

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 **

Display of Records

SDIR 9.7 - Search Page - FOR AUTHORIZED USE ONLY - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | AKC AKC | East Region PHC | East Region PHC

RESET ADVANCED SEARCH

Last CONFIDE First Middle DOB

Mother Maiden Gender Med Rec # starts with SEARCH

Source Local 25 Number of results

Home Others Search Result NEW PATIENT

	Last	First	Middle	DOB	M/E	Address	M.Maiden	Med Rec #	Lnk
<input type="radio"/>	CONFIDENTIAL	RECORDS		01/01/2000	U				0
<input type="radio"/>	CONFIDENTIAL	HOMERECORD		04/14/2003	F				0
<input type="radio"/>	CONFIDENTIALITY	CHECK		04/14/2003	F	1234 Any Street			0
<input type="radio"/>	CONFIDENTIALITY	TESTMORE		08/17/2004	F				0
<input type="radio"/>	CONFIDENTIALITY	TESTAGAIN		05/01/2004	M				1
<input type="radio"/>	CONFIDENTIALITY	TESTTWO		05/01/2003	F				1
<input type="radio"/>	CONFIDENTIAL	TEST		05/28/2004	U				2

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.

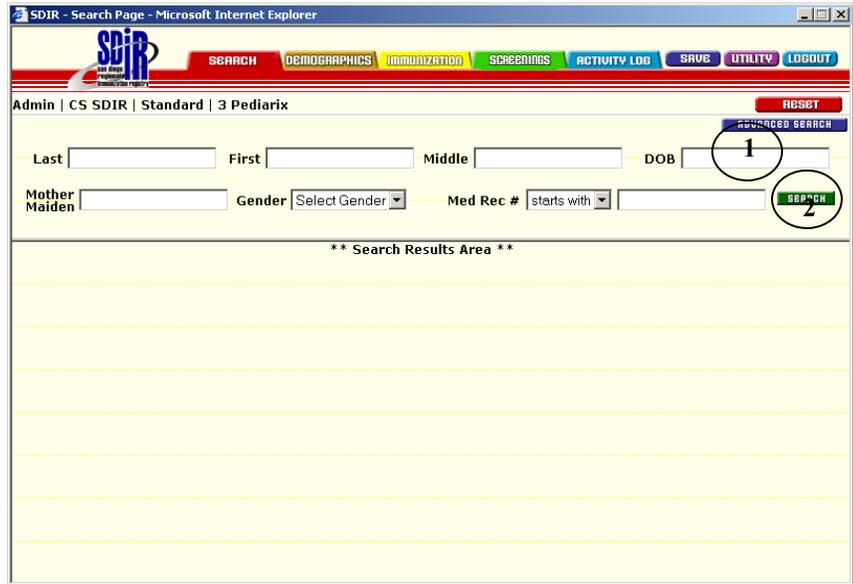
D **Number of records linked to the displayed record(s)**

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.

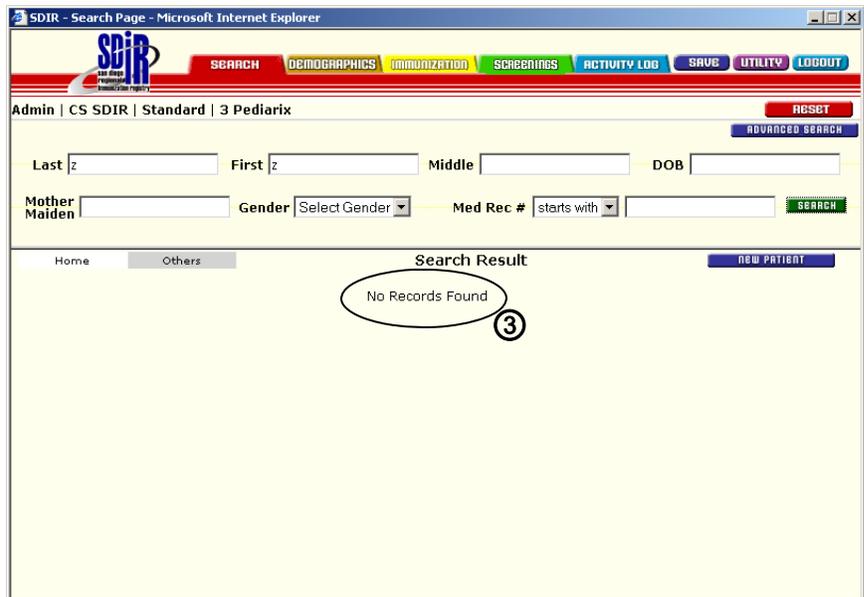
IF YOUR PATIENT IS NOT DISPLAYED

- 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.

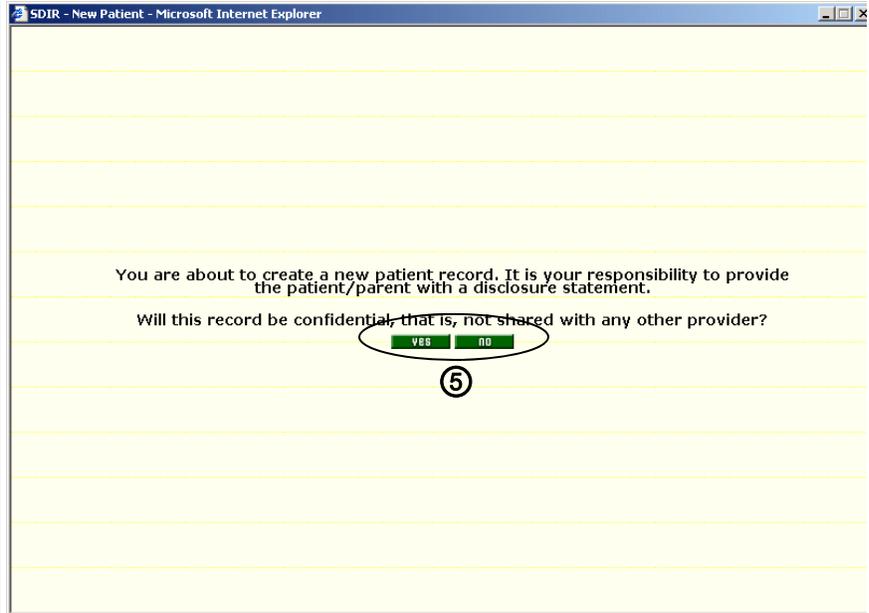
- ④ Click on “New Patient”

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, SCREENINGS, 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. A "NEW PATIENT" button is also visible in the bottom right corner. The search results area shows "No Records Found".

The screenshot shows the SDIR Search Page in Microsoft Internet Explorer, identical to the previous one. The "SEARCH" button is no longer circled. Instead, the "NEW PATIENT" button in the bottom right corner is circled with a red circle containing the number 4. The rest of the page, including the navigation bar, breadcrumb trail, and search results area, remains the same.

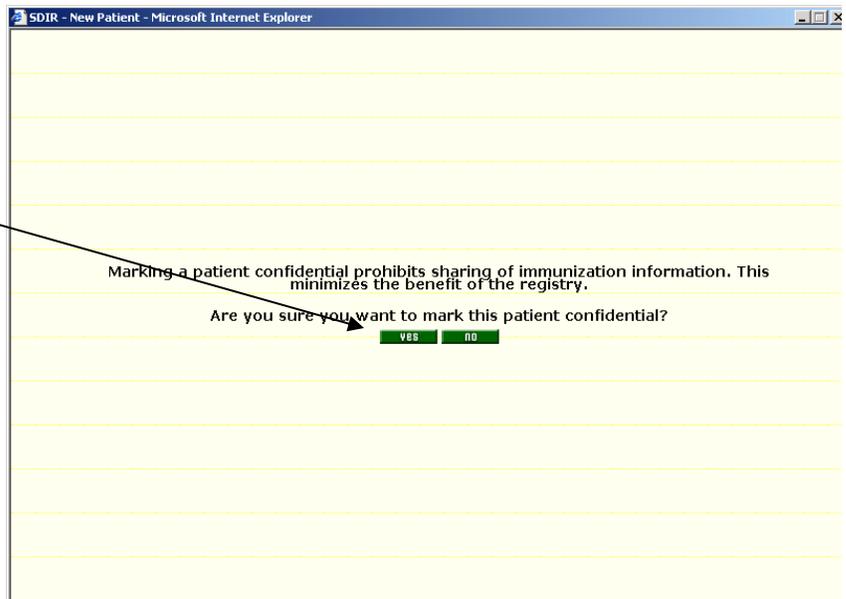
⑤ It is your responsibility to provide the Disclosure Statement to the parent/patient. If the parent/patient agrees to share the record, click **“No.”** This record will be UNCONFIDENTIAL.

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



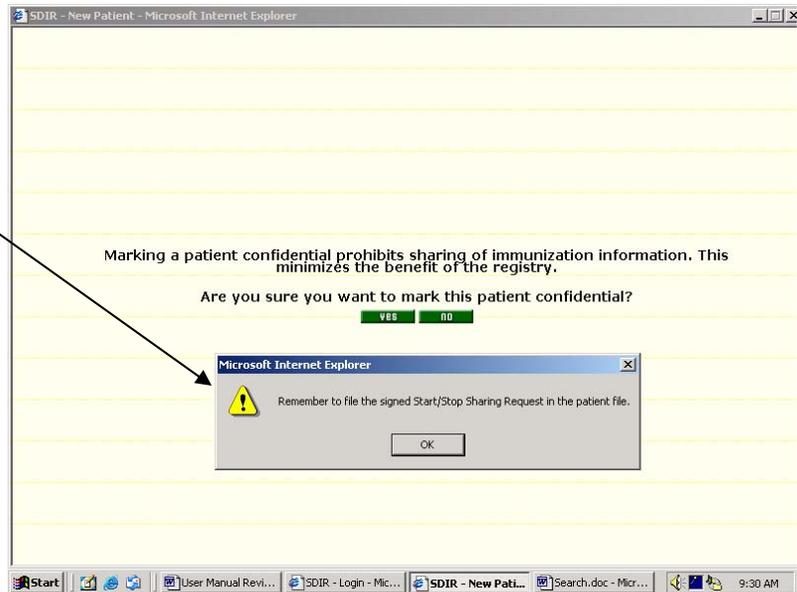
If you clicked **“Yes”** in the previous screen, you will see this screen.

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 for a patient named USER, MANUEL. The page displays two home records. The top record is the 'Home Record' (Record 1 of 1) and the bottom record is a duplicate (Record 1 of 1 [Home Record]). The bottom record has an 'Edit' link at the bottom right.

* Required Fields					
Last *	First *	Middle	Gender *	DOB *	Verify *
USER	MANUEL		Unknown	01/01/2001	MatchMerge 1.1
Address	Address 2	City	State	Zip	Bad Address
			CA		
Phone 1	Contact 1	Phone 2	Contact 2	Multiple Births	Birth State
				Unknown	
Mother Last	Mother First	Mother Middle	DOB	SSN	Maiden Name
Med Record	Facility	Reminder	Status	VFC	
	Training Clinic	Yes	Active		

Date Modified: 03/25/2004 [Confidential: N/A of n/a] CHANGE Home Record: Archive | Link | Unlink | Sibling | Show Iz | Print

Record 1 of 1 [Home Record]					
Last *	First *	Middle	Gender *	DOB *	Verify *
USER	MANUEL		Unknown	01/01/2001	MatchMerge 1.1
Address	Address 2	City	State	Zip	Bad Address
			CA		
Phone 1	Contact 1	Phone 2	Contact 2	Multiple Births	Birth State
				Unknown	
Mother Last	Mother First	Mother Middle	DOB	SSN	Maiden Name

Date Modified: 10/11/2004 Record 1: Edit | Log Error | Copy To Above | Show Iz

① Record 1 of 1 [home record]

Click on edit to rotate this record to the top

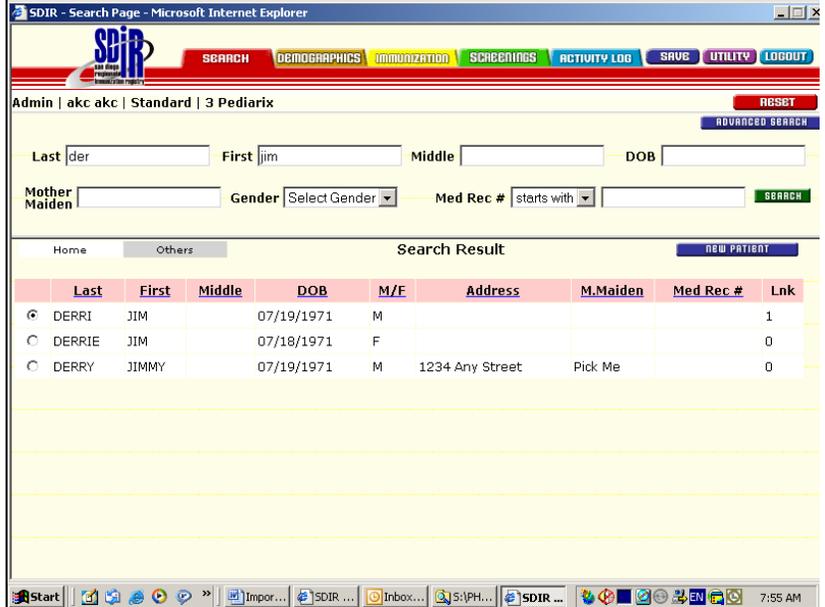
The bottom screen will then be rotated to the top and changes can then be made to the duplicate demographic or immunization record.

Method Two: Merge Linked Duplicate Home Records

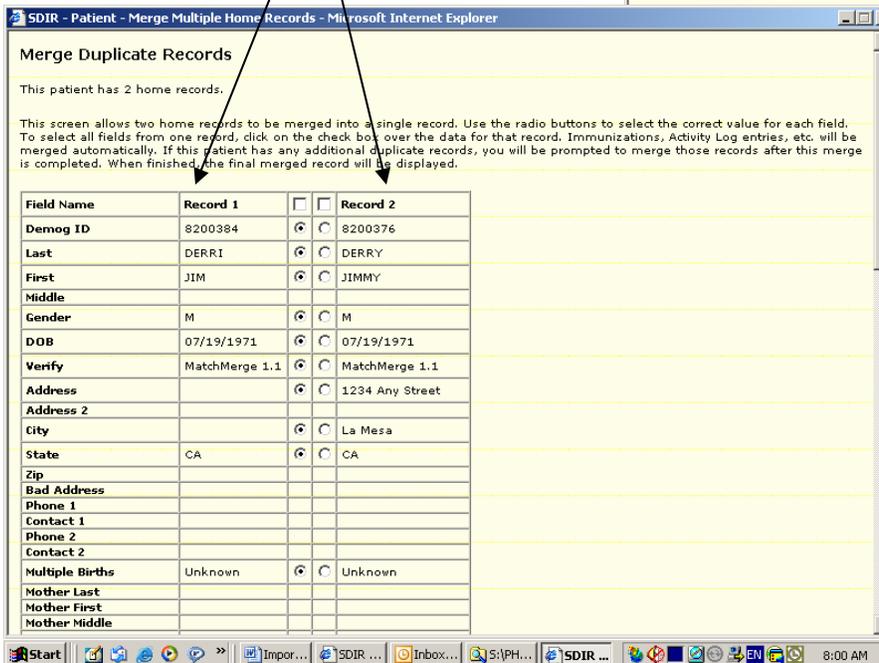
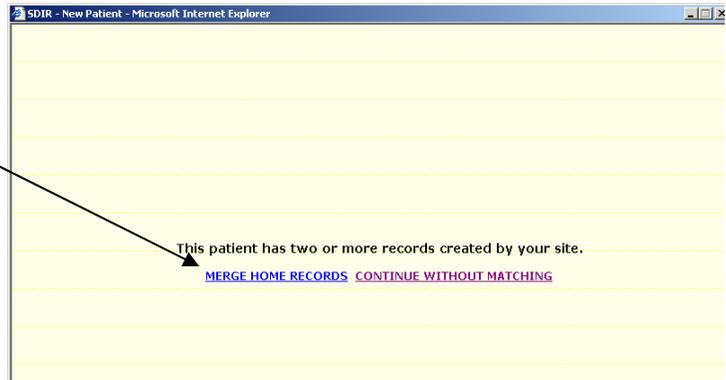
The merge linked duplicate home records feature allows users to merge linked duplicate home records. (Following this explanation will be how to linked, unlinked duplicate home records.)

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				

Start | Inpor... | SDIR... | Inbox... | S:\PH... | SDIR... | 8:04 AM

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

Start | Inpor... | SDIR... | Inbox... | S:\PH... | SDIR... | 8:06 AM

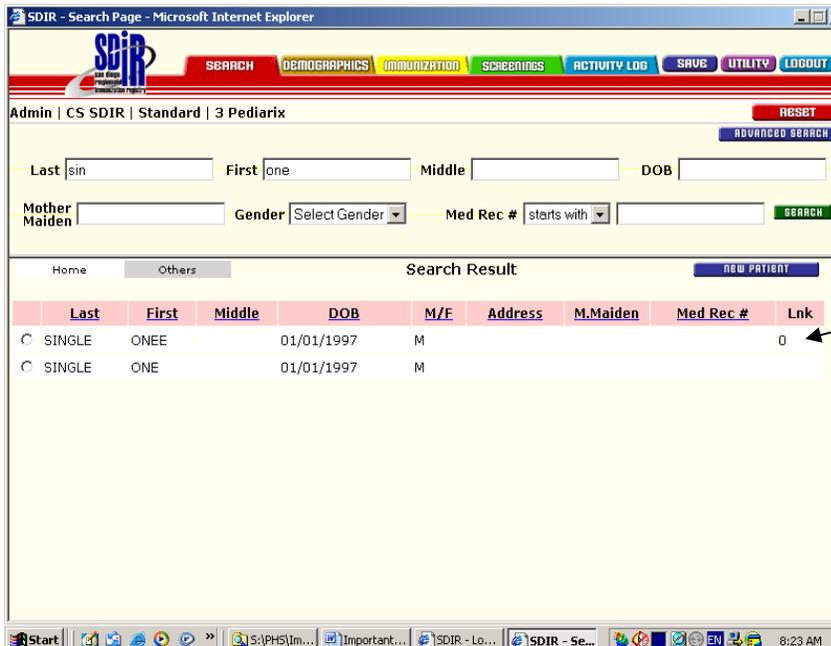
8. The two records will merge with the data that you have selected.

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):

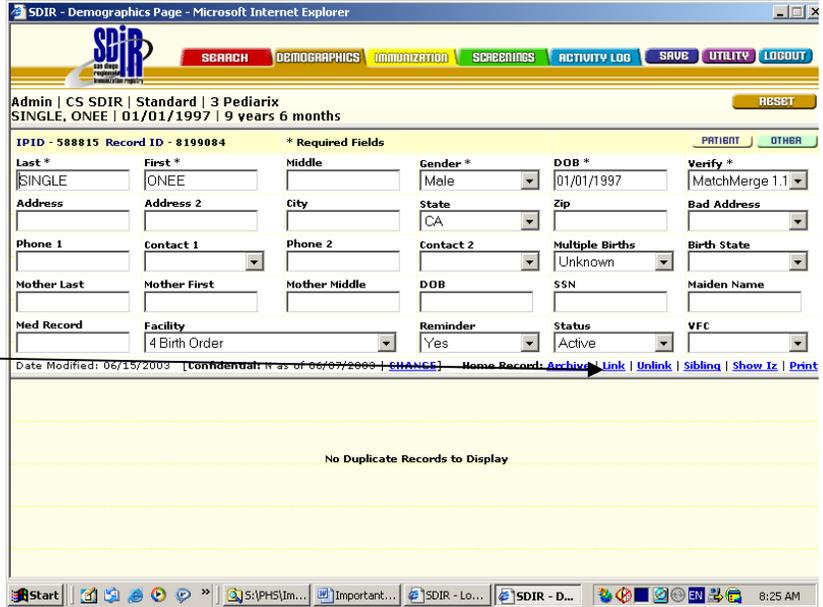
There may be some cases when users find that they have duplicate records, but the records are not linked.



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

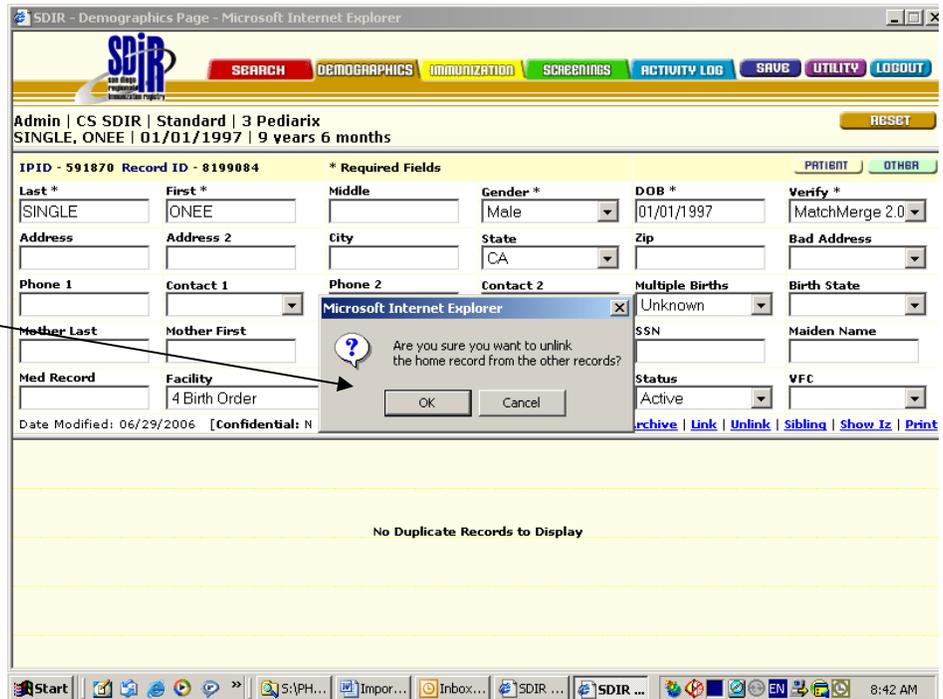
To link the unlinked records,
Select the first unlinked record:
Last name: Single, First name: One
Open the demographic page for
Single, One.

Click on the “Unlink” text at the
bottom on the white record. (Even
though the records are not linked.)

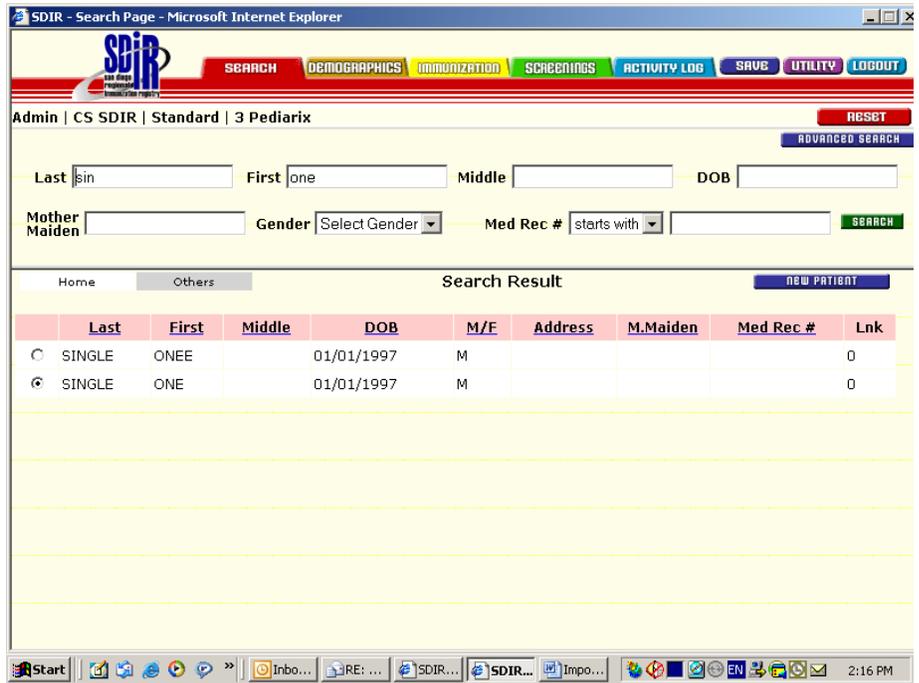


Once Unlink is clicked, a
message will appear: “Are
you sure that you want to
unlink the home record
(from the other records?)

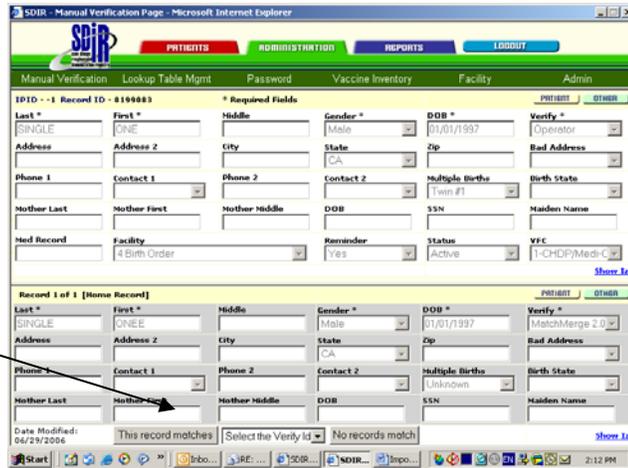
Click “OK”



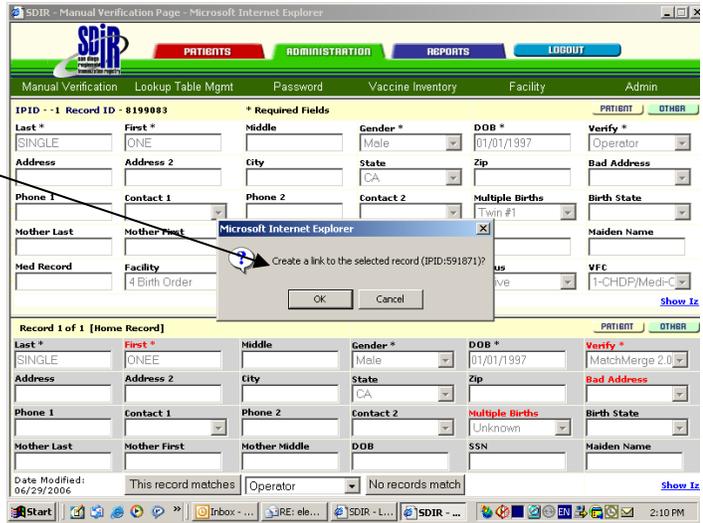
Click on the Save tab.
 Go back to the Search tab.
 Press reset
 Search for patient record once again.
 The duplicate home records will still appear.
 This time select one of the records to open the Demographic Tab.



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.”

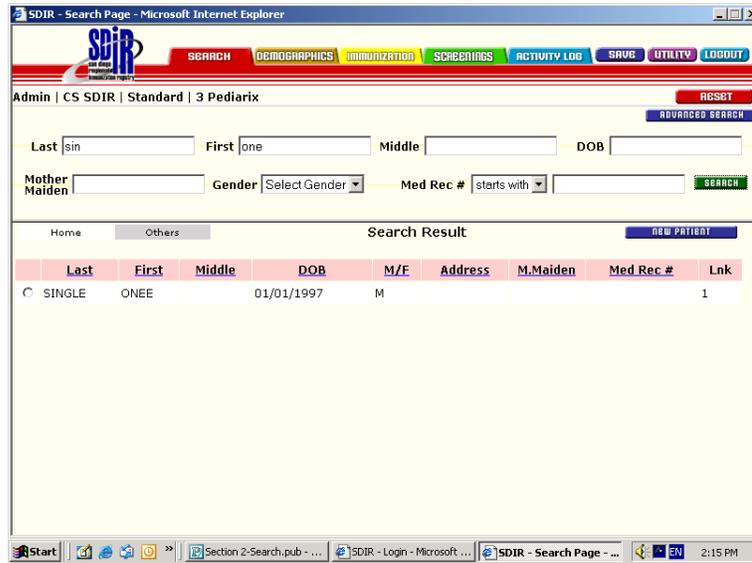


Click on Ok to create a link to the other record.



Go to the next page...

The result is that there will only be one white home record which is linked to the other record



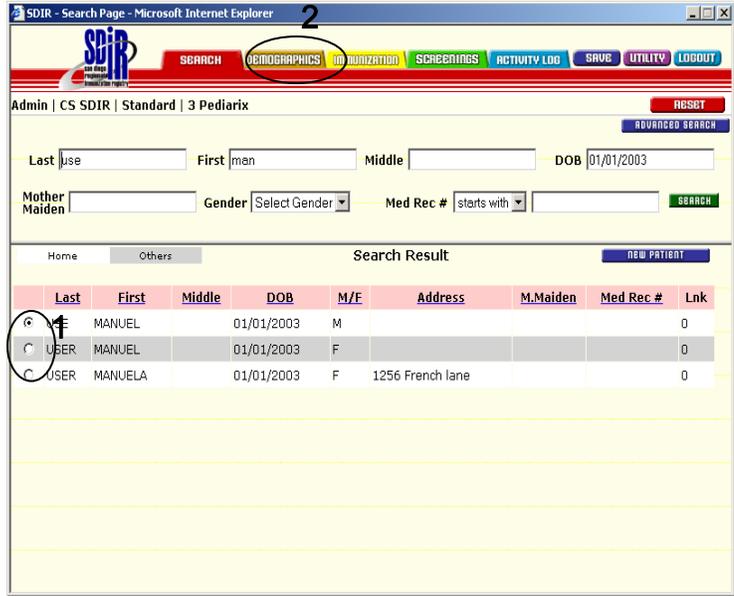
This is process that takes extra time but eliminating multiple and duplicate home records for the same patient will help all users of the SDIR.

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

IF YOUR PATIENT IS DISPLAYED

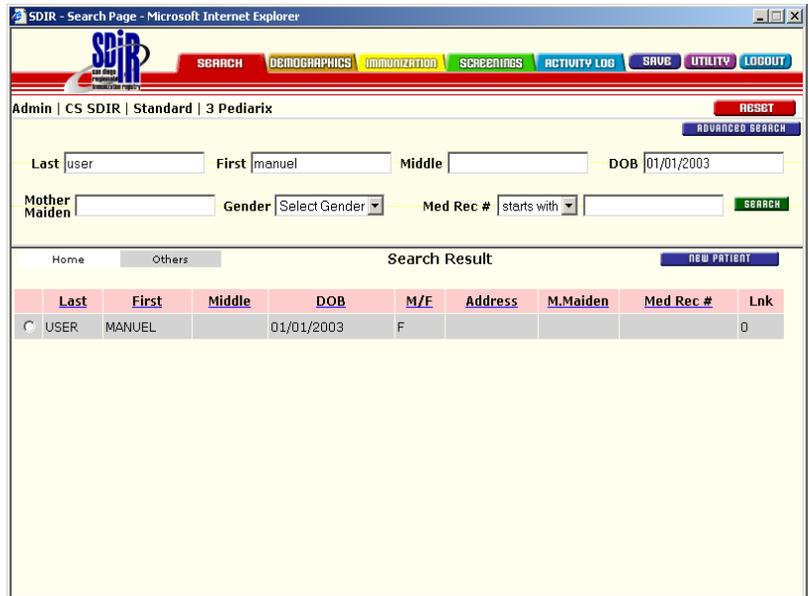
If a white patient record (home record) is shown:

- 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:

- ① Click in the circle next to the patient's name
 - ② 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

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 "SEARCH", "DEMOGRAPHICS", "IMMUNIZATION", "SCREENINGS", "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".

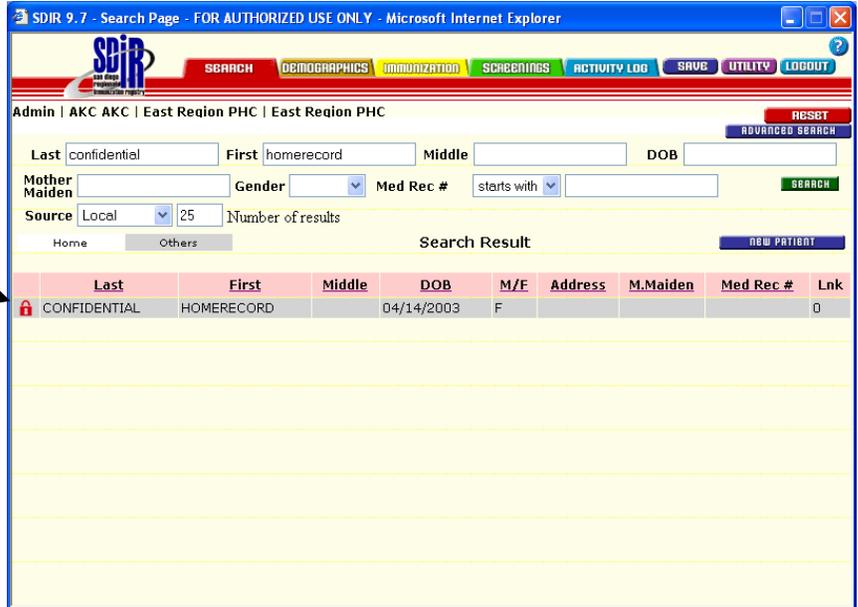
The main content area displays two patient records. The top record is white and is the "Home Record". The bottom record is grey and is labeled "Record 1 of 1 [Other Record]". The grey record has a "Copy To Above" link circled in red in the bottom right corner.

* Required Fields						PATIENT	OTHER
Last *	First *	Middle	Gender *	DOB *	Verify *		
USER	MANUEL		Female	01/01/2003	Operator		
Address	Address 2	City	State	Zip	Bad Address		
			CA				
Phone 1	Contact 1	Phone 2	Contact 2	Multiple Births	Birth State		
				Unknown			
Mother Last	Mother First	Mother Middle	DOB	SSN	Maiden Name		
Med Record	Facility	Reminder	Status	VFC			
	3 Pediarix	Yes	Active	5-Not Qualified			
Date Modified: 08/08/2006 [Confidential: N as of 05/28/2004]						Home Record:	

* Required Fields						PATIENT	OTHER
Last *	First *	Middle	Gender *	DOB *	Verify *		
USER	MANUEL		Female	01/01/2003	MatchMerge 1.1		
Address	Address 2	City	State	Zip	Bad Address		
			CA				
Phone 1	Contact 1	Phone 2	Contact 2	Multiple Births	Birth State		
				Unknown			
Mother Last	Mother First	Mother Middle	DOB	SSN	Maiden Name		
Date Modified: 05/28/2004						Record 1: Copy To Above Show It	

What to Do if a Record is Confidential

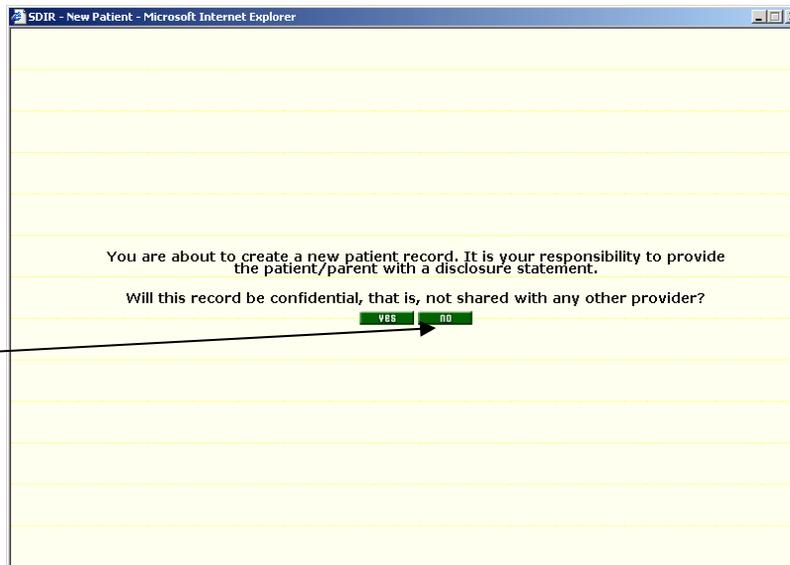
When searching for a patient, you may see that the patient has a confidential record as indicated by the padlock symbol.



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 SCREENINGS 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.

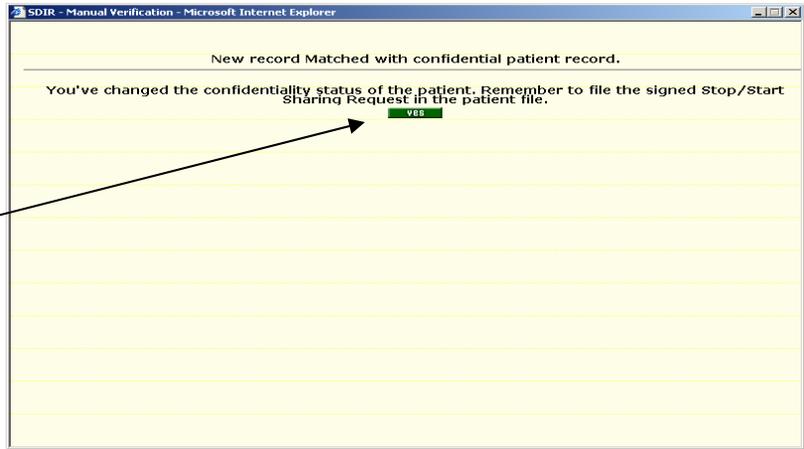
Continue?

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.

