

## How to Enter Demographic Information

Each provider must create his or her own demographic record for each patient. This design is to protect the demographic records from being changed without permission.

- ① Click on the DEMOGRAPHICS Tab.
- ② Complete patient demographic information. Mandatory fields have asterisks (\*) next to the field names (refer to the SDIR Data Entry Guidelines section of this manual)
- ③ Click “Other” to move to second screen.

SDIR - Demographics Page - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | CS SDIR | Standard | 3 Pediarix  
USER, MANUELA | 01/01/2003 | 3 years 7 months | RESET

IPID - 591926 Record ID - 8200580 \* Required Fields

Last \* First \* Middle Gender \* DOB \* Verify \*  
USER MANUELA Female 01/01/2003 Operator

Address Address 2 City State Zip Bad Address  
1256 French lane Apt # 1234 San Diego CA 92210

Phone 1 Contact 1 Phone 2 Contact 2 Multiple Births Birth State  
619-265-2626 Mother Last Mother First Mother Middle DOB SSN Maiden Name

Med Record Facility Reminder Status VFC  
Training Clinic Yes Active 1-CHDP/Med C

Date Modified: 08/02/2006 [Confidential: N as of 08/02/2006 | CHANGE] Home Record: Archive | Link | Unlink | Sibling | Show Iz | Print

No Duplicate Records to Display

Complete additional information. It is important to complete as much additional information as possible as this is used to verify patients.

SDIR - Demographics Page - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | CS SDIR | Standard | 3 Pediarix  
USER, MANUELA | 01/01/2003 | 3 years 7 months | RESET

IPID - 591926 Record ID - 8200580 PATIENT OTHER

Patient Alias Last Patient Alias First Patient Alias Middle Patient SSN Ethnicity Language  
Unknown Other

Guardian 1 Last Guardian 1 First Guardian 1 Middle DOB SSN Guardian 1 Relationship  
Self

Guardian 2 Last Guardian 2 First Guardian 2 Middle DOB SSN Guardian 2 Relationship  
Self

Medi-Cal Email Address Email POC Email Bad Phone 3 Contact 3

County Country School Physician Birth Country Informed  
San Diego United States Yes

Date Modified: 08/02/2006 [Confidential: N as of 08/02/2006 | CHG] Home Record: Archive | Link | Unlink | Sibling | Show Iz | Print

No Duplicate Records to Display

## How to Archive a Patient Record

You will only be able to archive a duplicate home record.

- ❑ After you have clicked on the DEMOGRAPHICS tab,

- ❑ Click on “Archive” to remove the patient record from appearing in the database.

SDIR - Demographics Page - Microsoft Internet Explorer

SEARCH DEMOGRAPHICS IMMUNIZATION SCREENINGS ACTIVITY LOG SAVE UTILITY LOGOUT

Admin | CS SDIR | Standard | 3 Pediarix  
USER, MANUELA | 01/01/2003 | 3 years 7 months |

IPID - 591926 Record ID - 8200580 \* Required Fields

Last \* First \* Middle Gender \* DOB \* Verify \*  
USER MANUELA Female 01/01/2003 Operator

Address Address 2 City State Zip Bad Address  
1256 French lane Apt # 1234 San Diego CA 92210

Phone 1 Contact 1 Phone 2 Contact 2 Multiple Births Birth State  
619-265-2626

Mother Last Mother First Mother Middle DOB SSN Maiden Name

Med Record Facility Reminder Status VFC  
Training Clinic Yes Active 1-CHDP/Medi-C

Date Modified: 08/02/2006 [Confidential: N as of 08/02/2006 | CHANGE] Home Records **Archive** | Link | Unlink | Sibling | Show Tx | Print

No Duplicate Records to Display

- ③ If you decide not to archive the patient, click on “No.”

- ④ If you are certain you want to remove the patient from Appearing in the database, Select “Duplicate Patient”

- ⑤ Click “Yes”

SDIR - Archive Patient - Microsoft Internet Explorer

Archiving a patient record removes it from the database.  
Are you sure you want to archive the home record?

NO

If you decide to archive the patient record  
Please select the reason for archival and then click on “Yes”

Duplicate Patient YES

## How Do You Change the Confidentiality Status of the Patient?

You can change the confidentiality status of the patient in the DEMOGRAPHICS module by clicking on “CHANGE”

SDIR - Demographics Page - Microsoft Internet Explorer

Admin | CS SDIR | Standard | 3 Pediarix  
USER, MANUELA | 01/01/2003 | 3 years 7 months |

IPID - 591926 Record ID - 8200580 \* Required Fields

Last \* [USER] First \* [MANUELA] Middle [ ] Gender \* [Female] DOB \* [01/01/2003] Verify \* [Operator]

Address [1256 French lane] Address 2 [Apt # 1234] City [San Diego] State [CA] Zip [92210] Bad Address [ ]

Phone 1 [619-265-2626] Contact 1 [ ] Phone 2 [ ] Contact 2 [ ] Multiple Births [Single] Birth State [ ]

Mother Last [ ] Mother First [ ] Mother Middle [ ] DOB [ ] SSN [ ] Maiden Name [ ]

Med Record [ ] Facility [Training Clinic] Reminder [Yes] Status [Active] VFC [1-CHDP/Medi-C]

Date Modified: 08/02/2006 [Confidential: N as of 08/02/2006] [CHANGE](#) Home Record: [Archive](#) | [Link](#) | [Unlink](#) | [Sibling](#) | [Show Iz](#) | [Print](#)

No Duplicate Records to Display

You will then need to confirm your decision to change the confidentiality status of the patient record.

SDIR - Confidential Flag - Microsoft Internet Explorer

Change Patient Confidential Status

Are you sure you want to change the Patient Confidential Status from Y to N?

[YES](#) [NO](#)

## How Do You Change the Confidentiality Status of the Patient?

Patients/Parents/Guardian can request to have the record's confidentiality status changed at any time.

After you click “Yes” you will need to click “OK” stating you will file the Start/Stop Sharing Request form.



The change will be noted in the DEMOGRAPHIC module

 A screenshot of the 'SDIR - Demographics Page' in Microsoft Internet Explorer. The page has a yellow header with the SDIR logo and navigation tabs: SEARCH, DEMOGRAPHICS (active), IMMUNIZATION, SCREENINGS, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. Below the header, it shows 'Admin | CS SDIR | Standard | 3 Pediarix' and a user profile for 'USER, MANUELA | 01/01/2003 | 3 years 7 months |'. There is a 'RESET' button. The main form is titled 'IPID - 591926 Record ID - 8200580' and contains various fields for patient information, including Last, First, Middle, Gender, DOB, Address, City, State, Zip, Phone, Contact, Mother, and Facility. A 'Med Record' section is also present. At the bottom, it says 'Date Modified: 08/02/2006 [Confidential: Y as of 08/02/2006] [CHANGE] Home Record: Archive | Link | Unlink | Sibling | Show Iz | Print'. A message at the bottom of the form states 'No Duplicate Records to Display'.

You will be alerted that you are going to change the patient's confidentiality status. Click “Yes” to continue.

 A screenshot of the 'SDIR - Confidential Flag' page in Microsoft Internet Explorer. The page has a yellow background and the title 'Change Patient Confidential Status'. In the center, there is a question: 'Are you sure you want to change the Patient Confidential Status from Y to N?'. Below the question are two green buttons: 'YES' and 'NO'. The Windows taskbar at the bottom shows the Start button and several open applications, including Internet Explorer, with the system clock showing 10:42 AM.

The change will also be noted in the ACTIVITY LOG

SDIR - Activity Page - Microsoft Internet Explorer

Admin | CS SDIR | Standard | 3 Pediatric  
USER, MANUELA | 01/01/2003 | 3 years 7 months |

Activity Log

Display: All

There are 57 Activity Log Records of type "All"

Log ID	Log Type	Log Date	Notes	Ref ID
83635	Merge Multiple Home	08/02/2006	Merged demoq id=8200564	--
83638	Edit Demographic	08/02/2006		--
83641	Confidentiality	08/02/2006	Confidential: N as of Wed Aug 02 00:00:00 PDT 2006	--
83645	Confidentiality	08/02/2006	Confidential: Y as of Wed Aug 02 00:00:00 PDT 2006	--
83639	Unlink	08/02/2006		--
83642	Save	08/02/2006		--
78579	Reminder	07/27/2004		--
78342	Reminder	06/28/2004		--
75829	Reminder	05/25/2004		--
83636	Edit Demographic	05/13/2004		--
74809	Save	05/13/2004		--
74737	Reminder	05/13/2004		--
74800	Reminder	05/13/2004		--
74681	Reminder	05/12/2004		--
74002	Reminder	04/09/2004		--
74001	Reminder	04/09/2004		--
73765	Save	03/25/2004		--
73759	Encounter	03/25/2004	mom states refusing due to illness	--

\*\* Insert/Edit/Delete Area \*\*

There is no longer a pad-lock appearing next to the patient's name. The record will be available for other authorized SDIR users to view.

SDIR - Demographics Page - Microsoft Internet Explorer

Admin | AKC AKC | East Region PHC | East Region PHC  
USER, MANUELA | 01/01/2003 | 3 years 7 months

IPID - 966677 Record ID - 8393808 \* Required Fields

Last *	First *	Middle	Gender *	DOB *	Verify *
USER	MANUELA		Unknown	01/01/2003	MatchMerge 2.0
Address	Address 2	City	State	Zip	Bad Address
231 Mylo Street		SAN DIEGO	CA	92110	
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	VFC
	East Region PHC	Yes	Active		5-Not Qualified

Date Modified: 08/16/2006 [Confidential: N as of 08/16/2006 | CHANGE] Home Record: [Archive](#) | [Link](#) | [Unlink](#) | [Sibling](#) | [Show Iz](#) | [Print](#)

No Duplicate Records to Display