

## 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 has a navigation bar with tabs for SEARCH, DEMOGRAPHICS, IMMUNIZATION, SCREENINGS, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. Below the navigation bar, there is a breadcrumb trail: Admin | CS SDIR | Standard | Training Clinic. A red 'RESET' button is visible. The 'ADVANCED SEARCH' button is circled in red with a '1' next to it. Below the navigation bar, there are input fields for Last, First, Middle, and DOB. There are also dropdown menus for Mother Maiden and Gender, and a text field for Med Rec # with a 'starts with' dropdown. A green 'SEARCH' button is located to the right of the Med Rec # field. Below the search fields is a large yellow area labeled '\*\* Search Results Area \*\*'.

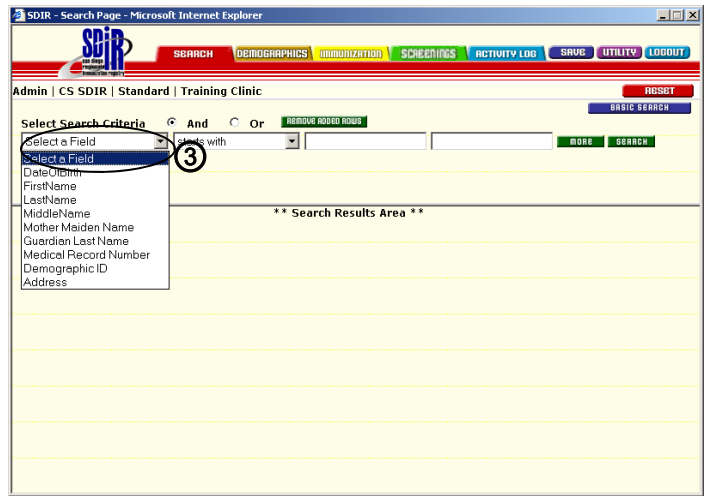
② Click on “And” or “Or”

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 has a navigation bar with tabs for SEARCH, DEMOGRAPHICS, IMMUNIZATION, SCREENINGS, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. Below the navigation bar, there is a breadcrumb trail: Admin | CS SDIR | Standard | Training Clinic. A red 'RESET' button is visible. The 'BASIC SEARCH' button is circled in red with a '2' next to it. Below the navigation bar, there is a 'Select Search Criteria' dropdown menu. To its right are radio buttons for 'And' and 'Or', with the 'And' button circled in red. Below the radio buttons is a text field for 'starts with' and a green 'SEARCH' button. Below the search fields is a large yellow area labeled '\*\* Search Results Area \*\*'.

③ Select a field

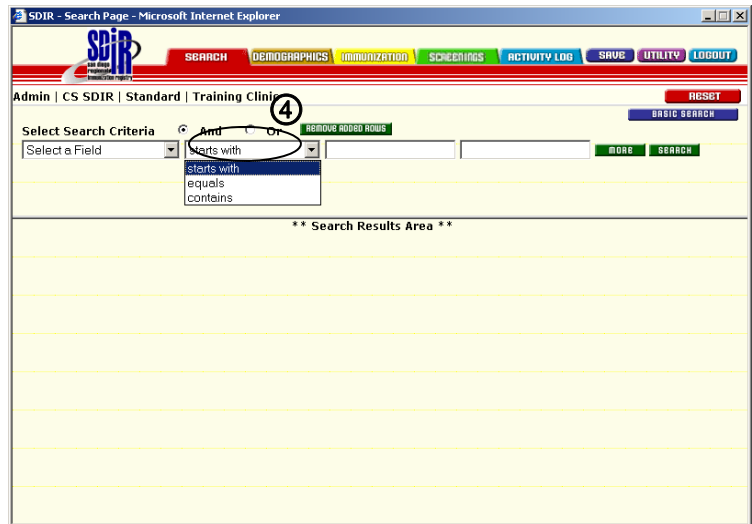


④ Select “starts with,” “equals.”  
“contains”

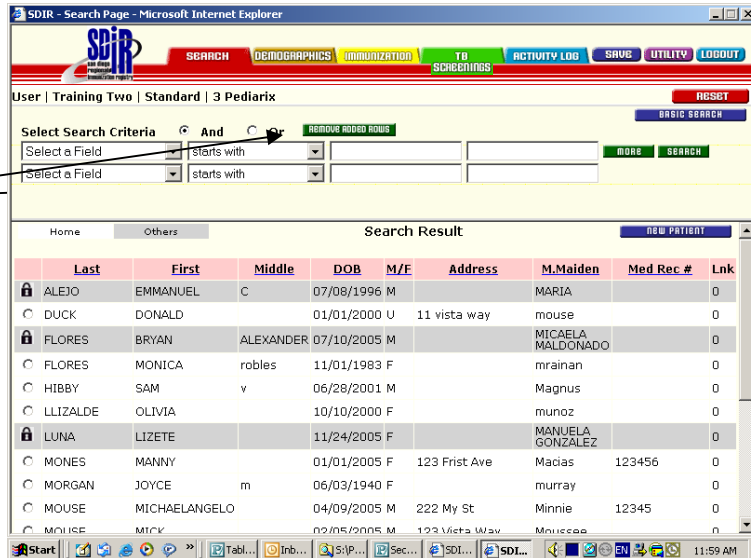
Starts with: what letters or numbers does your query start with (e.g., “Mar” or “01”)

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 on the “Add More Rows” to insert rows,; to remove them, click on “Remove Added Rows”.

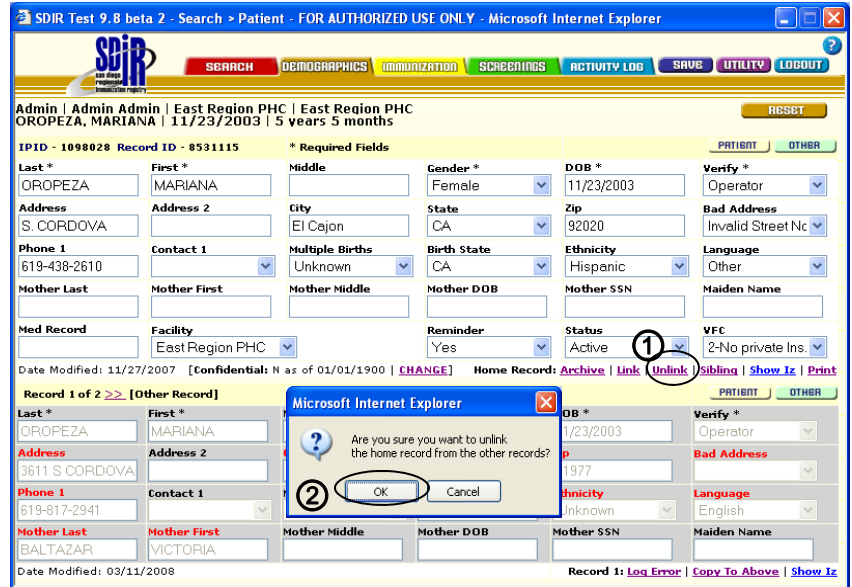


## How To Unlink a Patient Record

① Click on “Unlink”

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

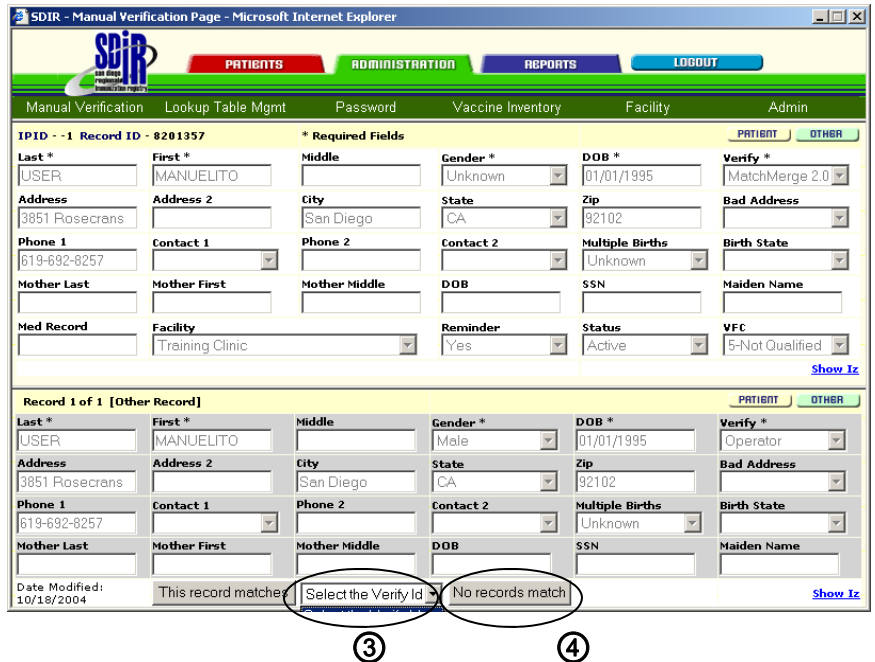
② Click on “OK”



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.



### Unlink patient record (continued)

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

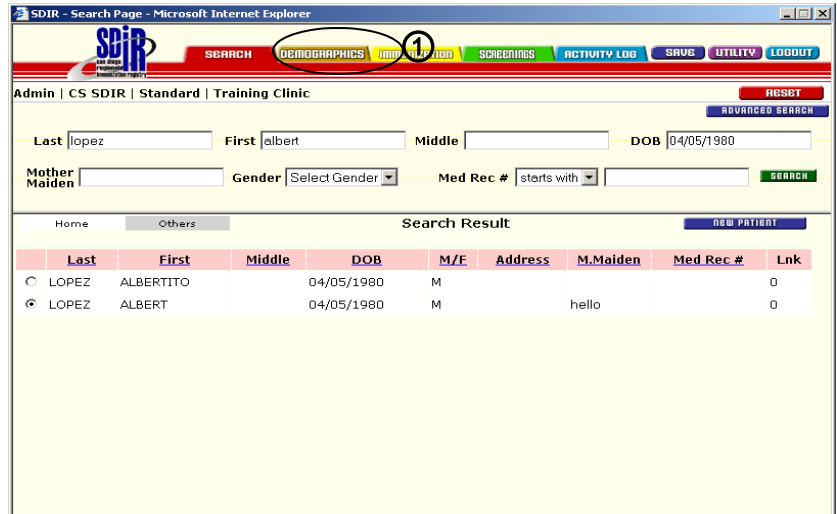
The screenshot shows the 'SDIR - Manual Verification Page' in a Microsoft Internet Explorer browser. The page contains a form for entering patient information. A modal dialog box is open in the center, titled 'Microsoft Internet Explorer', with the message 'You are creating new Record'. The dialog has two buttons: 'OK' and 'Cancel'. A circled number '5' is placed over the 'OK' button. The background form is partially obscured by the dialog. 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). At the bottom, there is a 'Date Modified' field (10/18/2004) and a search result summary: 'This record matches Operator' and 'No records match'.

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 displays a patient record for 'USER, MANUELITO' with DOB '01/01/1995' and age '11 years 7 months'. The form fields are identical to the previous screenshot. At the bottom, there is a 'Date Modified' field (08/21/2006) and a list of links: '[Confidential: N as of 10/11/2004 | CHANGE] Home Record: Archive | Link | Unlink | Sibling | Show Iz | Print'. Below the form, a message reads 'No Duplicate Records to Display'.

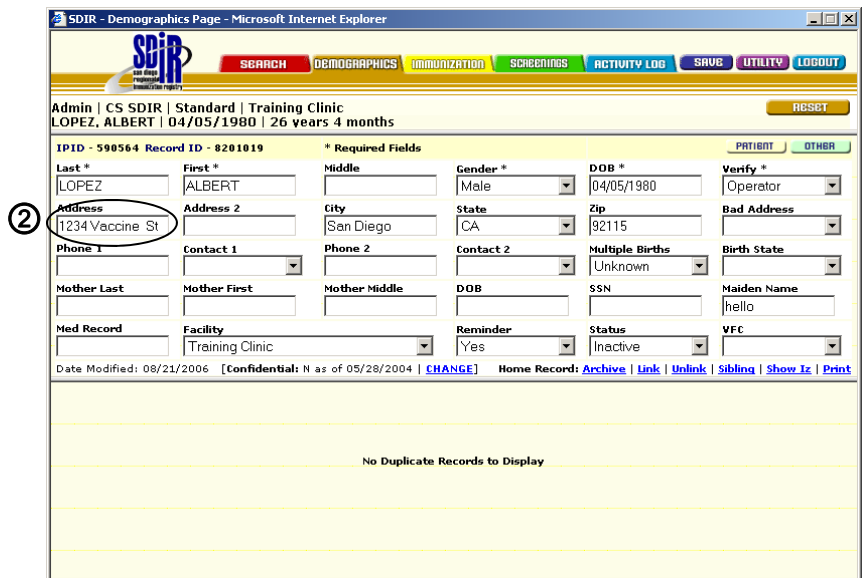
Unlink patient record (continued)

- 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



## How To Edit Demographics

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

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

IPID - 590564 Record ID - 8201019 \* Required Fields

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: 08/21/2006 [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

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

IPID - 590564 Record ID - 8201019 \* Required Fields

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		

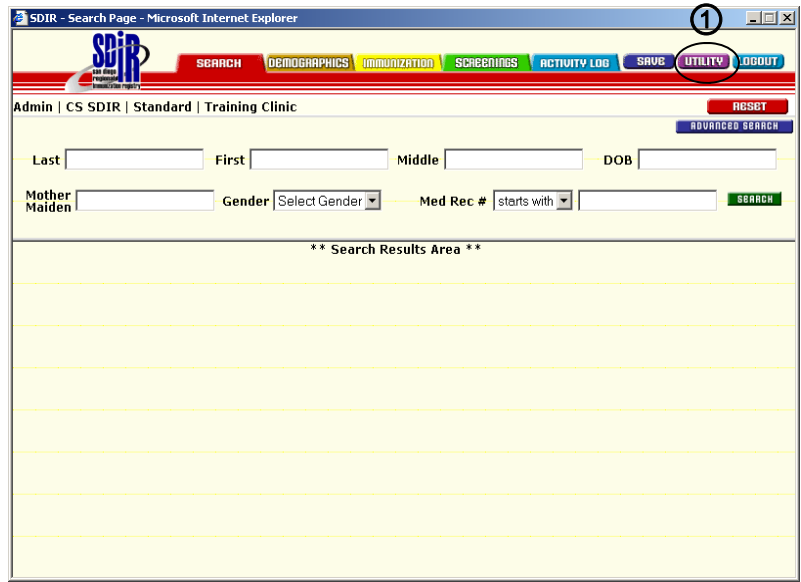
Date Modified: 08/21/2006 [Confidential: N as of 05/28/2004] [CHANGE](#) Home Record: [Archive](#) | [Link](#) | [Unlink](#) | [Sibling](#) | [Show Iz](#) | [Print](#)

No Duplicate Records to Display

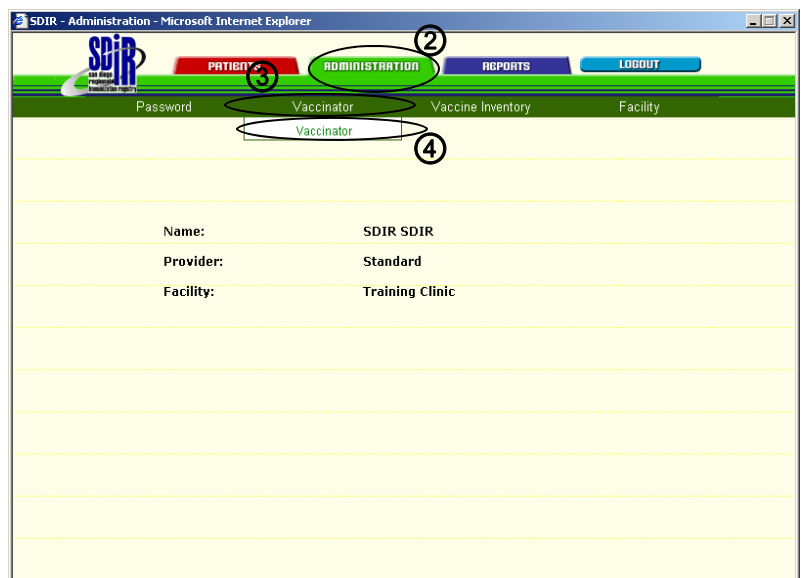
## How To Edit A Vaccinator

As a user, you may edit a vaccinator at your site at any time.

- ① Click on the UTILITY tab



- ② Application defaults to “Administration”
- ③ Put cursor on “Vaccinator”
- ④ Click on “Vaccinator”



③ Click on the ID number for the vaccinator you wish to change

ID	Name	Facility	Today Flag	Date In
1396	Antonio Banderas, MA	East Region PHC (5065)	Y	12/16/08
1	B. COPELAND P.H.N.	East Region PHC (5065)	N	10/31/01
1394	bad nurse	East Region PHC (5065)	Y	11/12/08
5	E. MARLOW P.H.N.	East Region PHC (5065)	N	06/23/00
6	E. TAPP R.N.	East Region PHC (5065)	Y	07/11/00
1395	manny mones	East Region PHC (5065)	Y	12/05/08
7	S. SANCHEZ L.V.N.	East Region PHC (5065)	Y	10/26/01

④ Click inside each text box to make your changes

⑤ When changes are completed click on the “Update” button

Vaccinator ID: 1394  
 Vaccinator Name: bad nurse  
 Facility Name: East Region PHC (5065)  
 Vaccinator Today Flag: Y = Yes

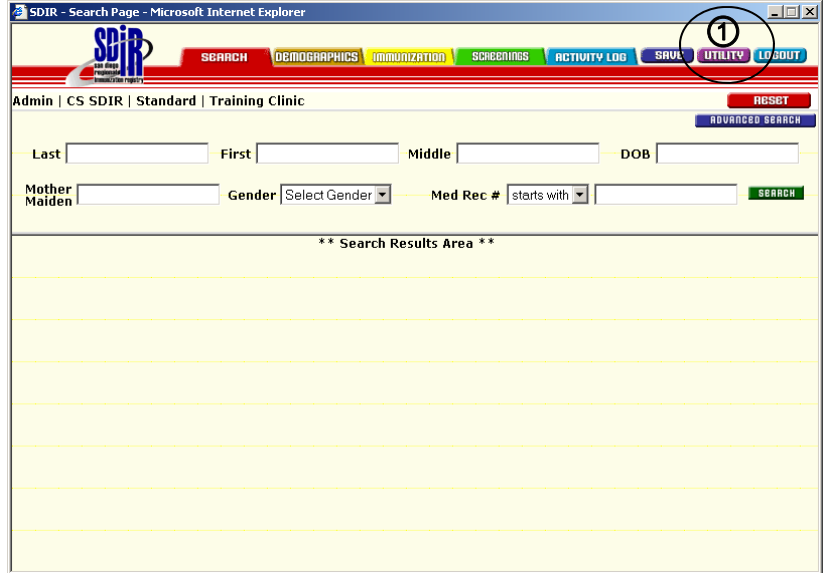
Buttons: UPDATE, CANCEL

## How to Edit Vaccine Inventory

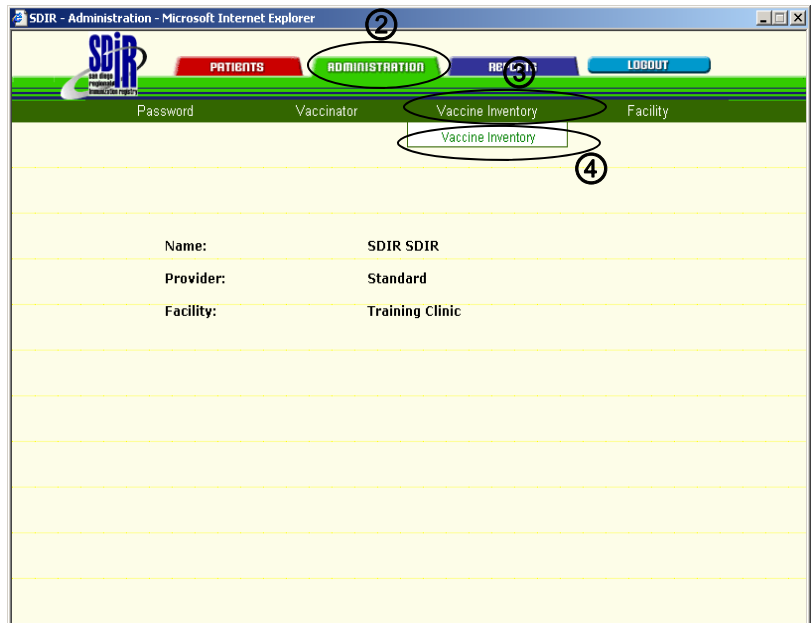
When you receive a new vaccine shipment (lot), you must enter the information regarding the shipment into the database before you can administer any of the vaccine.

For the facility that has multiple sites, make certain you choose the correct facility for which you want to make changes.

- 1 Click on the UTILITY



- 2 Application defaults to "Administration"
- 3 Put cursor on "Vaccine Inventory"
- 4 Click on "Vaccine Inventory"



Edit Vaccine Inventory (Continued)

⑤ Click on the Inv ID number for the inventory you wish to change.

Inv ID	Vaccine	Qty	In Date	Exp Date	Mfg	Brand Name	Lot #	Use Today	VFC Flag
1140	DTaP	85	07/28/2008	07/28/2009	SKB		123MONDAY	Yes	VFC
1145	DTaP	97	08/07/2008	08/07/2009	SKB		MANNY123	Yes	VFC
1148	DTaP	99	08/15/2008	08/15/2009	SKB		HAPPYFRIDAY	Yes	VFC
1150	DTaP	96	08/27/2008	08/27/2009	SKB		SYHC123CV	Yes	VFC
1189	DTaP	49	01/16/2009	01/16/2010	MSD		MANNY123	Yes	VFC
1139	DTaP	9	07/25/2008	07/25/2010	SKB		Manny23	Yes	VFC
1030	DTaP	98	10/17/2007	10/17/2010	SKB		123456EFM	Yes	VFC
1176	DTaP	99	12/09/2008	12/08/2010	SKB		123456EFM	Yes	VFC
1203	DTaP	98	04/20/2009	04/20/2011	PMC		ABC123	Yes	VFC
1223	DTaP	50	05/04/2009	05/04/2011	SKB		NCPHC123	Yes	VFC
1031	DTaP-HepB-IPV	49	10/17/2007	10/17/2010	SKB	PEDIARIX	123645	Yes	VFC
1193	DTaP-Hib-IPV	50	02/13/2009	02/13/2011	PMC		MANNY123	Yes	VFC
1179	HPV	40	11/09/2008	09/09/2009	MSD		436879B	Yes	VFC
1188	Hep A Adult	48	01/15/2009	11/07/2010	MSD		AFR345	Yes	VFC
920	Hep A-ped/adol. 2 dose	83	05/24/2007	05/24/2010	SKB		QCC12345	Yes	VFC
1226	Hep B Adult	99	05/06/2009	05/06/2022	SKB		HEPB123*	Yes	VFC
1120	Hep B-adol or ped	113	05/12/2008	05/12/2009	PMC		123steps	Yes	VFC
1173	Hep B-adol or ped	148	11/18/2008	11/18/2009	PMC		123ABC	Yes	VFC
697	Hep B-adol or ped	92	09/22/2006	12/31/2010	MSD		123456	Yes	VFC
936	Hib (HbOC)	73	06/08/2007	06/08/2008	PMC		ESC123456	Yes	VFC
1163	Hib (HbOC)	86	10/22/2008	10/22/2010	PMC		MANNY123	Yes	VFC

⑥ Click inside each text box to make your changes.

⑦ When changes are complete click on the “Update” button To make changes to your inventory, Click on “Adjustments” (Adjustments may include wasted doses, expired doses, doses transferred, doses returned to the Immunization Program)

**Training Clinic - Vaccine Inventory Lot Details**

Lot Number \* 123456 Vaccine \*  
 Date Received \* 04/24/2004 Incoming Quantity 150  
 Doses Administered Quantity on Hand -1  
 Adjustments Total -150 Manufacturer \* GRE | Greer Laboratories, Inc.  
 Use today Yes ⑥ Expiration Date \* 04/25/2005 Expiration Notice Yes  
 VFC Flag VFC/Public Warning 30 days Warning Notice Yes  
 Archived Inventory ID 171 CANCEL UPDATE ⑦

**Make an Adjustment**

Quantity \* Type \*  
 Date \* 08/23/2006 Comment

**Lot Activities Summary**

Date	Quantity	Type	Comment
07/15/2004	135		Expired
07/07/2004	10		wasted
05/24/2004	5		wasted
04/24/2004	150	Lot Created	

## Adjusting Vaccine Inventory

Positive (adding) or negative (subtracting) adjustments can be made to any vaccine lot.

① To make an adjustment (vaccine received, transferred, expired, wasted, and other), three fields are required to be filled:

- Quantity
- Date (defaulted to the current day but can be changed)
- Type (click on the arrow to see the drop-down menu of choices)

Once you have entered the information, click on “Insert”

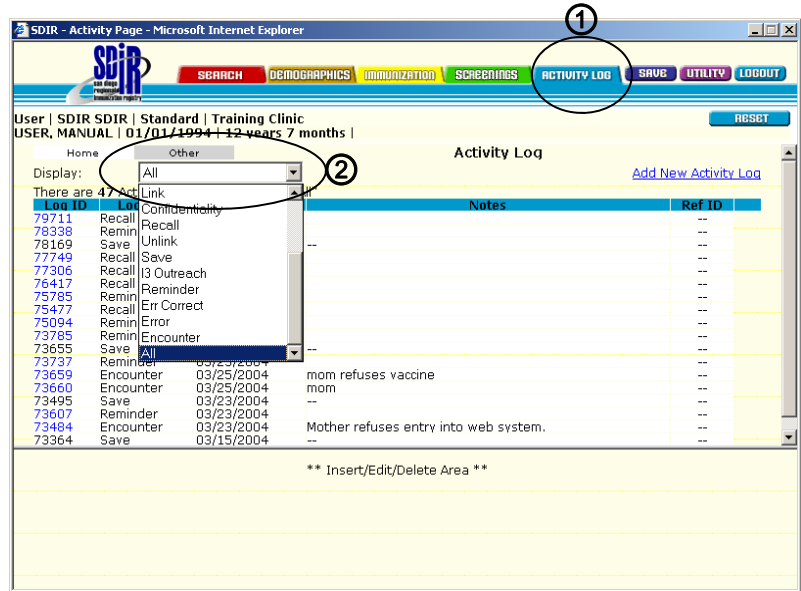
The screenshot shows the 'Training Clinic - Vaccine Inventory Lot Details' form. The 'Make an Adjustment' section is highlighted with a red oval. The fields in this section are: Quantity \* (0), Type \* (Other), and Date \* (08/23/2006). A red circle with the number 1 is placed over the Date field. An arrow points from the text box on the left to the 'INSERT' button.

Date	Quantity	Type	Comment
07/15/2004	135		Expired
07/07/2004	10		wasted
05/24/2004	5		wasted
04/24/2004	150	Lot Created	

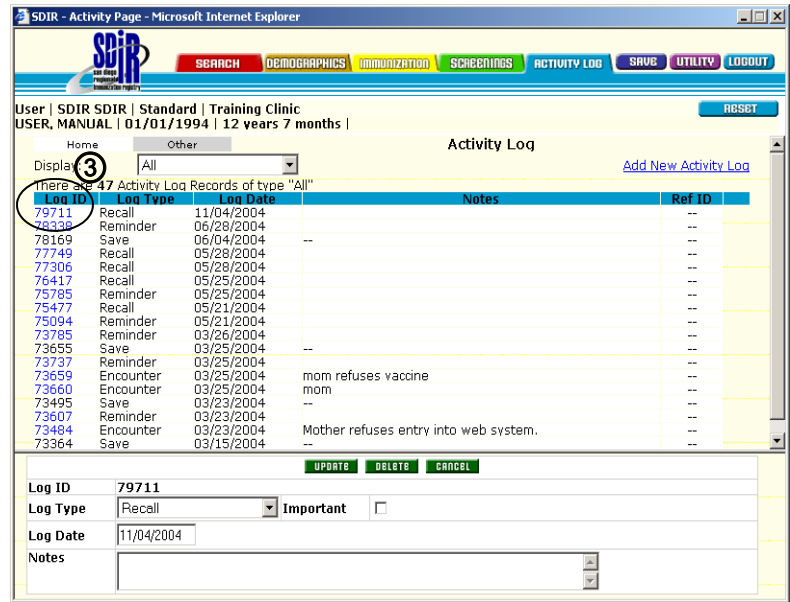
## How to Edit an Activity in the Activity Log

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 'Activity Log' page in Microsoft Internet Explorer. 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' and 'USER, MANUAL | 01/01/1994 | 12 years 7 months |'. A 'RESET' button is located to the right. 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 a form for editing the selected record. The 'Log ID' is 79711, 'Log Type' is Recall, 'Log Date' is 11/04/2004, and the 'Notes' field contains 'Mother was called but phone number has been disconnected.'. The 'UPDATE' button is circled with a '5', and the 'Notes' field is circled with a '4'.

### OUTCOME

The screenshot shows the '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 \*\*'.