the confidentiality status.

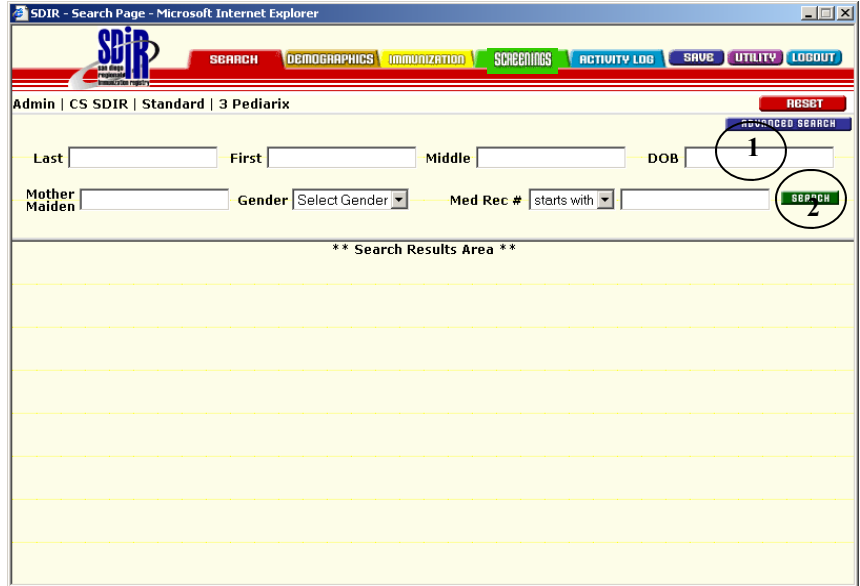
D **Number of records linked to the displayed record(s)**

A linked record is a record that has been attached to another record within the database. The Registry system will automatically do this when it feels that identifying criteria has been matched. You as a user will also have the ability to do this.

The number listed under the "Link" header is the actual number of records to which your record is attached/linked. Note: If you see that there is more than one home record for the same patient; please follow the instructions on how to merge duplicate home records.

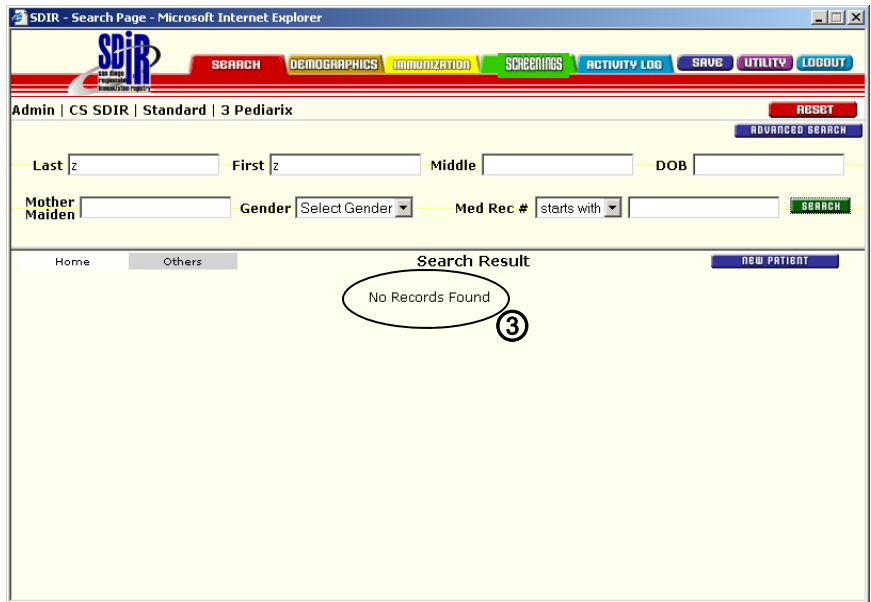
IF YOUR PATIENT IS NOT DISPLAYED

- ① Enter additional information to narrow the search (e.g., enter Date of Birth-DOB)
- ② Click on “Search”



- ③ If your patient is still not displayed, you will need to create a new patient record. Proceed to the next page, “How to Enter a New Patient.”

If your patient is displayed, proceed to “If Your Patient Is Displayed,” page 2.17.



How to Enter a New Patient

While in the SEARCH module:

- ① Enter the first 3 letters of the last name then press the “Tab” key
- ② Enter the first 3 letters of the first name
- ③ Click on “Search”

If there are no matching records (you will see “No Records Found” on the screen), enter more information about the patient. If you still can’t find the patient, proceed to step 4.

If there are matching records, you will need to confirm whether or not any of the records match the patient you are entering. If your new patient does not match any of the records, then proceed to step 4.

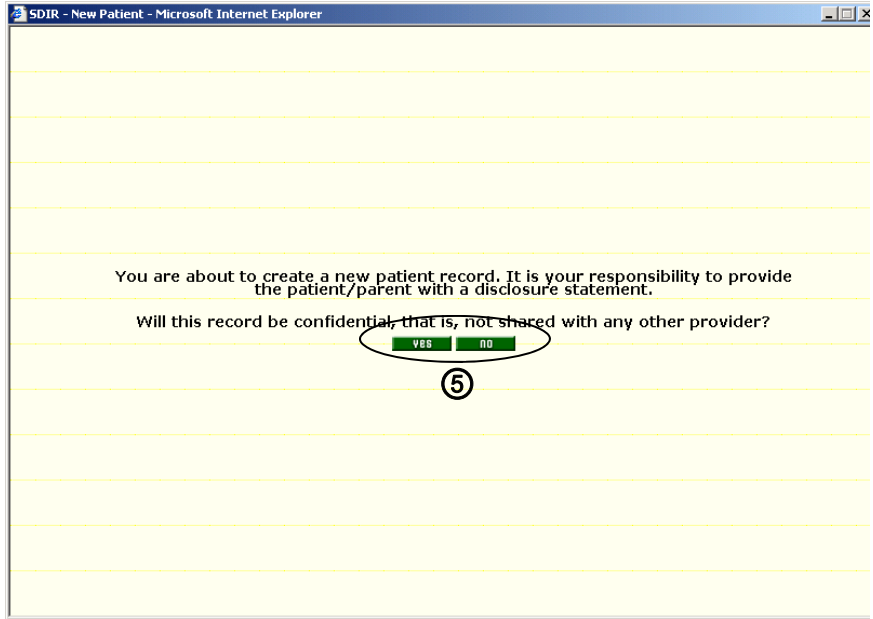
- ④ Click on “New Patient”

The screenshot shows the SDIR Search Page in Microsoft Internet Explorer. The browser title is "SDIR - Search Page - Microsoft Internet Explorer". The page has a navigation bar with tabs for SEARCH, DEMOGRAPHICS, IMMUNIZATION, TB, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. Below the navigation bar, there is a breadcrumb trail: Admin | CS SDIR | Standard | 3 Pediarix. The main form contains several input fields: Last (abc), First (def), Middle, and DOB. Below these are Mother Maiden, Gender (Select Gender), and Med Rec # (starts with). A green "SEARCH" button is circled with a red circle containing the number 3. There are also "RESET" and "ADVANCED SEARCH" buttons. At the bottom of the form, there are "Home" and "Others" tabs, and a "NEW PATIENT" button. The search result area displays "No Records Found".

The screenshot shows the same SDIR Search Page as above, but with the "NEW PATIENT" button circled in red with a red circle containing the number 4. The "SEARCH" button is no longer circled. The rest of the page content, including the navigation bar, breadcrumb trail, and search result area, remains the same.

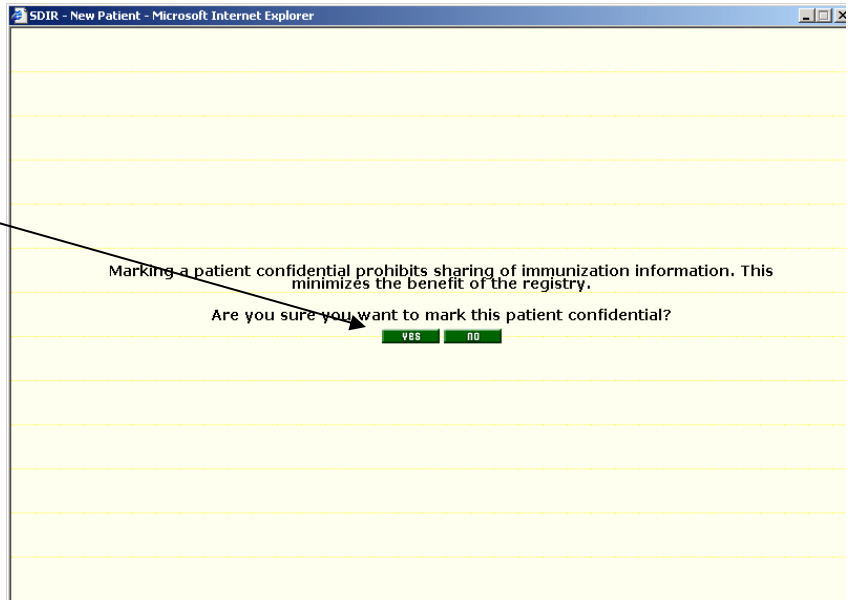
⑤ It is your responsibility to provide the Disclosure Statement to the parent/patient. If the parent/patient agrees to share the record, click “No.” This record will be UNCONFIDENTIAL.

You can make the record CONFIDENTIAL (thus patient information will not be shared) by clicking “Yes”



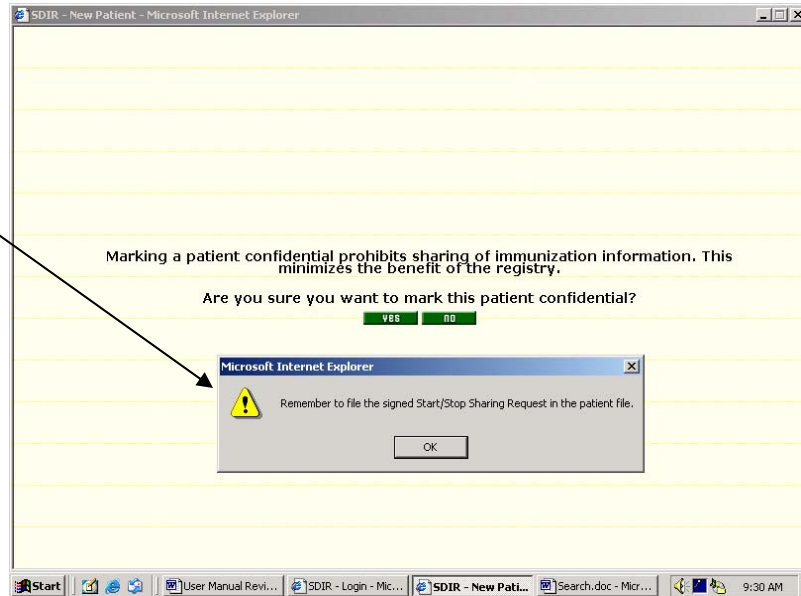
If you clicked “Yes” in the previous screen, you will see this screen.

If you click “Yes” again, you will be creating a CONFIDENTIAL record.



Before you can proceed, you will see a prompt to remind you to file the Start/Stop Sharing Request form.

Remember, it is your responsibility to file this form.



Note: Before creating a new home record, you may see an alert to prevent multiple home records: If your site has two or more home records for one patient, you will receive a prompt after searching for the record, selecting the record and clicking on the demographic tab.

The message states: *“This patient already has two or more records created by your site. There may be shots in several of the duplicate records.”*

Please select one record to use.

How to work with duplicate home records

Duplicate patient records from the same provider: Duplicate home records are to be avoided however, they may occur. Users may find that they are unable to edit fields in the bottom home record. See item 1 on how to identify a duplicate home record. There are several methods of dealing with duplicate home records.

Method One:

- 1) You can copy all the necessary information from the duplicate record with the least amount of relevant information into the home record that has the most information and then archive the duplicate. See Section 3, page 3.2 on how to archive a patient record.
- 2) You can decide to temporarily keep both home records and then click on the word “edit” at the bottom of the Demographic screen to edit the second (duplicate) home record.

The screenshot shows the SDIR Demographics Page in Microsoft Internet Explorer. The page displays two patient records for 'USER, MANUEL | 01/01/2001 | 5 years 7 months'. The top record is labeled 'Record 1 of 1 [Home Record]' and is highlighted in yellow. The bottom record is a duplicate and is dimmed. Annotations include a circled '1' pointing to the 'Record 1 of 1 [home record]' label and an arrow pointing to the 'Edit' link at the bottom of the duplicate record.

① Record 1 of 1 [home record]

Click on edit to rotate this record to the top

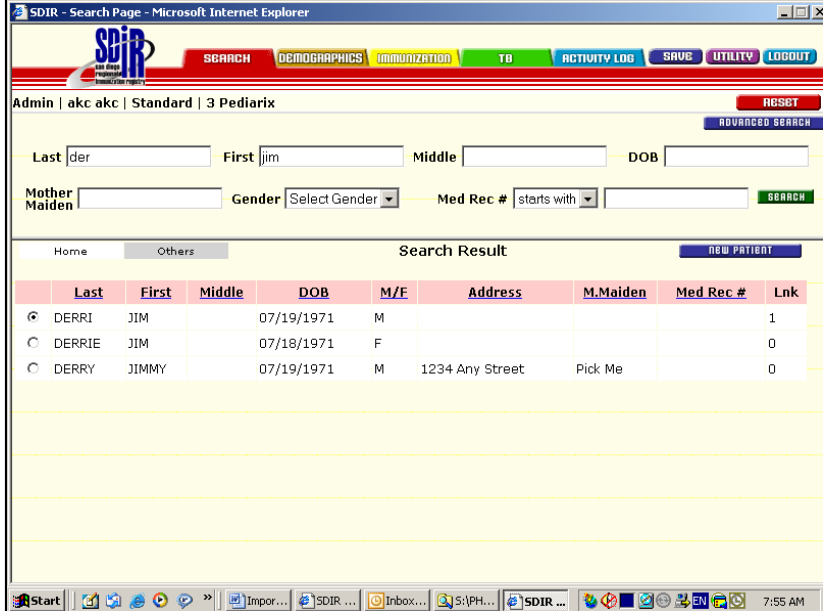
The bottom screen will then be rotated to the top and changes can then be made to the duplicate demographic or immunization record.

Method Two: Merge Linked Duplicate Home Records

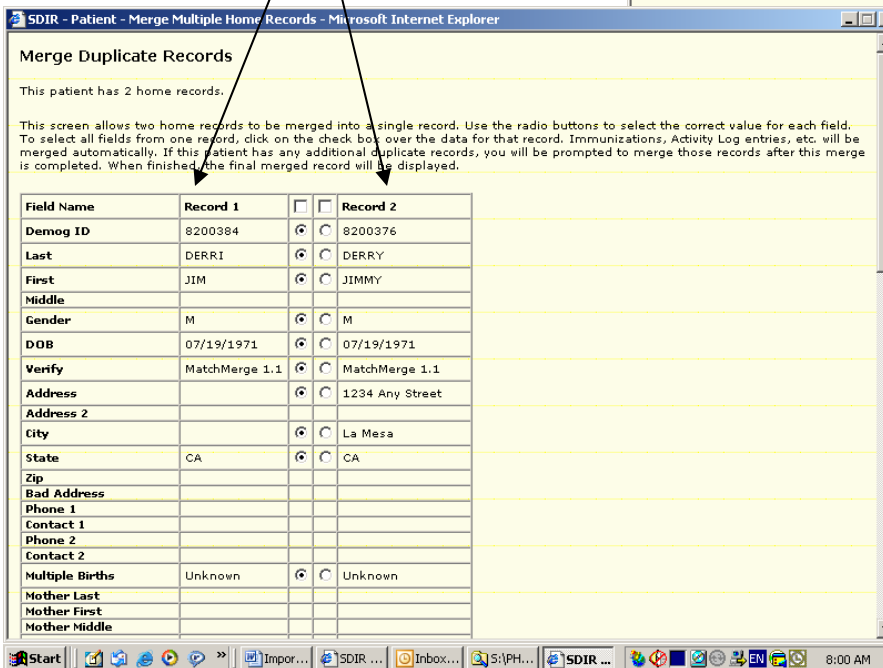
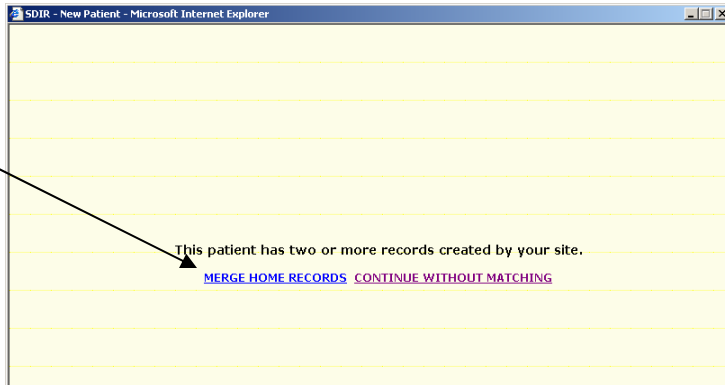
The merge linked duplicate home records feature allows users to merge linked duplicate home records. (Following this explanation will be how to linked, unlinked duplicate home records.)

Merging linked duplicate home records works like this:

1. When searching for a patient, the user sees multiple white (home) records for obviously the same patient. (This can happen when a patient's first or last name is spelled in various ways.)
2. Select one of the patient's white records.
3. Click on the Demographics tab



4. Click on Merge home records.
5. The data fields for the two duplicate records will appear side-to-side



6. Select the data fields, row-by-row, which are the most accurate and up-to-date.

You select by clicking in the circle of the information that you want.

7. Once the data has been reviewed for each field and a choice made on which field has the most current and correct information on the patient, scroll down to the bottom of the screen and click on Merge.

SDIR - Patient - Merge Multiple Home Records - Microsoft Internet Explorer

Merge Duplicate Records

This patient has 2 home records.

This screen allows two home records to be merged into a single record. Use the radio buttons to select the correct value for each field. To select all fields from one record, click on the check box over the data for that record. Immunizations, Activity Log entries, etc. will be merged automatically. If this patient has any additional duplicate records, you will be prompted to merge those records after this merge is completed. When finished, the final merged record will be displayed.

Field Name	Record 1	<input type="checkbox"/>	<input type="checkbox"/>	Record 2
Demog ID	8200384	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8200376
Last	DERRI	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DERRY
First	JIM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	JIMMY
Middle				
Gender	M	<input checked="" type="checkbox"/>	<input type="checkbox"/>	M
DOB	07/19/1971	<input checked="" type="checkbox"/>	<input type="checkbox"/>	07/19/1971
Verify	MatchMerge 1.1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MatchMerge 1.1
Address		<input type="checkbox"/>	<input checked="" type="checkbox"/>	1234 Any Street
Address 2				
City		<input type="checkbox"/>	<input checked="" type="checkbox"/>	La Mesa
State	CA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CA
Zip				
Bad Address				
Phone 1				
Contact 1				
Phone 2				
Contact 2				
Multiple Births	Unknown	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unknown
Mother Last				
Mother First				
Mother Middle				

SDIR - Patient - Merge Multiple Home Records - Microsoft Internet Explorer

Guardian 2 First				
Guardian 2 Middle				
DOB				
SSN				
Guardian 2 Relationship	Self	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Self
Medi-Cal				
Email Address				
Email POC				
Email Bad				
Phone 3				
Contact 3				
County	San Diego	<input checked="" type="checkbox"/>	<input type="checkbox"/>	San Diego
Country	United States	<input checked="" type="checkbox"/>	<input type="checkbox"/>	United States
School				
Physician				
Birth Country				
Informed	Y	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Y
Phone_poc				
Status	A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	A
Wic id				
Tb patient flag				
Tb treatment start date				
Tb treatment end date				
Tb next due date				
Tb phase				
Tb treat end Reason				
Tb case status				
Tb insurance				
Tb program subscriber	N	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N
Confidential flag	N	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N
Confidential flag date	09/08/2003	<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/20/2003
Birth State				

MERGE CANCEL

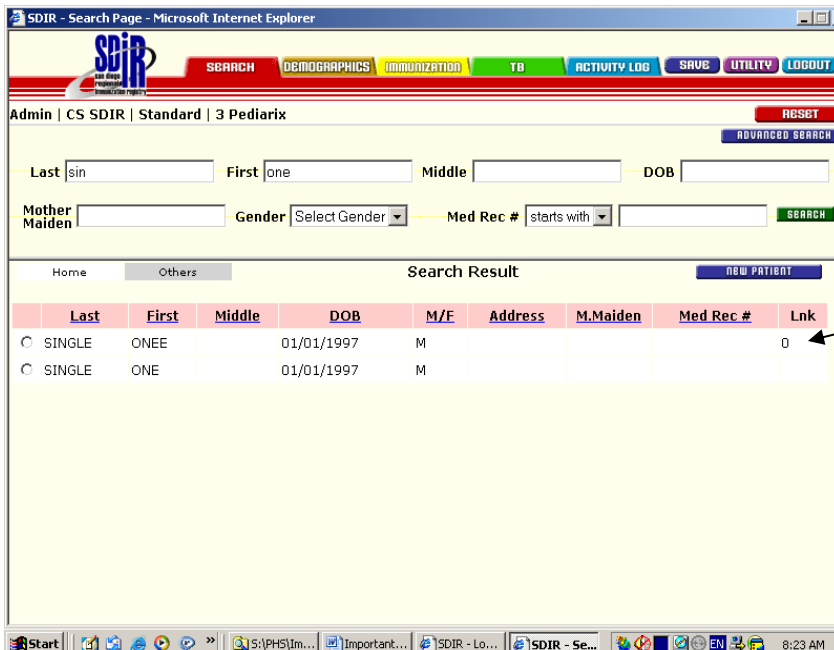
8. The two records will merge with the data that you have selected.

9. The user will automatically be returned to the Demographic Tab unless the computer recognizes additional home records to merge.



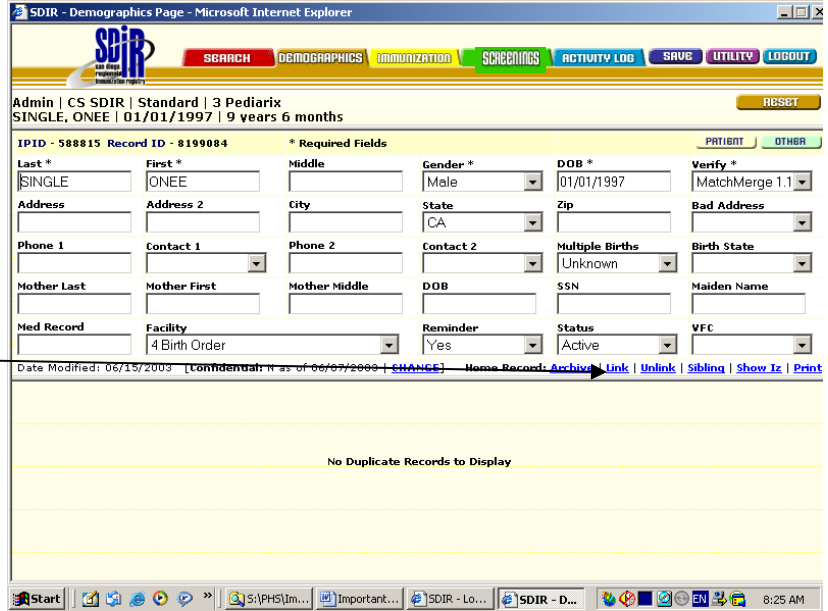
How to Link home Duplicate Home Records (that aren't linked):

There may be some cases when users find that they have duplicate records, but the records are not linked.



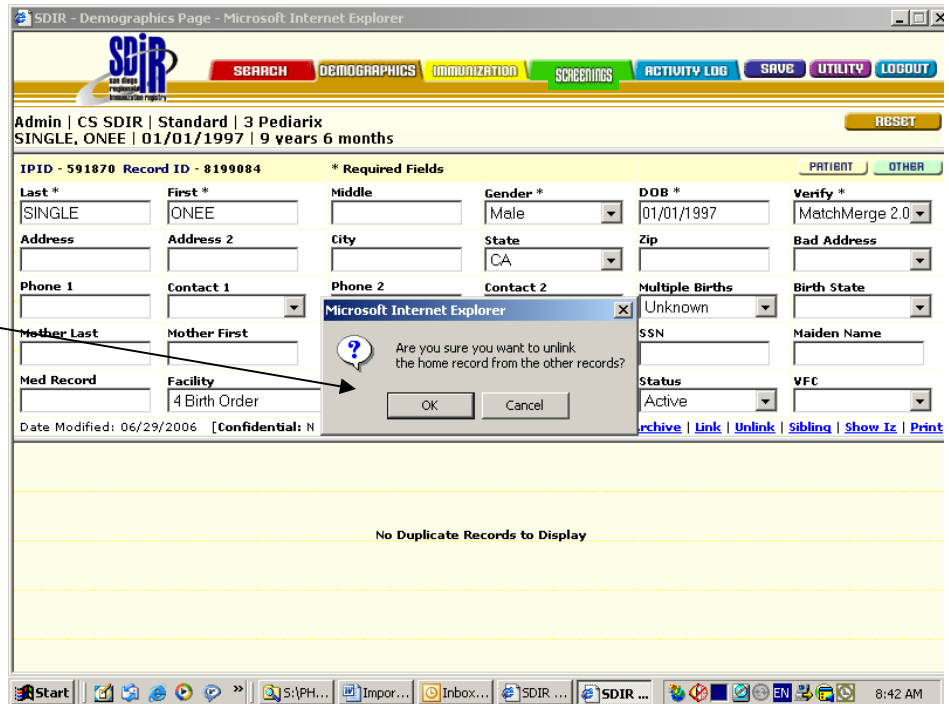
The other two records that appear to be duplicates (but have some differences) are not linked.

To link the unlinked records,
 Select the first unlinked record:
 Last name: Single, First name: One
 Open the demographic page for
 Single, One.
 Click on the “Unlink” text at the
 bottom on the white record. (Even
 though the records are not linked.)

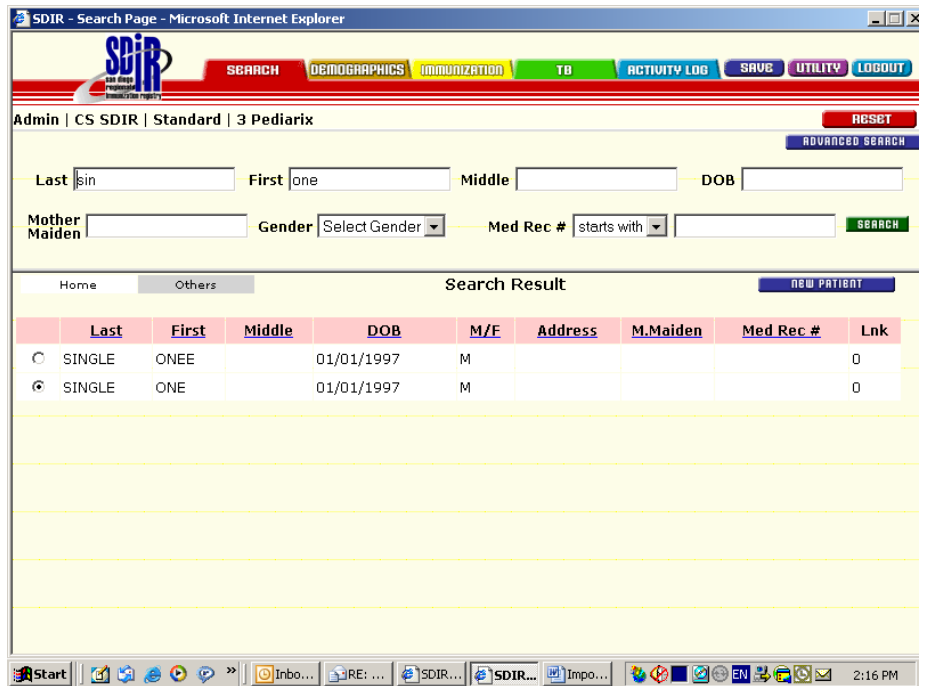


Once Unlink is clicked, a
 message will appear: “Are
 you sure that you want to
 unlink the home record
 (from the other records?”

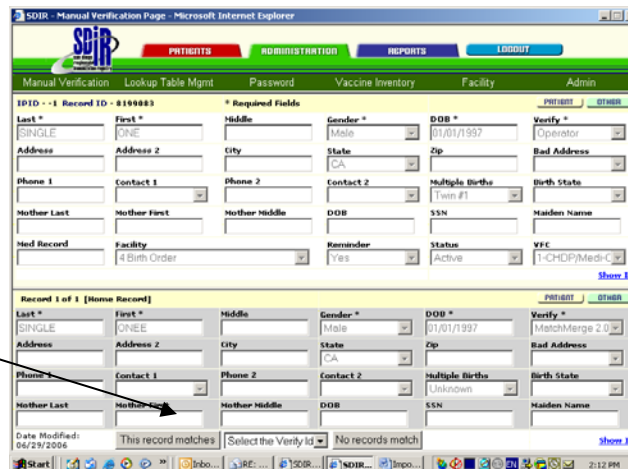
Click “OK”



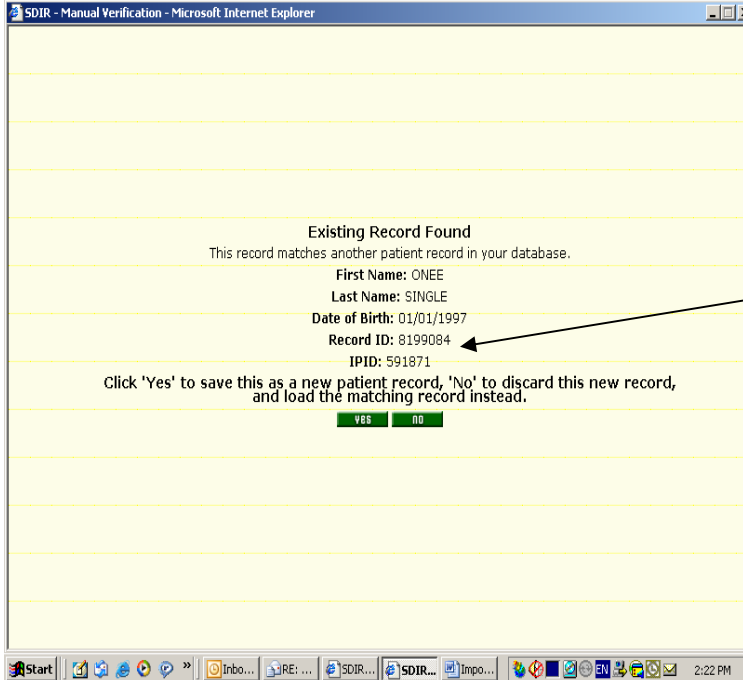
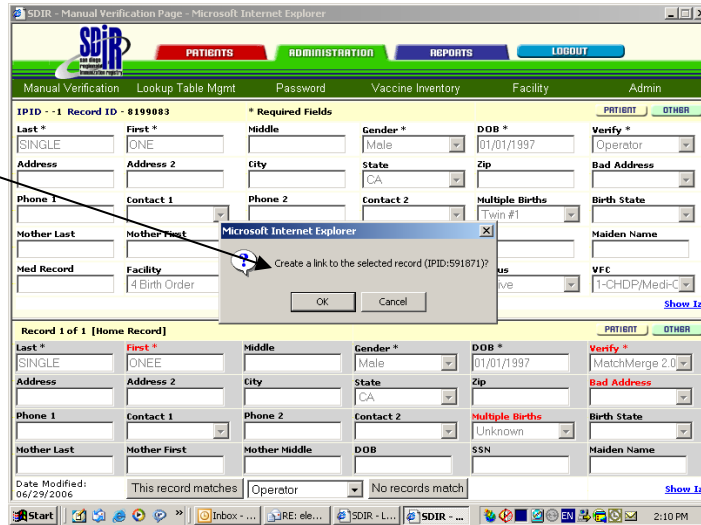
Click on the Save tab.
 Go back to the Search tab.
 Press reset
 Search for patient record once again.
 The duplicate home records will still appear.
 This time select one of the records to open the Demographic Tab.



You will see the MatchMerge operation down at the bottom of the screen
 Select one of the MatchMerge options—either Operator or Patient verified.
 Click “This record matches.”

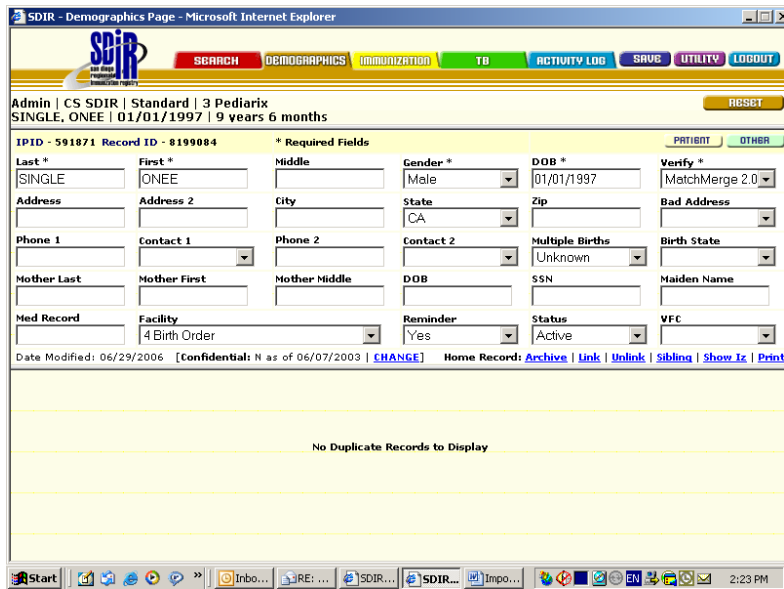


Click on Ok to create a link to the other record.



Select "No" to discard the new record (which is a duplicate home record) and load the matching record instead.

The result is that there will only be one white home record.



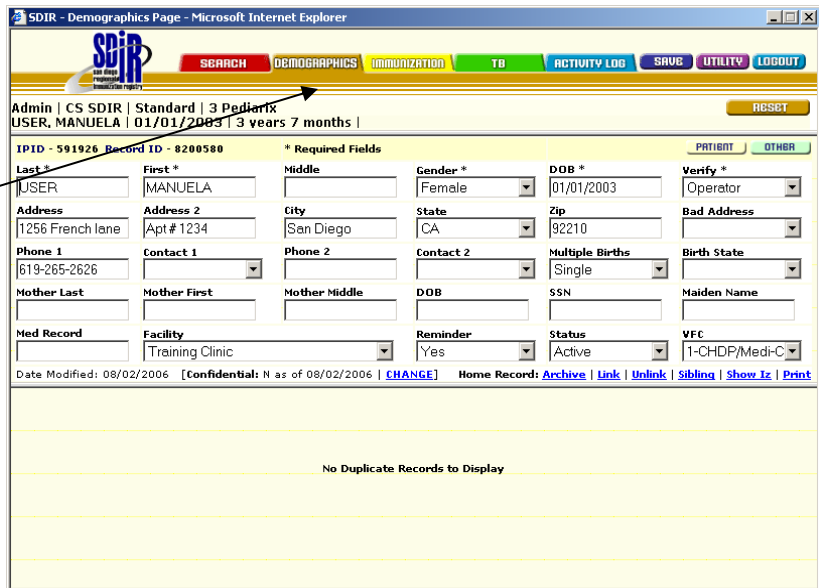
This is process that takes extra time but eliminating multiple and duplicate home records for the same patient will help all users of the SDIR.

Duplicate home records is one of the major issues immunization registries (and other electronic medical records) want to prevent.

You have now created a home record for this patient.

You can proceed to Section 3 to enter additional demographic information on the patient.

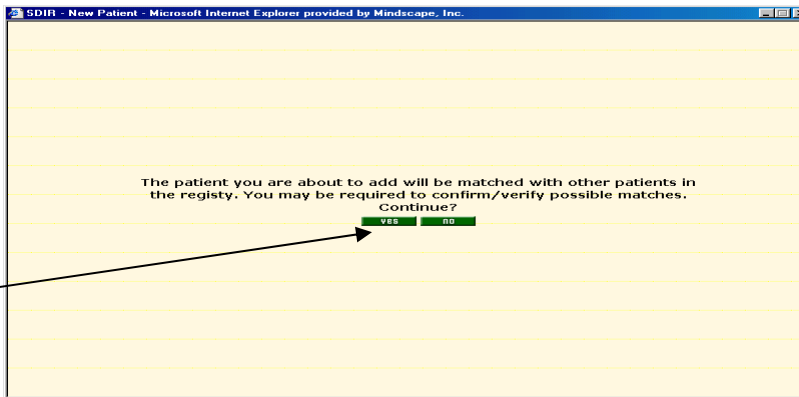
In addition, you can , click on the IMMUNIZATION tab to see what vaccines that individual has received.



Note: The computer application will attempt a final matching process

After clicking on the IMMUNIZATION tab, you will be given a prompt stating that the record you are adding will be matched with other records in the Registry with similar patient information.

To complete this process, click on “Yes”



If there are possible matches, you will need to confirm whether or not the records match each other and if the records should be merged.

If the record is a match, a screen will appear similar to this one:

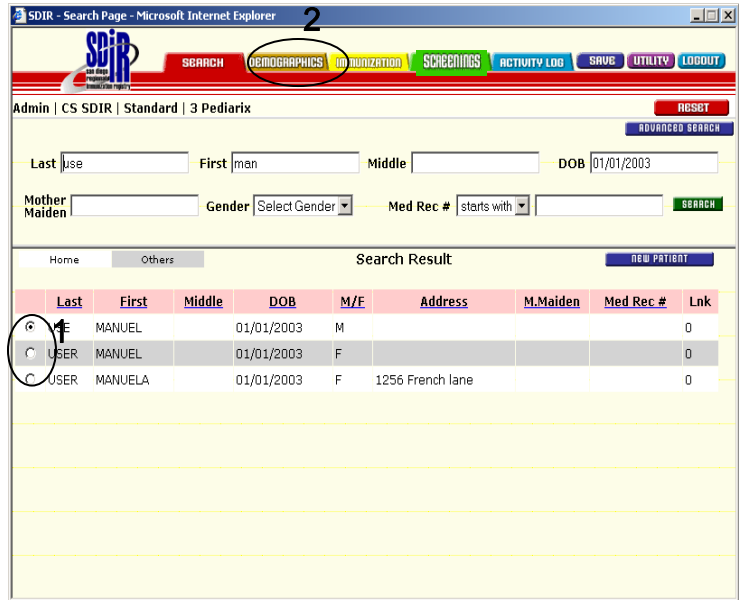
If the record does not match or you are unable to determine a match (the patient is not in the Registry), a screen will appear similar to this one:

The screenshot shows a web browser window titled "SDIR - Demographics Page - Microsoft Internet Explorer". The page has a navigation bar with buttons for SEARCH, DEMOGRAPHICS, IMMUNIZATION, TB, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. Below the navigation bar, the user is logged in as "Admin | CS SDIR | Standard | 3 Pediarix" and the patient information is "USE, MANUEL | 01/01/2003 | 3 years 7 months". A "RESET" button is visible. The main form area is titled "IPID - 590256 Record ID - 8200683" and includes a "* Required Fields" section. The form contains various input fields and dropdown menus for patient information such as Last, First, Middle, Gender, DOB, Address, City, State, Zip, Phone, Contact, Mother, and Facility. At the bottom of the form, there is a message "No Duplicate Records to Display" circled in black. The footer of the page includes "Date Modified: 03/25/2004" and a list of links: Home Record: Archive | Link | Unlink | Sibling | Show Iz | Print.

IF YOUR PATIENT IS DISPLAYED

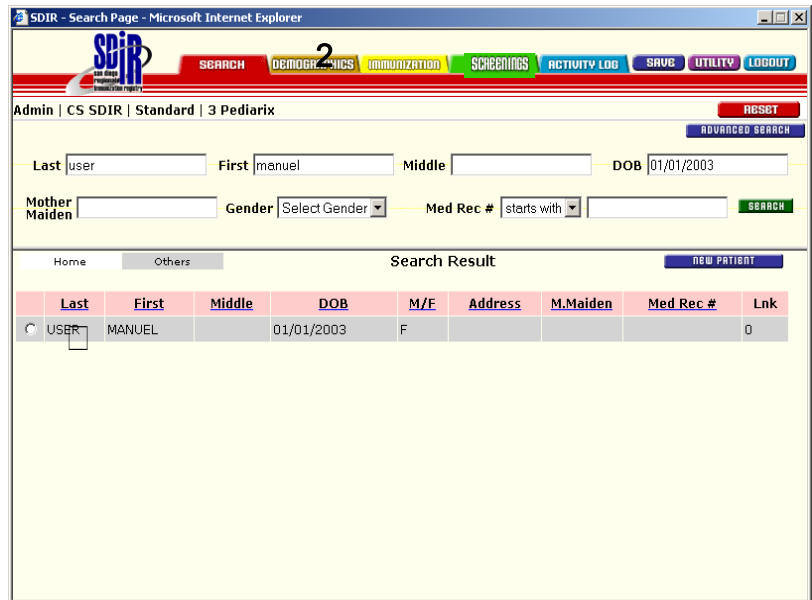
If a white patient record (home record) is shown:

- ① Click in the circle next to the patient's name
 - ② Click on the DEMOGRAPHICS tab
- The Demographics screen will appear.
- Note:** Demographic information should already be entered. However, always review the information with the parent/patient at each visit and fill in any new or missing information.



If a gray patient record (other facility's record) is shown:

- Click in the circle next to the patient's name
 - Click on the DEMOGRAPHICS tab
- The gray record will remain on the bottom of the screen.



How to copy a grey record to make a home record

③ To make a home record for this patient, click on the Demographics tab, click “Copy to Above” in the lower right corner of the gray record. The white record on top will then be your own facility’s record.

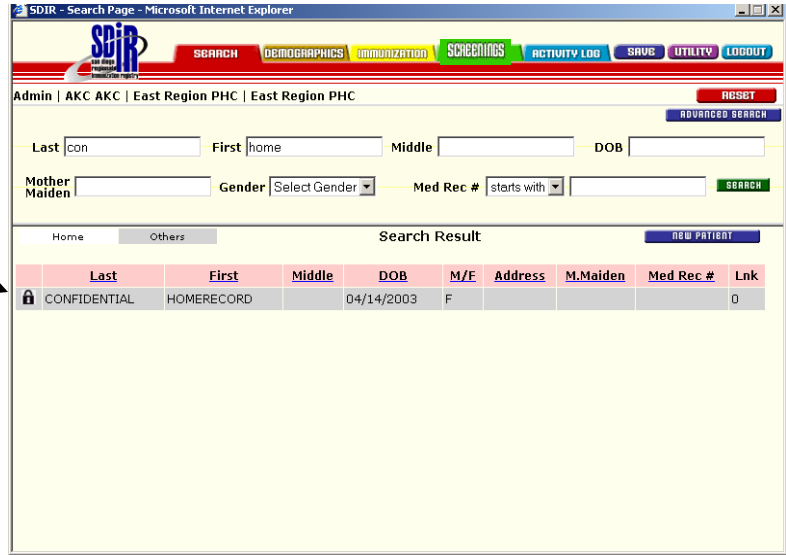
The screenshot shows the SDIR Demographics Page in Microsoft Internet Explorer. The page title is "SDIR - Demographics Page - Microsoft Internet Explorer". The navigation bar includes tabs for SEARCH, DEMOGRAPHICS, IMMUNIZATION, TB, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. The user is logged in as "Admin | CS SDIR | Standard | 3 Pediarix USER, MANUEL | 01/01/2003 | 3 years 7 months".

The main content area displays two patient records. The top record is white and is the "Home Record". The bottom record is grey and is labeled "Record 1 of 1 [Other Record]". Both records have the same fields: Last, First, Middle, Gender, DOB, Verify, Address, Address 2, City, State, Zip, Bad Address, Phone 1, Contact 1, Phone 2, Contact 2, Multiple Births, Birth State, Mother Last, Mother First, Mother Middle, DOB, SSN, Maiden Name, Med Record, Facility, Reminder, Status, and VFC.

In the grey record, the "Verify" field is set to "MatchMerge 1.1". In the bottom right corner of the grey record, the text "Record 1: Copy To Above | Show It" is visible, with "Copy To Above" circled in red.

What Do You Do if the Record You Have Searched for is Confidential?

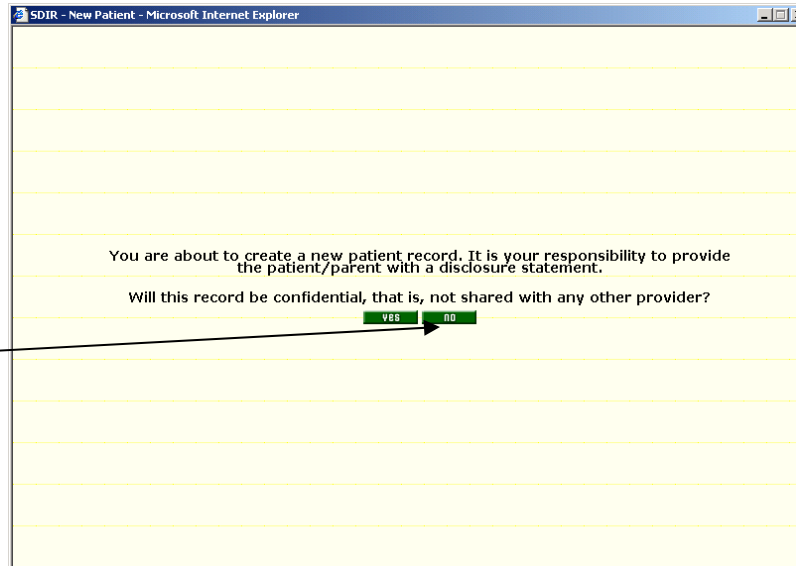
When searching for a patient, you may see that the patient has a confidential record as indicated by the padlock symbol.



You will now need to create a new patient record.

You will be asked if you want to make the record confidential.

Click "NO."



- Complete the demographic information
- Click on the IMMUNIZATION tab

SDIR - Demographics Page - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION TB ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | CS SDIR | Standard | 3 Pediarix
CONFIDENTIAL, RECORDS | 01/01/2000 | 6 years 7 months

IPID - 590185 Record ID - 8200537 * Required Fields

Last * First * Middle Gender * DOB * Verify *
CONFIDENTIAL RECORDS [] [] [] Unknown [] 01/01/2000 MatchMerge 1.1 []

Address Address 2 City State Zip Bad Address
[] [] [] CA [] [] []

Phone 1 Contact 1 Phone 2 Contact 2 Multiple Births Birth State
[] [] [] [] [] [] []

Mother Last Mother First Mother Middle DOB SSN Maiden Name
[] [] [] 01/01/1988 555-55-5566 []

Med Record Facility Reminder Status VFC
[] Training Clinic Yes [] Active []

Date Modified: 03/05/2004 [Confidential: N as of n/a] CHANGE Home Record: Archive Link Unlink Sibling Show All Print

1

No Duplicate Records to Display

You will now be asked if you want to match any other records in the Registry to the one you have just created

Click “Yes”

SDIR - New Patient - Microsoft Internet Explorer

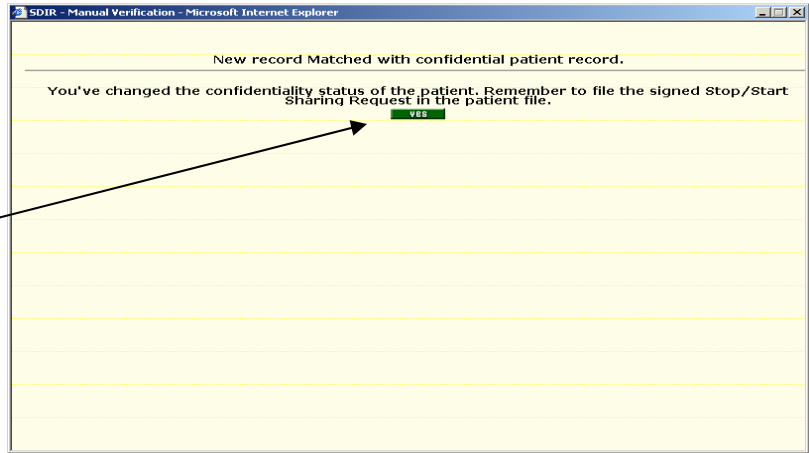
The patient you are about to add will be matched with other patients in the registry. You may be required to confirm/verify possible matches. Continue?

YES NO

Your new record will then be matched with the confidential record already in the Registry.

Remember to file a signed Stop/Start Sharing Request form, then

Click “Yes”



The records are now merged, the existing record will no longer be confidential, (you will not see a padlock symbol) and you will have a white (home) record.

