



# V2023.2 User Guide

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**CDPH CalREDIE**  
CALIFORNIA DEPARTMENT OF PUBLIC HEALTH

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## Section 1: Getting Started

At the end of this section, users will be able to:

1. Contact CalREDIE Help
2. Understand when HIV/AIDS information can and cannot be entered
3. Log into CalREDIE
4. Navigate CalREDIE using a mouse and keyboard

The California Reportable Disease Information Exchange (CalREDIE) is a web-based application for disease reporting and surveillance. CalREDIE was developed by the California Department of Public Health (CDPH) to allow for near real-time reporting and surveillance of communicable diseases. CalREDIE is an accessible but secure tool to capture and analyze real-time data. CDPH continues to enhance CalREDIE while also providing support to existing users.

### CalREDIE Help

CalREDIE Help is available by e-mail only since March 2020 and until further notice. All questions, comments, and issues related to CalREDIE should be directed to CalREDIE Help.

- E-mail Address: [CalREDIEHelp@cdph.ca.gov](mailto:CalREDIEHelp@cdph.ca.gov)

### Entering HIV/AIDS Information

There are very strict rules regarding HIV/AIDS information in CalREDIE. HIV/AIDS information may only be entered for conditions of:

1. Hepatitis B
2. Hepatitis C
3. HIV/AIDS
4. Meningococcal Infection
5. Tuberculosis
6. Gonorrhea
7. Chlamydia
8. Syphilis

**For all other conditions, HIV/AIDS information must not be entered.** All users that have access to Hepatitis B, Hepatitis C, HIV/AIDS, Meningococcal Infection, Tuberculosis, Gonorrhea, Chlamydia, and/or Syphilis data in CalREDIE are required to sign and submit **CDPH 8689, HIV/AIDS Security and Confidentiality Form**.

Entering HIV/AIDS information for conditions other than Hepatitis B, Hepatitis C, HIV/AIDS, Meningococcal Infection, Tuberculosis, Gonorrhea, Chlamydia, and Syphilis is a violation of Health and Safety Codes 121022(h), (i), and (j), and 121025. The consequences for violating these statutes affect not only CDPH and the local health jurisdiction (LHJ), but can personally affect the individual entering the information:

- **Mandatory report to law enforcement:** CDPH is required to report any potential or actual disclosure of HIV information to law enforcement;
- **CDPH and personal liability:** Not only is the local user, physician or other person who entered the data potentially personally liable for the mandatory fines, but CDPH and the individuals who configured the CalREDIE system to allow HIV information to be entered may also be personally liable. NOTE: The CalREDIE system audits and records user activity.
- **Mandatory Fines:** The **minimum fine** imposed by Health and Safety Code Sections 121022(i) and 121025(e) for entering HIV information in CalREDIE would likely be **\$5,000 per Patient Record/per view** on CalREDIE, because the fines increase if the court determines that entry was an intentional act and not a negligent act. The amount of the fine is set by the court, and is **not** within CDPH's control. The maximum fine would be **\$25,000 per Patient Record/per view** on CalREDIE per Health and Safety Code Section 121025(e)(2). These fines are paid directly to the patient whose HIV information is disclosed.
- **Criminal offense and money Damages:** if the patient whose HIV information is disclosed suffers any "economic, bodily, or psychological harm" (which isn't that hard to show in a lawsuit) then Health and Safety Code Section 121025(e)(3) imposes these additional penalties:
  - **Additional Damages:** the person whose HIV information is disclosed is allowed to recover a money judgment for all damages the person suffered.
  - **Crime:** the disclosure is a misdemeanor punishable by up to a year in county jail and an additional fine of up to \$25,000 per Patient Record/per view on CalREDIE.
- **Broad definition of what information is confidential:** Health and Safety Code Section 121035(c) imposes a very broad definition of what information cannot be disclosed without violating Health and Safety Code Sections 121022 or 121025. It includes **any** data or information that—**directly or indirectly**— may lead to the identification of the patient and that person's HIV or AIDS status, or HIV/AIDS test results. By including the word "indirectly" the definition covers information that by itself may not reveal anything, but if pieced together with other puzzle pieces (even from other sources) would allow someone to identify the person involved.

## Vital Records and CalREDIE

Vital Records, including birth certificates, death certificates (including fetal death and still birth certificates), and marriage certificates, are classified by the law as public documents, which are governed by different laws regarding disclosure than other information that is or may be collected during the course of a public health case investigation. Inclusion of copies of these vital records in an Incident in CalREDIE potentially threatens the confidentiality of the rest of the data in that CalREDIE Incident, meaning that Incident data that would normally be protected from public disclosure may



be required to be disclosed under certain circumstances. To maintain the confidentiality of the data collected and captured in CalREDIE, DO NOT attach any vital record including birth certificates, death certificates (including fetal death and stillbirth certificates), or marriage certificates to the Electronic Filing Cabinet of an Incident in CalREDIE.

**Please contact the CalREDIE Help Desk immediately if you have any questions.**

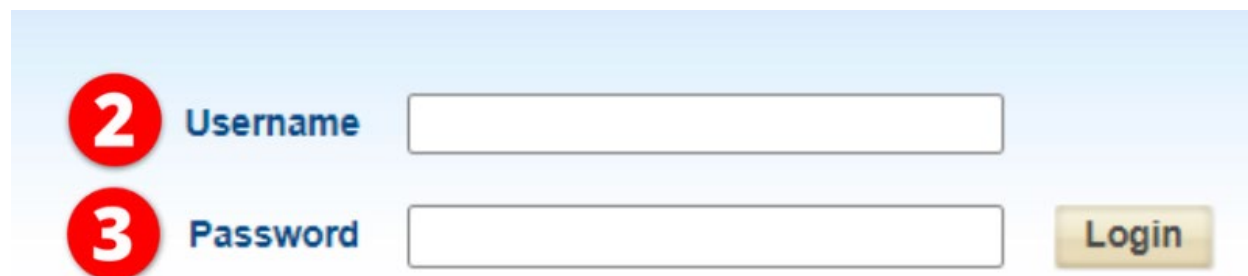
### Logging into CalREDIE

To log into CalREDIE users will need a username and password, provided by CDPH. All users must complete an **Account Authorization Request** (available on the CalREDIE Help webpage under “Accessing CalREDIE”) before being authorized to use CalREDIE.

#### Steps to Log into CalREDIE (Figure 1.1):

1. Navigate to the CalREDIE website: <https://calredie.cdph.ca.gov>
2. Enter your **Username**.
3. Enter your **Password**.
  - a. Note: Please contact the CalREDIE Help Desk for password assistance.
4. Click **Login**. You are now in CalREDIE.

**Figure 1.1: CalREDIE Login Screen**

The image shows a login screen with a light blue background. On the left, there are two red circular icons with white numbers: '2' and '3'. To the right of icon '2' is the label 'Username' in blue text, followed by a white rectangular input field. To the right of icon '3' is the label 'Password' in blue text, followed by a white rectangular input field. To the right of the password field is a yellow button with the word 'Login' in black text.

Users can navigate CalREDIE using the mouse and keyboard. Some important tips to remember:

1. CalREDIE is now browser-independent, meaning that it can be used with web browsers such as Chrome, Firefox, or Edge. However, Internet Explorer is no longer supported.
2. For security purposes, CalREDIE will timeout after 15 minutes of inactivity. Be sure to save your work often to prevent losing data.
3. You will be prompted to change your password every 60 days.
4. Use of the **Back** button is disabled when working within a record.
5. Always logout by clicking on the **Logout** button.
6. A pop-up button looks like an icon of a new window. Clicking on a pop-up button will open a pop-up window with additional information specific to the area of CalREDIE you are in.

7. Fields in red mean that the field is **REQUIRED**. Some fields are conditionally required and will turn red based on data entered in a previous field.
8. When entering data, remember to always tab out of the field or click elsewhere on the page so that the page is triggered to refresh. Page refreshes ensure that proper behind-the-scenes validations are performed. For certain fields this is especially important; these are pointed out in the guide where applicable.
9. The Navigation bar is located at the top of the screen and can be used to access the different areas of CalREDIE. These areas are covered in detail later in this guide.
10. Always contact CalREDIE Help with any questions!

### A Note about this User Guide

All screenshots were taken from a test environment, using fake patient records and fake incidents. Nevertheless, in some cases fake data was redacted to avoid potential confusion due to the appearance of real information.

## Section 2: Searching for a Person

At the end of this section, users will be able to:

1. Search for a person in the Master Person Index using several types of criteria
2. Create a new person in the Master Person Index
3. Search for a person with additional demographics
4. Identify the Disease Incidents or Contact Investigations associated with a person
5. Create a new Disease Incident or Contact Investigation for an existing person.

### Background Information

CalREDIE uses a Master Person Index (MPI) which is a list of every person that exists in CalREDIE. People can exist as a patient, contact, family member or any combination of the three. Users are able to search for a person in the MPI using a variety of different search parameters. **When searching for a person, always perform a thorough search; this will help keep the number of duplicates in the MPI to a minimum.** The different search parameters are located on the MPI search page as an expandable group of search fields. It is also possible to include additional demographics in a search. For more information about additional demographics, see [Section 8: Multiple Addresses and Identities](#).

To ensure a thorough search, use the motto “less is more”. Searching by less information will return more results. The more results that you are able to assess increases the likelihood that you will find the person if he or she already exists in CalREDIE.

When searching by **Name**, **SSN**, **Address**, **Medical Record Number**, **ZIP**, and/or **Patient ID**, it is possible to use a Wildcard (%) when searching. Be aware that searches containing a Wildcard might take longer than a normal search. The Wildcard matches zero or more characters wherever it is used. For example, searching for a name of “j%n%n” will return the following results: Jandinero, Janssen, Jansson, Jantzen, Jenkin Jenkins, etc.

### Searching for a person in the MPI

Steps to Search by Name (Figures 2.1 & 2.2):

1. Click on the **Search** button in the Navigation bar.
2. By default, the fields **Name**, **Identifier Type**, **Identifier**, **DOB** (*Date of Birth*), and **Age** appear. **Identifier** will appear as “SSN” by default.
3. Type the Last Name, First Name in the **Name** search field.
  - a. Note: The search is not case-sensitive
  - b. Note: A space is not needed before or after the comma
  - c. Note: If Last Name is unknown, search by “,First Name”
  - d. Note: You may also simply search by Last Name.
4. If desired, fill in any of the other search fields.

- a. Note: click the icon next to **DOB** to change from a single-date search to a date range search. The same icon is present on the **Age** search.
- b. Note: the **Age** search only works for patients that have an age but are missing a Date of Birth. Consequently, it will return very few results.
5. Click the **Expand** (plus sign) button to see additional search fields.
  - a. Fill out additional fields as needed, keeping in mind the “less is more” principle.
  - b. Note: the fields **Created** and **DOD** (*Date of Death*) operate in the same manner as the **DOB** and **Age** fields.
6. Click **Find**.
7. Use the **Prev** and **Next** buttons to move through results.
8. If the person is not found, click **New Patient** to add him or her to CalREDIE.

Figure 2.1: The MPI Search

Figure 2.1 shows the MPI Search interface. The search bar includes fields for Name, Identifier Type, Identifier, DOB, and Age. Below the search bar are tabs for Patient, Disease Incident, and Outbreak. A table displays search results for two patients: Testman, John and Testomanny, Janie. The table includes columns for Role(s), Patient ID, Name, DOB, SSN, MRN, Address, and Current status. A 'Find' button is visible next to the search bar.

Figure 2.2: The Expanded MPI Search

Figure 2.2 shows the Expanded MPI Search interface. This view shows additional search fields including Address, Zip, Phone, DOD, State Number, Person Status, Status Flag, Patient ID, Medical Record Number, and Created. The interface also includes tabs for Patient, Disease Incident, and Outbreak, and a 'Find' button.

Identifying Incidents, Contact Investigations, and Outbreaks associated with a person

Disease Incidents (DIs), Contact Investigations (CIs) and Outbreaks (OBs) for a person are displayed below the MPI. These records are displayed for the person in the MPI who is highlighted in yellow. Keep in mind that all CalREDIE users are able to view and search for a person in the MPI, however, only certain users are able to view the Incidents, Contact Investigations and Outbreaks that belong to a person.

Note: Contact Investigations are currently used almost exclusively for active Tuberculosis (TB-3).

Access to this disease information is based on the users' jurisdiction and/or disease grouping. Users will see *"There are some masked or read-only records you are not authorized to access"* if a record does not belong to their jurisdiction and/or disease grouping.

### Steps to View the Records Associated with a Person (Figure 2.3):




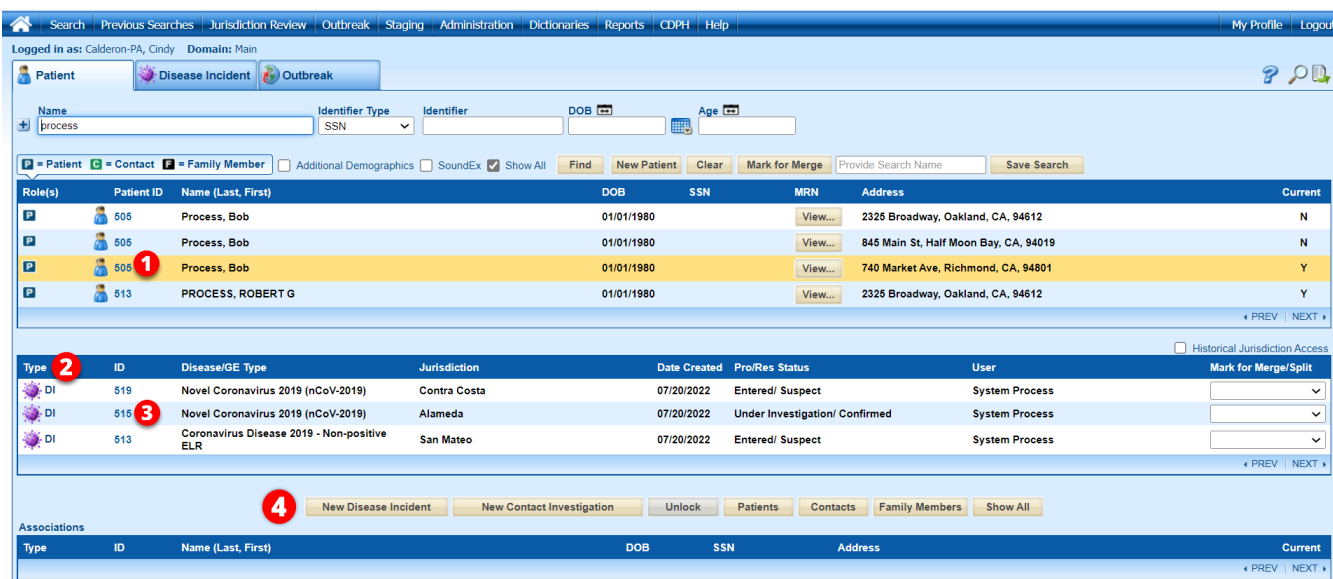
- Click on the blue **Patient ID** to select a person. The row for this person will become highlighted in yellow.
  - Note: To access the Patient Record, click the icon of the person in the blue shirt next to the **Patient ID**.
- View Incidents, CIs, and Outbreaks for the patient below the MPI. The following icons are used for each record type:
  - Disease Incident  DI
  - Outbreak  OB
  - Contact Investigation  CI
- Click on the blue ID number to open an Incident, CI, or Outbreak.
- To add a new Incident for the selected person, click **New Incident**, or click **New Contact Investigation** to start a CI.

Figure 2.3: Seeing Incidents Associated with Person



Logged in as: Calderon-PA, Cindy Domain: Main

**Patient** | Disease Incident | Outbreak

Name: process Identifier Type: SSN Identifier: DOB: Age:

☐ Patient ☒ Contact ☐ Family Member ☐ Additional Demographics ☐ SoundEx ☒ Show All Find New Patient Clear Mark for Merge Provide Search Name Save Search

Role(s)	Patient ID	Name (Last, First)	DOB	SSN	MRN	Address	Current
P	505	Process, Bob	01/01/1980		View...	2325 Broadway, Oakland, CA, 94612	N
P	505	Process, Bob	01/01/1980		View...	845 Main St, Half Moon Bay, CA, 94019	N
P	505	Process, Bob	01/01/1980		View...	740 Market Ave, Richmond, CA, 94801	Y
P	513	PROCESS, ROBERT G	01/01/1980		View...	2325 Broadway, Oakland, CA, 94612	Y

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Historical Jurisdiction Access

Type	ID	Disease/GE Type	Jurisdiction	Date Created	Pro/Res Status	User	Mark for Merge/Split
DI	519	Novel Coronavirus 2019 (nCoV-2019)	Contra Costa	07/20/2022	Entered/ Suspect	System Process	
DI	515	Novel Coronavirus 2019 (nCoV-2019)	Alameda	07/20/2022	Under Investigation/ Confirmed	System Process	
DI	513	Coronavirus Disease 2019 - Non-positive ELR	San Mateo	07/20/2022	Entered/ Suspect	System Process	

PREV NEXT

**4** New Disease Incident New Contact Investigation Unlock Patients Contacts Family Members Show All

Associations

Type	ID	Name (Last, First)	DOB	SSN	Address	Current
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PREV NEXT

## Section 3: Patient Record

At the end of this section, users will be able to:

1. Create a new Patient Record
2. Standardize an address
3. Enter multiple races
4. Enter other demographic information for a person

### Background Information

A Patient Record is a record type that is not necessarily associated with a Disease Incident or Outbreak. A Patient Record can stand by itself, but all Disease Incidents must be associated with a Patient Record.

Steps to create a Patient Record from the MPI Search page:

1. Conduct a patient search in the MPI.
2. If no results are returned, the **New Patient** button becomes enabled. Click it.

The Patient Record contains demographic information that is typically found on the paper Confidential Morbidity Report (CMR), and contains **most of the same fields found on the Patient Tab (Section 4) of a Disease Incident**. A unique Patient ID is displayed at the top of each Patient Record, and as the selectable data item for each patient in the MPI. Fields in red are required and must be completed in order to create the Patient Record. All other fields on the Patient Record are not required, however information should be entered if available. For an explanation of each field, see the **CalREDIE Reference Guide**.

Steps to enter information on the Patient Record (Figure 3.1 and 3.2)<sup>1</sup>:

1. Enter **Last Name** and **First Name (REQUIRED)**.
2. Enter **SSN**.
  - a. Note: **SSN** can be entered as nine digits; CalREDIE will auto-format as xxx-xx-xxxx
3. Enter **DOB**.
  - a. Note: the age will be automatically calculated based on the **DOB**
  - b. Note: **DOB** is an example of a date field. There are three ways dates can be entered in a date field. The first way is to manually enter the date. Dates can be manually entered in any of the following ways: MM/DD/YYYY, MM-DD-YYYY, MM.DD.YYYY, MMDDYYYY, M/D/YYYY. CalREDIE will automatically format date fields to MM/DD/YYYY.

The calendar icon can also be used to select a date. To use the calendar icon, click on the icon located next to the date field and select the desired

<sup>1</sup> Note: this guide will aim to cover the most important fields as well as all the different types of fields. If you have any questions about fields not covered here, please reach out to CalREDIE Help.

date from the calendar pop-up.

Dates can also be added using what is called “t-notation”. T-notation assumes that the letter “t” is today’s date. To enter today’s date in a date field, type a “t” in the date field. When you click out of the field, the date will automatically populate in the MM/DD/YYYY format. To enter a past date using t-notation, type a “t-X”, where X is the number of days prior to today’s date. For example, t-1 would be yesterday’s date.

4. Enter an address. The physical **Address Number & Street, City, and Zip Code** should all be entered.
5. Click on the pop-up button next to the **Geo Location** field to geocode the address. The **County of Residence** field will auto-populate based on the geocoded address.
  - a. Note: if you do not geocode the address using the pop-up button, CalREDIE will automatically geocode the address when you change tabs.
  - b. Note: some addresses cannot be standardized. You will receive a pop-up message stating this, with the only available selection being **OK**. You will need to manually select the **County of Residence**.
  - c. Note: use the **Clear** button to clear the **Geo Location** field.
6. Enter any Phone Numbers
  - a. Note: Phone Numbers can be entered without parentheses as a 10-digit number. CalREDIE will auto-format to xxx-xxx-xxxx.
7. If available, enter an **E-mail Address** and **Other Electronic Contact Information**.
8. If applicable, select the **Work/School Location**. To use this field, users must select a location from the Location Dictionary. For instructions on using these dictionaries, see [Section 7: Report Source and Location Dictionaries](#).
  - a. Note: The **Occupation Location** field on the bottom of the Patient Tab collects the same information but in a free-text format.
9. Select a **Gender (REQUIRED)** from the dropdown. If Gender is unknown, select “Unknown”.
10. **Marital Status, Occupation Setting, and Occupation** all have values that can be selected from the dropdown. Select values for these fields if they are known.
11. **Medical Record Number (MRN)** can be entered by clicking on **View**. In order to enter a medical record number, users must select a Reporting Source from the Report Source Dictionary. See [Section 7: Report Source and Location Dictionaries](#).
12. Select an **Ethnicity (REQUIRED)** from the dropdown. If **Ethnicity** is unknown, select “Unknown”.
13. Select one or more **Races (REQUIRED)** using the checkboxes.
  - a. To specify race categories within a particular race, click on the **Specify** button located below the selected race. This will open a pop-up where one or more race categories can be selected.

- b. Below the **Race** checkboxes is the **Reported Race** field, which is auto-populated based on the race(s) selected.
- 14. Any Disease Incidents or Outbreaks associated with this patient will appear in the grid.
- 15. Any patients or contacts associated with this patient will appear in the *All Associations* grid. Click **Show All** to see all associations.
- 16. Enter information for any *Family Members* as necessary.
  - a. Note: Family Members are linked to the Master-Person Index. Please search the MPI for the person first (see Step 18 below) before creating a new entry.
- 17. Use the **Copy Address** button to paste the address from your patient into the Family Member's address fields.
- 18. Use the **Link Patient/Unlink** button to link an existing patient record as a family member, or to unlink a *Family Member* from the patient record.
  - a. Note: if you enter a new person as a *Family Member* and then unlink, the person will remain as a person in the MPI without a role.
- 19. Click **Add Family Member** to enter or link an additional person as a family member.
- 20. Click **Save**.



Figure 3.1: Patient Record

**Patient**

Patient: Process, Bob  
 Patient ID: 505  
 DOB: 01/01/1980

**Name**

\* Last Name **1** Process \* First Name Bob Middle Name ? Third Name  
 Fourth Name Name Suffix Name Prefix

**SSN** **2** **DOB (MM/DD/YYYY)** **3** 01/01/1980 Age Months Days 44  
 Address Number & Street **4** 740 Market Ave Apartment/Unit Number  
 City Richmond State CA Zip 94801  
 Geo Location **5** 365002 County of Residence Contra Costa Country of Residence  
 Country of Birth Date of Arrival (MM/DD/YYYY)  
 Home Telephone **6** Cellular Phone / Pager Work/School Telephone  
 E-mail Address **7** Other Electronic Contact Information  
 Work/School Location **8** Work/School Contact  
 \* Gender **9** Male  
 Marital Status **10** Medical Record Number **11** BOB01011980 View...  
 Occupation Setting Describe/Specify  
 Occupation Describe/Specify Occupation Location  
 Alerts

**Primary Language**  
**Primary Nationality**  
 \* Ethnicity **12** Not Hispanic or Latino  
 \* Race **13**  
☐ American Indian or Alaska Native  
☐ Asian  
☐ Black or African American  
☐ Native Hawaiian or Other Pacific Islander  
☒ Other  
☐ Unknown  
☒ White  
**Reported Race**  
 Multiple Race

Figure 3.2: Patient Record Continued

**14**

Type	ID	Disease	Date Created	Pro/Res Status	User
DI	519	Novel Coronavirus 2019 (nCoV-2019)	07/20/2022	Entered/ Suspect	System Process
DI	515	Novel Coronavirus 2019 (nCoV-2019)	07/20/2022	Under Investigation/ Confirmed	System Process
DI	513	Coronavirus Disease 2019 - Non-positive ELR	07/20/2022	Entered/ Suspect	System Process

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**Associations 15**

Patients Contacts Family Members Show All

Type	Record ID	Name	DOB	SSN	Current	Address
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**Family Members 16**

ID-001 **18** Link Patient

Last Name First Name Middle Name Third Name Fourth Name Suffix Prefix

DOB (MM/DD/YYYY) Age Months Days Gender Relationship Ethnicity Primary Language

Race

☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or Other Pacific Islander ☐ Other ☐ Unknown ☐ White

Reported Race

Address Number & Street Apartment/Unit Number City

State Zip Geo Location

Home Phone Cellular Phone / Pager

**17** Copy Address

**19** Add Family Member

**20** Save Cancel New Disease Incident New Contact Investigation

## Section 4: Entering an Incident – Patient Tab

At the end of this section, users will be able to:

1. Select a condition from the **Disease** dropdown
2. Create a Disease Incident

### Background Information

As mentioned previously, all Disease Incidents must be associated with a Patient Record. The Patient Tab of a Disease Incident contains many of the same fields as the Patient Record. If a Disease Incident is being created from an existing Patient Record, then the Patient Tab of the Disease Incident will be auto-populated with the current demographic information. If a Disease Incident is being created without an existing Patient Record, entering information on the Patient Tab of the Disease Incident will also create a corresponding Patient Record.

Steps to enter information on the Patient Tab (Figure 4.1 and 4.2):

1. Do one of the following:
  - a. Select a patient from the MPI Search screen for whom you wish to create a new incident, then click **New Disease Incident**.
  - b. Select **New Patient** from the MPI Search screen, enter the patient information, and select **New Disease Incident** at the bottom of the Patient Record.
2. On the Patient Tab, select the condition being reported from the **Disease Being Reported** dropdown (**REQUIRED**).
  - a. Note: Tab or click out of the dropdown so that the page refreshes.
3. Additional tabs may appear between the Patient and Case Investigation Tabs.
  - a. Note: For certain disease conditions, you may notice minor additions to the Patient Tab. For example, for HIV/AIDS the field **STATENO** will appear below **Disease Being Reported**, while for some conditions, the checkbox list **Gender(s) of Sex Partners** will appear under the field **Reported Race**.
4. If the demographic information is not pre-populated, or needs to be updated, then enter information for all relevant fields.
  - a. Note: Fields in red are required and must be completed in order to move onto the next tab.
  - b. Note: If the Disease Incident is being created for an existing Patient Record, the information on the Patient Tab will be pre-populated.
5. Note: The Patient Tab contains certain fields which do not appear on the Patient Record. The fields **Pregnant?** And **Estimated Delivery Date** do not appear on the Patient Record, nor do the **Multiple Addresses** and **Multiple Identities** buttons.

6. Most diseases will have the “ADDITIONAL PATIENT DEMOGRAPHICS” section at the bottom of the form. You may expand this section by clicking the + icon to its left.
7. Click **Next** to move to the next tab or click directly on the tab you wish to access.
8. Clicking **Save** will save any information you have entered and generate an Incident ID.

**Figure 4.1: Patient Search**

The screenshot displays the 'Patient' tab of a software interface. At the top, there are three tabs: 'Patient' (selected), 'Disease Incident', and 'Outbreak'. Below the tabs is a search form with fields for 'Name' (containing 'Beesly, Pam'), 'Identifier Type' (set to 'SSN'), 'Identifier', 'DOB', and 'Age'. There are also checkboxes for 'Additional Demographics', 'SoundEx', and 'Show All'. A red circle with the number '1' is placed over the 'New Patient' button. Below the search form is a table with columns: 'Role(s)', 'Patient ID', 'Name', 'DOB', 'SSN', and 'MRN'. The table contains one entry for 'Beesly, Pam' with Patient ID 460 and DOB 12/04/1980. Below this table is another table with columns: 'Type', 'ID', 'Disease/GE Type', 'Jurisdiction', 'Date Created', and 'Pro/Res Status'. This table contains two entries: one for 'Novel Coronavirus 2019 (nCoV-2019)' with ID 1485, and another for 'Legionellosis' with ID 468. At the bottom of the interface, there are buttons for 'New Disease Incident', 'New Contact Investigation', 'Unlock', 'Patients', and 'Contact'. A red circle with the number '1' is placed over the 'New Disease Incident' button.

Role(s)	Patient ID	Name	DOB	SSN	MRN
P	460	Beesly, Pam	12/04/1980		View...

Type	ID	Disease/GE Type	Jurisdiction	Date Created	Pro/Res Status
DI	1485	Novel Coronavirus 2019 (nCoV-2019)	Sacramento	09/03/2022	Entered/ Suspect
DI	468	Legionellosis	Sacramento	07/14/2022	Entered/ Suspect

Figure 4.2: Patient Tab

**Disease Incident** ?

Patient: Beesly, Pam      Patient ID: 460      Incident ID:  
 DOB: 12/04/1980      Disease: Novel Coronavirus 2019 (nCoV-2019)      Pro/Res Status: /

Patient    PUI and Epi Form    Laboratory Info.    Case Investigation **3**

\* Disease Being Reported **2** Novel Coronavirus 2019 (nCoV-2019)

**4** Name

\* Last Name: Beesly    \* First Name: Pam    Middle Name:    Third Name:    Fourth Name:    Name Suffix:    Name Prefix:

SSN:    DOB (MM/DD/YYYY): 12/04/1980    Age: 43    Months:    Days: **5**

Address Number & Street: 1000 R St    Apartment/Unit Number:

City: Sacramento    State: CA    Zip: 95811

Geo Location: 002100    County of Residence: Sacramento    Country of Residence:

Country of Birth:    Date of Arrival (MM/DD/YYYY):    Work/School Telephone:

Home Telephone: 408-555-0101    Cellular Phone / Pager:    Work/School Contact:

E-mail Address: pbeesly@example.net    Other Electronic Contact Information:

Work/School Location:    Work/School Contact:

\* Gender: Female    Pregnant? ☐ Yes ☒ No ☐ Unknown    Estimated Delivery Date:

Marital Status: Married    Medical Record Number:    View...

Occupation Setting:    Describe/Specify:    Occupation Location:

Occupation:    Describe/Specify:    Alerts

**6** ADDITIONAL PATIENT DEMOGRAPHICS

Sex Assigned at Birth:    Sexual Orientation:

**7** Next    Cancel    Save **8**

**5**

Primary Language:    Primary Nationality:    \* Ethnicity: Not Hispanic or Latino    \* Race: ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☒ Native Hawaiian or Other Pacific Islander Specify: ☐ Other ☐ Unknown ☐ White    Reported Race: Native Hawaiian or Other Pacific Is

Gender(s) of Sex Partners (check all that apply): ☐ Male ☐ Female ☐ Transgender (M to F) ☐ Transgender (F to M) ☐ Unknown ☐ Refused

## Section 5: Entering an Incident – Case Investigation Tab

At the end of this section, users will be able to:

1. Assign a new Jurisdiction
2. Assign an Investigator
3. Select Reporting Sources
4. Update the Process and Resolution Statuses
5. Enter Notes/Remarks
6. Save/Submit the Incident

### Background Information

The Case Investigation Tab exists for all conditions. It is always the last tab and is divided into three columns: Case Information, Dates, and Statuses. There is also a section for **Notes/Remarks**. For an explanation of each field on the Case Investigation Tab, see the **CalREDIE Reference Guide**.

### Case Information - Jurisdictions

The **Jurisdiction** dropdown is automatically populated based on the person's address. If the person's address could not be geocoded, you will need to manually select the Jurisdiction from the dropdown. The Jurisdiction can be changed if necessary; changing the Jurisdiction after the incident has been saved will result in the original Jurisdiction becoming the secondary Jurisdiction. This is part of how Incidents are transferred between Jurisdictions<sup>2</sup>.

- Note: The primary Jurisdiction has read/write access to the Incident and is able to edit the Incident. The secondary Jurisdiction has read-only access and is only able to view the Incident. Users who create an incident for which their jurisdiction is not assigned to either the primary or secondary Jurisdiction will retain read-only access, however other users in their jurisdiction will be unable to access the incident.

### Case Information - Investigator

The **Investigator** dropdown is pre-populated with all possible Investigators for a user's jurisdiction. Users are also able to view the number of Incidents assigned to an Investigator.

#### Steps to Assign an Investigator (Figure 5.1):

1. To select an Investigator, click on the pop-up button next to the **Investigator** dropdown and search the Link to Investigator screen. Clicking the Investigator's name will automatically select him or her as the Investigator.
  - a. Note: The Link to Investigator screen will also show the number of open cases assigned to each investigator.

<sup>2</sup> For the full Jurisdiction Transfer protocol, please see the CalREDIE Reference Guide.



- Alternatively, simply select an Investigator from the dropdown.

**Figure 5.1: Jurisdiction and Investigator Assignment**

The screenshot shows the 'Case Investigation' tab in the 'CalREDIE Staging UAT - Investigator Link' window. The 'Case Information' section includes a dropdown for '\* Jurisdiction' (currently set to 'Sacramento') and a dropdown for 'Investigator' (highlighted with a red circle and the number 2). The 'Dates' section includes 'Date of Onset', 'Lab Specimen Collection Date', and 'Lab Specimen Result Date'. The 'Statuses' section includes '\* Process Status' (currently set to 'Entered') and buttons for 'Set to the Next Status' and 'Set to: Not a Case'. A red circle with the number 1 highlights the 'Investigator' dropdown menu. Below the main form is a 'Link to Investigator' section with a search bar and a table of 'Available Investigators'.

Name	# of Open Cases
34Abdali, Pam	3
34Aguire - nCoV, Alicia	0
34Akhter, Sayeda	892
34Allamby - nCoV2019, Shaun	0
34Allen, Rachel	0
34Alubani, Rania	0
34Armendariz, Teresa	35
34Armendariz - HIV, Teresa	0
34Ayala - nCoV2019, Yesica	0
34Banks, Tatiana	0

## Case Information - Reporting Source

The *Reporting Source* section allows for a provider and a laboratory to be linked to the Incident. For incidents created by a lab or web report, some fields in this section will be pre-populated with information about the submitting laboratory or provider.

The user may select up to two providers and two laboratories to be associated with the Incident. All of the providers and laboratories are stored in the Report Source and Location Dictionaries and users must perform a search in the appropriate dictionary to find the provider or laboratory of interest. To learn more about the Report Source and Location Dictionaries, and how to enter an existing provider and/or laboratory, see [Section 7: Report Source and Location Dictionaries](#).

## Dates

Several dates are collected in this section. **Date of Onset**, **Lab Specimen Collection Date**, **Lab Specimen Result Date**, **Date of Diagnosis**, and **Date of Death** can all be entered here. For some diseases, entering a **Date of Onset** on the Case Investigation Tab will automatically populate the **Date of Onset** on the Clinical Tab. **Episode Date** and **Date Closed** are automatically populated and cannot be edited. **Specimen Collection Date** can be automatically populated from the *Lab (system)* section of the

Laboratory Info Tab. **Date Received** is automatically populated but can be edited. **Date Created** is automatically populated but can only be edited by State users and higher. For a definition of each date field, see the [CaIRENIE Reference Guide](#).

### Statuses – Process Status

The **Process Status** is a required field. It is automatically set based on the workflow for the disease being reported. As an Incident moves through an investigation, the Process Status can be changed. When the case investigation has been completed by the LHD, the Process Status must be changed to “Closed by LHD”. See the [CaIRENIE Reference Guide](#) to learn more about the different workflows.

#### Steps to Change the Process Status (Figure 5.2):

1. Use the **Process Status** dropdown to change the Process Status. –OR–
2. Click **Set to the Next Status** below the **Process Status** field to advance the Incident to the next Process Status.
  - a. Note: After the Process Status is changed, click or tab out of the field so that the page refreshes. This ensures that the Process Status is set properly.
  - b. Note: Click **Set to: Not a Case** to quickly set the Process Status to “Not a Case”.

### Statuses – Imported Status, Resolution Status, Final Disposition

**Resolution Status** defaults to “Suspect” when an Incident is first entered and can be changed using the dropdown. **Imported Status, Final Disposition, and Transmission Status** can be selected from their respective dropdowns.

#### Steps to Change the Imported Status, Resolution Status, Final Disposition, or Transmission Status (Figure 5.2):

3. Select the desired status from each dropdown.



Figure 5.2: Statuses

**Disease Incident**

Patient: Test, 12345 Incident ID: 2405076 Process Status: Entered  
 DOB: Disease: Amebiasis Resolution Status: Suspect

**Patient** **Laboratory Info.** **Case Investigation**

**Case Information**

\* Jurisdiction  
 Sacramento

Secondary Jurisdiction

Investigator

**Reporting Source**

Provider

Provider Name

Submitter Name Ramirez - Admin, Dianerik

Lab

Additional Provider

Additional Lab

Index Case Cluster ID

Patient Died of This Illness ☐ Yes ☐ No

Patient Hospitalized ☐ Yes ☐ No

Hospital ☐ Inpatient ☐ Outpatient

**Dates**

Date of Onset

☐ Asymptomatic

Lab Specimen Collection Date

Lab Specimen Result Date

Date of Diagnosis

Date of Death

Date Received 06/23/2022

\* Date Created 06/23/2022

Episode Date 06/23/2022

Date Closed

Date Admitted

Date Discharged

**Statuses**

\* Process Status Entered

Set to the Next Status

Set to: Not a Case

Reported by:

☐ Web Report

☐ Lab Report

Imported Status

Resolution Status Suspect

Final Disposition

Transmission Status

Date Sent

Last CDC Update

**Linked Outbreaks**

Outbreak ID	Outbreak #	Location	Date Created	Jurisdiction	Process / Resolution
-------------	------------	----------	--------------	--------------	----------------------

## Notes/Remarks

Users can enter notes and remarks in the text box. All entries are stamped with the date, time, and username. **Once a note has been entered, it cannot be deleted. Do not enter HIV/AIDS information here unless it is for an Incident of hepatitis B, hepatitis C, meningococcal infection, TB, chlamydia, gonorrhea, syphilis, or HIV/AIDS.**

Steps to Add Notes/Remarks (Figure 5.3):

1. Click the **Add** button located below the **Notes/Remarks** box.
2. Enter comments in the **New Notes** field.
3. Click **OK**.

**Figure 5.3: Adding a Note**

The screenshot displays a software interface for adding a note. At the top, there is a 'Notes/Remarks' section with a large text box and an 'Add' button, marked with a red circle containing the number 1. Below this is a dialog box titled 'CalREDIE Staging UAT-Add a Note'. Inside the dialog, there is a section titled 'Add a Note' which contains two text boxes: 'Current Note' and 'New Note'. The 'New Note' text box is marked with a red circle containing the number 2. At the bottom right of the dialog, there are 'OK' and 'Cancel' buttons, with the 'OK' button marked with a red circle containing the number 3.

### Saving/Submitting the Incident

When the **Submit** button—located on the bottom of the Case Investigation Tab—is clicked, the Incident is not submitted to CDPH. It is submitted to the CalREDIE database and saved. When the **Submit** button is used, CalREDIE validates the data in several fields on the Case Investigation Tab. For this reason, it is recommended to use the **Submit** button **before** the **Save** buttons are used on other tabs.

### Transferring an Incident to Another Jurisdiction

Once saved, an incident can be transferred to another jurisdiction, while retaining the original jurisdiction's read-access.

#### Steps to Modify the Jurisdiction:

1. Select the correct Jurisdiction from the **Jurisdiction** field, then click or tab out of the field.
2. Verify that the original Jurisdiction automatically became the secondary Jurisdiction.
3. Select a **Process Status** of "Jurisdiction Transfer".
4. Click **Submit**.
  - a. Note: Users should notify the new Jurisdiction via fax, phone, or E-mail about the transfer. See the **CalREDIE Reference Guide** for information on transferring Incidents.

## Section 6: Entering an Incident – UDF Tabs

1. Identify and use an *Add Section*
2. Collapse and expand sections on UDFs
3. Copy Data Feature
4. Understand how business rules work

### Background Information

When the disease condition is selected on the Patient Tab, additional tabs may or may not appear. These additional tabs are called User Defined Forms, or UDFs. UDFs collect information specific to the disease being reported. Items commonly found on UDFs are described below.

### Add Sections

*Add Sections* are areas of CalREDIE where numerous entries can be added to the same section. Each entry is given an ID number and is numbered sequentially in the order in which it is added. Entries in an *Add Section* can also be deleted; when an entry is deleted, all remaining entries are renumbered.

#### Steps to Use an Add Section (Figure 6.1):

1. Navigate to a tab that has an *Add Section* (e.g. the Clinical Tab for Salmonellosis).
2. Complete the fields for the first entry.
3. Click **Add**. A blank section will appear.
4. Complete the fields for the second entry.
5. Continue to click **Add** to add additional sections.
6. Use the **Delete** button to remove an individual entry.

Figure 6.1: Add Section

The screenshot displays the 'HOSPITALIZATION - DETAILS' form with two entries. Red numbered callouts indicate the steps for adding a section:

- 2**: Points to the 'ID-001' entry header.
- 4**: Points to the 'ID-002' entry header.
- 3**: Points to the 'Add' button at the bottom right.
- 5**: Points to the 'Add' button at the bottom right.
- 6**: Points to the 'Delete' button at the bottom right.

The form contains the following fields for each entry:

- ID-001**: Hospital name (Fake Hospital), City (Sacramento), Zip code, Admit date (08/03/2022), Medical record number, Street address (123 Fake Ln), State (CA), Telephone, Discharge / transfer date (08/05/2022), Discharge diagnosis.
- ID-002**: Hospital name (Good Hospital), City (Sacramento), Zip code, Admit date (12/01/2022), Medical record number, Street address (987 Phony St), State (CA), Telephone, Discharge / transfer date (12/02/2022), Discharge diagnosis.

## Expanding and Collapsing Sections

Some of the UDF tabs are very long. To make the tab more manageable, controls are available to expand and collapse 1) all sections at once 2) all empty sections at once, or 3) a specific section.

### Steps to Collapse or Expand Sections (Figure 6.2)

1. Navigate to a UDF tab.
2. Clicking on the purple **Plus/Minus** button in the top right-hand corner of the tab will alternate between “+” and “-”. This will collapse and expand all empty sections on the page.
3. Clicking on the green **Plus/Minus** button in the top right-hand corner of the tab will alternate between “+” and “-”. This will collapse and expand all sections on the page.
4. Clicking the **Plus/Minus** button next to a section header will alternate between “+” and “-”. This will collapse and expand that section only.

**Figure 6.2: Expanding and Collapsing Icons**

The screenshot displays the 'Disease Incident' form interface. At the top, there is a header bar with a title and a series of icons. Below this, patient information is shown: 'Patient: Test, Fakey', 'DOB: 01/01/1990', 'Patient ID: 539', 'Disease: Listeriosis', 'Incident ID: 550', and 'Pro/Res Status: Entered/Suspect'. A tabbed interface follows, with 'Patient' selected and others like 'Clinical Info.', 'Laboratory Info.', 'Epidemiologic Info.', and 'Case Investigation' visible. On the right side of the tab bar, there are two small buttons: a purple one with a plus/minus icon (labeled '2') and a green one with a plus/minus icon (labeled '3'). The main content area lists several sections, each with a plus/minus icon to its left: 'SIGNS AND SYMPTOMS' (labeled '4'), 'PAST MEDICAL HISTORY', 'HOSPITALIZATION', 'HOSPITALIZATION - DETAILS', and 'OUTCOME'. At the bottom of the form, there are five buttons: 'Back', 'Next', 'Save', 'Cancel', and 'Print Tab'.

## Copy Data Feature

New in CalREDIE v2023.2, users can now copy data from a section into another iteration of the same exact section elsewhere for the same patient. For example, if a patient were to test positive for both Salmonella and e. Coli and was hospitalized, you

may wish to copy the hospitalization details from one incident into the other, rather than hand-enter twice.

Please note that this only works under the following conditions:

- Both incidents must belong to the same patient record;
- The user must have access to both disease incidents;
- The section must be the same exact section, not simply a similar section that collects similar data.

#### Steps to Copy Data from a Selected Section into the Current Section (Figure 6.3):

1. Navigate to a UDF tab.
2. Navigate to the section you want to fill with data from the same section of a different disease incident.
3. Click on the **Copy** button at the top right of the section. This will open a pop-up that shows if the data has been filled out elsewhere.
  - a. Note: The pop-up will display the Record ID, Record Type, Disease, Form/Section, Episode Date, Diagnosis Date, Onset Date, and Specimen Collection Date. Clicking on the **View** button will show a preview of the data from the section of that disease incident.
4. Select the section you want to copy from.
5. Click **Copy** from the pop-up to copy data from the selected section into the current section.
  - a. Note: Copying data from the selected section will overwrite all data in the current section.
6. If the section is an **Add Section**, the **Append** button will be available to select. Appending to an Add Section will copy all iterations of data from the selected section and append them to the end of the current section.

**Figure 6.3: Copying or Appending Data**

**HOSPITALIZATION** **2**

Did patient visit emergency room for illness?

Was patient hospitalized?

If Yes, how many total hospital nights?

**CalREDIE Training - Copy**

Please select the data you would like to copy

Record ID	Type	Disease	Form/Section	Episode Date	Diagnosis Date	Onset Date	Specimen Collection Date
1486 <b>4</b>	DI	Salmonellosis (Othe...	Clinical Info. (SALMONLACLICR)	09/19/2024			

View 1 - 1 of 1

Warning: Copying data from the selected section will overwrite all data in the current section. Be sure to View the data in the source record before choosing "Copy" or "Append".

**Copy** **5** **Append** **6** **Close**

## Business Rules

Business rules are integrated throughout CaLEDIE and work to help facilitate data entry and keep the data clean. The most common type of business rule enables or disables fields based on certain responses in previous fields. They are especially noticeable on the UDFs as many fields are greyed out until a previous question has been answered.

### Steps to Understand How Business Rules Work (Figure 6.4):

1. Navigate to a UDF tab (e.g. the Clinical Info Tab for Salmonellosis).
2. Notice that some fields are greyed out and will not let you enter data in them.
3. To enable a field that is greyed out, you must provide an answer (often a particular answer) to a previous question.
4. The controlling field often immediately precedes the controlled field, but this is not always the case.

**Figure 6.4: Understanding Business Rules**

**BEFORE**

**PAST MEDICAL HISTORY**

Did the patient take antibiotics in the month prior to onset? If Yes, specify

Does the patient take any medications regularly? If Yes, specify

Does the patient have any medical conditions? (i.e., renal disease, diabetes, immune compromising conditions) If Yes, specify

---

**AFTER**

**PAST MEDICAL HISTORY**

Did the patient take antibiotics in the month prior to onset? If Yes, specify

Yes

Does the patient take any medications regularly? If Yes, specify

Yes

Does the patient have any medical conditions? (i.e., renal disease, diabetes, immune compromising conditions) If Yes, specify

Yes

## Section 7: Report Source and Location Dictionaries

At the end of this section, users will be able to:

1. Search for a provider or location in the Report Source or Location Dictionaries
2. Request a new entry be added to the Report Source or Location Dictionaries

### Background Information

The Report Source and Location Dictionaries are where provider, facility, and laboratory information are stored. The Report Source Dictionary contains mostly providers. The Location Dictionary contains physical locations such as facilities, clinics, and laboratories, as well as non-medical sites such as exposure sites and workplaces. All Report Sources must be linked to a Location Dictionary entry, however Location Dictionary entries can also exist in their own right, independent of any Report Source. Once a provider, facility, or laboratory has been entered in its respective dictionary, it will remain there indefinitely unless it is inactivated.

All CalREDIE users are accessing the same Report Source and Location Dictionaries. It is important to keep this in mind when entries are being added or modified. All new entries in the Report Source and Location Dictionaries must follow the naming standards outlined in the **V2023.2 CalREDIE Reference Guide** and are created via a request form submitted to the CalREDIE Help Desk. Please consult these guidelines and always perform a thorough search before requesting a new or updated entry.

### Steps to Select an Existing Provider from the Report Source Dictionary (Figure 7.1):

1. Click the pop-up button next to the **Provider** field. This will open the Report Source Dictionary in a pop-up box.
2. To search for the provider, enter the provider's name in the **Provider/Location** field.
  - a. Note: If the provider name is not found, a new provider entry will need to be added. To request that a new entry be added to the Report Source Dictionary, contact the CalREDIE Help Desk.
3. Click **Search**.
4. From the search results, click on the Provider Name. The Provider will now be highlighted in yellow.
5. View the provider's contact information below, as well as the linked Location and verify it is correct.
  - a. Note: If the contact information or linked Location is not correct, a new provider entry will need to be added to the Report Source Dictionary. Minor edits are also allowed, provided they do not change the basic character of the entry (e.g. OK to add credentials, not OK to change linked Location)
6. Click **OK**. This will close the pop-up window.
7. Verify that the provider's name appears in the **Provider** field.



- a. Note: Use the **Clear** button to clear the **Provider** field.

**Figure 7.1: Report Source Dictionary Pop-up**

**Reporting Source**

Provider 1

7 Provider Name

Submitter Name Calderon-PA, Cindy

Date

Date of Diagnosis

Date of Death

☐ Lab Report

Imported Status

Resolution Status

**CalREDIE Training - Report Source Dictionary**

Provider / Location case 2 Address 2100

Provider Type

Show All ☐

3 Search Clear Mark for Merge

Provider	Provider Type	Location	Location Type	Location Address	City	Inactive
+Case, Cellphone, MD - Submitter	Doctor <span>4</span>	+Fake Hospital - Sacramento - Pediatrics	Hospital Outpatient	2100 Q St, Sacramento, CA, 95816	Sacramento	

PREV NEXT

**Add/Edit Section**

5 \* Provider +Case, Cellphone, MD - Submitter

\* Provider Type Doctor

Provider Identifier

National Provider Identifier ☐

Location	Location Type	Address	City	Zip	Main Phone	Primary
1 +Fake Hospital - Sacra	Hospital Outpatient	2100 Q St	Sacramento	95816		<input checked="" type="checkbox"/>

PREV NEXT

Add Delete

Private Phone/Ext.

Fax Number

Notes

Bldg./Suite

E-mail

Is Private ☐

Inactive ☐

Auto-Import from Staging Area ☐

Disable Default Matching Rules ☐

Locked Record ☐

6

Matching Rules... New Save OK Cancel

back to top

### Steps to Select an Existing Lab from the Location Dictionary (Figure 7.2):

1. Click the pop-up button next to the **Lab** field to open the Location Dictionary.
2. To search for a laboratory by name, enter the laboratory name in the **Location Name** field.
3. Click **Search**.
4. From the search results, select the Location so that it becomes highlighted in yellow.
5. View the location contact information below and verify it is correct.
  - a. Note: If the contact information is not correct, a new location will need to be added to the Location Dictionary. Minor edits to existing entries are also allowed.
6. Click **OK**. This will close the pop-up window.
7. Verify that lab name appears in the **Lab** field.
  - a. Note: If there is more than one provider or laboratory, use the **Additional Provider** and **Additional Lab** fields. Follow the same steps listed above.
  - b. Note: Use the **Clear** button to clear the **Lab** field.

**Figure 7.2: Location Dictionary Pop-up**

Lab

Date Received: 05/05/2022

Final Disposition

### CalREDIE Training - Location Dictionary

#### Location Dictionary

Location: low

Location Type: [v]

Investigation: [v]

Site #: [ ]

Address Number and Street: [ ]

Classification: Laboratory

Phone: [ ]

Jurisdiction: [v]

☐ Show All

Search Clear Mark for Merge

Location	Location Type	Address	Inactive
+Lowtech Labs of Sacramento	Laboratory	4600 Broadway, Sacramento, CA, 95820	

PREV NEXT

#### Add/Edit Section

\* Location: +Lowtech Labs of Sacramento

\* Classification: Laboratory

Address Number and Street: 4600 Broadway

City: Sacramento

State: CA

Geo Location: 002900

County: Sacramento

Primary Contact: [ ]

E-mail: [ ]

OID: [ ]

Inactive: ☐

Locked Record: ☐

Investigation(s): ☐ Lead ☐ Pesticide

ID/CLIA Code: 976431258

Can Enter Results Manually: ☒

Access to Lab View Message Monitor: ☐

New Save OK Cancel

back to top

## Section 8: Contacts

At the end of this section, users will be able to:

1. Create Contacts to a previously entered Incident.
2. Delete a previously entered Contact from an Incident
3. Turn a Contact into an Incident
4. Locate a Contact in the Master-Person Index (MPI)

### Background Information

Contacts exist in CalREDIE as a contact to a Disease Incident. Users can create Contacts to an Incident for certain conditions using the *Contacts (System)* section. If necessary, these Contacts can be turned into an Incident. Contacts appear in the MPI with a **Contact** icon next to their name.

When adding a Contact to a Disease Incident, it is possible that the person to be added as the Contact already exists in CalREDIE. Users can search the MPI from within the *Contacts (System)* section to determine if the person already exists. If so, users can use the existing person to create the Contact; this ensures that a duplicate person is not created in the MPI.

#### Steps to Add an Existing Person as a Contact (Figure 8.1):

1. Navigate to the *Contacts (System)* section for a Disease Incident. The *Contacts (System)* section can be found on the Epidemiologic Info Tab for some conditions (e.g. Mumps) or as its own tab for other conditions (e.g. Chlamydia).
  - a. Note: Not all conditions have a *Contacts (System)* section.
2. Click the Link Patient pop-up in the lower right-hand side of the *Contacts (System)* section.
3. Search for the person using any of the following search parameters: **Last Name**, **First Name**, **DOB**, **Address**, and/or **Phone Number**. Users with HIV/AIDS permissions may also search by **STATENO**.
4. Click on the blue Name so that the person becomes highlighted in yellow.
5. Click **OK**. Demographic information for this person will auto-populate in the *Contacts (System)* fields. The fields within the red borders can be populated by this method. The remaining fields are specific to the Contact (System) section.
6. Complete any other information in the *Contacts (System)* fields.
7. If there is another Contact to enter, click **Add**. A new Contact entry section will appear below the previously entered Contact.
  - a. Note: Contacts are numbered sequentially in the order in which they are added.

Figure 8.1: Contacts (system) Section

**Contacts (system)** 1

ID-001

\* Last Name: Candles \* First Name: Tall Middle Name: ? Name Suffix: DOB: 05/16/1980 Age: 42 Gender: Male Phone Number:

Street Address: Apartment: City: State: Zip: Jurisdiction: Investigator:

Race: ☐ American Indian or Alaska Native ☒ Asian Specify ☐ Black or African American ☐ Native Hawaiian or Other Pacific Islander ☐ Other ☐ Unknown ☐ White 6

Type of Contact: Date of Contact: Exposure Event: Cluster ID:

Priority: Status: Medication Used: E-mail Address: Other Electronic Contact Information:

2 Link Patient

Date reported to Public Health: If Type of Contact is Other, specify:

Date of illness onset: Relationship:

Same household:

Occupation: Sensitive occupation / situation?:

Create Disease Incident Create Investigation Delete

7 Add

**CalREDIE Training - Select a Patient**

Select a Patient

Last, First: Candles, Tall DOB: State Number:

Address: Phone: 3 Search Clear

Role(s)	Name	DOB	SSN	Gender	Current	Address
P	Candles, Tall 4	05/16/1980		Male	Y	

PREV NEXT

5 OK Cancel

### Steps to Add a New Person as a Contact (Figure 8.2):

1. Navigate to the *Contacts (System)* section for a Disease Incident.
  - a. Note: the *Contacts (System)* section can appear in either a standard layout or in Grid View.
2. Search for the person in the MPI using the steps described above. When the person is not found, he or she must be entered as a Contact manually.
3. Enter the contact information in the *Contacts (System)* section. The Last Name and First Name are **REQUIRED**. Enter as much demographic information as possible as it is helpful in identifying the correct person in the MPI.
4. Complete the other fields in the *Contacts (System)* section, then click **OK**. After the next time this incident is saved, the person will appear as a Contact in the MPI.
5. If there is another Contact to enter, click **Add**. A new Contact entry section will appear below the previously entered Contact.

### Steps to Turn a Contact into an Incident or Delete a Contact (Figure 8.2):

6. Navigate to a Contact that has already been entered in the *Contacts (System)* section.
7. Click on the **Create Incident** button to create a Disease Incident for the Contact.
8. Click on the **Delete** button to instead delete a Contact.
9. When a Disease Incident is created, a link to the new record will appear in the *Contacts (System)* section. Click the ID to open the new Incident.
  - a. Note: The Contact must be saved before it can be turned into an Incident.
  - b. Note: Once a Contact in the *Contacts (System)* section is turned into an Incident, it cannot be deleted as a Contact to the Incident or edited in the *Contacts (System)* section.
  - c. Note: When a Disease Incident is created from a Contact, CalREDIE will attempt to geocode the address. If the address successfully geocodes to your jurisdiction and/or if you select your jurisdiction from the **Jurisdiction** dropdown menu, you will be granted read/write access to the Incident. However, if the address geocodes to a different jurisdiction or is unable to geocode, you will be granted read-only access and other users in your jurisdiction will be unable to see it.

**Figure 8.2: Adding a New Person as a Contact or Turning Contact into a Disease Incident**

**Disease Incident**

Patient: Test, Flamingo      Incident ID: 560      Process Status: Entered  
 DOB: 08/06/2004      Disease: Chlamydia      Resolution Status: Suspect

Patient    Clinical Info.    Laboratory Info.    Hlth Dpt Follow-up    **STD Contacts**    Case Investigation

**Contacts (system)**

ID	Last Name	First Name	DOB	Jurisdiction
ID-001	Test	Unknown	02/11/2000	Unknown

View 1 - 1 of 1      Page 1 of 1      10      Add

**CalREDIE Training - Section Instance**

**Contacts (system)**

ID-001

\* Last Name: Test    \* First Name: Unknown    Middle Name: ?    Name Suffix:    DOB: 02/11/2000    Age: 22    Gender: Femal    Phone Number:

Street Address: 228 Van Ness Ave    Apartment:    City: San Francisco    State: CA    Zip: 94102    Jurisdiction: Unknown    Investigator:

Race: ☐ American Indian or Alaska Native    ☐ Asian    ☒ Black or African American    ☐ Native Hawaiian or Other Pacific Islander    ☐ Other    ☐ Unknown    ☐ White

Type of Contact: Friend    Date of Contact: 07/01/2022    Exposure Event:    Cluster ID:

Priority:    Status:    Medication Used:    E-mail Address:    Other Electronic Contact Information:

DI 561

Create Disease Incident    Create Investigation    Link Patient    Delete

OK    Cancel    Add

### Steps to Locate a Contact in the Master Person Index (Figure 8.3):

1. If the person is a Contact, he or she will have a **green** “C” next to his or her name.
  - a. Note: a person can have multiple roles, e.g. a Contact and a Patient.
2. Click on the **Patients** button to view the person(s) the Contact is associated with. The person(s) will appear down below.
3. If the person is a patient, he or she will have a **blue** “P” next to his or her name.
4. Click on the **Contacts** button to view the Contact(s) that belong to him or her. The person(s) will appear down below.

**Figure 8.3: Patient Search Grid**

Name: 
 Identifier Type: 
 Identifier: 
 DOB: 
 Age:

☐ Additional Demographics
 ☐ SoundEx
 ☒ Show All

Role(s)	Patient ID	Name	DOB	SSN	MRN	Address	Current
P	56	Smith, Hope	05/09/1999		View...	500 J St, Sacramento, CA, 95814	Y
P C 1	561	Smith, James	11/12/1982		View...	2600 S Hoover St, Los Angeles, CA, 90007	N
P C	561	Smith, James	11/12/1982		View...	1419 Westwood Blvd, Apt 200, Los Angeles, CA, 90024	Y
P	557	Smith, James	01/01/1980		View...	400 N St, Sacramento, CA, 95814	Y
P	560	Smith, Jameson	06/23/1992		View...	1649 El Prado, San Diego, CA, 92101	Y
P	557	Smith, Jimmy	01/01/1980		View...	530 N 2nd St, San Jose, CA, 95112	N
P	558	Smith, Mary	04/15/1984		View...	400 N St, Sacramento, CA, 95814	Y
P C	552	Smith, Smitty	03/03/1990		View...	119 Cherry Blossom Dr, San Jose, CA, 95123	Y
	562	Smithson, Jameson	03/30/1964		View...	1 Civic Center Plz, Irvine, CA, 92606	Y

☐ Historical Jurisdiction Access

Type	ID	Disease/GE Type	Jurisdiction	Date Created	Pro/Res Status	User	Mark for Merge/Split
DI	1487	Diphtheria	Santa Clara	09/19/2022	Entered/ Suspect	Bui-PA, Tina	<input type="button" value="Mark for Merge/Split"/>

All Associations

Type	ID	Name	DOB	SSN	Address	Current
P	568	Doe, Jane	02/02/1990		CA	Y
C	1487	Smith, James	11/12/1982		1419 Westwood Blvd, Apt 200, Los Angeles, CA, 90024	Y

### Steps to view associations on the Patient Record (Figure 8.4):

1. Navigate to any Patient Record.
2. Scroll to the *All Associations* grid.
3. Click **Patients** to only view associated patients.
4. Click **Contacts** to only view associated contacts.

**Figure 8.4: All Associations Grid**

Type	Record ID	Name	DOB	SSN	Current	Address
P	568	Doe, Jane	02/02/1990		Y	CA
C	1487	Smith, James	11/12/1982		Y	1419 Westwood Blvd, Apt 200, Los Angeles, CA, 90024

## Section 9: Multiple Addresses and Identities

At the end of this section, users will be able to:

1. Add a new primary address for a patient
2. Create a new identity for a patient
3. Include additional demographics when searching the Master Person Index

### Background Information

Users can enter multiple addresses for a Patient Record in CalREDIE. Additional identities may also be created for a person if he or she uses an alias or other non-primary name. Each person version must always have a primary address and a primary identity; these are the values used when searching for a person version in the Master Patient Index. It is possible to include any additional identities or addresses that have been entered for a Patient in a Master Person Index search by using the **Additional Demographics** checkbox.

Multiple Addresses and Identities are only accessible via the Patient Tab of an incident; while they are technically a part of the Patient Record, they do not appear on the Patient Record.

### Steps to Create a New Address for a Patient (Figure 9.1):

1. Navigate to the Patient Tab of an existing person's Incident.
  - a. Note: This incident must be associated with the Current Version of the person. The Multiple Identities & Addresses sections are *Read-Only* in Non-Current Versions.
2. Click on the pop-up next to the **Zip Code** field. The Multiple Addresses pop-up window will appear and the current address information will be displayed.
3. Click **New**.
4. Enter the new Address.
5. Click the pop-up next to the **Geo Location** field to geocode the address.
  - a. Note: The **Address Number** and **Street**, plus either the **City** and **State** or **Zip Code**, must be entered in order to geocode the address.
6. Select an **Address Type (REQUIRED)**.
7. If this information is to be used as the person's primary address, click the **Primary Address** checkbox.
  - a. Note: The information for the Primary Address is the information that will appear on the Patient Tab. **This applies to all incidents associated with the Current Version.**
8. Click **Save**.
9. View the addresses listed at the top of the window. Click on the blue Address to display the information for that address.
10. Click **Close** to exit the pop-up window.



Figure 9.1: Multiple Addresses Pop-up

Patient **1** PUI and Epi Form Laboratory Info. Case Investigation

\* Disease Being Reported: Novel Coronavirus 2019 (nCoV-2019)

**Name**

\* Last Name: Test \* First Name: Flamingo Middle Name: Third Name: Fourth Name: Name Suffix: Name Prefix:

SSN: DOB (MM/DD/YYYY): 08/06/2004 Age: 17 Months: Days:

Address Number & Street: 425 Market St Apartment/Unit Number: City: San Francisco State: CA Zip: 94105

Primary Language: Primary Nationality: \* Ethnicity: Not Hispanic or Latino \* Race: ☐ American Indian or Alaska Native ☐ Asian

**CalREDIE Training - Multiple Addresses** **10**

**Multiple Addresses**

☐ Show All

Address	Data Source	Address Type	Entry Date	Inactive	Primary Address
CA			08/05/2022		
425 Market St, San Francisco, CA, 94105	Self	Other	08/05/2022		X

Entry Date: 08/05/2022

Address Number and Street: 425 Market St Apt/Unit: City: San Francisco State: CA Zip: 94105 Geo Location: 061501

From Date: To Date:

**3** New **7** ☒ Primary Address **6** \* Address Type: Other **5** ☐ Inactive Source: Self

**4** **8** Save Close

Steps to Create a New Identity for a Person (Figure 9.2):

1. Navigate to the Patient Tab of an existing person's Incident.
  - a. Note: This incident must be associated with the Current Version of the person. The Multiple Identities & Addresses sections are *Read-Only* in Non-Current Versions.
2. Click the pop-up next to the **Days** field. The Multiple Identities pop-up window will appear and the current person information will be displayed.
3. Click **New**.
4. Enter **Last Name (REQUIRED)**.
5. Enter **First Name (REQUIRED)**.
6. Complete other fields if information is available.
7. If this information is to be used as the person's primary identity, click the **Primary Identity** checkbox.
8. Click **Save**.
  - a. Note: The demographic information for the Primary Identity is the demographic information that will appear on the Patient Tab. **This applies to all incidents associated with the Current Version.**
9. View the identities listed at the top of the window. Click on the blue Last Name of an identity to display the information for that identity.
10. Click **Close** to exit the pop-up window.

Figure 9.2: Multiple Identities Pop-up

**Disease Incident**

Patient: Test, Flamingo Incident ID: 558 Process Status: Entered  
 DOB: 08/06/2004 Disease: Novel Coronavirus 2019 (nCoV-2019) Resolution Status: Suspect

Patient **1** PUI and Epi Form Laboratory Info. Case Investigation

\* Disease Being Reported Novel Coronavirus 2019 (nCoV-2019)

\* Last Name Test \* First Name Flamingo Middle Name Name Suffix Primary Language  
 Third Name Fourth Name Name Prefix Primary Nationality  
 SSN DOB (MM/DD/YYYY) Age Months Days **2** \* Ethnicity Not Hispanic or Latino

**CalREDIE Training - Multiple Identities**

**Multiple Identities**

☐ Show All

Last Name	First Name	Middle Name	Identity Type	DOB	SSN	Source	Is Primary	Entry Date
Test	Flamingo			08/06/2004			X	08/05/2022
test	FLAMINGO							08/05/2022

PREV NEXT

Entry Date 08/05/2022 Identity Type ☐ Primary Identity ☐ Inactive Last Updated 08/05/2022

Source Source Identifier Source Description Account Number

**4** \* Last Name **5** First Name Middle Name Name Suffix SSN

Date of Birth Gender Home Phone Cellular Phone / Pager Work/School Telephone **6**

E-mail Address Other Electronic Contact Information From Date To Date

**3** New **8** Save **10** Close

#### Steps to Include Multiple Addresses and Identities in Search of MPI:

1. Click on the **Search** button in the Navigation bar.
2. Enter the search criteria in the search fields.
3. Check the **Additional Demographics** checkbox in the middle of the screen.
4. Click **Find**. Additional addresses and identities will be included in the search.

The fields for Multiple Addresses and Identities can also be populated when records are imported from the DISA. For additional information, see [Section 14: Disease Incident Staging Area \(DISA\)](#).

## Section 10: Person Versioning

At the end of this section, users will be able to:

1. Identify current and non-current versions in the *Person Search* screen.
2. Create a new person version.

### Background Information

When creating new incidents for an existing patient in the MPI, users may be presented with the option to create new versions of a Patient Record to retain relevant demographic information for a person's disease incident history. A version is either the *current version (Y)*, or it is a *non-current version (N)*. Every person in the MPI has exactly one current version, but can have zero, one, or many non-current versions. By default, the Patient Record will always update to display the demographic information contained within the current version.

For a comprehensive guide to Person Versioning, please see the **V2023.2 Person Versioning Guide** on the CalREDIE Help website.

### Steps to Identify All Versions of a Person (Figure 10.1):

1. Navigate to the *Person Search* screen and search for a person in the MPI by the Patient's name. Click **Find**.
2. Results will appear where the name matches your search. Versions under alternate name spellings *will not* appear, and versions of other Patient Records matching your name search *will* appear.
3. Copy the Patient ID from any row corresponding to the person you searched for, then hit **Clear** to reset your search.
4. Paste the Patient ID into the **Patient ID** field, then click **Find**.
  - a. Note: you will need to expand the MPI search grid to find the **Patient ID** field.
5. All versions of that Patient Record will appear regardless of name spelling, and only versions associated with that Patient Record will appear.
6. Uncheck **Show All** to hide non-current versions.

To find all versions of a person, you must use the Patient ID. Searches using other criteria will not identify person versions where that piece of information doesn't match. For example, searching by name will not locate any versions of the person where the name spelling doesn't match.

Figure 10.1a: Searching by Patient Name

Patient | Disease Incident | Outbreak

Name:  (1) | Identifier Type:  | Identifier:  | DOB:  | Age:   
 Address:  | Zip:  | Phone:  | DOD:  | State Number:   
 Person Status:  | Status Flag:  | Patient ID:  | Medical Record Number:  | Created:

☐ Patient ☒ Contact ☐ Family Member ☐ Additional Demographics ☐ SoundEx ☒ Show All   (3)

Role(s)	Patient ID	Name (Last, First)	DOB	SSN	MRN	Address	Current
P	542	Test, James	01/01/2000		View...	500 N St, Sacramento, CA, 94203	Y
	543	Testing, Jameson	12/12/1990		View...	1200 K St, Sacramento, CA, 95814	Y

PREV NEXT

Figure 10.1b: Searching by Patient ID

Patient | Disease Incident | Outbreak

Name:  | Identifier Type:  | Identifier:  | DOB:  | Age:   
 Address:  | Zip:  | Phone:  | DOD:  | State Number:   
 Person Status:  | Status Flag:  | Patient ID:  (4) | Medical Record Number:  | Created:

☐ Patient ☒ Contact ☐ Family Member ☐ Additional Demographics ☐ SoundEx ☒ Show All (6)

Role(s)	Patient ID	Name (Last, First)	DOB	SSN	MRN	Address	Current
P	542	Test, James	01/01/2000		View...	500 N St, Sacramento, CA, 94203	Y
P	542	Test, Jimmy	01/01/2000		View...	500 S St, Sacramento, CA, 95811	N

PREV NEXT

### Steps to Create a New Person Version (Figure 10.2):

1. Navigate to the *Person Search* screen and find an existing person in the MPI with at least one incident. Select that person.
2. Scroll to the bottom of the screen, then click **New Disease Incident**.
3. On the Patient Tab of the new incident, first select a disease condition from the **Disease Being Reported** dropdown, then click or tab out to refresh the screen.
4. Add, delete, or update any demographic information, as needed.
5. Navigate to the Case Investigation Tab, fill out information, then click **Submit**.
  - a. Note: In prior releases of CalREDIE, versioning prompts occurred when navigating away from the Patient Tab.
6. A pop-up screen will appear with a versioning prompt, offering a choice of one of three Actions: **New Version**, **Correction**, or **Discard**.
  - a. Note: If no demographic changes were made on the Patient Tab, no versioning prompt will appear.
7. Click the +/- symbol to review the changes made to the patient information.
8. Select **New Version**, then click **Save**.
9. The new incident will now show the new version information, while historic incidents retain the demographic information they had prior.
  - a. Note: The **Correction** option would overwrite the information of the existing Current Version, which would overwrite the patient demographic information for any historic incident that uses that version. The **Discard** option would cancel the changes you applied and use the existing patient demographics for your new incident. For more information about proper use of versioning, see the **V2023.2 Person Versioning Guide** in the CalREDIE Document Repository, or on the CalREDIE Help website.

**Figure 10.2: Versioning Prompt**

Demographic information for the following records has changed. Please select an action for each record.

Client Details					Actions		
Client ID	Type	Last Name	First Name	New Versi	Correction	Discard	
12	P	Test	James	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

	Field	Original	Modified
1	Apartment Number		14C
2	City	Sacramento	Citrus Heights
3	Geo Location	001101	008138
4	Street Address	500 N St	6041 Sunrise Blvd
5	Zip	94203	95610

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Role Type **P** = Primary Record **C** = Contact **F** = Family Member

## Section 11: Electronic Filing Cabinet (EFC)

At the end of this section, users will be able to:

1. Create an image album and upload a file into the EFC
2. Open a previously uploaded file and edit an album
3. Locate case report forms in the EFC

### Background Information

Each Incident, Contact Investigation, and Outbreak in CalREDIE has an Electronic Filing Cabinet (EFC). Users are able to upload documents, images, and files into the EFC. Items stored in the EFC must support case investigation and disease control efforts and may include medical records, laboratory reports or Confidential Morbidity Reports (CMRs). Items stored in the EFC can be accessed anytime the record is opened. The EFC also contains several Case Report forms. The EFC is only available after an Incident, Contact Investigation or Outbreak has been submitted. The following items must **NOT** be uploaded to the EFC:

1. **Do not upload files that contain HIV/AIDS information unless it is for an Incident of Hepatitis B, Hepatitis C, Meningococcal infection, Tuberculosis, Gonorrhea, Chlamydia, Syphilis, or HIV/AIDS.**
2. **Do not upload death, birth, or marriage certificates. Refer to the segment on the Vital Records and CalREDIE in [Section 1: Getting Started](#) of this document for more information.**

### Steps to Access the EFC (Figure 11.1):

1. Open a previously submitted Incident or Outbreak
2. Click on the EFC icon to open the EFC pop-up window.
  - a. Note: A picture of the icon is show in [Section 12: Toolbar](#)
3. To add an Album, click **New Album**.
4. To add a Case Report click **New Case Report**.
5. Any albums or case reports already stored in the EFC will appear in the pop-up window.
6. Click the **Open** button to access an album or Case Report.
7. Close the window by clicking on the "X" in the upper right-hand corner.



Figure 11.1: Electronic Filing Cabinet (EFC)

Disease Incident

CalREDIE Training - Filing Cabinet

Filing Cabinet

Patient: Process, Bob  
Record ID: 519

**3** New Album **4** New Case Report

☐ Show Deleted Items ☒ Files for the Selected Disease Incident / Contact Investigation Only ☐ All Files for the Current Patient

☐ Show Historical Forms ☒ Date Received ☐ Date of Message

From  To  Name

Type  Description

Search Clear

Type	Name	Description
08/05/2022 3:19:50 PM	File Album	Test Album
08/05/2022 3:19:19 PM	Case Report	Healthcare Worker Contact Investigation
07/20/2022 10:06:05 AM	Lab Report	FUNK7890G

Preview/Print Images

Steps to Create a New Image Album and Upload a Document into the EFC (Figure 11.2):

1. Open a previously submitted Incident or Outbreak.
2. Click on the EFC icon.
3. Click **New Album**.
4. Enter an **Album Name (REQUIRED)**.
5. Enter any notes about the album.

Figure 11.2: Creating an Album in the EFC

Disease Incident

CalREDIE Training - Filing Cabinet

Filing Cabinet

Patient: Process, Bob  
Record ID: 519

**3** New Album **2** New Case Report

CalREDIE Training - Acquire Files

Acquire Files

Patient: Process, Bob  
Record ID: 519

File Upload Method: ☐ Advanced (ActiveX) ☐ TWAIN (ActiveX) ☒ Simple (HTTP)

\* Album Name: **4**  Maximum file size of 5 MB for each file can be saved to an album.  
\* Scanning requires the Advanced upload method.

Notes: **5**

Files

Choose File	No file chosen	Clear
Choose File	No file chosen	Clear
Choose File	No file chosen	Clear
Choose File	No file chosen	Clear
Choose File	No file chosen	Clear

Acquire File(s) Max File Size: 5 MB

Files in the Album:

File	Name	Date & Time Created	Delete

There are two ways to upload a document to the newly created album: Advanced (ActiveX) and Simple (HTTP).

#### Steps to Upload a Document into the EFC using Advanced (ActiveX):

1. Select the radio button for **Advanced (ActiveX)**.
2. Click **Acquire File**.
3. Select the desired file to upload from the standard window's "Open" dialog box by double clicking on the file name. Click **Open**.
4. The uploaded file will appear under the *Files in the Album* heading.
5. To open the file, click on the **File** icon.
6. To edit the File Name, click on the blue Name.
7. To delete the file from the album, click the blue Delete.
8. Close the window by clicking on the **X** in the upper right-hand corner.

#### Steps to Upload a Document into the EFC using Simple (HTTP) (Figure 11.3):

1. Select the radio button for **Simple (HTTP)**.
2. Click any **Choose File** button.
3. Select the desired file to upload from the standard Windows "Choose File to Upload" dialog box by clicking on the File Name. Click **Open**.
4. Use the other **Browse** buttons to select additional files to upload. Up to 5 files can be uploaded at one time.
5. Click **Acquire File(s)**.
6. The uploaded file will appear under the *Files in the Album* heading.
7. To open the file, click on the **File** icon.
8. To edit the File Name, click on the blue Name.
9. To delete the file from the album, click the blue Delete.
10. Close the window by clicking on the **X** in the upper right-hand corner.

**Figure 11.3: Uploading Documents to the EFC using Simple (HTTP)**

**Acquire Files**

Patient: Process, Bob  
Record ID: 519

File Upload Method: ☐ Advanced (ActiveX) ☐ TWAIN (ActiveX) ☒ Simple (HTTP)

\* Album Name: Test Album

Maximum file size of 5 MB for each file can be saved to an album.  
\* Scanning requires the Advanced upload method.

Notes:

Files

Choose File	File Name	Action
Choose File	EFC Test.docx	Clear
Choose File	No file chosen	Clear
Choose File	No file chosen	Clear
Choose File	No file chosen	Clear
Choose File	No file chosen	Clear

Acquire File(s) Max File Size: 5 MB

Files in the Album:

File	Name	Date & Time Created	Delete
	EFC Test.docx	08/05/2022 3:19:50 PM	Delete

PREV NEXT

### Steps to Open, Edit or Delete a Previously Created Album (Figure 11.4):

1. Click on the **EFC** icon.
2. Click the **Open** button for the album you wish to open.
3. Edit **Album Name** and **Notes** if desired.
4. To open the file, click on the file thumbnail.
5. To edit the File Name, click on the blue Name.
6. To delete a file, click on the blue Delete.
7. To save any changes to the album, click **Save**.
8. To delete the entire album, click the blue Delete from the Filing Cabinet screen, or the **Delete Album** button from the Album Viewer screen.
9. To add additional files to the album, click **Add File(s)**.
10. To preview or print any images, click **Print/Preview Images**.
11. To close the pop-up window, click **Close**.

**Figure 11.4: Opening Album in the EFC**

**CalREDIE Training - Filing Cabinet**

Patient: Process, Bob  
Record ID: 519

**New Album** **New Case Report**

☐ Show Deleted Items ☒ Files for the Selected Disease Incident / Contact Investigation Only ☐ All Files for the Current Patient

☐ Show Historical Forms ☒ Date Received ☐ Date of Message

From  To  Name

Type  Description

**Search** **Clear**

Date	Type	Name	Description	
08/05/2022 3:19:50 PM	File Album	Test Album		Delete <b>2</b> Open
08/05/2022 3:19:19 PM	Case Report	Healthcare Worker Contact Investigation	UDF	Delete Open
07/20/2022 10:06:05 AM	Lab Report	FUNK7890G	+Training: 2019-nCoV PCR - Final	Open

**Preview/Print Images**

---

**CalREDIE Training - Album Viewer**

Patient: Process, Bob  
Record ID: 519

**Album Name:**  **3**

**Notes:**

☐ Show Deleted Items

**Files:**

File	Name	Date & Time Created	Delete
<b>4</b>	<b>5</b> EFC Test.docx	08/05/2022 3:19:50 PM	<b>6</b> Delete

**7** Save **8** Delete Album **9** Add File(s) **10** Preview/Print Images **11** Close

### Steps to Access a Case Report Form (Figure 11.5):

1. Click on the **EFC** icon.
2. Click **New Case Report**.
3. Select a report to add from the dropdown.
4. Click **Open Case Report**.
5. Complete Case Report and Click **Save**.
6. Close Case Report window.

**Figure 11.5: Creating Case Report Form in the EFC**

**CalREDIE Training - Filing Cabinet**

Patient: Process, Bob  
Record ID: 519

**New Album** **2 New Case Report**

☐ Show Deleted Items ☒ Files for the Selected Disease Incident / Contact Investigation Only ☐ All Files for the Current Patient

☐ Show Historical Forms ☒ Date Received ☐ Date of Message

From  To  Name

Type  Description

**Search** **Clear**

Date	Type	Name	Description		
08/05/2022 3:19:50 PM	File Album	Test Album		Delete	Open
08/05/2022 3:19:19 PM	Case Report	Healthcare Worker Contact Investigation	UDF	Delete	Open
07/20/2022 10:06:05 AM	Lab Report	FUNK7890G	+Training: 2019-nCoV PCR - Final		Open

PREV NEXT

**Preview/Print Images**

**CalREDIE Training - Case Report Select**

**Case Report Select**

**Report Selection**  
Patient: Process, Bob  
Record ID: 519

**3** Select a report to add Healthcare Worker Contact Investigation (EBOLAHCW)

**4** **Open Case Report** **Cancel**

## Section 12: Toolbar

At the end of this section, users will be able to:

1. Access electronic help
2. View version, jurisdiction transfer, process status, and resolution status histories
3. Print and utilize a print preview

### Background Information

Depending on where users are in CalREDIE, different toolbar icons are visible along the top of the screen. The **Help** icon is always available while other icons become available once an Incident has been submitted. All icons are accessed by clicking on them. Important icons are described below.

Help



The **Help** icon provides information that is specific to the page users are on. Keep in mind that the information found here has been provided by the company that developed CalREDIE, not CalREDIE itself, so some discrepancies will be observed.

Patient Record



The **Patient Record** icon will take you to the Patient Record page to which the Incident is associated.

Jurisdiction Transfer History



The **Jurisdiction Transfer History** icon provides a way to track transfers of the incident from one jurisdiction to another. It includes information about the previous and new jurisdictions, date of transfer, users involved and reason for transfer.

Version History



The **Version History** icon shows any changes that have been made to the version of the person. Anytime a new Incident is added for a person and the demographic information is changed, users have the option to create a new person version. Creating a new version allows the old demographic information to be retained with previously entered Incidents.

Condition History



The **Condition History** icon displays any changes that have been made to the **Disease Being Reported** dropdown on the Patient Tab. This icon will show the previous and

new diseases, the date, time, and user that made the change, as well as the investigator assigned to the Incident.

### Process Status History



The **Process Status History** Icon displays changes that have been made to the process status. It displays the date and time a change was made, the user who made the change, the old and new statuses, and how many days the process status remained at each status.

### Resolution Status History



The **Resolution Status History** Icon displays changes that have been made to the resolution status. It displays the date and time a change was made, the user who made the change, the old and new statuses, and how many days the resolution status remained at each status.

### Electronic Filing Cabinet (EFC)



See [Section 11: Electronic Filing Cabinet \(EFC\)](#).

### Scan



The **Scan** Icon will take users directly to the screen where documents can be uploaded into the EFC. See [Section 11: Electronic Filing Cabinet \(EFC\)](#).

### Print All



The **Print All** Icon allows you to easily print the record. The types of information that is printed can be selected using the checkboxes in the pop-up window.

### Audit



The **Audit** Icon provides a complete audit trail for the Incident or Outbreak. This feature tracks not only when edits are made to the record, but also any time a user views the record.

## Section 13: Outbreaks

At the end of this section, users will be able to:

1. Create a new Outbreak
2. Access a previously entered Outbreak
3. Link individuals to an existing Outbreak via the Case Investigation Tab

### Background Information

Outbreaks can be created within CalREDIE. When the Outbreak disease is selected, additional tabs will appear that are specific to the Outbreak type. Users are able to track several components of an Outbreak investigation and are able to link individuals to an Outbreak.

#### Steps to Access an Outbreak (Figure 13.1):

1. In the Navigation bar, click on Outbreak.
2. Select the search parameter to use (**Outbreak #**, **Disease**, **Onset Date**, **ID**, **Create Date**, **Location**, or **Priority**).
  - a. Note: In the search results grid, “No Records Shown By Default” will display. Records will display once a search is conducted.
3. Enter the item to search for in the **Search** field.
4. Click **Find**.
5. Click the blue Outbreak # to open an existing Outbreak.
6. Click **New Outbreak** to create a new Outbreak.

Figure 13.1: Searching for an Outbreak

The screenshot shows the CalREDIE web application interface. At the top is a navigation bar with tabs: My Case Load, Search, Previous Searches, Jurisdiction Re, **Outbreak** (highlighted with a red circle 1), Staging, Administration, Dictionaries, Reports, CDPH, Help, My Profile, and Logout. Below the navigation bar, the user is logged in as 'Bul-PA, Tina' with 'Domain: Main'. There are three tabs: Patient (highlighted with a red circle 2), Disease Incident, and Outbreak. Under the Outbreak tab, there are radio buttons for search criteria: Outbreak # (selected, highlighted with a red circle 3), Disease, Onset Date, ID, Create Date, Location, and Priority. A search input field contains 'HF20221' (highlighted with a red circle 3). To the right of the input field are buttons for 'Find' (highlighted with a red circle 4), 'Clear', 'Provide Search Name', and 'Save Search'. Below the search area is a table with the following data:

Outbreak #	Create Date	Disease	Jurisdiction	Location	Pro/Res Status	Priority	Mark for Merge
HF20221 (highlighted with a red circle 5)	08/01/2022	GI, Foodborne	Sacramento		Entered/ Suspect		<input type="checkbox"/>

At the bottom of the table are 'PREV' and 'NEXT' links. Below the table is a 'New Outbreak' button (highlighted with a red circle 6).



---

Steps to Create a New Outbreak (Figure 13.2):

1. In the Navigation bar, click on Outbreak.
2. Click **New Outbreak** at the bottom of the screen.
3. Enter the **# of Cases (REQUIRED)**.
4. Select the **Disease** from the dropdown (**REQUIRED**) and click or tab out of the field so that the page refreshes.
  - a. Note: when the page refreshes, additional tabs will appear. These tabs collect information found on the paper Outbreak report forms.
5. Select the **Facility Type (REQUIRED)**.
6. To enter a Location, click the pop-up next to the **Location** field. Select a Location from the Location Dictionary or add a new Location. See [Section 5: Report Source and Location Dictionaries](#).
7. Enter a **Date of Onset**.
8. Select your Jurisdiction (**REQUIRED**) from the **Jurisdiction** dropdown.
9. Select an Investigator from the **Investigator** dropdown.
10. Select a Priority from the **Priority** dropdown.
11. The **Process Status** will default to "Entered". Update if necessary.
12. The **Resolution Status** will default to "Suspect". Update if necessary.
13. Select an Outbreak Type from the **Outbreak Type** radio button list.
14. To enter **Notes/Remarks**, click **Add**. Enter note, click **OK**.
15. Click **Next** to go onto the next tab or **Save**.
  - a. Note: When the Outbreak is saved, the Outbreak ID and Outbreak # are generated. Outbreak # can be edited if desired. The EFC is also available for use after the Outbreak is saved. See [Section 11: Electronic Filing Cabinet](#).

Figure 13.2: Outbreak

## Outbreak

**Outbreak ID:**  
**Disease:** GI, Foodborne

**Process Status:** Entered  
**Resolution Status:** Suspect

Outbreak

Outbreak Report

Foodborne OB

\* # of Cases

25

3

Outbreak Number

\* Disease

GI, Foodborne

4

\* Facility Type

☐ Health Facility
 ☒ Non-Health Facility

5

Location

6

Date of Onset

7

\* Date Created

08/01/2022

Date Closed

\* Jurisdiction

Sacramento

8

Investigator

9

Priority

10

Process Status

Entered

11

Resolution Status

Suspect

12

Outbreak Type

13

☐ Diarrhea of the Newborn  
☐ Foodborne Disease  
☐ Other  
☐ Waterborne Disease

Notes/Remarks

14

Add

Patients linked to this Outbreak:

Link Existing Patient Disease Incident

Record ID	Last Name	First Name	Address	Date of Onset	Index Case	Cluster ID	Print
<div>PREV</div> <div>NEXT</div>							

Show All

Contacts linked to this Outbreak:

☒ All
 ☐ Disease Incident Contacts
 ☐ Outbreak Contacts

Link Existing Contact Investigation

Record ID	Last Name	First Name	Address	Contact Type	Cluster ID	Print
<div>PREV</div> <div>NEXT</div>						

Show All

Delete

15

Next

Save


Cancel

Print Tab

### Steps to Link an Individual to an Outbreak from the Outbreak page (Figure 13.3):

1. Navigate to the main Outbreak page of a previously created Outbreak.
2. To link a patient to the Outbreak, click **Link Existing Patient Incident**.
  - a. Note: this button will be disabled until the outbreak has been submitted.
3. In the Select a Patient pop-up, use the four search criteria to find your patient.
  - a. Note: To view all individuals able to be linked to the Outbreak, leave the **Last, First** field blank. Relevant patients will be ordered reverse-sequentially.
4. Click **Search**.
5. Click on the ID Number of the person to be linked. The row will become highlighted in yellow.
6. Click **OK**. The person now appears under the heading, “*Patients linked to this Outbreak*”. Any contacts to the patient linked to the Outbreak, will also display under “*Contacts linked to this Outbreak*”.
7. Use the radio buttons to view the different types of Contacts linked to the Outbreak.
  - a. **All** – displays all contacts linked to the Outbreak
  - b. **Incident Contacts** – displays only contacts of patients that are linked the Outbreak (i.e. contacts entered in the *Contacts (System)* section of a linked Incident).
  - c. **Outbreak Contacts** – displays only contacts that have been linked to the Outbreak itself.


**Figure 13.3: Linking to an Outbreak from Outbreak Page**

**Patients linked to this Outbreak:** Link Existing Patient Disease Incident  **2**

Record ID	Last Name	First Name	Address	Date of Onset	Index Case	Cluster ID	Print
◀ PREV   NEXT ▶							

**Show All**

**Contacts linked to this Outbreak: 0** **7**

☒ All
 ☐ Disease Incident Contacts
 ☐ Outbreak Contacts
 Link Existing Contact Investigation 

Record ID	Last Name	First Name	Address	Contact Type	Cluster ID	Print
◀ PREV   NEXT ▶						

**Show All**


---

**CalREDIE Training - Select a Patient** ✕

**Select a Patient**

Last, First  **3**
 DOB 
 State Number

Address 
 Phone 
**4**

Role(s)	ID	Create Date	Person Name	DOB	Gender	Address
<b>5</b> 	555	08/04/2022	Test, Jimmy	01/01/2000	Male	500 S St, Sacramento, CA, 95811

◀ PREV | NEXT ▶

**6**

### Steps to Link an Individual to an Outbreak on the Case Investigation Tab (Figure 13.4 and 13.5):

1. Create an Outbreak following the steps listed above.
2. Navigate to the Case Investigation Tab for an Incident to be linked to the Outbreak.
3. Locate the *Linked Outbreaks* grid on the Case Investigation Tab.
4. Click the **Add** button located below the *Linked Outbreaks* grid. The Link to an Outbreak window will pop up.
5. Use the Outbreak # search field to search through available Outbreaks. Click **Search**.
  - a. Note: Only Outbreaks in the Outbreak Disease Group for the disease condition will display
6. Click the blue Outbreak Number from the list of available Outbreaks. The selected Outbreak will populate the *Linked Outbreaks* grid.
7. To view the Outbreak, click **View**. This will open the Outbreak in a pop-up window. No changes made be made to the Outbreak from this view.
8. To go to the linked Outbreak and make any changes, click **Go To**.
9. To unlink an Incident from an Outbreak, click on the blue Outbreak Number so that the Outbreak is highlighted, and then click **Unlink**.

**Figure 13.4: Linking to an Outbreak from Case Investigation Tab**

Linked Outbreaks **3**

Outbreak ID	Outbreak #	Location	Date Created	Jurisdiction	Process / Resolution Status
◀ PREV   NEXT ▶					

Unlink Add **4**

CalREDIE Training - Outbreak Link

Link to an Outbreak

Available Outbreaks

**5** Outbreak # HF20221 Search Clear

Outbreak #	Disease	Date of Onset
<b>6</b> HF20221	GI, Foodborne	

◀ PREV | NEXT ▶

**Figure 13.5: Linked Outbreak**

Linked Outbreaks

Outbreak ID	Outbreak #	Location	Date Created	Jurisdiction	Process / Resolution Status
6047	HF20221		08/01/2022	Sacramento	Entered/Suspect <b>7</b>

◀ PREV | NEXT ▶

**9** Unlink **8** Add

## Section 14: Disease Incident Staging Area (DISA)

At the end of this section, users will be able to:

1. Navigate the DISA screen.
2. Identify a match between a person in the DISA and an existing person in the CalREDIE Master Person Index (MPI).
3. View matched record in the DISA feature.
4. Understand the various scenarios for managing records received in the DISA.

### Background Information

Providers and laboratories submit reports and results into CalREDIE using the Provider Portal (PP) and Electronic Laboratory Reporting (ELR). All reports and results submitted by an outside source arrive in the Disease Incident Staging Area (DISA). Here, local users can review information submitted by providers and laboratories and import reports and results into the CalREDIE Master Person Index (MPI).

CalREDIE will automatically identify possible matches between existing persons in CalREDIE and persons in the DISA. If a person already exists in the system, it is possible to use the PP or ELR report to create a new Disease Incident or attach a PP or ELR report to an existing Incident. This helps to prevent duplicates in the MPI.

For a comprehensive guide to the DISA, please see the **V2023.2 DISA Guide** on the CalREDIE Help website.

### Steps to Navigate the DISA (Figure 14.1):

1. Click on Staging in the Navigation bar.
2. The main Disease Incident Tab is for Web Reports from the Provider Portal and laboratory results from ELR. At present there are no other tabs.
3. Users may easily search for records in the DISA, by selecting specific search criteria in the upper portion of the screen.
4. All records/results to be imported appear in the grid below the search area.
5. Potential person matches for the record/result highlighted in yellow appear in the middle portion of the screen, in the *Patients* grid.
  - a. Note: Users can hide selected patient matches by selecting the **Hide** checkbox for that row. A master **Hide** checkbox will check/uncheck all matches in the *Patients* grid. To unhide the patient, simply navigate away from the record, and then return to the record.
  - b. Note: The **Show All** checkbox is checked by default. Unchecking the **Show All** checkbox will hide all non-current person versions from display
6. If the patient highlighted in the *Patients* grid has any Disease Incidents that you are authorized to view, they will be displayed in the *Records* grid.
7. Options for importing records/results appear in the lower portion of the screen.
8. To select a record, click on the blue ID number. The row will become highlighted in yellow.

9. To change the disease for a record, click on the blue Disease and select a new disease from the dropdown.
10. To delete a record from the DISA, check the **Delete** checkbox for that row, and then click **Delete**.
11. To view the patient's demographics, click **View Patient Demographics**.
12. To change the jurisdiction of a record, click on the **Jurisdiction** button that displays the name of the jurisdiction and select a new jurisdiction from the dropdown. Refresh the page to remove that record from your queue.
  - a. Note: If you are a local health department user and a jurisdiction is selected other than your own, you will no longer have access to the record in the DISA.
13. To view a summary of the person's record, click on **View Patient's Web Report/View Patient's Lab Report**. For reports received via PP, this will be a three page summary of the report, for reports received via ELR, this will be a one page copy of the paper lab report.

**Figure 14.1: Disease Incident Staging Area (DISA)**

The screenshot shows the Disease Incident Staging Area (DISA) interface. The top navigation bar includes links for My Case Load, Search, Previous Searches, Jurisdiction Review, Out, Staging, Administration, Dictionaries, Reports, CDPH, and Help. The user is logged in as 'Bul-PA, Tina' with the domain 'Main'.

The main section is titled 'Staging Area' and contains a 'Disease Incident' tab. Below this, there are search filters for Date Received, Date of Message, Date From, To, Jurisdiction, Patient, Lab, Disease, Grouping, Accession, Resulted Test, Value, and HL7 File Name. A 'Search' button is located at the bottom right of the filter section.

The 'Imported Results' table lists various records with columns for Record ID, Date Received, Patient Name, DOB, Gender, City, Accession Number, Resulted Test, Value, Disease, Jurisdiction, Laboratory, and a Delete checkbox. The table contains 10 rows of data, including records for Influenza, Novel Coronavirus 2019, Listeriosis, Coccidioidomycosis, Dengue Virus Infection, Mumps, Influenza A RNA, Malaria, and Shigellosis.

Below the table, there are sections for 'Patients' and 'Records'. The 'Patients' section has a 'Show All' checkbox and a table with columns for Match By, Patient Name, DOB, Gender, Address, and Current. The 'Records' section has a table with columns for Type, Record ID, Date, Jurisdiction, Investigator, Disease, Status, Resolution Status, and Last Update Date.

At the bottom, there are 'Import Options' and a 'Routing' section. The 'Import Options' section includes checkboxes for 'Create a New Person and Disease Incident Record', 'Only Attach Lab Report', 'Create New Disease Incident', 'Add Multiple Demographics', 'Create New Person Version', 'Correct Current Person Version', 'Discard Incoming Demographics', 'Attach Species Result', 'Attach Serogroup / O Group Result', and 'Attach Serotype Result'. The 'Routing' section has a 'Routing Investigator' dropdown and a 'Ready For Import' checkbox.

Numbered callouts (1-13) are placed over the interface to indicate specific actions: 1 points to the 'Staging' tab; 2 points to the 'Disease Incident' tab; 3 points to the 'Disease' dropdown; 4 points to the 'Imported Results' table; 5 points to the 'Patients' section; 6 points to the 'Records' section; 7 points to the 'Import Options' section; 8 points to the 'Date Received' filter; 9 points to the 'Disease' dropdown in the table; 10 points to the 'Delete' checkbox; 11 points to the 'View Patient's Demographics' button; 12 points to the 'Jurisdiction' button; and 13 points to the 'View Patient's Lab Report' button.



### Steps to Search the DISA (Figure 14.2):

1. Click on **Staging** in the Navigation bar.
2. Check the radio button for either **Date Received** or **Date of Message**. Use the **From** and **To** date fields to specify a date range.
  - a. Note: Web Reports have no **Date of Message**, so searches by that criterion will only generate results of ELRs.
3. Use the **Patient** field to search by patient name.
4. Check the radio button for either **Disease** or **Grouping** to search for a specific disease condition or a formal grouping of diseases.
5. A Record ID is assigned to each record at the time it arrives in the DISA. Enter the full Record ID to search.
6. Use the dropdown to select a desired **Jurisdiction**.
7. Use the dropdown to select a desired **Lab**.
8. The **Accession** number is a laboratory-provided identifier that can be used to search for lab reports.
9. Use the **Resulted Test** field to search by a specific test name.
10. Enter the file name assigned to the lab report in the **HL7 File Name** field.
11. Click **Search**. Results will appear in the *Imported Records* grid.
12. Click **Clear** to clear the search criteria.

The DISA search options are particularly powerful because they may be combined for a narrower search.

**Figure 14.2: Search Options**

The screenshot shows the 'Staging Area' search interface. At the top is a navigation bar with links: My Case Load, Search, Previous Searches, Jurisdiction Review, Out, Staging (highlighted with a red circle 1), Administration, Dictionaries, Reports, CDPH, and Help. Below the navigation bar, it says 'Logged in as: Bul-PA, Tina Domain: Main'. The main section is titled 'Staging Area' and contains a 'Disease Incident' section with two radio buttons: 'Date Received' (selected) and 'Date of Message'. Below these are 'Date From' and 'To' date pickers. To the right are fields for 'Patient' (with a red circle 3), 'Disease' (selected with a red circle 4), 'Grouping', 'Record ID' (with a red circle 5), 'Jurisdiction' (dropdown with a red circle 6), 'Lab' (dropdown with a red circle 7), 'Accession' (with a red circle 8), and 'HL7 File Name' (with a red circle 10). At the bottom are 'Resulted Test' (with a red circle 9) and 'Value' fields. On the far right are 'Search' (with a red circle 11) and 'Clear' (with a red circle 12) buttons.



### Steps to Identify a Match between a Person in the DISA and an Existing Person in the MPI (Figure 14.3):

1. Click on Staging in the Navigation bar.
2. Click on the blue Record ID for the record of interest. The record's row will become highlighted in yellow.
3. Possible matches with existing persons in CalREDIE will appear below the Patients heading. Select the checkbox next to the existing person in CalREDIE that matches with the person to be imported.
4. To manually select a match, click the **Select Patient** button. This will open the Master Person Index.
5. Search for the person of interest using the different fields in the top of the pop-up.
6. To select a person, click on his or her blue name.
7. Click **OK**. The selected person will now appear as a match under the Patients heading. Use the checkbox to select him or her.
  - a. Note: When the matching person is selected using the checkbox, clicking on the **View Patient Demographics** button will allow you to compare the demographic information for the person to be imported and the person that exists in CalREDIE.

**Figure 14.3: Select a Patient Pop-up**

The screenshot displays the 'Select a Patient' pop-up window, which is used to manually select a match from the Master Person Index. The window includes a 'Staged Demographics' section with fields for Name, DOB, SSN, Gender, Home Phone, Work Phone, Address, MRN, and Reporting Source. Below this is a table with columns: Role(s), Name, DOB, SSN, Gender, MRN, Address, and Current. A red circle '6' highlights a row in this table. At the bottom of the pop-up, there are buttons for 'OK', 'Cancel', and 'Remove User Selected Person'. A red circle '7' highlights the 'OK' button. On the left side of the main interface, there is a 'Patients' section with a 'Match By' dropdown and a 'Show All' button. A red circle '3' highlights the 'Match By' dropdown. At the bottom of the main interface, there is a 'Select Patient...' button. A red circle '4' highlights this button. The background shows a table of 'Imported Results' with columns: Record ID, Date Received, Patient Name, DOB, Gender, City, Accession Number, Resulted Test, Value, Disease, Jurisdiction, Laboratory, and Delete. A red circle '2' highlights a row in this table. At the bottom of the main interface, there is a 'Records' section with a table of Type, Record ID, and Date. A red circle '5' highlights a row in this table.

New in CalREDIE v2023.2, users can preview the target disease incident in a read-only format prior to importing a lab/web result into it. Users can navigate through all the available tabs, click on the icons to open tools such as the EFC and Audit Log, and see the full details of the incident before making a decision.

#### Steps to view a matched record in the DISA feature (Figure 14.4):

1. Click on Staging in the Navigation bar.
2. Click on the blue Record ID for the record of interest. The record's row will become highlighted in yellow.
3. Possible matches with existing persons in CalREDIE will appear below the Patients heading. Select the checkbox next to the existing person in CalREDIE that matches with the person to be imported.
4. Possible matches with existing records in CalREDIE will appear below the Records heading. To view a matched record, click the **View** button.
5. A pop-up of a read-only preview of the Disease Incident Record will appear. Users can navigate through all the tabs available in the incident and click on all the available icons, such as the EFC.

**Figure 14.4: Previewing a Matched Record**

**Imported Results**

Record ID	Date Received	Patient Name	DOB	Gender	City	Accession Number	Resulted Test	Value	Disease	Jurisdiction	Laboratory	Delete
1482	02/22/2023	Costanza, Baby	09/04/2022	Male	Sacramento	BUN5732132	+Training: Salmonellosis Culture	pos	Salmonellosis (Other than Typhoid Fever)	Sacramento	+Bunson Burner Laboratory Corporation - MLR	<input type="checkbox"/>
1466	10/19/2022	Sacramento, Baby	09/04/2022	Male	Sacramento	FUNK43921	+Training: CHIKV IgM SerPI QI IF	Detected	Chikungunya Virus Infection	Sacramento	+Funkytown Diagnostic Laboratories -	<input type="checkbox"/>
1464	10/19/2022	Sacramento, Baby	09/04/2022	Male	Sacramento							<input type="checkbox"/>
1463	10/19/2022	Chikungunya, Baby	09/04/2022	Male	Sacramento							<input type="checkbox"/>
1461	10/19/2022	Chikungunya, Baby	09/04/2022	Male	Sacramento							<input type="checkbox"/>
1459	10/19/2022	Chikungunya, Baby	09/04/2022	Male	Sacramento							<input type="checkbox"/>
1453	10/19/2022	Chikungunya, Baby	09/04/2022	Male	Sacramento							<input type="checkbox"/>
1451	10/19/2022	Chikungunya, Baby	09/04/2022	Male	Sacramento							<input type="checkbox"/>
1449	10/19/2022	Chikungunya, Baby	09/04/2022	Male	Sacramento							<input type="checkbox"/>
1447	10/19/2022	Chikungunya, Baby	09/04/2022	Male	Sacramento							<input type="checkbox"/>

**Patients** ☒ Show All

Match By	Name
<input checked="" type="checkbox"/>	Costanza29, Baby

**Records**

Type	Record ID	Date	Jurisdiction	Investigator	Disease	Status	Resolution Status	Last Update Date
<input type="checkbox"/>	DI	1387	10/19/2022	Sacramento	Pertussis	Entered	Suspect	10/19/2022 5:50:29 PM

**Disease Incident**

Patient: Costanza29, Baby Patient ID: 1352 Incident ID: 1387  
 DOB: 09/04/2022 Disease: Pertussis ProRes Status: Entered/Suspect

**Patient** **Clinical Info.** **Laboratory Info.** **Epidemiologic Info** **Case Investigation** **5**

\* Disease Being Reported: Pertussis

**Name**  
 \* Last Name: Costanza29 \* First Name: Baby Middle Name: Third Name:  
 Fourth Name: Name Suffix: Name Prefix:

**Primary Language**  
 Primary Nationality:  
 \* Ethnicity: Unknown  
 \* Race: American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other

**SSN** **DOB (MM/DD/YYYY)** **Age** **Months** **Days**  
 Address Number & Street: 5913 Broadway Apartment/Unit Number:  
 City: Sacramento State: CA Zip: 95820  
 Geo Location: County of Residence: Country of Residence:

**Routing**  
 Investigator:

**Import Options**  
☐ Create a New Person and Disease Incident Record  
☐ Only Attach Lab Report  
☐ Create New Disease Incident  
☐ Add Multiple Demographics  
☐ Create New Person Version  
☐ Correct Current Person Version  
☐ Discard Incoming Demographics  
☐ Attach Species Result  
☐ Attach Serogroup / O Group Result  
☐ Attach Serotype Result

**Buttons:** Delete, View Patient's Demographics, Unlock, Sacramento, Hide Selected Matches, LIP Info..., View Patient's Lab Report..., Select Patient..., Import Selected Results...

### Steps to Import a New Person and Disease Incident into CalREDIE (Figure 14.5):

1. Click on Staging in the Navigation bar.
2. All results to be imported into CalREDIE are located under the Imported Results heading. Click on the blue Record ID for the person to be imported. The person's row will become highlighted in yellow.
3. Possible matches with existing persons in CalREDIE will appear in the *Patients* grid. Verify that the person to be imported does not already exist in the system by conducting a search in the **Select Patient** screen. (If the person does exist, follow the steps to create a new Incident or attach web report to existing Incident).
4. Under Import Options, click the box next to Create a New Person and Disease Incident Record. The person's row will become highlighted in green.
5. Click **Import Selected Results**.
6. The Import Confirmation screen will appear. Click **Yes**.
7. Return to the MPI and search for the imported person to ensure they now appear in the MPI.

**Figure 14.5: Importing a New Person and Disease Incident**

**Imported Results**

Record ID	Date Received	Patient Name	DOB	Gender	City	Accession Number	Resulted Test	Value	Disease	Jurisdiction	Laboratory	Delete
1033	08/19/2022	[REDACTED]	[REDACTED]	Female	Fair Oaks	LOWP01	+Training: Influenza Virus A RNA	DETECTED	Influenza - Initial Report	Sacramento	+Lowtech Labs of Sacramento - MLR	<input type="checkbox"/>
972	08/19/2022	[REDACTED]	[REDACTED]	Male	Sacramento				Novel Coronavirus 2019 (nCoV-2019)	Sacramento		<input type="checkbox"/>
811	08/18/2022	[REDACTED]	[REDACTED]	Female	Sacramento	FNK01	+Training: Listeria monocytogenes	Positive	Listeriosis	Sacramento	+Funkytown Diagnostic Laboratories - MLR	<input type="checkbox"/>
526	07/27/2022	[REDACTED]	[REDACTED]	Male	Sacramento				Coccidioidomycosis	Sacramento		<input type="checkbox"/>
411	05/13/2022	[REDACTED]	[REDACTED]	Male	Sacramento	accF0001	DENGUE FEVER ANTIBODY (IGG)	1.88	Dengue Virus Infection	Sacramento	Test_Lab	<input type="checkbox"/>
351	05/13/2022	[REDACTED]	[REDACTED]	Male	Sacramento	accC001	MuV RNA NAA+probe Qi (Specimen)	Detected	Mumps	Sacramento	Test_Lab	<input type="checkbox"/>
321	05/13/2022	[REDACTED]	[REDACTED]	Female	Fair Oaks	accA001	Influenza A RNA Presence Unspecified Specimen Probe and Target Amplification Method	POSITIVE	Influenza - Initial Report	Sacramento	Test_Lab	<input type="checkbox"/>
221	05/13/2022	[REDACTED]	[REDACTED]	Female	Sacramento	accB001	Plasmodium sp Ag IA Qi (Bid)	30020004Plasmodium falciparumSCTPos P. Falcipar...	Malaria	Sacramento	Test_Lab	<input type="checkbox"/>
191	05/13/2022	[REDACTED]	[REDACTED]	Male	Sacramento	abcacc001	Plasmodium sp Ag IA Qi (Bid)	30020004Plasmodium falciparumSCTPos P. Falcipar...	Malaria	Sacramento	Test_Lab	<input type="checkbox"/>
161	05/13/2022	[REDACTED]	[REDACTED]	Female	Carmichael	acc0001	Shigella DNA XXX Qi PCR	260373001DetectedSCT Detected	Shigellosis, Unspecified	Sacramento	Test_Lab	<input type="checkbox"/>

PREV NEXT

**Patients** ☒ Show All

Match By	Patient Name	DOB	Gender	Address	Current	Hide
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	<input type="checkbox"/>

PREV NEXT

**Records**

Type	Record ID	Date	Jurisdiction	Investigator	Disease	Status	Resolution Status	Last Update Date
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

PREV NEXT

Matched by Person Name 1234 Matched by ID User Selected Matched by Disease Incident Matched by Custom Rule All Demographics Do Not Match Ready For Import

**Import Options**

☒ Create a New Person and Disease Incident Record ☐ Only Attach Lab Report ☐ Create New Disease Incident

☐ Add Multiple Demographics ☐ Create New Person Version ☐ Correct Current Person Version ☐ Discard Incoming Demographics

☐ Attach Species Result ☐ Attach Serogroup / O Group Result ☐ Attach Serotype Result

**Routing**  
Investigator [REDACTED]

Delete View Patient's Demographics Unlock Sacramento Hide Selected Matches  
LIP Info... View Patient's Lab Report... Select Patient Import Selected Results...

Steps to Import a New Disease Incident or Attach a Web Report for an Existing Person (Figure 14.6):

1. Follow the steps above to identify a match between a person to be imported and an already existing person.
2. To attach the report submitted by the provider or lab to an existing Incident, click **Only Attach Web Report**. This will attach the report in the DISA to an existing Disease Incident in the CalREDIE MPI.
3. To create a new Disease Incident, click **Create New Disease Incident**. This will create a new Disease Incident for an existing person in the CalREDIE MPI.
4. Because this person already exists in CalREDIE, you have the option to update the demographic information for the person. You have 4 different options to choose from:
  - a. Choosing **Add Multiple Demographics** will add an entry to the Multiple Identities pop-up and an entry to the Multiple Addresses pop-up using the demographics contained in the Staging record.
  - b. Choosing **Create New Person Version** creates a new current person version using the demographics contained in the Staging record.
  - c. Choosing **Correct Current Person Version** will update the demographic information of the current person version using the demographics contained in the Staging record.
  - d. Choosing **Discard Incoming Demographics** will ignore the demographics in the Staging record.
5. Click **Import Selected Results**.
6. The Import Confirmation screen will appear. Click **Yes**.
7. Return to the MPI and search for the imported person to ensure they now appear in the MPI.



Figure 14.6: Importing for an Existing Person

**Imported Results**

Record ID	Date Received	Patient Name	DOB	Gender	City	Accession Number	Resulted Test	Value	Disease	Jurisdiction	Laboratory	Delete
1033	08/19/2022	[REDACTED]	[REDACTED]	Female	Fair Oaks	LOWP01	*Training: Influenza Virus A RNA	DETECTED	Influenza - Initial Report	Sacramento	*Lowtech Labs of Sacramento - MLR	<input type="checkbox"/>
972	08/19/2022	[REDACTED]	[REDACTED]	Male	Sacramento				Novel Coronavirus 2019 (nCoV-2019)	Sacramento		<input type="checkbox"/>
811	08/18/2022	[REDACTED]	[REDACTED]	Female	Sacramento	FNK01	*Training: Listeria monocytogenes	Positive	Listeriosis	Sacramento	*Funktown Diagnostic Laboratories - MLR	<input type="checkbox"/>
526	07/27/2022	[REDACTED]	[REDACTED]	Male	Sacramento				Coccidioidomycosis	Sacramento		<input type="checkbox"/>
411	05/13/2022	[REDACTED]	[REDACTED]	Male	Sacramento	accF0001	DENGUE FEVER ANTIBODY (IGG)	1.88	Dengue Virus Infection	Sacramento	Test_Lab	<input type="checkbox"/>
351	05/13/2022	[REDACTED]	[REDACTED]	Male	Sacramento	accC001	MuV RNA NAA+probe QI (Specimen)	Detected	Mumps	Sacramento	Test_Lab	<input type="checkbox"/>
321	05/13/2022	[REDACTED]	[REDACTED]	Female	Fair Oaks	accA001	Influenza A RNA Presence Unspecified Specimen Probe and Target Amplification Method	POSITIVE	Influenza - Initial Report	Sacramento	Test_Lab	<input type="checkbox"/>
221	05/13/2022	[REDACTED]	[REDACTED]	Female	Sacramento	accB001	Plasmodium sp Ag IA QI (Bid)	30020004Plasmodium falciparumSCTPos P. Falcipar...	Malaria	Sacramento	Test_Lab	<input type="checkbox"/>
191	05/13/2022	[REDACTED]	[REDACTED]	Male	Sacramento	abcacc001	Plasmodium sp Ag IA QI (Bid)	30020004Plasmodium falciparumSCTPos P. Falcipar...	Malaria	Sacramento	Test_Lab	<input type="checkbox"/>
161	05/13/2022	[REDACTED]	[REDACTED]	Female	Carmichael	acc0001	Shigella DNA XXX QI PCR	260373001DetectedSCT Detected	Shigellosis, Unspecified	Sacramento	Test_Lab	<input type="checkbox"/>

PREV NEXT

**Patients** ☒ Show All

Match By	Patient Name	DOB	Gender	Address	Current	Hide
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	Male	[REDACTED]	Y	<input type="checkbox"/>

PREV NEXT

**Records**

Type	Record ID	Date	Jurisdiction	Investigator	Disease	Status	Resolution Status	Last Update Date
<input checked="" type="checkbox"/>	975	08/19/2022	Sacramento		Novel Coronavirus 2019 (nCoV-2019)	Under Investigation	Confirmed	08/19/2022 9:57:29 AM

PREV NEXT

☒ Matched by Person Name
 ☒ Matched by ID
 ☒ User Selected
 ☒ Matched by Disease Incident
 ☒ Matched by Custom Rule
 ☒ All Demographics Do Not Match
 ☒ Ready For Import

**Import Options**

☐ Create a New Person and Disease Incident Record  
☐ Merge with Existing Disease Incident  
☒ Only Attach Web Report  
☐ Create New Disease Incident

☒ Add Multiple Demographics  
☐ Create New Person Version  
☐ Correct Current Person Version  
☐ Discard Incoming Demographics

☐ Attach Species Result  
☐ Attach Serogroup / O Group Result  
☐ Attach Serotype Result

**Routing**  
Investigator:

Delete View Patient's Demographics Unlock Sacramento Hide Selected Matches  
 LIP Info... View Patient's Web Report... Select Patient... Import Selected Results... Merge Disease Incidents

### Steps to Merge Two Incidents (Figures 14.7 and 14.8):

\*Merging Incidents is used if the user wishes to keep some data from the record in the DISA AND some data from the Disease Incident that is already in the CalREDIE MPI. Merging Incidents can only be done with records that are submitted via the Provider Portal; it is not necessary with ELR results.

1. Follow the steps above to identify a match between the person to be imported and an existing person in CalREDIE. The disease for each person must be the same in order to merge.
2. Check the checkbox next to an associated record that you want to merge with.
3. Under Import Options, select Merge with Existing Incident.
4. Select an option for how the demographics should be updated (i.e. Add Multiple Demographics, Create New Person Version, Correct Current Person Version, or Discard Incoming Demographics)
5. Click **Merge Incidents**.
6. You will receive a pop-up asking you to confirm your decision. Click **OK**.
  - a. Note: Once you click **OK**, the Incidents will be imported into CalREDIE. If you cancel the merge at any point after this, the Incidents will appear as 'Marked for Merge' in the MPI.
7. Use the Merge Incidents pop-up to select which data should be kept from each Incident (see the Merging Incidents section for more information).
8. Use the radio buttons to make your selections. The selections will appear in the middle column.
  - a. Note: The "Supplemental – Tab" is not used by CDPH so whatever is selected here will have no effect on the merge.
  - b. Note: The "Case Investigation – Date Created" option only refers to the **Date Created** field, not the entire Case Investigation Tab.
  - c. Note: Remember to select an ID to be kept with the final merged Incident.
9. Click on the **Printer** icon to see a print preview of each Incident.
10. Click on the **Folder** icon for each supplemental tab to compare the data for the two tabs.
11. To use one Incident entirely, check **Use This Incident Completely**.
12. To keep information from the Case Investigation Tab (other than the **Date Created**), use the **Keep This Incident's History** button. This will keep the Case Investigation Tab data as well as the audit history and version history of the selected Incident.
13. Click **Save**. Click **OK** in the pop-up.
14. Navigate to the MPI and verify that the Incidents were merged correctly.

Figure 14.7: Merging Selected Record

Imported Results

Record ID	Date Received	Patient Name	DOB	Gender	City	Accession Number	Resulted Test	Value	Disease	Jurisdiction	Laboratory	Delete
1033	08/19/2022	[REDACTED]	[REDACTED]	Female	Fair Oaks	LOWP01	+Training: Influenza Virus A RNA	DETECTED	Influenza - Initial Report	Sacramento	+Lowtech Labs of Sacramento - MLR	<input type="checkbox"/>
972	08/19/2022	[REDACTED]	[REDACTED]	Male	Sacramento				Novel Coronavirus 2019 (nCoV-2019)	Sacramento		<input type="checkbox"/>
811	08/18/2022	[REDACTED]	[REDACTED]	Female	Sacramento	FNK01	+Training: Listeria monocytogenes	Positive	Listeriosis	Sacramento	+Funkytown Diagnostic Laboratories - MLR	<input type="checkbox"/>
526	07/27/2022	[REDACTED]	[REDACTED]	Male	Sacramento				Coccidioidomycosis	Sacramento		<input type="checkbox"/>
411	05/13/2022	[REDACTED]	[REDACTED]	Male	Sacramento	accF0001	DENGUE FEVER ANTIBODY (IGG)	1.88	Dengue Virus Infection	Sacramento	Test_Lab	<input type="checkbox"/>
351	05/13/2022	[REDACTED]	[REDACTED]	Male	Sacramento	accC001	MuV RNA NAA+probe QI (Specimen)	Detected	Mumps	Sacramento	Test_Lab	<input type="checkbox"/>
321	05/13/2022	[REDACTED]	[REDACTED]	Female	Fair Oaks	accA001	Influenza A RNA Presence Unspecified Specimen Probe and Target Amplification Method	POSITIVE	Influenza - Initial Report	Sacramento	Test_Lab	<input type="checkbox"/>
221	05/13/2022	[REDACTED]	[REDACTED]	Female	Sacramento	accB001	Plasmodium sp Ag IA QI (Bid)	30020004Plasmodium falciparumSCTPos P. Falcipar...	Malaria	Sacramento	Test_Lab	<input type="checkbox"/>
191	05/13/2022	[REDACTED]	[REDACTED]	Male	Sacramento	abacc001	Plasmodium sp Ag IA QI (Bid)	30020004Plasmodium falciparumSCTPos P. Falcipar...	Malaria	Sacramento	Test_Lab	<input type="checkbox"/>
161	05/13/2022	[REDACTED]	[REDACTED]	Female	Carmichael	acc0001	Shigella DNA XXX QI PCR	260373001DetectedSCT Detected	Shigellosis, Unspecified	Sacramento	Test_Lab	<input type="checkbox"/>

PREV NEXT

Patients ☒ Show All

Match By	Patient Name	DOB	Gender	Address	Current	Hide
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	Male	[REDACTED]	Y	<input type="checkbox"/>

PREV NEXT

Records

Type	Record ID	Date	Jurisdiction	Investigator	Disease	Status	Resolution Status	Last Update Date
<input checked="" type="checkbox"/> 2	975	08/19/2022	Sacramento		Novel Coronavirus 2019 (nCoV-2019)	Under Investigation	Confirmed	08/19/2022 9:57:29 AM

PREV NEXT

Matched by Person Name Matched by ID User Selected Matched by Disease Incident Matched by Custom Rule All Demographics Do Not Match Ready For Import

Import Options

☐ Create a New Person and Disease Incident Record

☒ Merge with Existing Disease Incident 3

☐ Only Attach Web Report

☐ Create New Disease Incident

☒ Add Multiple Demographics 4

☐ Create New Person Version

☐ Correct Current Person Version

☐ Discard Incoming Demographics

☐ Attach Species Result

☐ Attach Serogroup / O Group Result

☐ Attach Serotype Result

Routing Investigator [REDACTED]

Delete View Patient's Demographics Unlock Sacramento Hide Selected Matches

LIP Info... View Patient's Web Report... Select Patient... Import Selected Results... 5 Merge Disease Incidents

Figure 14.8: Merge Disease Incidents Pop-up

Merge/Unmerge Disease Incidents

Select Disease Incident Select Details

Disease Incident 1 Details 9

ID 552

Patient Tab - Record Specific

Case Investigation - Date Created 08/02/2022

Supplemental - Tab Standard 1

Supplemental Tab 1 Clinical Info. 1

Supplemental Tab 2 Laboratory Info. 1

Supplemental Tab 3 Epidemiologic Info. 1

Supplemental Tab 4

☐ Use This Disease Incident Completely

☒ Keep This Disease Incident's History

11

12

13 Save Cancel

Disease Incident Details - Final

ID

Patient Tab - Record Specific

Case Investigation - Date Created

Supplemental - Tab

Supplemental Tab 1

Supplemental Tab 2

Supplemental Tab 3

Supplemental Tab 4

☐ Use This Disease Incident Completely

☒ Keep This Disease Incident's History

Disease Incident 2 Details 10

ID 546

Patient Tab - Record Specific

Case Investigation - Date Created 07/27/2022

Supplemental - Tab Standard 2

Supplemental Tab 1 Clinical Info. 2

Supplemental Tab 2 Laboratory Info. 2

Supplemental Tab 3 Epidemiologic Info. 2

Supplemental Tab 4

☐ Use This Disease Incident Completely

☒ Keep This Disease Incident's History



## Section 15: Jurisdiction Review

At the end of this section, users will be able to:

1. Generate a list of records for their jurisdiction.
2. Expand or narrow search results based on selected variables.
3. Link an individual to an Outbreak
4. Assign an investigator to a record
5. Change the Process Status of a record
6. Use the Advanced Find

### Background Information

The **Jurisdiction Review** is an area where users can view the Incidents and Outbreaks that belong to their jurisdiction. Users are able to use several different parameters to search for these records. Within this screen, users are able to link a record to an Outbreak, assign an investigator to a record, and update the Process Status. Users can also use the **Advanced Find** to search for records that have a certain value in a field on a UDF tab.

- Note: Leaving any of the fields on the Jurisdiction Review page blank will not limit the results based on the field. For example, leaving **Process Status** blank will return results with ALL Process Statuses.

### Steps to Search for Incidents, Contact Investigations, and Outbreaks (Figure 15.1):

1. Click on **Jurisdiction Review**.
  - a. Note: In the search results grid, *"No Records Shown By Default"* will display. Records will display once a search is conducted.
2. Select a Type. Types include All Records, Only Disease Incidents Only Contact Investigations, Only Contacts, Only Outbreaks, Only Contacts, and Only Index Cases.
  - a. Note: It is important to select the Type first. Changing the Type after specifying other search may result in the previous selection being cleared.
3. Select a Date Type from the dropdown.
4. Use the **From** and **To** Date fields to specify a date range.
5. Select **Jurisdiction** or **Region** as your search criteria, then select an item from the dropdown.
6. Select **Disease** or **Grouping** as your search criteria.
7. Select one or more **Diseases** or a **Grouping** from the dropdown.
8. If desired, select one or more **Process Statuses** from the dropdown.
9. If desired, select one or more **Resolution Statuses** from the dropdown.
10. If desired, select one or more **Investigators** from the dropdown.
  - a. Note: New in CalREDIE v2023.2, users now have the ability to search for incidents that have yet to be assigned to an investigator. Select the

[Unassigned] value at the top of the list. Note that the {Pending Assignment} entries are not the same thing.

11. Click **Find**.

12. Use the **Prev** and **Next** buttons to move through results.

13. Click on the ID number to go directly to the record.

- a. Note: Exposure Location and Cluster ID can also be used to narrow results.

**Figure 15.1: Jurisdiction Review Page**

The screenshot shows the 'Jurisdiction Review' page in a web application. The page has a navigation bar at the top with links like Search, Previous Search, Jurisdiction Review, Outbreak, Staging, Administration, Dictionaries, Reports, CDPH, and Help. The main content area is titled 'Jurisdiction Review' and contains a search filter section with various dropdowns and checkboxes. Below the filters is a table of results with columns for ID, Type, Name/ID#, Date Created, Date of Onset/Contact/Event, Date Closed, Disease/Type, Jurisdiction, Process Status, Resolution Status, Investigator, Outbreak #, and ClusterID. The table lists several records, including Campylobacteriosis, HIV/AIDS, STD/HIV Field Investigation Incident, Monkeypox, and Novel Coronavirus 2019 (nCoV-2019). Red numbered callouts (1-13) point to specific elements: 1 points to the 'Jurisdiction Review' tab; 2 points to the 'Record Type' dropdown; 3 points to the 'Date Type' dropdown; 4 points to the 'From' date field; 5 points to the 'Jurisdiction' dropdown; 6 points to the 'Disease' dropdown; 7 points to the 'Exposure Location Type' dropdown; 8 points to the 'Process Status' dropdown; 9 points to the 'Resolution Status' dropdown; 10 points to the 'Investigator' dropdown; 11 points to the 'Find' button; 12 points to the 'PREV' and 'NEXT' buttons; and 13 points to the 'ID' column header.

**Search Filters:**

- Record Type: ☒ All \* ☐ Only Disease Incidents ☐ Only Contact Investigations ☐ Only Group Events ☐ Only Index Cases
- Date Type:
- From: 07/25/2022 To: 08/01/2022
- Jurisdiction:
- Disease: ☒ Disease ☐ Grouping
- Exposure Location Type:
- Exposure Location:
- Process Status:
- Resolution Status:
- Investigator:
- Cluster ID:
- Buttons: Advanced Find, Find, Clear, Provide Search Name, Save Search

ID	Type	Name/ID#	Date Created	Date of Onset/Contact/Event	Date Closed	Disease/Type	Jurisdiction	Process Status	Resolution Status	Investigator	Outbreak #	ClusterID
2405910	DI	...	08/01/2022	08/01/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405909	DI	...	08/01/2022			HIV/AIDS	Sacramento	Under Investigation	Confirmed	Maia-Davis - HIV, Maria	-Link-	
2405908	DI	...	08/01/2022			STD/HIV Field Investigation Incident	Kern	Under Investigation	Suspect	Maia-Davis - HIV, Maria	-Link-	
2405907	DI	...	07/29/2022			Monkeypox	San Francisco	Entered	Suspect	-Assign-	-Link-	
2405906	DI	...	07/29/2022			Monkeypox	San Francisco	Entered	Suspect	-Assign-	-Link-	
2405905	DI	...	07/29/2022			Monkeypox Contact	San Francisco	Entered	Suspect	38 Sanchez Valle, Raul	-Link-	
2405904	DI	...	07/29/2022			Monkeypox	San Francisco	Entered	Suspect	-Assign-	-Link-	
2405903	DI	...	07/29/2022			Monkeypox	Napa	Entered	Suspect	-Assign-	-Link-	
2405902	DI	...	07/29/2022			STD/HIV Field Investigation Incident	Santa Cruz	Under Investigation	Suspect	Maia-Davis - HIV, Maria	-Link-	
2405901	DI	...	07/28/2022			Novel Coronavirus 2019 (nCoV-2019)	Orange	Entered	Probable	-Assign-	-Link-	

\* Contacts are not displayed when the "All" option is selected

12 PREV NEXT

### Steps to Link an Incident to an Outbreak (Figure 15.2):

1. Perform a search in Jurisdiction Review using your choice of search parameters.
2. Under the Outbreak # column, click the **Link** button that belongs to the Incident that you wish to link to an Outbreak. The Linked Outbreaks window will appear.
3. Click **Add**. The Link to an Outbreak window will appear.
4. Use the **Outbreak #** search field to search through available Outbreaks. Click **Search**.
  - a. Note: Only Outbreaks in the Outbreak Disease Group for the disease condition will display
5. Click on the blue Outbreak Number. The selected Outbreak will appear under the **Linked Outbreaks** grid.
6. Click **Close**.
7. Verify that the correct Outbreak Number appears where the **Link** button previously was on the Jurisdiction Review page.
  - a. Note: To remove a link, click on the blue Outbreak ID so that the Outbreak is highlighted, and click **Unlink**. Close the window.

**Figure 15.2: Linking to an Outbreak from Jurisdiction Review**

**Jurisdiction Review**

Record Type: ☒ All ☐ Only Disease Incidents ☐ Only Contact Investigations ☐ Only Index Cases  
☐ Only Contacts ☐ Only Outbreaks ☐ Only Group Events

Date Type:  From:  To:

☒ Jurisdiction ☐ Region ☐ Disease ☐ Grouping ☐ Exposure Location Type

Process Status:  Resolution Status:  Investigator:

Exposure Location:  Cluster ID:

Advanced Find **1** Find Clear  
 Provide Search Save Search

ID	Type	Name/OB#	Date Created	Date of Onset/ Contact/Event	Date Closed	Disease/Type	Jurisdiction	Process Status	Resolution Status	Investigator	Outbreak #	ClusterID
2405910	DI	Staphylococcus	08/01/2022	08/01/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link- <b>2</b>	
2405909	DI	Staphylococcus	08/01/2022			CaREDIE Staging UAT - Multiple Outbreaks					-Link-	
2405908	DI	Staphylococcus	08/01/2022			Linked Outbreaks					-Link-	
2405907	DI	Staphylococcus	07/29/2022								-Link- <b>7</b>	
2405906	DI	Staphylococcus	07/29/2022								-Link-	
2405905	DI	Staphylococcus	07/29/2022								-Link-	
2405904	DI	Staphylococcus	07/29/2022								-Link-	
2405903	DI	Staphylococcus	07/29/2022								-Link-	
2405902	DI	Staphylococcus	07/29/2022								-Link-	
2405901	DI	Staphylococcus	07/28/2022								-Link-	

\* Contacts are not displayed when the "All" option is selected

**Linked Outbreaks**

Outbreak ID	Outbreak #	Location	Date Created	Jurisdiction	Process / Resolution Status
8082	TEST 2		06/28/2019	CDPH Use Only	Entered/Suspect

View Goto  
 PREV NEXT  
 Unlink **3** Add  
 Close **6**

### Steps to Assign an Investigator (Figure 15.3):

1. Perform a search in Jurisdiction Review using your choice of search parameters.
2. Under the Investigator column, click the **Assign** button that belongs to the record that you wish to assign an investigator. A list of available investigators will show in the Link to Investigator pop-up window.
  - a. Note: This list is ordered alphabetically.
3. Search using the **Lastname, Firstname** field if necessary, then click on the Name of the Investigator you wish to assign. The pop-up window will close.
4. Verify that the correct Investigator appears where the **Assign** button previously was.

**Figure 15.3: Assigning an Investigator from Jurisdiction Review**

Jurisdiction Review

Record Type: ☒ All \* ☐ Only Disease Incidents ☐ Only Contact Investigations ☐ Only Index Cases  
☐ Only Contacts ☐ Only Outbreaks ☐ Only Group Events

Date Type:  From:  To:

☒ Jurisdiction ☐ Region ☐ Disease ☐ Grouping ☐ Exposure Location Type

Exposure Location:

Process Status:  Resolution Status:  Investigator:  Cluster ID:

Advanced Search **1** Find Clear  
 Provide Search Save Search

ID	Type	Name/CDS	Date Created	Date of Onset/ Contact/Event	Date Closed	Disease/Type	Jurisdiction	Process Status	Resolution Status	Investigator	Outbreak #	ClusterID
2405910	DI	...	08/01/2022	08/01/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign- <b>2</b>	TEST 2	
2405909	DI	...	08/01/2022							Main-Davis - Link-		
2405908	DI	...	08/01/2022							Main-Davis - HIV - Link-		
2405907	DI	...	07/29/2022							Main-Davis - Link-		
2405906	DI	...	07/29/2022							-Assign- -Link-		
2405905	DI	...	07/29/2022							-Assign- -Link-		
2405904	DI	...	07/29/2022							38Sanchez Valle, Raul -Link-		
2405903	DI	...	07/29/2022							-Assign- -Link-		
2405902	DI	...	07/29/2022							Main-Davis - HIV - Link-		
2405901	DI	...	07/28/2022							-Assign- -Link-		

\* Contacts are not displayed when the "All" option is selected

Link to Investigator

Lastname,Firstname  Search Clear

Available Investigators

Name	# of Open Cases
85Sp, Peter <b>3</b>	0
88Ali, Stefano	0
88Chan, Elena	0
88Cooper, Ronald	1
88Ha, Jennifer	0
88Herrera, Christine	0
88Nakashima, James	1
88Winters, Tessa	0
Alexander, Angel	192
Arima - MPOX, Gabriela	0

PREV NEXT

Cancel

### Steps to update the Process Status (Figure 15.4):

1. Navigate to Jurisdiction Review.
2. If necessary, perform a search for desired records.
3. Click on the Process Status to be updated. The Set Status pop-up will appear.
4. Use the dropdown to select the desired Process Status.
5. Click **OK**. The Process Status is now changed.

**Figure 15.4: Updating Process Status from Jurisdiction Review**

**Jurisdiction Review**

Record Type: ☒ All \* ☐ Only Disease Incidents ☐ Only Contact Investigations ☐ Only Outbreaks ☐ Only Group Events ☐ Only Index Cases

Date Type:  From: 07/25/2022 To: 08/01/2022

☒ Jurisdiction ☐ Region  Process Status:  Resolution Status:  Investigator:

☒ Disease ☐ Grouping  Exposure Location Type:  Cluster ID:

Exposure Location:  Advanced Find

Provide Search Value

ID	Type	Name/OB#	Date Created	Date of Onset/ Contact/Event	Date Closed	Disease/Type	Jurisdiction	Process Status	Resolution Status	Investigator	Outbreak #	ClusterID
2405910	DI	Maia-Davis	08/01/2022	08/01/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405909	DI	Maia-Davis	08/01/2022	08/01/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405908	DI	Maia-Davis	08/01/2022	08/01/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405907	DI	Maia-Davis	07/29/2022	07/29/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405906	DI	Maia-Davis	07/29/2022	07/29/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405905	DI	Maia-Davis	07/29/2022	07/29/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405904	DI	Maia-Davis	07/29/2022	07/29/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405903	DI	Maia-Davis	07/29/2022	07/29/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405902	DI	Maia-Davis	07/29/2022	07/29/2022		Campylobacteriosis	CDPH Use Only	Entered	Suspect	-Assign-	-Link-	
2405901	DI	Maia-Davis	07/28/2022	07/28/2022		Campylobacteriosis	CDPH Use Only	Entered	Probable	-Assign-	-Link-	

\* Contacts are not displayed when the "All" option is selected

PREV NEXT

### Steps to search for records using Advanced Find (Figure 15.5):

1. Navigate to Jurisdiction Review.
2. Click **Advanced Find**. The Search pop-up will appear.
3. Select the desired **Form** (tab) from the dropdown.
4. Select the desired **Section** from the dropdown.
5. Select the desired **Field** from the dropdown.
6. Enter or select the value you are searching for in the **Value** field.
7. Click **Add**. The selections will appear in the box below.
  - a. Note: Repeat steps 2-6 to include an additional search criterion, keeping in mind that Advanced Find will search for only incidents where **all** criteria are met.
8. Click **Find**. Any records with the specified value(s) will appear in the results grid.

**Figure 15.5: Jurisdiction Review Advanced Find**

The screenshot shows the 'Jurisdiction Review' interface with an 'Advanced Search' dialog box open. The dialog box has a title bar 'CalREDIE Training - Advanced Search' and a close button. Inside, there are four dropdown menus: 'Form' (selected: 'Epidemiologic Info. (SALMONLAEPICR)'), 'Section' (selected: 'FOOD HISTORY'), 'Field' (selected: 'Eaten undercooked or raw?'), and 'Value' (selected: 'Yes'). Below these is a text box containing the search criteria: 'Epidemiologic Info. (SALMONLAEPICR)::FOOD HISTORY::Eaten undercooked or raw?::Yes'. To the right of the text box are 'Add' and 'Remove' buttons. At the bottom of the dialog are 'Search' and 'Cancel' buttons. On the right side of the dialog, there are buttons for 'Advanced Find', 'Find', 'Clear', and 'Save Search'. A search name input field is also present. The background shows the 'Jurisdiction Review' page with a sidebar containing 'Jurisdiction', 'Disease', 'Exposure Location', and 'Exposure'. A table with columns 'ID', 'Type', and 'Name/OB#' is visible at the bottom left. A note at the bottom left states: '\* Contacts are not displayed when the "All" option is selected'.

## Section 16: Searching by Disease Incident

At the end of this section, users will be able to:

1. Search for an Incident by ID Number
2. Search for an Incident by onset date
3. Search for an Incident by disease

### Background Information

The Disease Incident search tab allows users to search for Incidents in CalREDIE. This differs from the Person search tab where users are searching for a person. Disease Incidents can be searched for by Record ID (i.e. Incident ID), CMR ID, Onset Date, Disease, or Recently Viewed.

A Wildcard can be used when searching by ID number. To use the Wildcard, insert a “%” character where desired. Remember, the Wildcard represents 0 to ∞ characters, so a search for “%205” will pull up any results where the ID is or ends with “205”.

The **Customize Grid** feature allows for users to customize the variables shown as columns in the results grid when searching by Disease, and the Recently Viewed search option, which when selected will show all incidents the user has viewed in the past three days.

### Steps to Search by Record ID, CMR ID, or Onset Date (Figure 16.1):

1. On the CalREDIE Search page, click on the Disease Incident Tab.
  - a. Note: In the search results grid, “*No Records Shown By Default*” will display. Records will display once a search is conducted.
2. Select either Record ID, CMR ID, or Onset Date.
3. Enter the search criteria in the search field. If searching by Record ID or CMR ID, enter the number. If searching by Onset Date, enter a **From** and **To** date.
4. Click **Find**.
5. In the list of results, click on the respective blue ID, CMR, or Onset Date to open the record.
  - a. Note: Resulting records will be ordered reverse-sequentially.
6. If the desired result was not found, a new Incident can be created. Click **New Incident** or **New Contact Investigation**.

Figure 16.1: Searching by Record ID

1 Patient 2 Disease Incident 3 Outbreak

Record ID ☐ CMR ID ☐ Onset Date ☐ Disease ☐ Recently Viewed

2405920 Find Clear Provide Search Name Save Search

ID	Type	Name (Last, First)	Disease	Jurisdiction	Pro/Res Status	Create Date	Onset Date
2405920	DI		Monkeypox	Unknown	Entered/ Suspect	08/03/2022	
2405020	DI		STD/HIV Field Investigation Incident	San Diego	Entered/ Suspect	05/31/2022	
2403920	DI		Tuberculosis (Clinically Active - TB3)	San Luis Obispo	Entered/ Suspect	05/02/2022	
2403820	DI		Gonorrhea	Orange	Closed by LHD/ Suspect	04/15/2022	
2403720	DI		Novel Coronavirus 2019 (nCoV-2019)	Sierra	Under Investigation/ Probable	04/11/2022	
2403620	DI		Novel Coronavirus 2019 (nCoV-2019)	Sierra	Under Investigation/ Probable	04/11/2022	
2403520	DI		Novel Coronavirus 2019 (nCoV-2019)	Sierra	Under Investigation/ Probable	04/11/2022	
2403420	DI		Novel Coronavirus 2019 (nCoV-2019)	Sierra	Under Investigation/ Probable	04/11/2022	
2403320	DI		Novel Coronavirus 2019 (nCoV-2019)	Sierra	Under Investigation/ Probable	04/11/2022	
2403220	DI		Novel Coronavirus 2019 (nCoV-2019)	Sierra	Under Investigation/ Probable	04/11/2022	

6 New Disease Incident New Contact Investigation

Steps to Search by Disease (Figure 16.2):

1. Click on the **Disease Incident** tab.
2. Select the **Disease** radio button.
3. Click the field to type in the name of a disease or select a disease from the list.
4. Click **Find**.
5. Incidents of the selected disease will be displayed below. Click on the blue ID to open an Incident or Contact Investigation.
6. If you are unable to find the record you are looking for, a new Incident or Contact Investigation can be created. Click **New Incident** or **New Contact Investigation**.
7. To customize the columns of the search grid, click the **Customize Grid** button. This activates when Disease is the criterion and a condition has been selected.

Figure 16.2: Searching by Disease

1 Patient 2 Disease Incident 3 Outbreak

Record ID ☐ CMR ID ☐ Onset Date ☒ Disease ☐ Recently Viewed

Anthrax Find Clear Provide Search Name Save Search

ID	Type	Name (Last, First)	Jurisdiction	Pro/Res Status	Address	Create Date	Onset Date	Current
2405849	DI		Contra Costa	Entered/ Suspect		06/30/2022		Y
2405066	DI		Solano	Entered/ Suspect		06/21/2022		N
2405061	DI		Kern	Entered/ Suspect		06/20/2022		N
2400567	DI		Sacramento	Entered/ Suspect		03/30/2022		Y
2381935	DI		Alameda	Entered/ Suspect		07/22/2020		Y
2380611	DI		Sacramento	Suspect		04/28/2020		Y
2379376	DI		Unknown	Entered/ Suspect		11/21/2019		N
2379348	DI		Unknown	Entered/ Suspect		11/05/2019		N
2379249	DI		Unknown	Entered/ Suspect		09/13/2019		Y
2379217	DI		Sierra	Entered/ Suspect		08/23/2019		Y

6 New Disease Incident New Contact Investigation



### Steps to Use the Customize Grid Screen (Figure 16.3):

1. Select **Disease** as the criterion and a condition to enable the **Customize Grid** button at the top right of the search grid.
2. Using the checkboxes, select the variables you would like in the search grid.
3. To specify a variable's column width in pixels, first click the row, then edit the text box under Width. You can also type "auto" and the column will automatically size based on other the columns' width.
4. Use the **Up** and **Down** buttons to reorder a particular variable: first click the row to highlight it in yellow, then select **Up** or **Down** to adjust its position.
5. Click **Default** to reset the variables to the system default.
6. Click **Save** to save your changes, and **Close** to return to the Incident Search.
7. The selected settings will now be your default view for that disease condition.

**Figure 16.3: Customized Grid for Disease Criterion**

**Customize Grid**

Disease: Anthrax

Order	Field	Select	Width (auto or pixels)
001	ID	<input checked="" type="checkbox"/>	65
002	Type	<input checked="" type="checkbox"/>	70
003	Name (Last, First)	<input checked="" type="checkbox"/>	auto
004	Jurisdiction	<input checked="" type="checkbox"/>	auto
005	Pro/Res Status	<input checked="" type="checkbox"/>	auto
006	Address	<input checked="" type="checkbox"/>	auto
007	Create Date	<input checked="" type="checkbox"/>	70
008	Onset Date	<input checked="" type="checkbox"/>	70
009	Current	<input checked="" type="checkbox"/>	65
010	Age	<input type="checkbox"/>	65
011	Gender(s) of Sex Partners	<input type="checkbox"/>	100
012	Occupation	<input type="checkbox"/>	100
013	Is Pregnant	<input type="checkbox"/>	80

Up Down Default Save Close

### Steps to Search for Recently Viewed Incidents:

1. Click the radio button for **Recently Viewed**.
2. Click **Find**. This will show all incidents viewed in the past three days.
3. To refine your search (e.g. to show only results from the past two days), use the **From** and **To** fields.

## Section 17: Reports and Exports

At the end of this section, users will be able to:

1. Generate a Cumulative Report
2. Generate a De-Identified Report
3. Generate a Ranged Report
4. Generate an EPI Curve

### Background Information


Users can generate several types of reports in CalREDIE. Each type of report contains different options for exporting data.

The Cumulative Report returns the number of Disease Incidents created for a specified period of time, and can be filtered for various statuses (Resolution and Process) available in CalREDIE.

#### Steps to Generate a Cumulative Report (Figure 17.1):



1. Click on Reports, Cumulative Report.
2. Select a **Date Type**.
3. Enter a date range in the **From** and **To** fields (**REQUIRED**).
4. Select **Disease Incident Jurisdiction** or **Grouping** and the desired jurisdiction or grouping from the dropdown.
  - a. Note: If the **Include Outbreaks** checkbox is selected, then Outbreaks for each Outbreak type are included in the report
  - b. Note: **Outbreak Jurisdiction** and **Grouping** will enable once the **Include Outbreaks** checkbox is selected. Specify a jurisdiction or grouping from the dropdown.
5. To add a **Disease Group**, select the desired value from the dropdown.
6. Click **Add**.
7. To add an additional **Disease Group**, select other values from the dropdown and click **Add**.
8. Repeat the same steps for **Resolution Status**.
9. Repeat the same steps for **Process Status**.
10. Leave **Transmission Status** blank. This field is not currently used.
11. Click **Submit**.
12. The report will appear in a new browser window or tab.

Figure 17.1: Generating a Cumulative Report

**Cumulative Report** 

Select the appropriate parameters for the Cumulative Report

**2** Date Type ☒ Create ☐ Onset ☐ Episode ☐ Closed ☐ Sent ☐ Last Updated

**3** \* From   \* To  

☐ Weekly Place of Report Format

☒ Include Outbreaks ☒ Outbreak Jurisdiction ☐ Grouping

**4** ☒ Disease Incident Jurisdiction ☐ Grouping

**5** Disease Group  **6** Add Remove

Enterics  
obGI-Foodborne

Resolution Status  **8** Add Remove

Suspect  
Probable

Transmission Status  Add Remove

**10**

Process Status  **9** Add Remove

Under Investigation

**11** Submit Close

Note: This process could take a while with a large date range.

The De-Identified Report provides users the ability to generate reports of disease counts and incidence rates free of Patient Identifying Information, and can be filtered by various fields available in CalREDIE.

### Steps to Generate a De-Identified Report (Figure 17.2):

1. Click Reports, De-Identified Reports.
2. Select an **Output Type**. The selected value will automatically populate in the **Title Line 1** field.
3. Select a value for **Group Output By**. The selected value will automatically populate in the **Title Line 2** field.
4. Select **Disease** or **Grouping** and select a value from the dropdown.
5. Select a **Date Type**.
6. Select a **Time frame**.
7. If desired, values can be selected for **Reporting Source**, **Jurisdiction** or **Grouping**, **Region**, **Process Status** and **Resolution Status**.
8. Select the fields to be included in the report. Use **Select/Unselect All** checkbox to select all fields.
9. Click **Generate**.
10. Open or Save the report.

**Figure 17.2: Generating a De-Identified Report**

The screenshot shows the 'Disease Counts & Incidence Rates - Pivot Table Generator' interface. It includes a title bar with a help icon, a main form area with various dropdowns and checkboxes, and a 'Generate' button at the bottom. Red circles with numbers 1 through 9 are overlaid on the form to indicate the steps for generating a report.

**1** Select Output Type: Number of Cases

**2** Group Output By: Month

Title Line 1: Number of Cases

Title Line 2: Month

Select the proper parameters for the Report/Export

**3** ☒ Disease ☐ Grouping: Salmonellosis (Other than Typhoid Fever)

**4** Date Type: ☒ Create ☐ Onset ☐ Episode ☐ Closed ☐ Reported

**5** Time frame: ☒ Year 2022

**6** ☐ Range To

**7** Reporting Source: [Dropdown]

☒ Jurisdiction ☐ Grouping: [Dropdown]

Region: [Dropdown]

Process Status: Entered

Resolution Status: Confirmed

**8** Include Fields

<input checked="" type="checkbox"/> Date of Birth	<input checked="" type="checkbox"/> Age	<input checked="" type="checkbox"/> Gender	<input checked="" type="checkbox"/> Marital Status
<input checked="" type="checkbox"/> Primary Nationality	<input checked="" type="checkbox"/> Ethnicity	<input checked="" type="checkbox"/> Race	<input checked="" type="checkbox"/> Occupation or Setting
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> Zip	<input checked="" type="checkbox"/> Disease being Reported
<input checked="" type="checkbox"/> Date Created	<input checked="" type="checkbox"/> Date of Onset	<input checked="" type="checkbox"/> Episode Date	<input checked="" type="checkbox"/> Date of Diagnosis
<input checked="" type="checkbox"/> Date Closed	<input type="checkbox"/> Date Reported	<input checked="" type="checkbox"/> Report Source	<input checked="" type="checkbox"/> Jurisdiction
<input checked="" type="checkbox"/> Region	<input checked="" type="checkbox"/> Process Status	<input checked="" type="checkbox"/> Resolution Status	<input checked="" type="checkbox"/> Web Report
<input checked="" type="checkbox"/> Lab Report			

☒ Select / Unselect All

**9** Generate

Note: This process could take a while with a large date range.

The Ranged Report provides a number of different export options for row-level datasets, and can be filtered for multiple fields available in CalREDIE to provide a dataset with either broad or narrow parameters.

Steps to Generate a Ranged Report (Figure 17.3 and 17.4):

1. Click Reports, Ranged Report.
2. Select a Report or Export from the dropdown. The page will refresh.
  - a. Note: Depending on the Report or Export selected, some additional fields may appear.
3. Select a **Record Type**.
4. Select a Date Type and enter a date range in the **From** and **To** fields.
5. Select a **Process Status** and **Reporting Source**.
6. Select a **Reporting Source, Disease or Grouping, Jurisdiction, Region** and **Resolution Status**.
7. Click **Export**.
8. Depending on the report or export chosen, select **Export Type** if applicable.
9. Depending on the report or export chosen, select the fields to export if applicable.
  - a. Note: To select all fields, click the **Select/Unselect All** checkbox.
10. Click **Export**.
11. Open or save the report or export.

**Figure 17.3: Generating a Ranged Report**

**Ranged Reports**

Select a Report or Export  
Incident & Investigation Export

Select the proper parameters for the Report/Export

**Record Type** ☒ All ☐ Disease Incidents ☐ Contact Investigation ☐ Outbreak ☐ Patient Record

**Date Type** ☒ Create ☐ Onset/Contact/Event ☐ Episode ☐ Closed ☐ Reported

**From** 07/25/2022 **To** 08/01/2022

**Process Status** Entered

**Reporting Source** Salmonellosis (Other than Typhoid Fever)

☒ **Disease** ☐ **Grouping** Sacramento

☒ **Jurisdiction** ☐ **Grouping** Sacramento

**Region**

**Resolution Status** Confirmed

**Templates**

Edit Delete ☐ Include Selected Format ☐ Include Selected Fields

New Template Name Save As

**Export**

Note: This process could take a while with a large date range.

Figure 17.4: Selecting Export Type and Fields

**Instant Export**

Grid

Ranged Report

**8** Export Type

☐ Comma Delimited Text ☐ Tab Delimited Text ☐ Microsoft Excel ☐ Microsoft Access ☐ XML

**9**

<input type="checkbox"/> Additional Identifiers	<input type="checkbox"/> Primary Nationality
<input type="checkbox"/> Additional Laboratory	<input type="checkbox"/> Priority
<input type="checkbox"/> Additional Provider	<input type="checkbox"/> Process Status
<input type="checkbox"/> Address Number & Street	<input type="checkbox"/> Process Status Closed by LHD - ELR Date
<input type="checkbox"/> Address Standardized	<input type="checkbox"/> Process Status Closed by LHD - ELR Repeated
<input type="checkbox"/> Age	<input type="checkbox"/> Process Status Closed by LHD Date
<input type="checkbox"/> American Indian or Alaska Native - Specify	<input type="checkbox"/> Process Status Closed by LHD Repeated
<input type="checkbox"/> Apartment/Unit Number	<input type="checkbox"/> Process Status Closed by State Date
<input type="checkbox"/> Asian - Specify	<input type="checkbox"/> Process Status Closed by State Repeated
<input type="checkbox"/> Black or African American - Specify	<input type="checkbox"/> Process Status Contact Investigation Completed Date
<input type="checkbox"/> Case Investigation UD Section	<input type="checkbox"/> Process Status Contact Investigation Completed Repeated
<input type="checkbox"/> Cellular Phone / Pager	<input type="checkbox"/> Process Status Contact Lab Specimen Cleared Date

☐ Select / Unselect All ☐ All Fields Except System Section Fields/Additional Identifiers ☐ System Section Fields Only

**10** Export Close


The EPI-Curve generates a graph which shows the volume of cases over a given year, and can be customized for specific years, diseases, and jurisdictions available in CalREDIE.

Steps to Generate an EPI Curve (Figure 17.5):

1. Click Reports, EPI Curve.
2. Select a **Year to chart**.
3. Select a value from the **Number of historic years to create baseline** dropdown.
4. Select a value from the **Disease** dropdown.
5. Select to restrict your search by “Jurisdiction”, “Jurisdiction Group”, “My Cases”, “Region”, or “Zip”, then select a value to restrict to.
6. Click **Chart**. A real time EPI Curve will appear in a pop-up window.

**Figure 17.5: Generating an EPI Curve**

The screenshot shows the 'EPI Curve' interface. It features several dropdown menus and buttons. Red circles with numbers 2 through 6 are overlaid on the interface to indicate the steps for generating the curve. Step 2 points to the 'Year to chart' dropdown, which is set to '2022'. Step 3 points to the 'Number of historic years to create baseline' dropdown, which is set to '2'. Step 4 points to the 'Disease' dropdown, which is set to 'Salmonellosis (Other than Typhoid Fever)'. Step 5 points to the 'Restrict By' dropdown, which is set to 'Jurisdiction'. Step 6 points to the 'Chart' button. The 'of value' dropdown is set to 'Sacramento'. A 'Clear' button is also visible.

**EPI Curve** 

**2** Year to chart 2022 **3** Number of historic years to create baseline 2

**4** Disease Salmonellosis (Other than Typhoid Fever)

**5** Restrict By Jurisdiction of value Sacramento **6** Chart Clear

## Section 18: My Case Load

The My Case Load Tab is the first page that most local users see when they first login to CalREDIE. The My Case Load Tab displays all Incidents and Outbreaks that are assigned to the user. Users can use several search parameters to find Incidents and Outbreaks that are assigned to them.

Steps to use My Case Load (Figure 18.1):

1. Log into CalREDIE and the My Case Load page will appear. All Incidents and Outbreaks that are assigned to you will appear.
2. Enter a View Begin Date. This date entered here will return results that have a Create Date on or after the View Begin Date.
3. Select a Process Status from the **Status** dropdown. Leaving this field blank will return results with all Process Statuses.
4. To search for an individual person or Outbreak, enter the person's name or the Outbreak number in the **Name/OB#/GE#** field.
5. To search by disease, click on the **Disease** radio button and type the disease name in the Disease field.
6. Click **Search** to perform the search. Results will be displayed in the grid below.
7. Use the **Prev** and **Next** buttons to navigate through the results.
8. Click on the blue ID Number to open the Incident, Outbreak or Contact Investigation.

**Figure 18.1: My Case Load Page**

The screenshot shows the 'My Case Load' page. At the top is a navigation bar with links: Home, My Case Load, Search, Previous Searches, Jurisdiction Review, Outbreak, Staging, Administration, Dictionaries, Reports, CDPH, and Help. Below this, it says 'Logged in as: Bui-PA, Tina' and 'Domain: Main'. The main content area has two tabs: 'Case Load' (selected) and 'Lab Results'. Below the tabs are search filters: 'View Begin Date:' (with a calendar icon), 'Status:' (a dropdown menu), and three radio buttons: 'Name/OB#/GE#' (selected), 'Disease/GE Type', and 'Task Name'. To the right of these filters is a text input field and two buttons: 'Search' and 'Clear'. Below the filters is a section titled 'My Records \*' containing a table with columns: ID, Type, Name/OB#/GE#, Disease/GE Type, Status, Date Created, and Date of Onset/Event. The table has one row with ID 550, Type DI (with a virus icon), Name/OB#/GE# 'Test, Fakey', Disease/GE Type 'Listeriosis', Status 'Entered', Date Created '08/01/2022', and Date of Onset/Event '07/29/2022'. Below the table is a note '\* Contacts and Animal Reports not listed' and navigation buttons 'PREV' and 'NEXT'. At the bottom is a section titled 'My Tasks' with a table that has columns: ID, Type, Name/OB#/GE#, Disease/GE Type, Task Name, and Completed. The table is currently empty.



## Section 19: Instant Export

The **Instant Export** icon is used to export results for a variety of different searches in CalREDIE. The icon typically is found in the upper right-hand corner of the screen. Results can be exported into a variety of formats including Microsoft Excel, Access or tab-delimited.

### Steps to Use the Instant Export (Figure 19.1):

1. Navigate to a screen with an **Instant Export** icon (e.g. Jurisdiction Review).
2. Perform the desired search.
  - a. Note: If no search is performed, everything will be exported.
3. Click on the **Instant Export** icon.
4. Select Export Type.
5. Select variables to be included in export.
  - a. Note: Some variables force you to export into Access.
6. Click **Export**.
7. Open or save the exported file.

**Figure 19.1: Instant Export Pop-up**

The screenshot shows the 'Jurisdiction Review' screen in CalREDIE. The 'Instant Export' pop-up window is open, displaying the following elements:

- Record Title:** CalREDIE Training- Instant Export
- Instant Export** section with a 'Grid' dropdown set to 'Dictionary'.
- Export Type:** A dropdown menu with options: Comma Delimited Text, Tab Delimited Text, Microsoft Excel, Microsoft Access, and XML.
- Variables:** A list of variables to be included in the export, such as DEE\_EXPOSURETYPE, DEE\_LOCATION, DEE\_ROWID, ExposureEndDate, ExposureEndTime, ExposureLocation, ExposureLocationType, ExposureStartDate, ExposureStartTime, ExposureType, LOCATIONISACTIVE, PR\_InstanceID, PR\_Investigator, PR\_InvestigatorDR, PR\_IsLinkedToAR, PR\_Jurisdiction, PR\_JurisdictionDR, PR\_LabSpecimenCollectedDate, PR\_LastName, PR\_Location, PR\_LocationType, PR\_NameOB, and PR\_OutbreakDRsText.
- Buttons:** 'Export' and 'Close' buttons at the bottom.

Red circles with numbers 3, 4, 5, and 6 highlight the steps: 3 points to the Instant Export icon in the top right, 4 points to the Export Type dropdown, 5 points to the variable selection list, and 6 points to the Export button at the bottom.

## Section 20: Merging Incidents

At the end of this section, users will be able to:

1. Mark Incidents for merge
2. Merge two Incidents

Enhanced staff are able to merge two Incidents of the same disease that belong to a person. Users have the ability to choose which tabs from each Incident are kept and stored with the merged Incident. If two Incidents are accidentally merged for any reason, the Incidents may be unmerged, provided that the merged Incident has not be altered or changed.

### Steps to Mark Incidents for Merge (Figure 20.1):

1. Search for the person in the MPI.
  - a. Note: in order for incidents to be merged together, they must belong to the same Patient Record. Please contact the CalREDIE Help Desk for assistance with a Patient Merge.
2. Select the **Marked for Merge** checkbox next to the Incidents to be merged.
3. After the second Incident is marked, a pop-up will appear. Click **OK**.

Figure 20.1: Merging Incidents

The screenshot displays the CalREDIE staging system interface. At the top, there are tabs for Patient, Disease Incident, and Outbreak. A search bar is visible with the text "Test, Jimmy" and a red circle 1 highlighting the search input. Below the search bar, there are checkboxes for Patient, Contact, and Family Member. A red circle 3 highlights an "OK" button. The main area shows a table of patient records with columns: Role(s), Patient ID, Name (Last, First), Date Created, View..., Address, and Current. Below this, there is a table of disease incidents with columns: Type, ID, Disease/GE Type, Jurisdiction, Date Created, Pro/Res Status, User, and Mark for Merge/Split. A red circle 2 highlights the "Mark for Merge" dropdown menu in the incident table. At the bottom, there are buttons for New Disease Incident, New Contact Investigation, Unlock, Patients, Contacts, Family Members, and Show All. The Associations section at the very bottom shows a table with columns: Type, ID, Name (Last, First), DOB, SSN, Address, and Current.

Steps to Merge Incidents (Figure 20.2):

1. Select Administration, Record Management, Merge Incidents.
2. Select the person's name so that the row becomes highlighted in yellow. Click **Continue**. This will open the Select Details Tab. Note that you can also click the Select Details tab for the same result.
  - a. Note: There are three columns on the Select Details Tab. The first column contains information that belongs to Incident #2. The third column contains information that belongs to Incident #1. The center column contains the information that will belong to the merged Incident.
3. To view data from the Patient and Case Investigation Tabs, click on the **Printer** icon for either Incident.
4. To view information for a Supplemental Tab (Clinical, Laboratory, Epidemiology, etc.) click on the **Folder** icon located next to the Supplemental Tab 1, 2, 3, or 4 field. This will display the Supplemental Tab for both Incidents.
  - a. Note: The option for "Supplemental – Tab" is for a tab not used by CDPH. It doesn't matter which Incident is selected here, there will be no effect on the merge.
5. To use a combination of information from both Incidents, use the radio buttons located next to each type of tab/field to choose which information will be used for the merged Incident.
  - a. Note: Select an ID to be kept with the final merged Incident.
6. To keep information from the Case Investigation Tab (other than the Date Created), use the **Keep This Incident's History** button. This will keep the Case Investigation Tab data as well as the audit history and version history of the selected Incident.
  - a. To use all of the information from one Incident, select the **Use this Incident Completely** checkbox for either Incident #1 or Incident #2.
7. Click **Save**.
  - a. Note: It is possible to unmerge two Incidents, provided that the merged Incident has not be altered or changed in any way.

Figure 20.2: Merge/Unmerge Incidents Page

## Merge/Unmerge Disease Incidents



Select Disease Incident    Select Details

**Disease Incident 1 Details**

**ID**

☐ 557

**Patient Tab - Record Specific**

☐ Test, James

**Case Investigation - Date Created**

☐ 08/05/2022

**Supplemental - Tab**

☐ Standard 1

**Supplemental Tab 1**

☐ Clinical Info. 1

**Supplemental Tab 2**

☐ Laboratory Info. 1

**Supplemental Tab 3**

☐ Epidemiologic Info. 1

**Supplemental Tab 4**

☐

☐ Use This Disease Incident Completely

☒ Keep This Disease Incident's History

**3 Disease Incident Details - Final**

**ID**

**Patient Tab - Record Specific**

**Case Investigation - Date Created**

**Supplemental - Tab**

**Supplemental Tab 1**

**Supplemental Tab 2**

**Supplemental Tab 3**

**Supplemental Tab 4**

**Disease Incident 2 Details**

**ID**

☐ 556

**Patient Tab - Record Specific**

☐ Test, James

**Case Investigation - Date Created**

☐ 08/04/2022

**Supplemental - Tab**

☐ Standard 2

**Supplemental Tab 1**

☐ Clinical Info. 2

**Supplemental Tab 2**

☐ Laboratory Info. 2

**Supplemental Tab 3**

☐ Epidemiologic Info. 2

**Supplemental Tab 4**

☐

☐ Use This Disease Incident Completely

☐ Keep This Disease Incident's History

**7** **5** **6** **4**

Save    Cancel

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