

CalREDIE Person Versioning

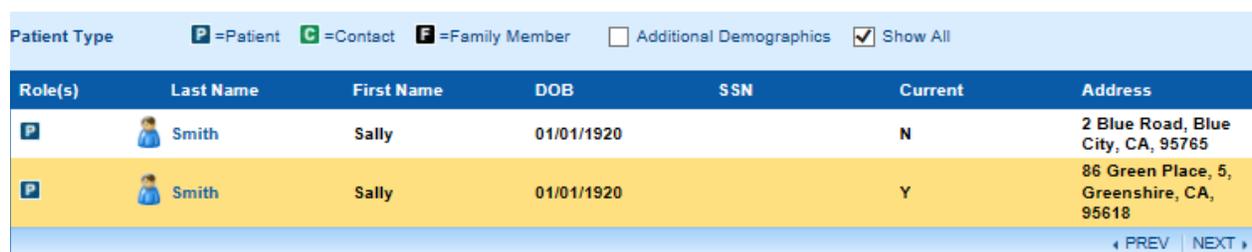
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Identifying Person Versions

CalREDIE tracks all demographics for a patient. Demographics are tracked through Person Versions or through the Multiple Identities and Multiple Addresses pop-up windows (see FAQ on pg. 7). Person Versions are created anytime there is a demographic change associated with a new Disease Incident. Person Versions are displayed on the Patient Grid of the Master Person Index (MPI) as multiple lines for the same Person. The Current Version of the Person is the line with a value of “Y” in the Current column. Non-Current Versions of the Person have a value of “N” in the Current column.

In **Figure 1**, Sally Smith has a Current Person Version and a Non-Current Person Version. The Current Person Version is highlighted in yellow.



Role(s)	Last Name	First Name	DOB	SSN	Current	Address
P	Smith	Sally	01/01/1920		N	2 Blue Road, Blue City, CA, 95765
P	Smith	Sally	01/01/1920		Y	86 Green Place, 5, Greenshire, CA, 95618

Figure 1. Image of CalREDIE MPI

Note: In order to open a Disease Incident or create a new Disease Incident, the user does not have to select the Current Version. Every version of a Person is linked to all Disease Incidents associated with that Person.

Users can uncheck the “Show All” checkbox to hide Non-Current Versions from the Patient Grid as shown in **Figure 2**.

Patient Type =Patient =Contact =Family Member Additional Demographics Show All

Role(s)	Last Name	First Name	DOB	SSN	Current	Address
<input checked="" type="checkbox"/>	Smith	Sally	01/01/1920		Y	86 Green Place, 5, Greenshire, CA, 95618

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Figure 2. Image of CalREDIE MPI with “Show All” unchecked

When creating a new Person Version, the patient’s prior Disease Incidents remain associated with the now Non-Current Person Version and new Disease Incidents are associated with the new Current Person Version.

Creating a New Person Version from a Disease Incident

When a new Disease Incident is created for an existing Person and there is a change to one of the demographic fields on the Patient tab, the user has the option of creating a New Version of the Person or making a Correction to the existing demographic information for the Person. Choosing to create a New Version of a Person allows the existing demographic information to be retained with previously entered Disease Incidents and the updated demographic information to be used with new Disease Incidents. Choosing to Correct the existing demographic information permanently changes the demographic information for ALL associated Disease Incidents. It is critical to choose correctly between a New Version and Correction when the patient changes jurisdictions between Disease Incidents.

When creating a new Disease Incident, if the user changes one or more of the demographics a dialog box opens. **Figure 3**

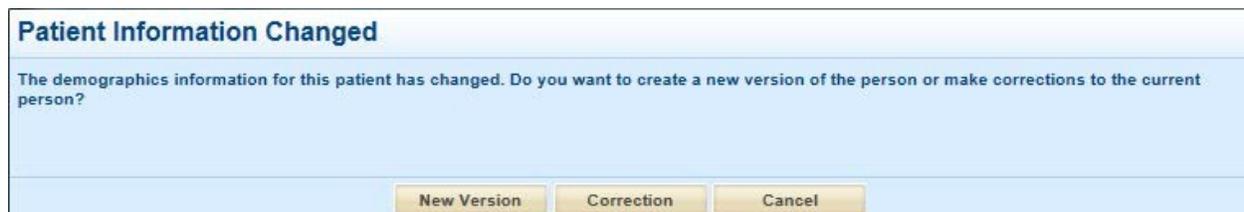


Figure 3. Image of New Version or Correction dialog box

The dialog box offers two options:

1. New Version

The changes are considered a new Person Version and a new line is added to the Patient Grid in the MPI.

Example: If a patient’s name changes due to marriage, then the name change would be saved as a New Version.

Note: When a New Version is created, the changes to the demographics appear in the newly created version of the record only.

2. Correction

The demographics are updated and become the current values.

Example: If a misspelled street name in a patient's address is changed to the correct spelling, this would be saved as a Correction.

Note: When a correction is made, demographics are updated for ALL associated Disease Incidents.

In **Figure 4**, "Sally Smith" has several Disease Incidents and several Person Versions. Searching by Sally's Patient ID shows her complete version history in CalREDIE.

Sally has two names in her history, "Sally Mae" (highlighted in Yellow and Red) and "Sally Smith" (highlighted in Blue and Green). She has had four different addresses: Red Street (highlighted in red), Yellow Avenue (highlighted in yellow), Blue Road (highlighted in blue) and Green Place (highlighted in green).

The screenshot shows the CalREDIE MPI interface. At the top, there are tabs for 'Person', 'Disease Incident', and 'Outbreak'. Below these are search filters for Name, SSN, DOB, Address, Phone, Zip, Create Date, MRN, SoundEx, Source Identifier, and Patient ID. The Patient ID search box contains '2350914'. Below the search box are buttons for 'Find', 'New Patient', and 'Clear'. There are also checkboxes for Patient Type: Patient (checked), Contact, Family Member, Additional Demographics, and Show All.

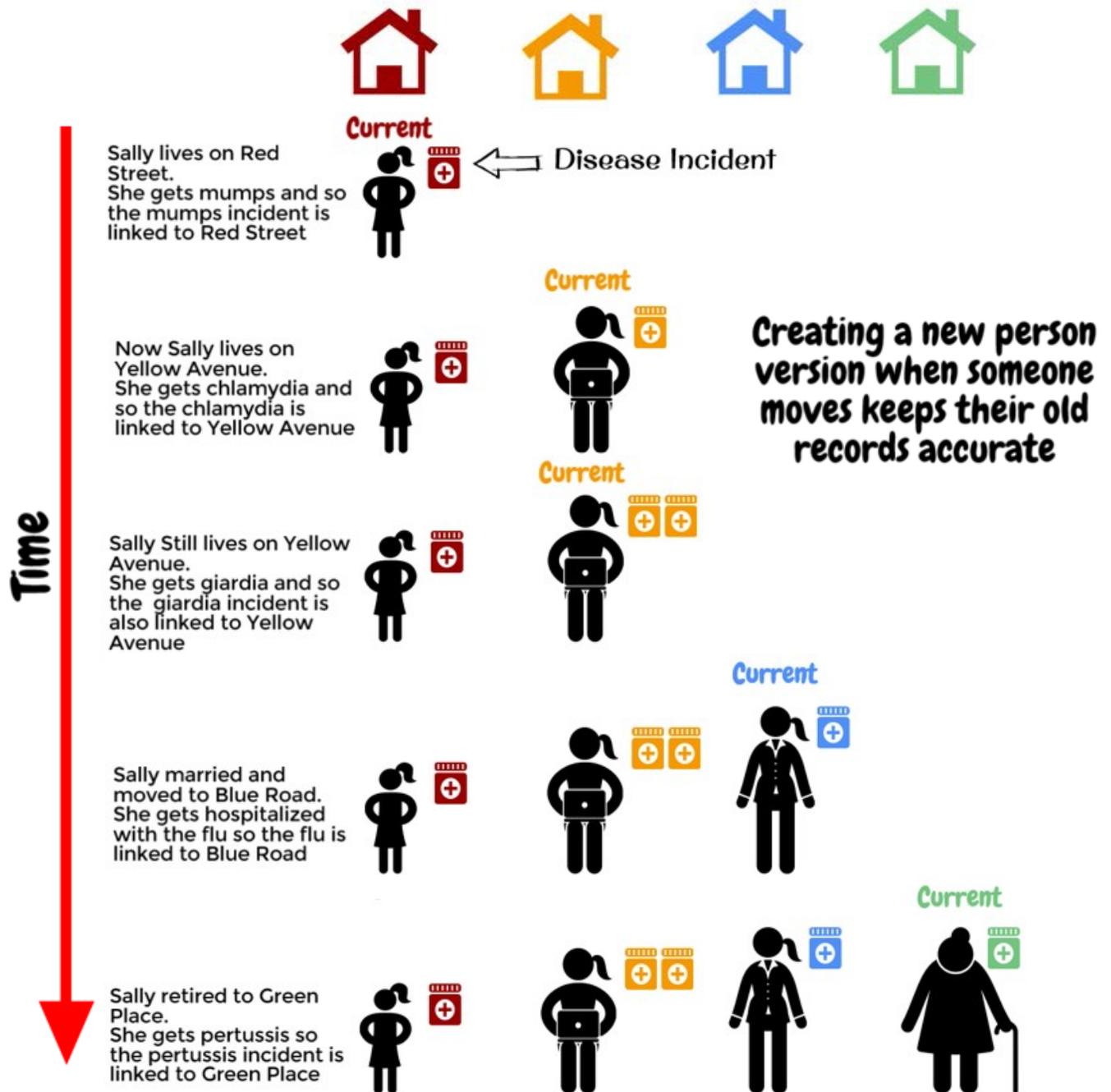
Role(s)	Patient ID	Last Name	First Name	DOB	SSN	Current	Address
P	2350914	Mae	Sally	01/01/1920		N	314 Yellow Avenue, Yellowtown, CA, 95814
P	2350914	Mae	Sally	01/01/1920		N	42 Red Street, Redtown, CA, 95814
P	2350914	Smith	Sally	01/01/1920		N	2 Blue Road, Blue City, CA, 95765
P	2350914	Smith	Sally	01/01/1920		Y	86 Green Place, 5, Greenshire, CA, 95618

Type	ID	Disease/GE Type	Jurisdiction	Date Created	Pro/Res Status	User	Mark for Merge/Split
DI	2377260	Pertussis	Yolo	05/03/2016	Entered/ Suspect	Rose - Prog Admin, Kevin	
DI	2377259	Influenza - ICU Hospitalization (0-64 years old)	Yuba	06/08/1978	Entered/ Suspect	Rose - Prog Admin, Kevin	
DI	2377258	Giardiasis	Long Beach	05/13/1945	Entered/ Suspect	Rose - Prog Admin, Kevin	
DI	2377257	Chlamydia	Long Beach	05/03/1940	Entered/ Suspect	Rose - Prog Admin, Kevin	
DI	2377256	Mumps	Sonoma	05/05/1925	Entered/ Suspect	Rose - Prog Admin, Kevin	

Figure 4. Image of CalREDIE MPI displaying Person Versions and Record for Sally Smith

Since a new Person Version was created every time Sally changed addresses, each of her Disease Incidents is tied to the correct address.

See **Figure 5** for a representation of how Person versioning correctly preserved Sally's Disease Incident history.



Looking at Sally's record, we can see that each of her incidents is tied to the version of Sally that was correct at the time she got sick; we kept an accurate record of Sally and her reported incidents through time.

Figure 5. Image demonstrating Sally Smith's correct Person Versioning

Creating a New Person Version from a Contact (system) section

The Contact (system) section is associated with the Current Person Version. Making a change to the demographics in an existing Contact (system) section acts as a correction to the Current Person Version and the change affects all records associated with the Current Person Version.

After a Contact (system) section is created, it should not be edited except to add or correct demographics.

If an existing Person is linked to a Contact (system) section, the demographics should not be edited except to add or correct demographics. Any changes made to the demographics are reflected in the Patient Record and any Disease Incidents associated with the Current Person Version.

If changes need to be made to the demographics in a Contact (system) section, then the Contact (system) section will need to be converted into a Disease Incident. To convert a Contact (system) section into a Disease Incident, follow these steps:

1. Leave the demographics in the Contact (system) section unchanged.
2. Convert the Contact (system) section into a Disease Incident by clicking the “Create Incident” button.
3. A dialog box appears asking “Do you want to create a new version of the person?”
4. Select “Yes”.
5. Make any needed changes to the demographics within the new Disease Incident.

These steps allow a new Current Person Version to be created. The Disease Incident, and its Person Version, can be edited without affecting other Disease Incidents associated with the Person.

Note: The New Version dialog box will only display if the Person/Contact is already associated with a Disease Incident.

Note: The Contact (system) section, even if disabled due to conversion to a Disease Incident, will always display data from the Current Person Version.

Family Member sections and Person Versioning

Family Member sections are similar to Contact (system) sections for Person versioning with the exception that Disease Incidents cannot be created from Family Member sections.

The Family Member section is associated with the Current Person Version. A change to the demographics in an existing Family Member section acts as a correction to the Current Person Version and the change affects all records associated with the Current Person Version.

After a Family Member section is created, it should not be edited except to add or correct demographics.

If an existing Person is linked to a Family Member section, the demographics should not be edited except to make additions or corrections. Any changes made to the demographics are reflected in the Patient Record and any Disease Incidents associated with the Current Person Version.

Note: The Family Member section always displays data from the Current Person Version.

Patient Record and Person Versioning

There is no versioning of Patient Records themselves. They always reflect the Current Person Version. While a Disease Incident may show old demographics, the Patient Record always shows the current demographics.

Any changes made to the demographics in the Patient Record are reflected in all Records associated with the Current Person Version (Disease Incidents, Contact (system) sections, and Family Member sections).

After a Patient Record is created, it should not be edited except to add or correct demographics.

FAQ

What if I have a demographics change but I am not creating a new Disease Incident?

The Demographics can be added to the Multiple Identities and Multiple Addresses pop-ups. This is particularly useful for tracking demographic changes in chronic conditions. Time period of Residency can be tracked in these pop-ups. For more information on the Multiple Identities and Multiple Addresses pop-ups see page 33 of the CalREDIE User Guide.

What if I am correcting Demographics in an existing record?

Make the change directly to the field in the Disease Incident. This change will affect all Disease Incidents associated with the Person Version. Only do this for a data correction, such as a typo in a street name.

Why am I not getting the “New Version” or “Correction” dialog box?

The “New Version” or “Correction” dialog box will only appear after a New Disease Incident is created for an existing Patient Record and then a demographic field is changed on the Patient Tab.

*Special thanks to the Wisconsin Department of Public Health for images.