CDPH
California Department of Public Health

CalREDIE
California Reportable Disease Information Exchange

V2023.2 User Guide

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

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.

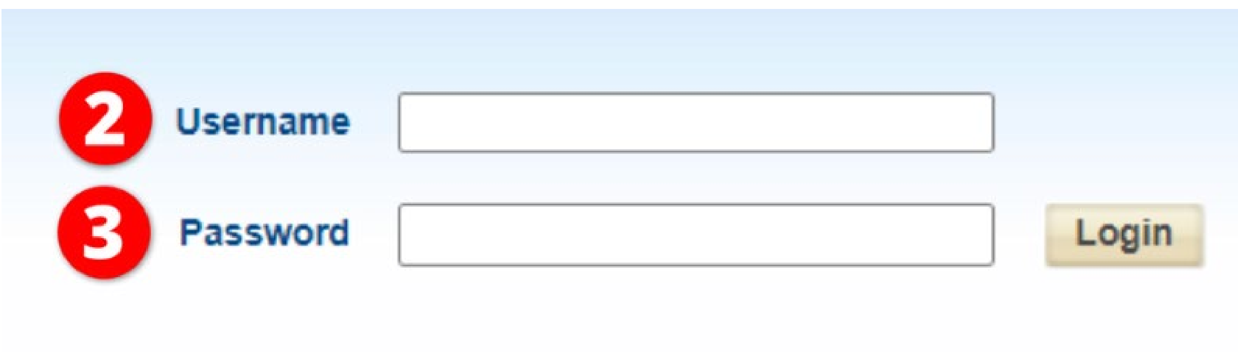
Logging into CalREDIE

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



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 that 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

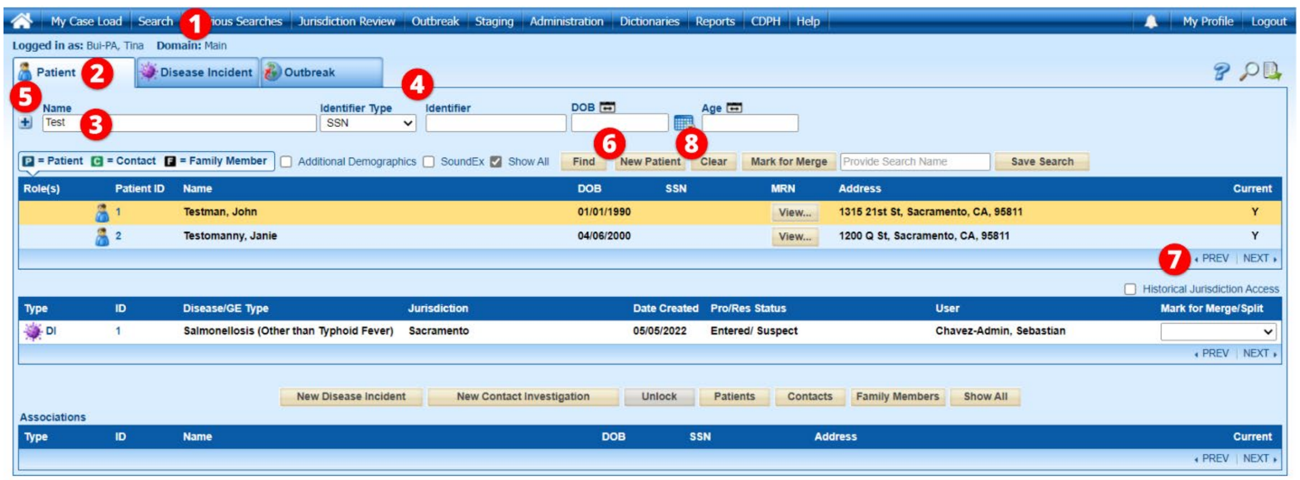
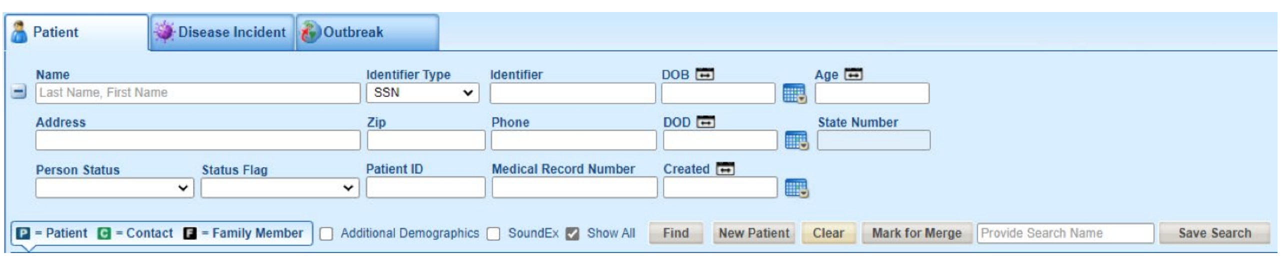


Figure 2.2: The Expanded MPI Search



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):

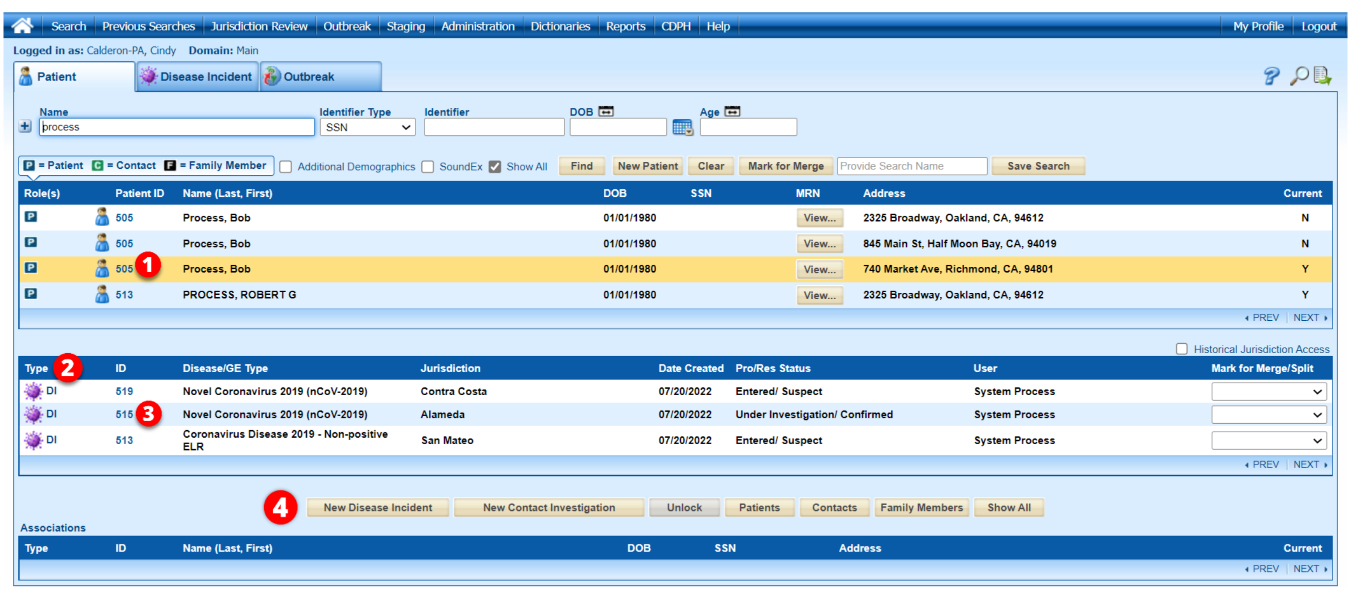
1. Click on the blue ***Patient ID*** to select a person. The row for this person will become highlighted in yellow.
    a. Note: To access the Patient Record, click the icon of the person in the blue shirt next to the ***Patient ID***.
2. View Incidents, CIs, and Outbreaks for the patient below the MPI. The following icons are used for each record type:
    a. Disease Incident
    

    b. Outbreak
    

    c. Contact Investigation
    

3. Click on the blue ID number to open an Incident, CI, or Outbreak.
4. 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



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.

<u>Steps to create a Patient Record from the MPI Search page:</u>

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 <u>red</u> 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**.

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

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

[1] 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

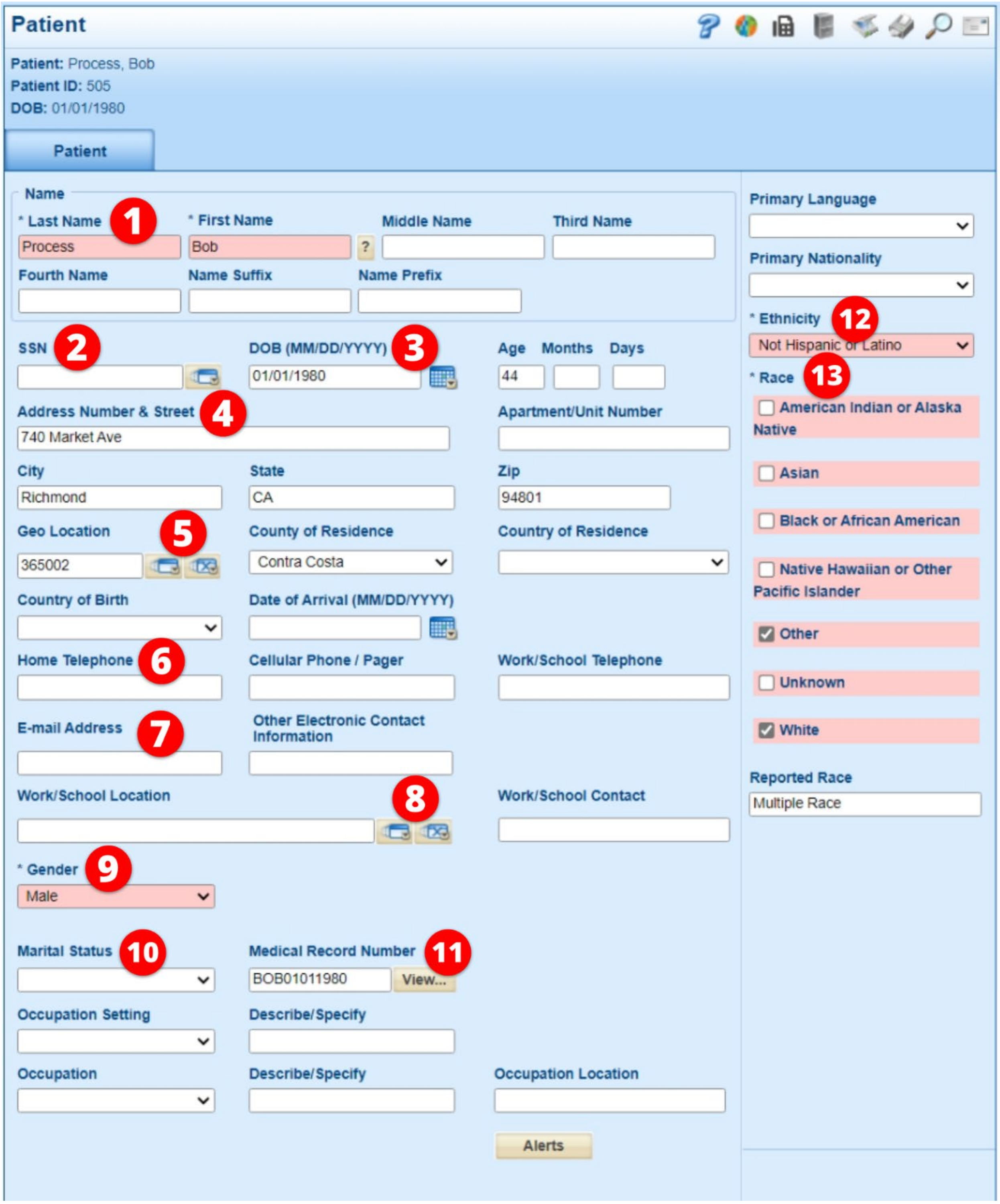


Figure 3.2: Patient Record Continued

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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

PREV | NEXT

Associations 15

Patients | Contacts | Family Members | Show All

Type	Record ID	Name	DOB	SSN	Current	Address

PREV | NEXT

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 | Copy Address 17

Home Phone | Cellular Phone / Pager

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.

<u>Steps to enter information on the Patient Tab (Figure 4.1 and 4.2):</u>

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 <u>red</u> 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

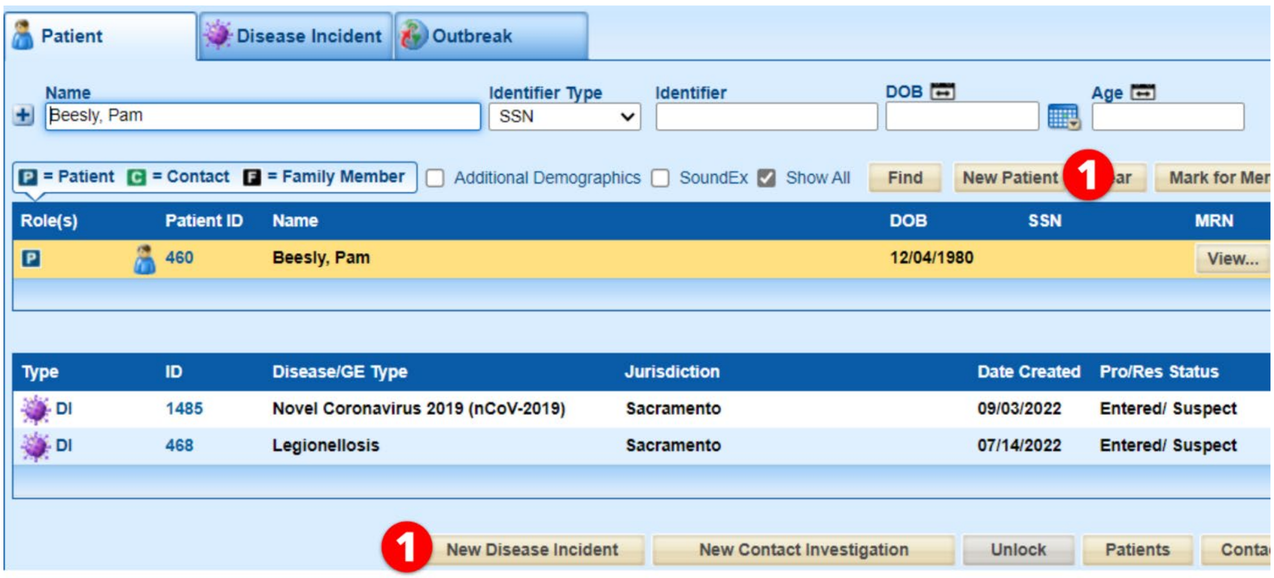
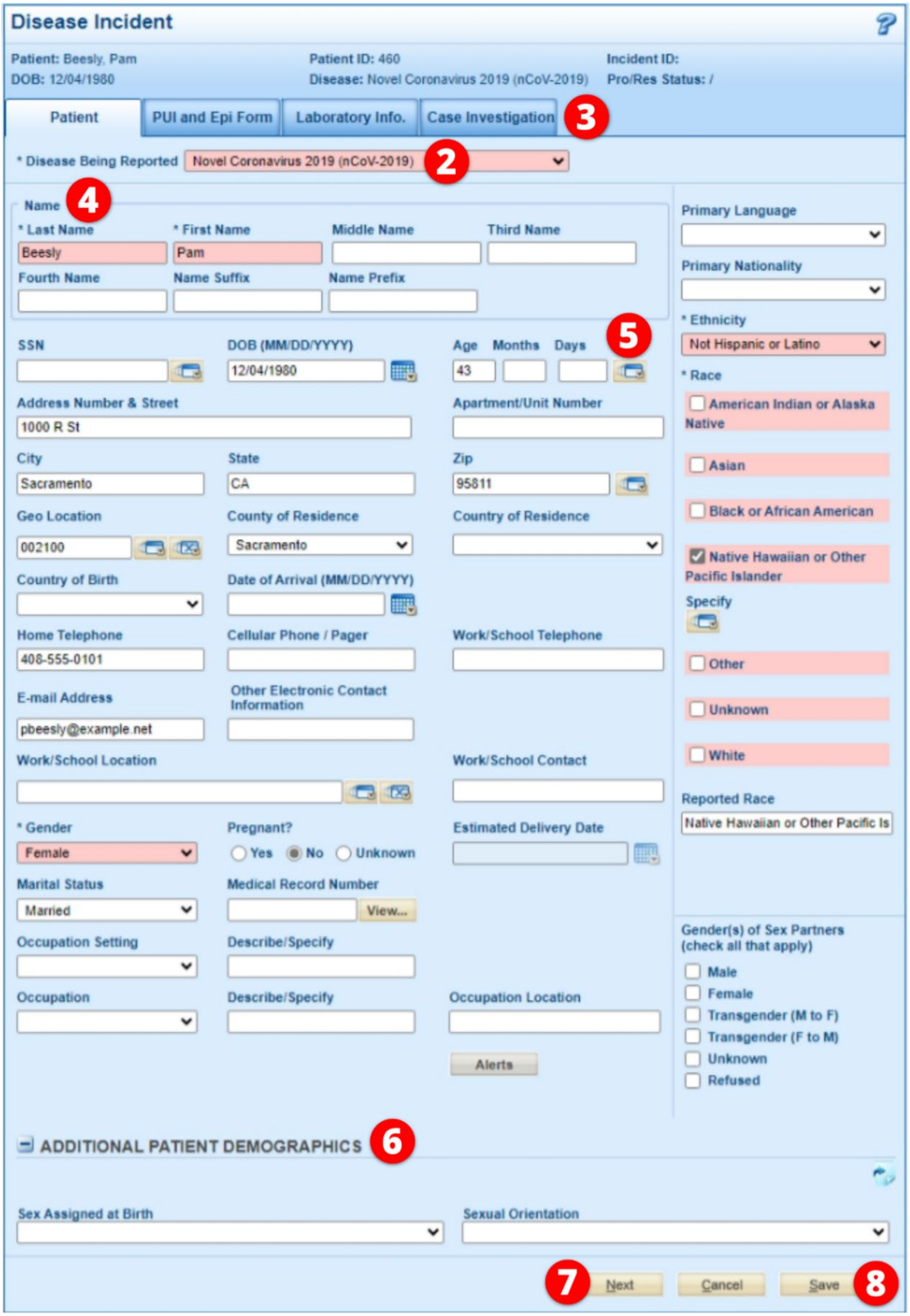


Figure 4.2: Patient Tab



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[2].

- 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.

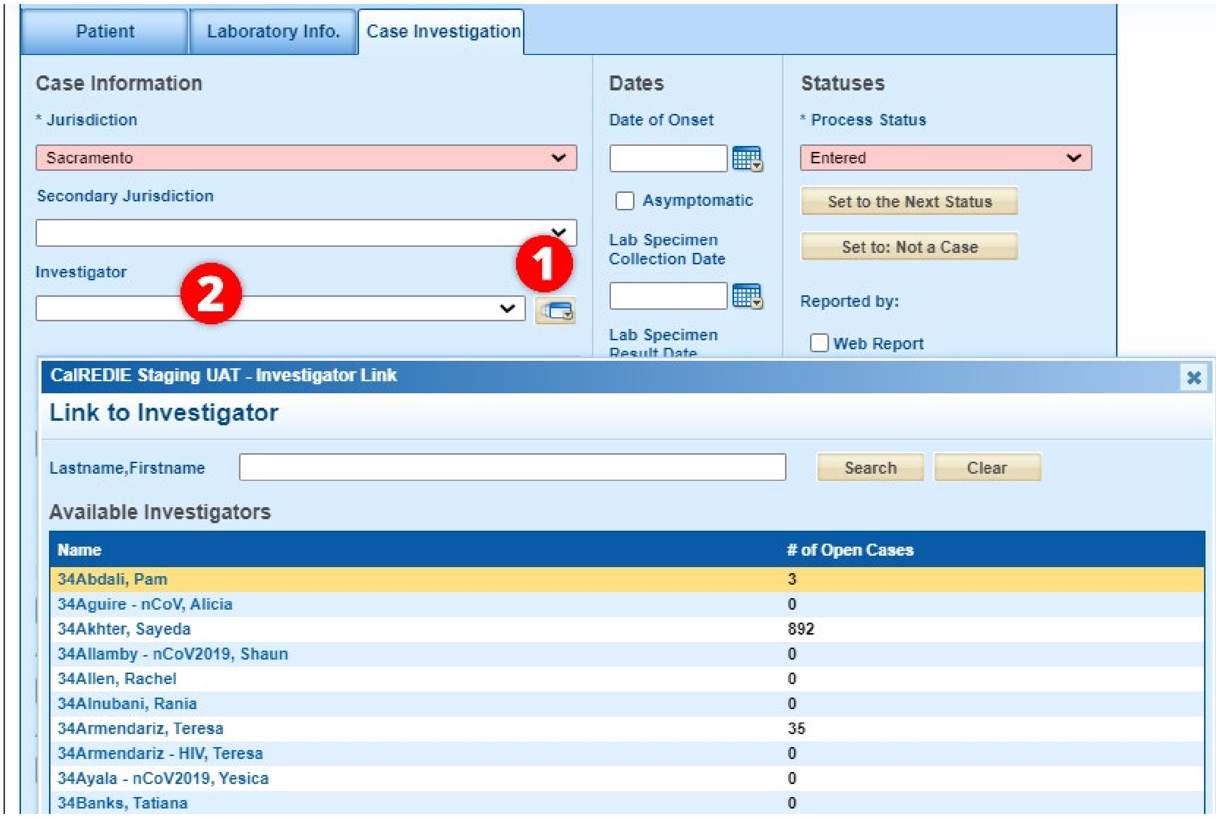
Steps to Assign an Investigator (Figure 5.1):

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.

[2] For the full Jurisdiction Transfer protocol, please see the CalREDIE Reference Guide.

2. Alternatively, simply select an Investigator from the dropdown.

Figure 5.1: Jurisdiction and Investigator Assignment



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 **CalREDIE 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 **CalREDIE 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".

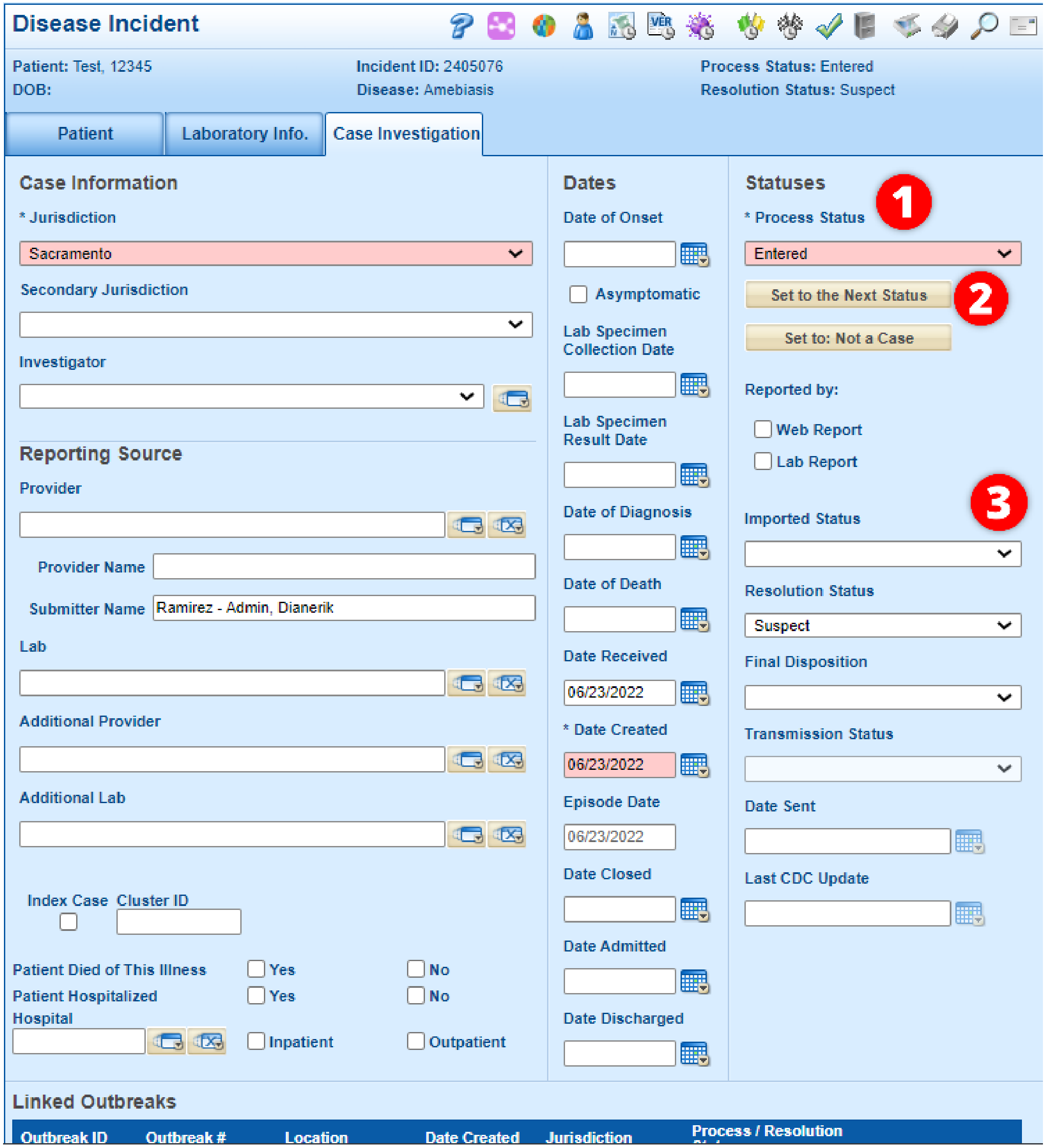
Statuses – Imported Status, Resolution Status, Final Disposition

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



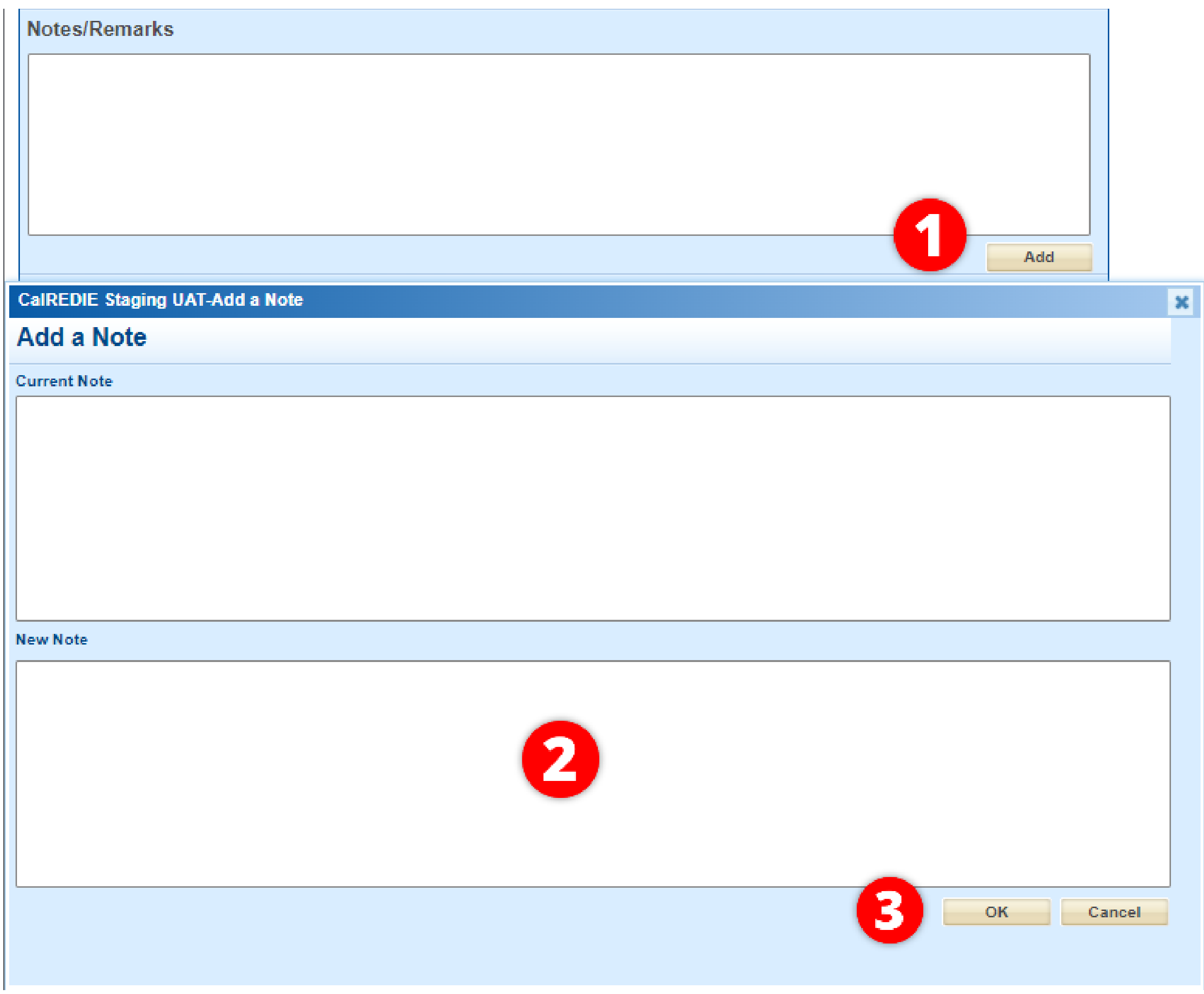
Notes/Remarks

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.**

<u>Steps to Add Notes/Remarks (Figure 5.3):</u>

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



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.

<u>Steps to Modify the Jurisdiction:</u>

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 <u>**CalREDIE Reference Guide**</u> 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.

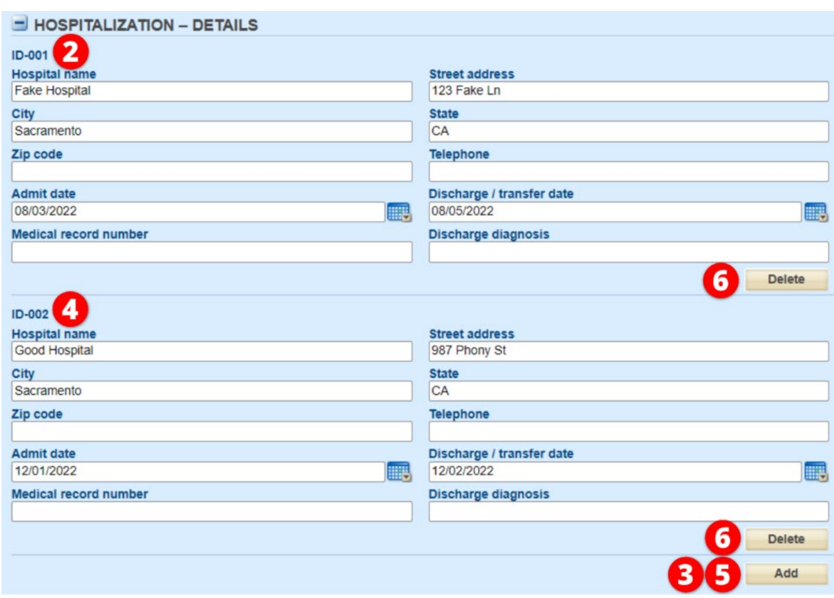
Add Sections

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



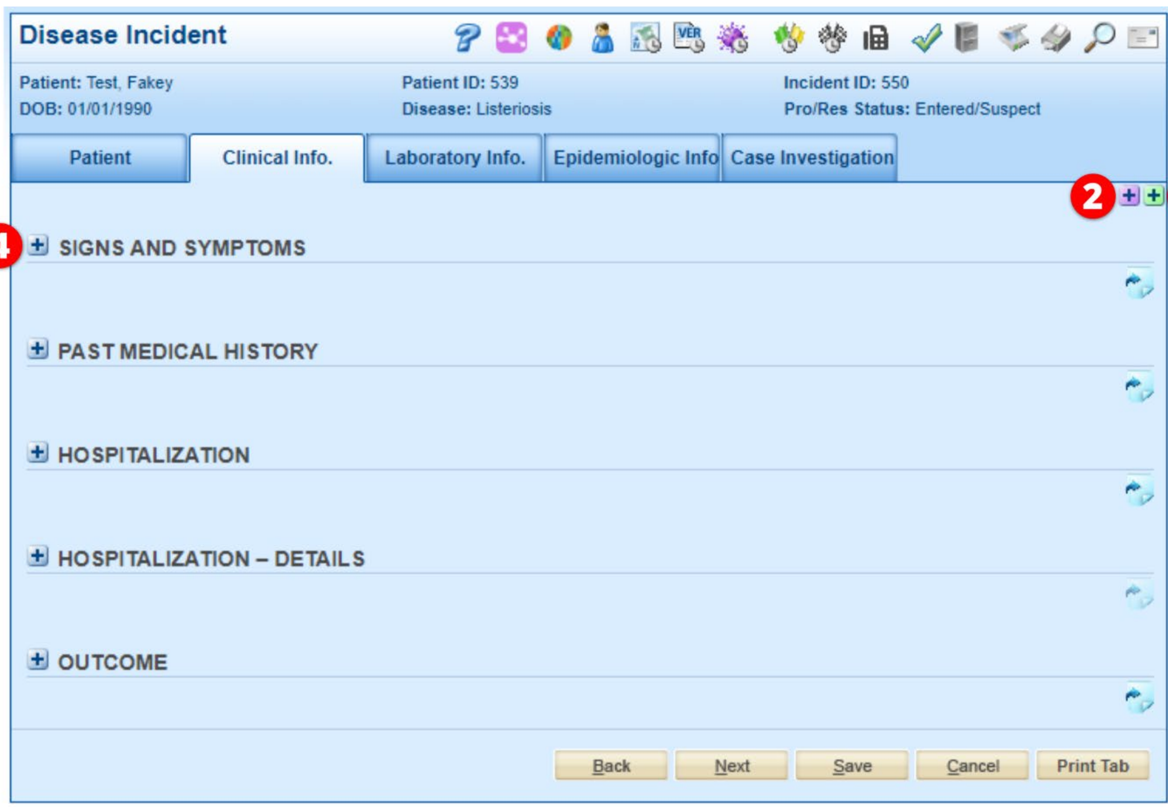
Expanding and Collapsing Sections

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



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.

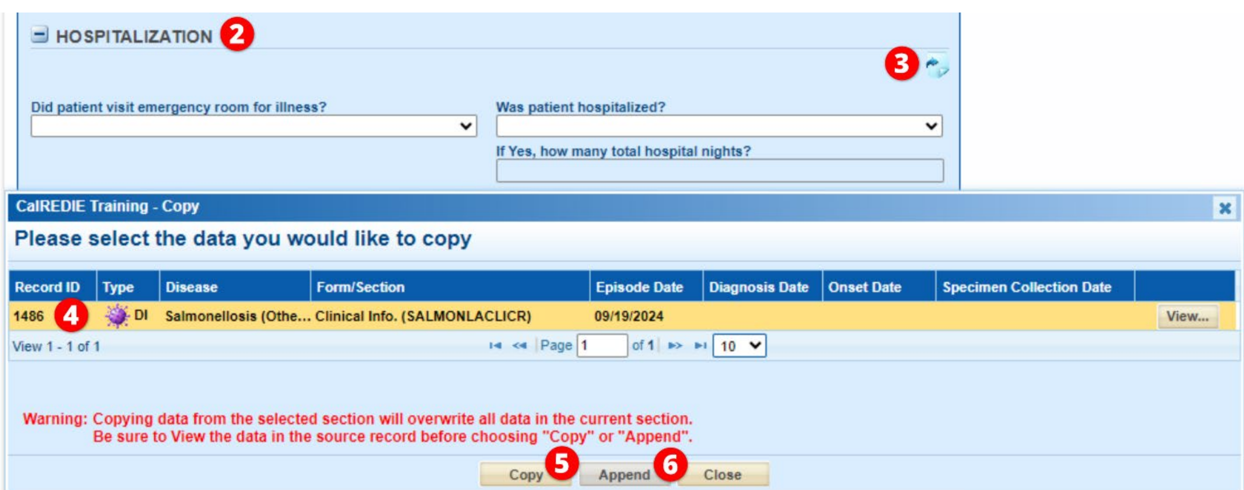
Please note that this only works under the following conditions:

- 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



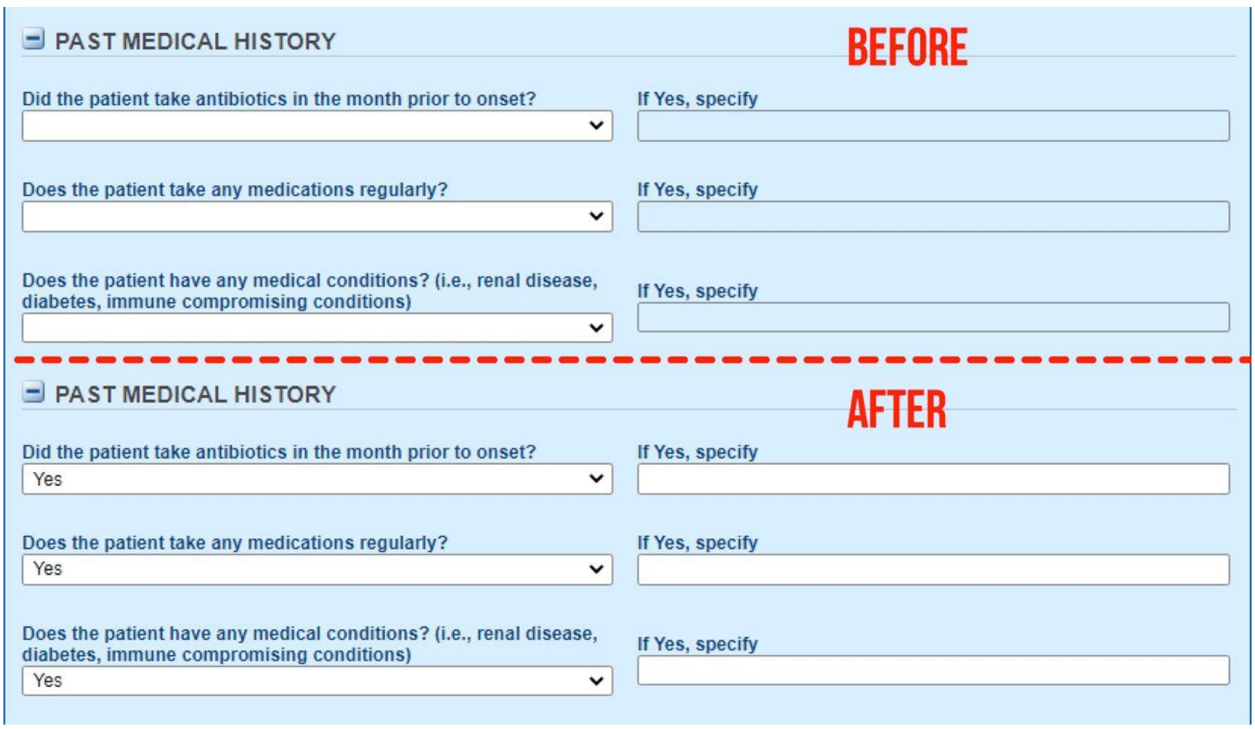
Business Rules

Business rules are integrated throughout CalREDIE 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.

<u>Steps to Understand How Business Rules Work (Figure 6.4):</u>

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



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.

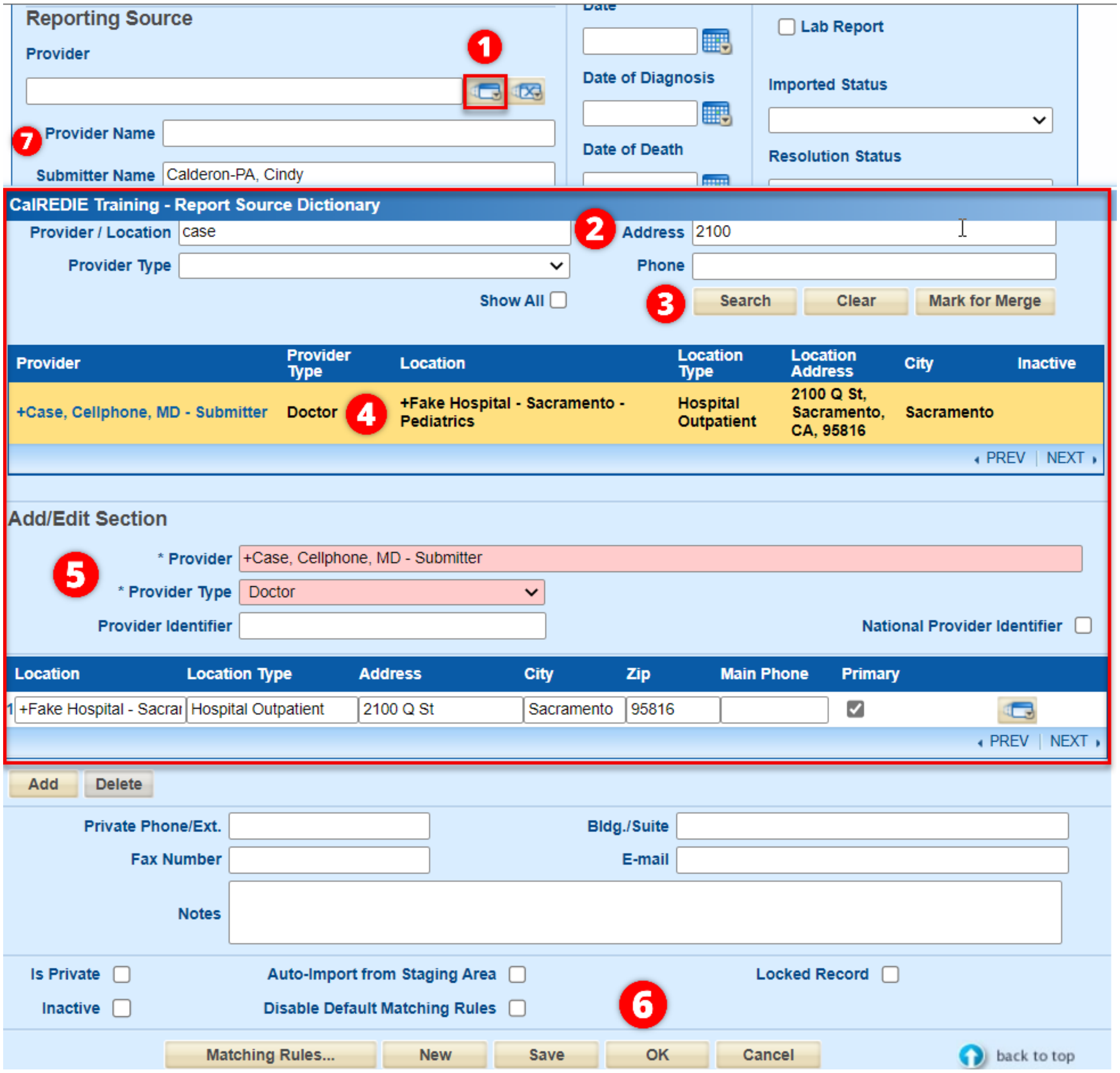
All CalREDIE users are accessing the same Report Source and Location Dictionaries. It is important to keep this in mind when entries are being added or modified. All new entries in the Report Source and Location Dictionaries must follow the naming standards outlined in the **V2023.2 CalREDIE Reference 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.

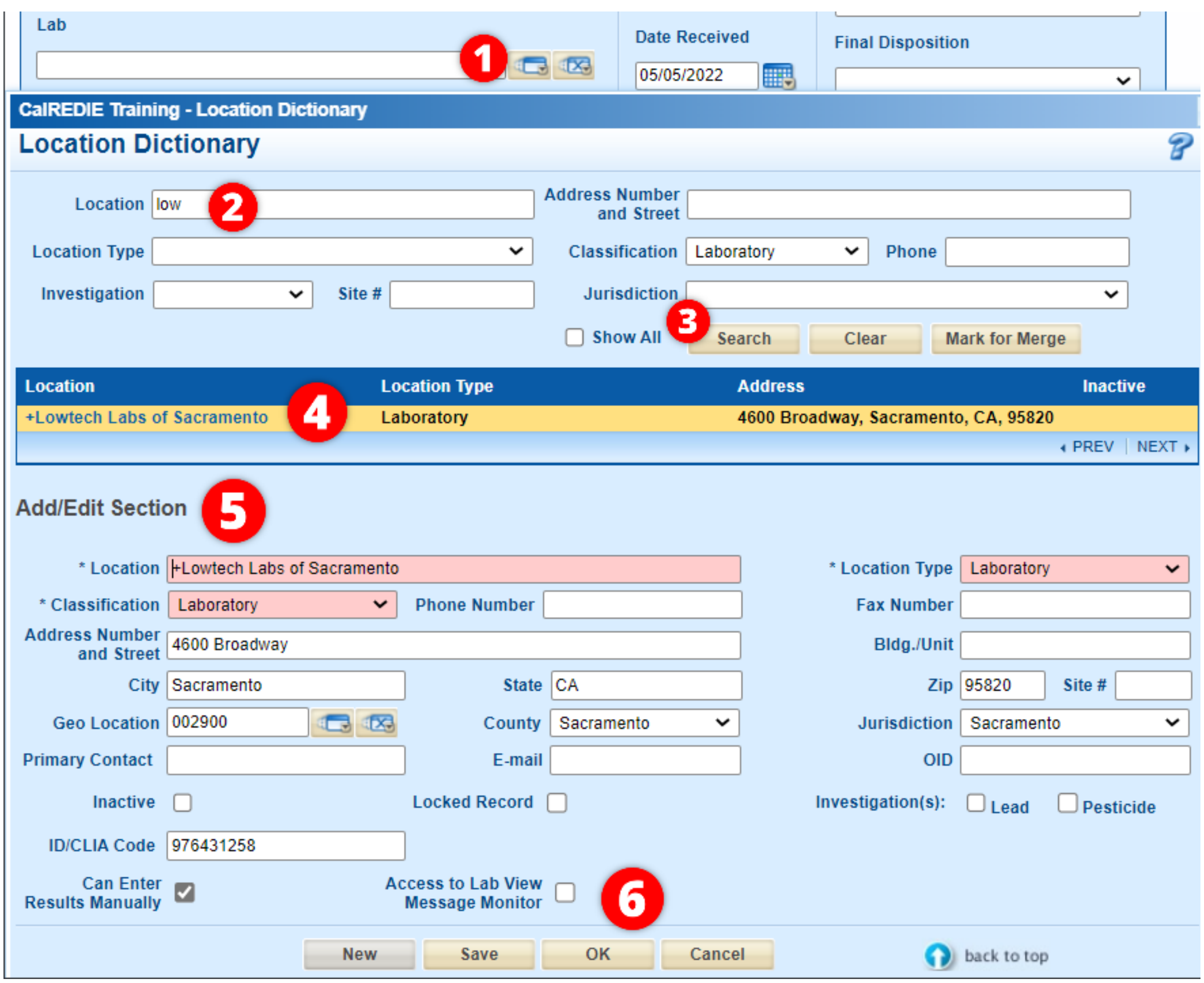
Figure 7.1: Report Source Dictionary Pop-up



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



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

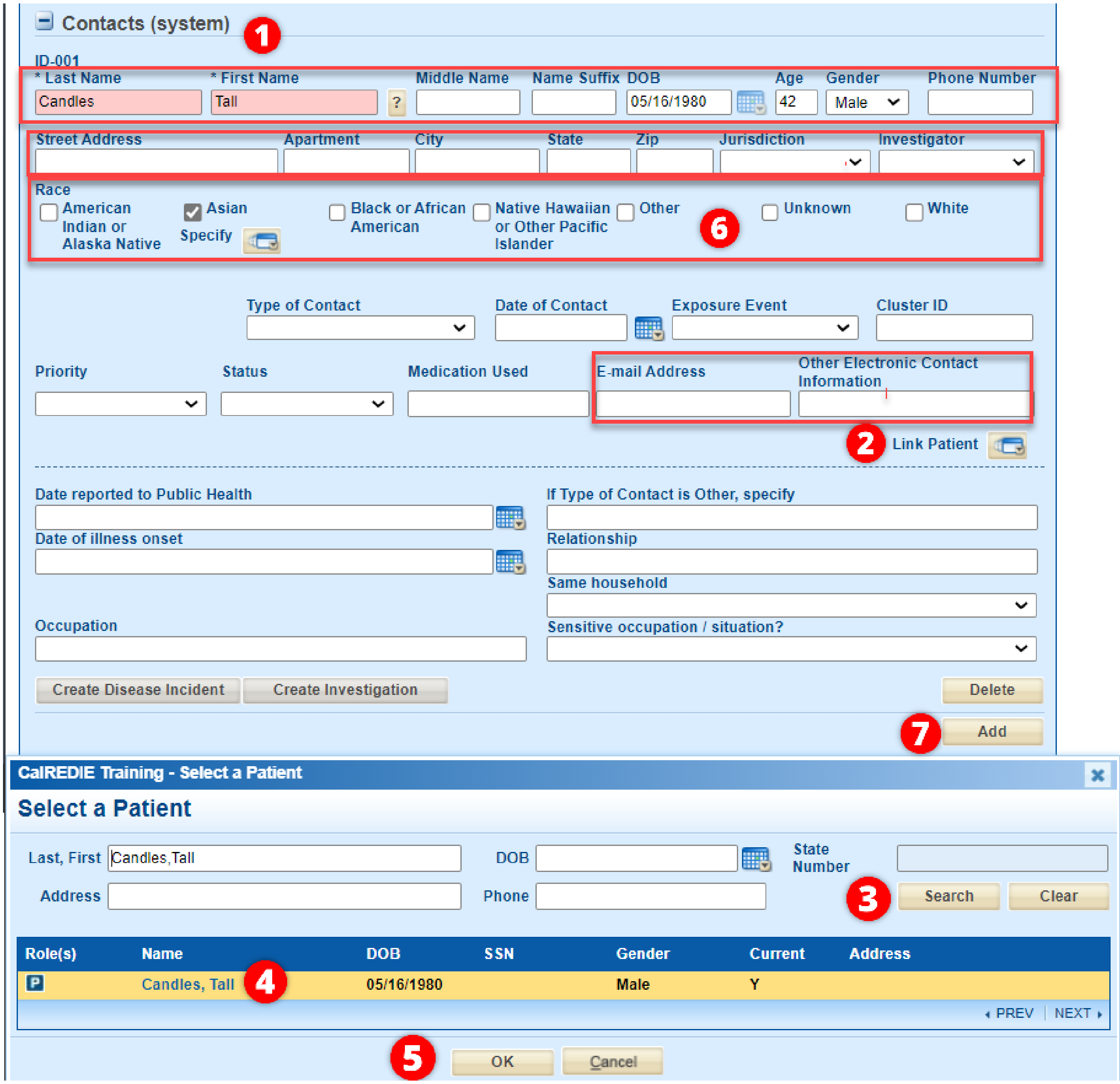
Contacts exist in CalREDIE as a contact to a Disease Incident. Users can create Contacts to an Incident for certain conditions using the *Contacts (System)* section. If necessary, these Contacts can be turned into an Incident. Contacts appear in the MPI with a **Contact** icon next to their name.

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.

<u>Steps to Add an Existing Person as a Contact (Figure 8.1):</u>

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 <u>blue</u> Name so that the person becomes highlighted in <u>yellow</u>.
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



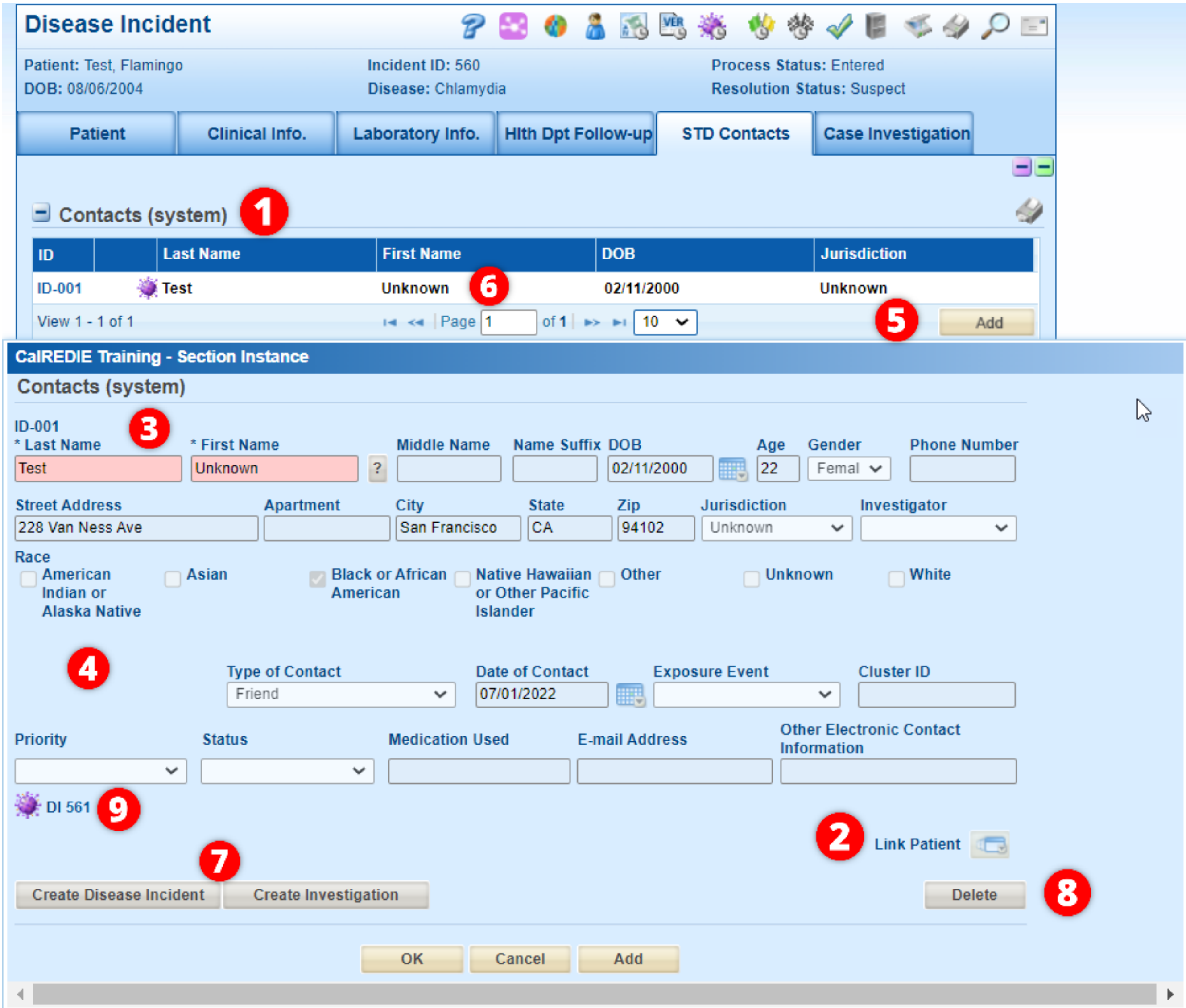
<u>Steps to Add a New Person as a Contact (Figure 8.2):</u>

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.

<u>Steps to Turn a Contact into an Incident or Delete a Contact (Figure 8.2):</u>

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.

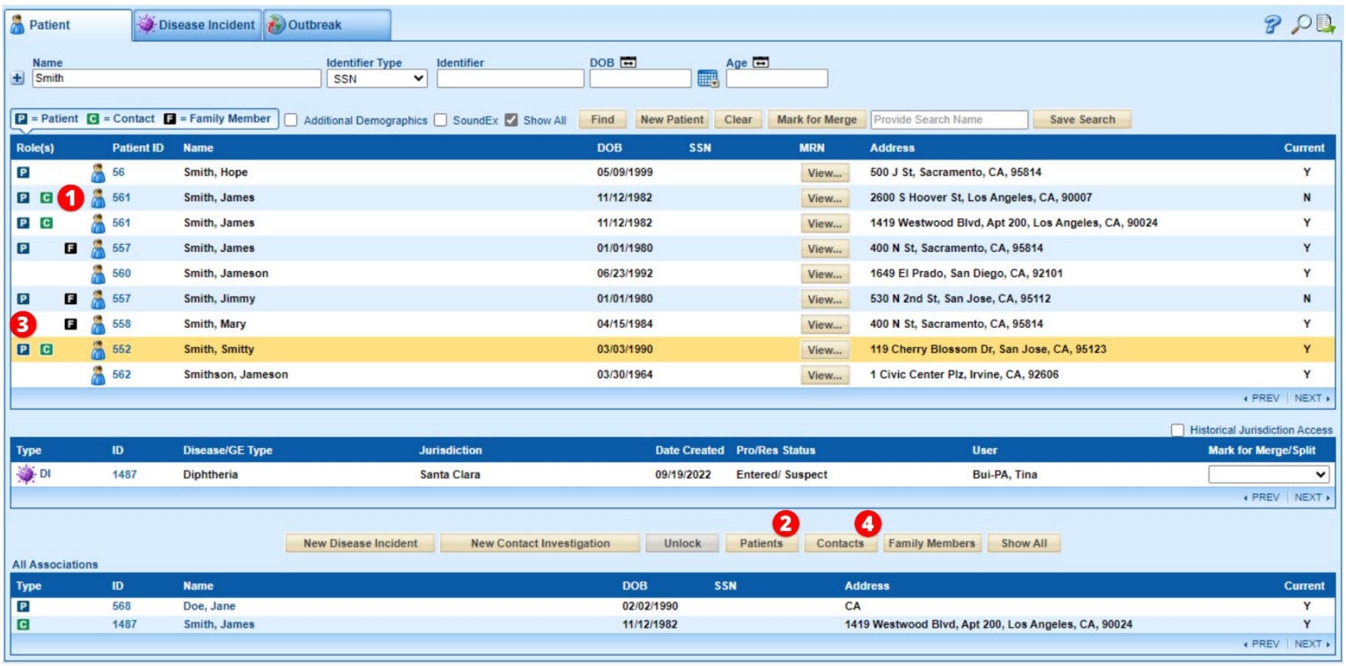
Figure 8.2: Adding a New Person as a Contact or Turning Contact into a Disease Incident



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.

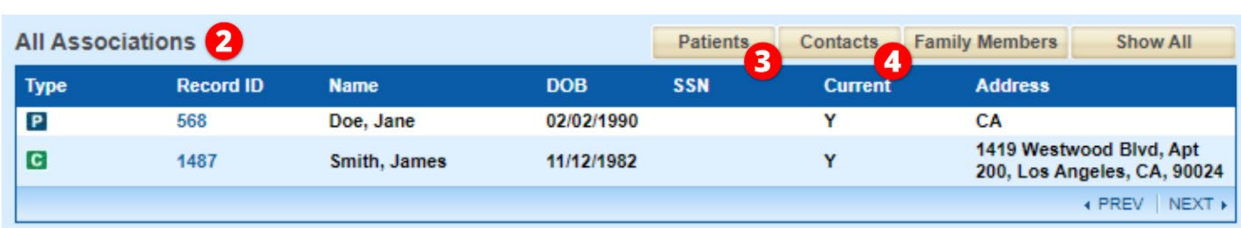
Figure 8.3: Patient Search Grid



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



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

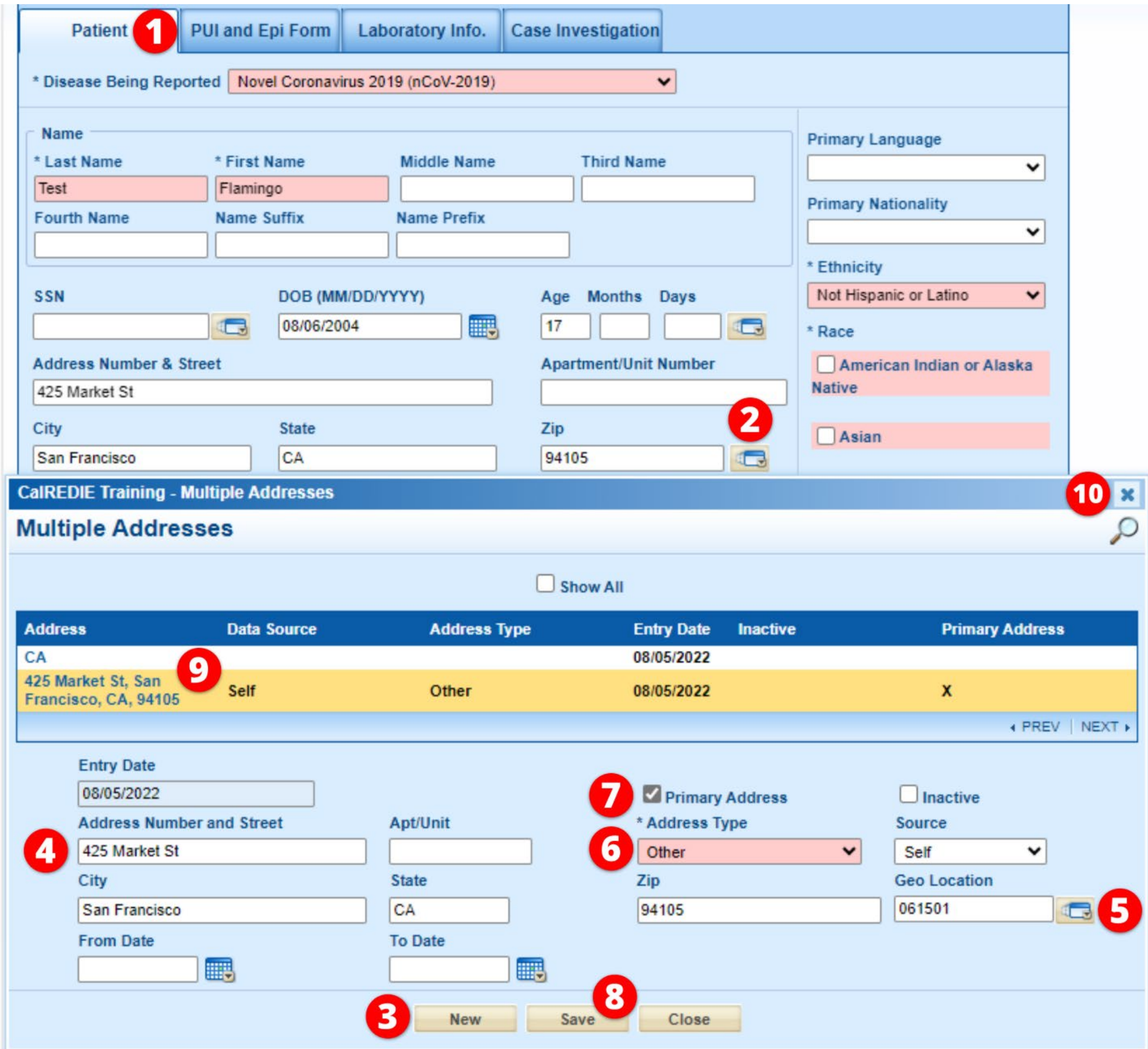
Users can enter multiple addresses for a Patient Record in CalREDIE. Additional identities may also be created for a person if he or she uses an alias or other non-primary name. Each person version must always have a primary address and a primary identity; these are the values used when searching for 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.

<u>Steps to Create a New Address for a Patient (Figure 9.1):</u>

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 <u>blue</u> Address to display the information for that address.
10. Click ***Close*** to exit the pop-up window.

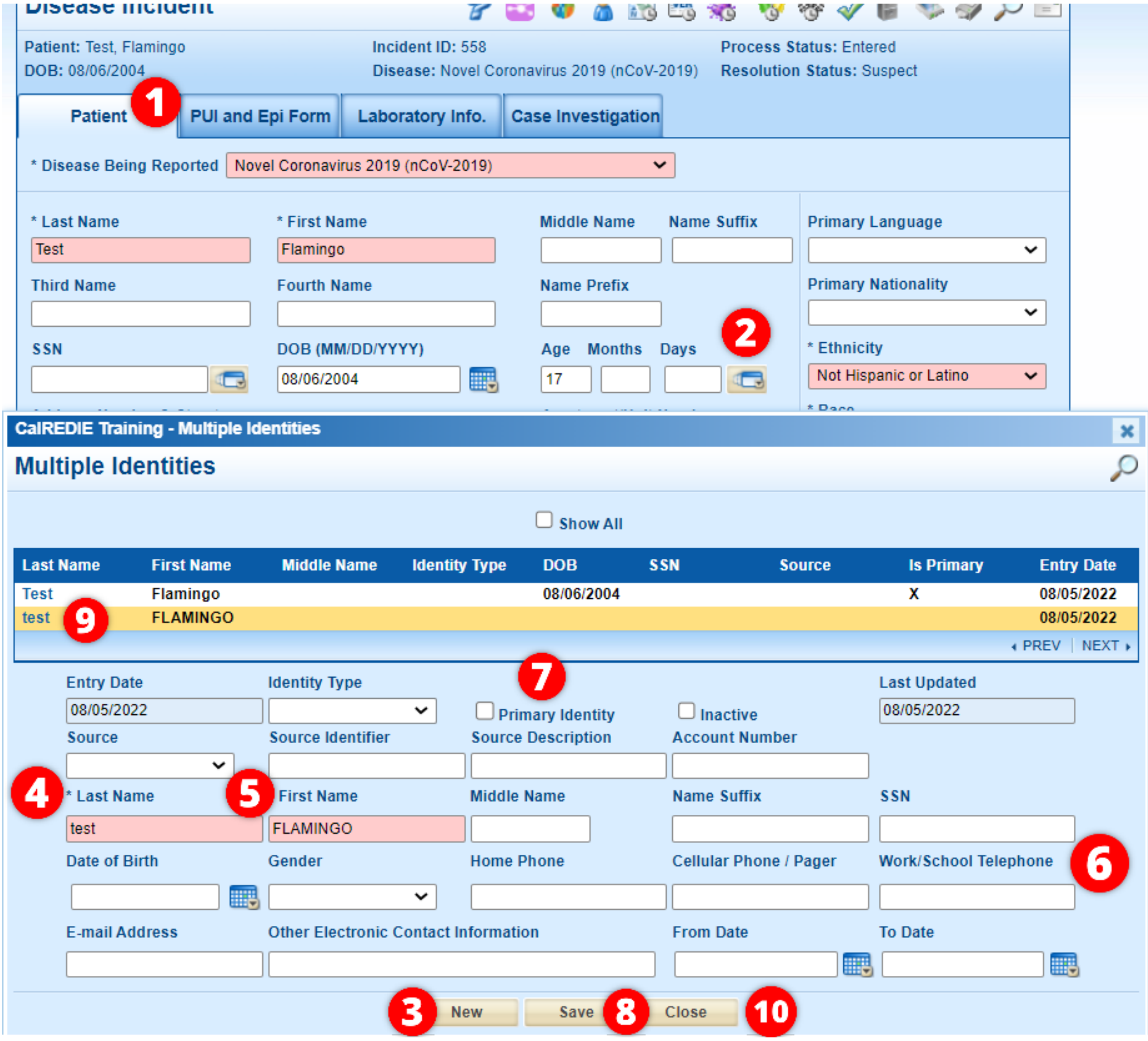
Figure 9.1: Multiple Addresses Pop-up



Steps to <u>Create a New Identity for a Person (Figure 9.2):</u>

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 <u>blue</u> 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



<u>Steps to Include Multiple Addresses and Identities in Search of MPI:</u>

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

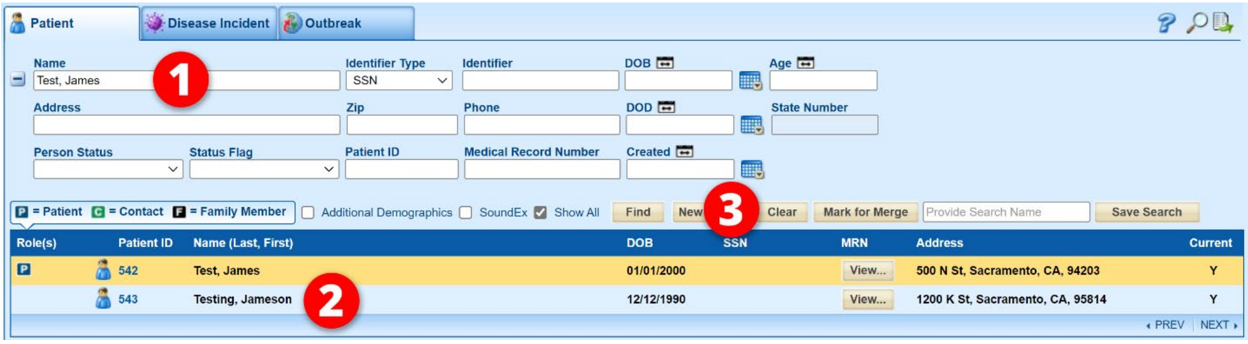
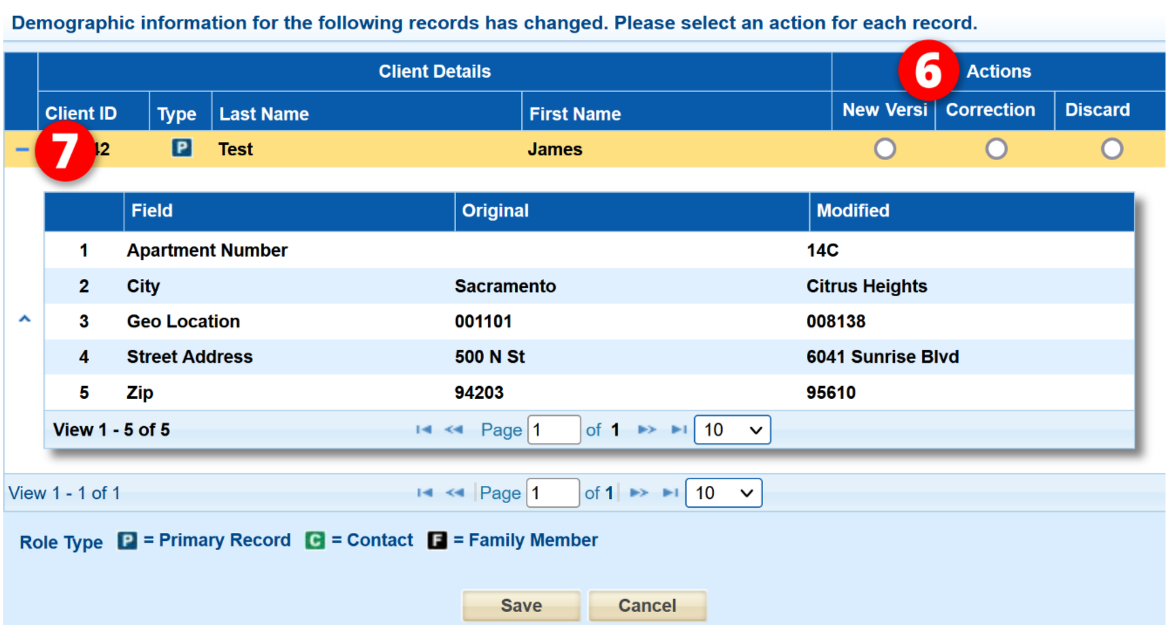


Figure 10.1b: Searching by Patient ID

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



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

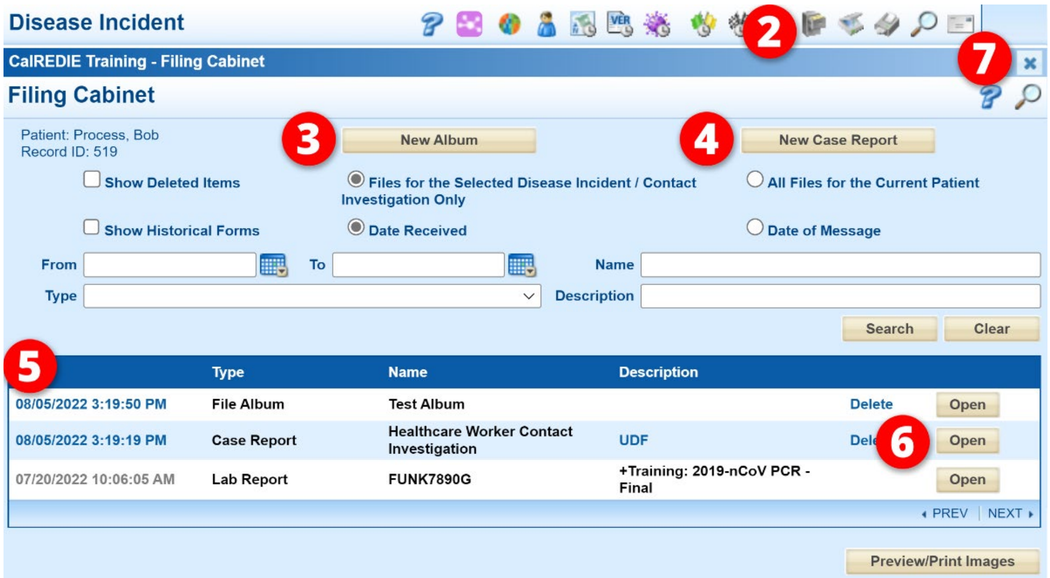
Each Incident, Contact Investigation, and Outbreak in CalREDIE has an Electronic Filing Cabinet (EFC). Users are able to upload documents, images, and files into the EFC. Items stored in the EFC must support case investigation and disease control efforts and may include medical records, laboratory reports 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.

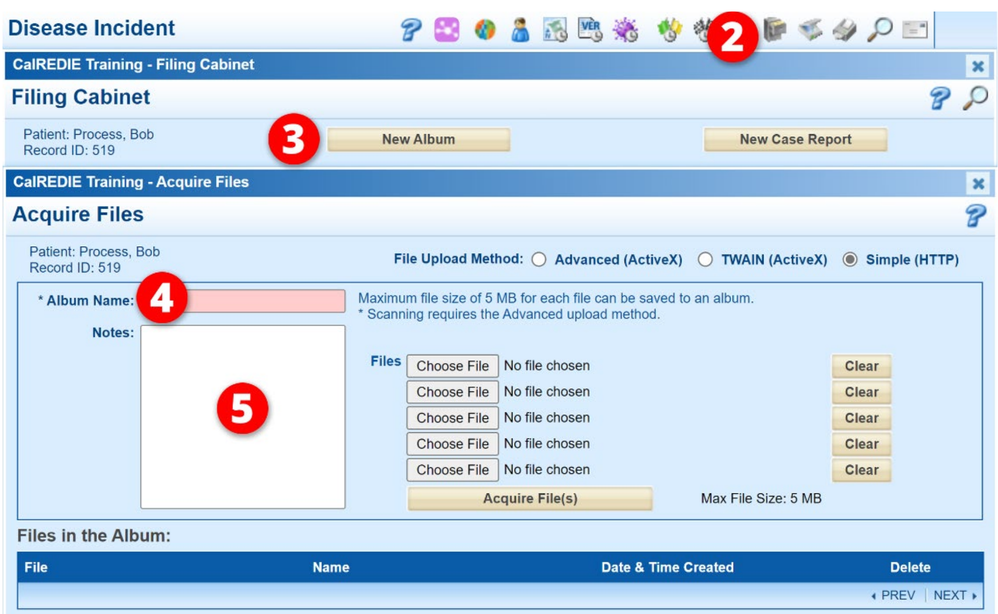
Figure 11.1: Electronic Filing Cabinet (EFC)



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



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

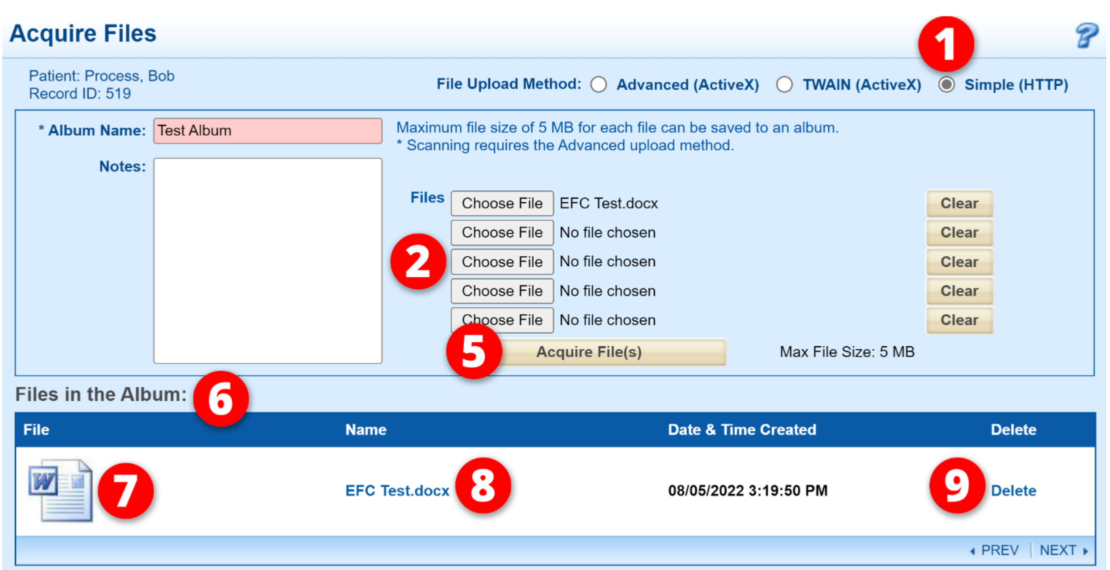
Steps to Upload a Document into the EFC using Advanced (ActiveX):

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.

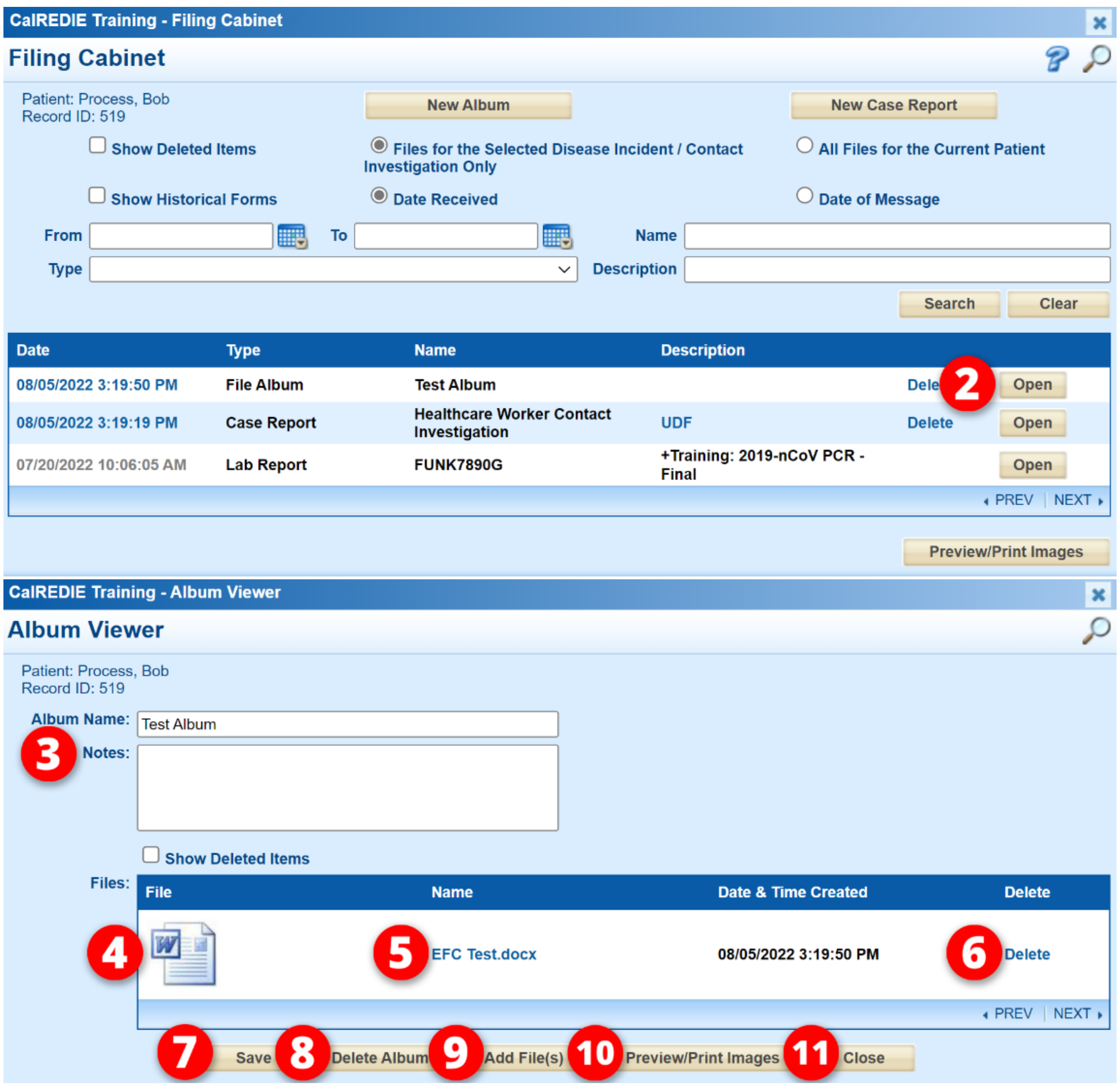
Figure 11.3: Uploading Documents to the EFC using Simple (HTTP)



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***.

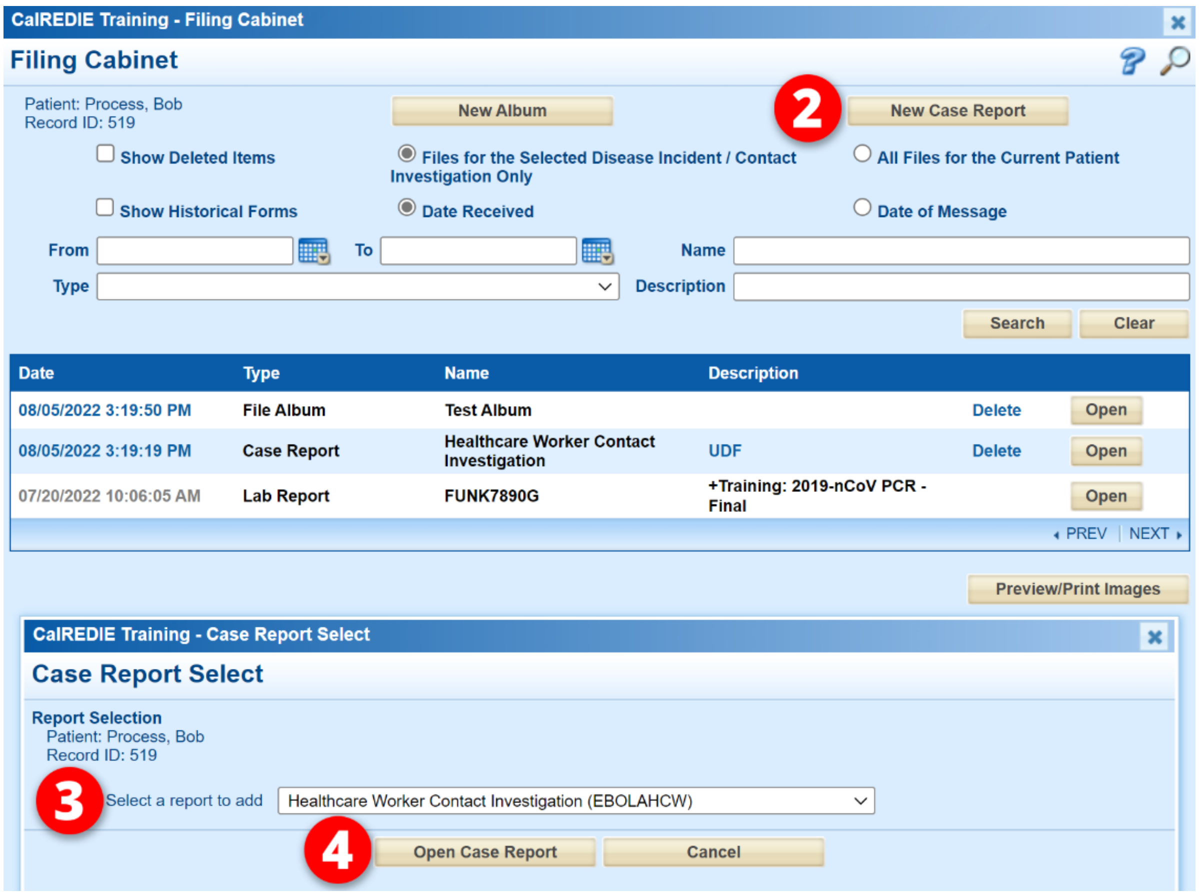
Figure 11.4: Opening Album in the EFC



<u>Steps to Access a Case Report Form (Figure 11.5):</u>

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



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.

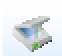
Resolution Status History

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

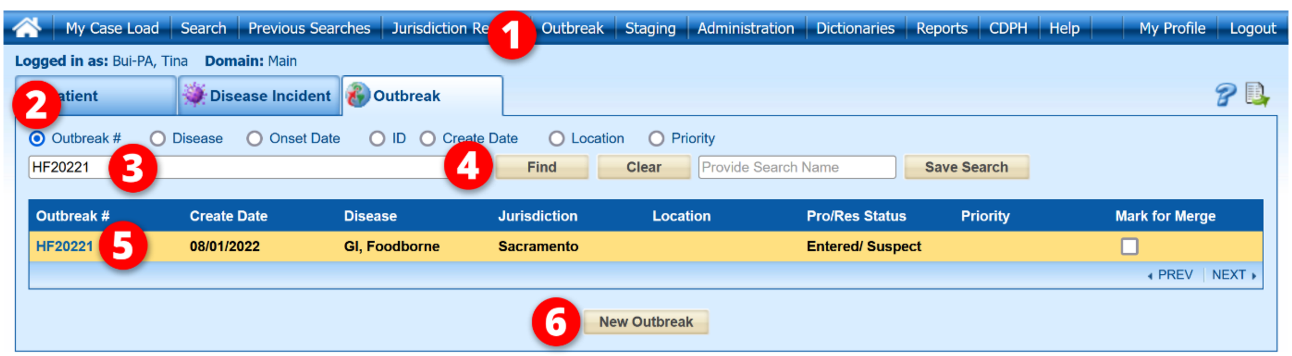
Background Information

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.

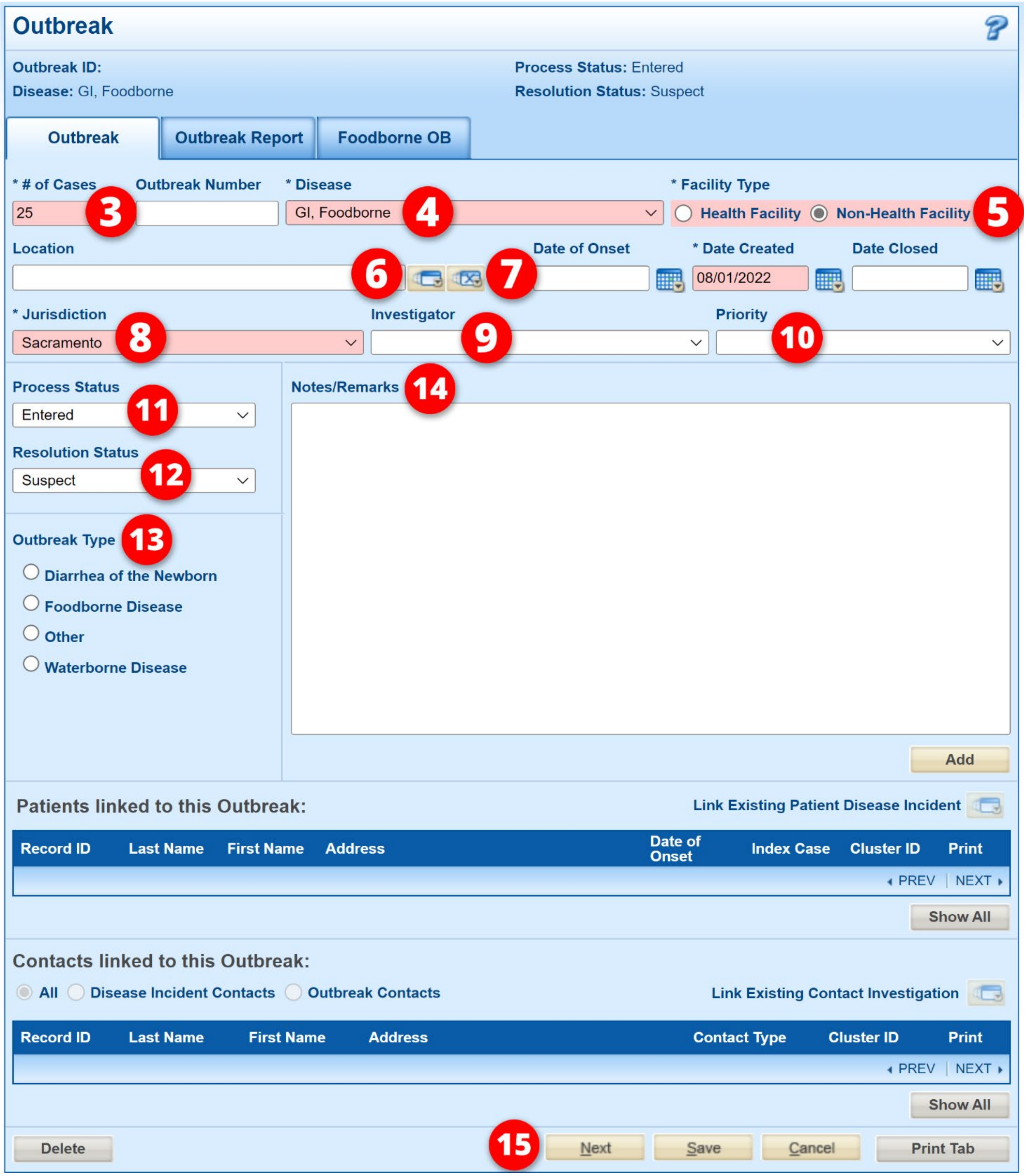
Figure 13.1: Searching for an Outbreak



<u>Steps to Create a New Outbreak (Figure 13.2):</u>

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*.

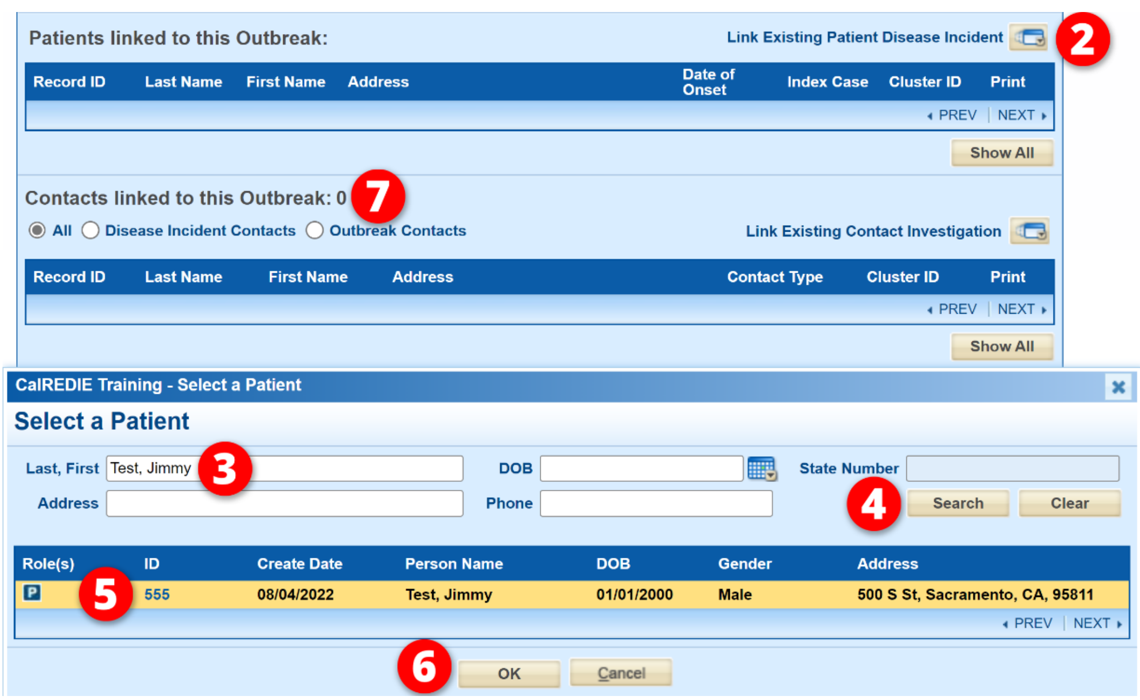
Figure 13.2: Outbreak



<u>Steps to Link an Individual to an Outbreak from the Outbreak page (Figure 13.3):</u>

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 <u>yellow</u>.
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



<u>Steps to Link an Individual to an Outbreak on the Case Investigation Tab (Figure 13.4 and 13.5):</u>

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 <u>blue</u> 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 <u>blue</u> Outbreak Number so that the Outbreak is highlighted, and then click ***Unlink***.

Figure 13.4: Linking to an Outbreak from Case Investigation Tab

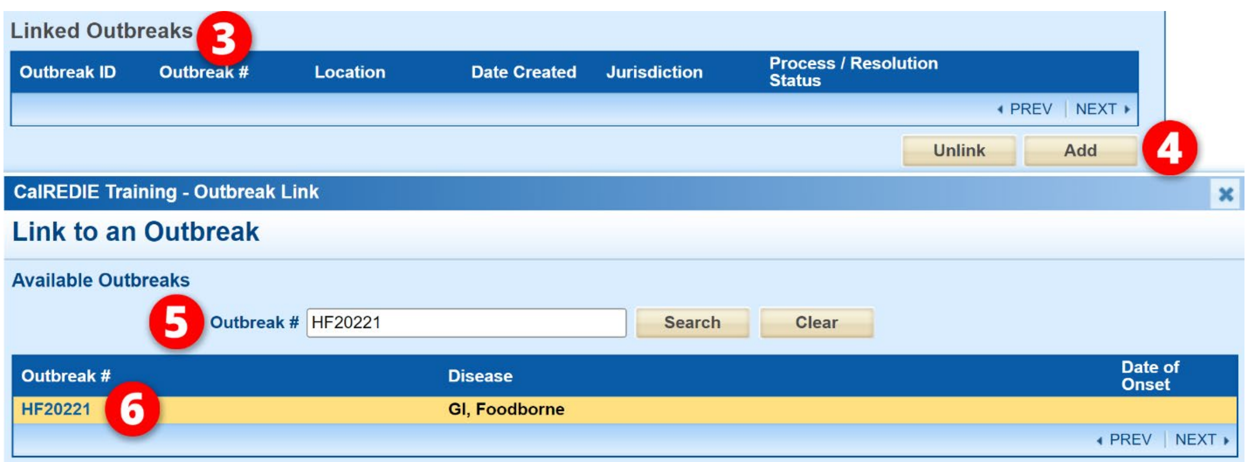
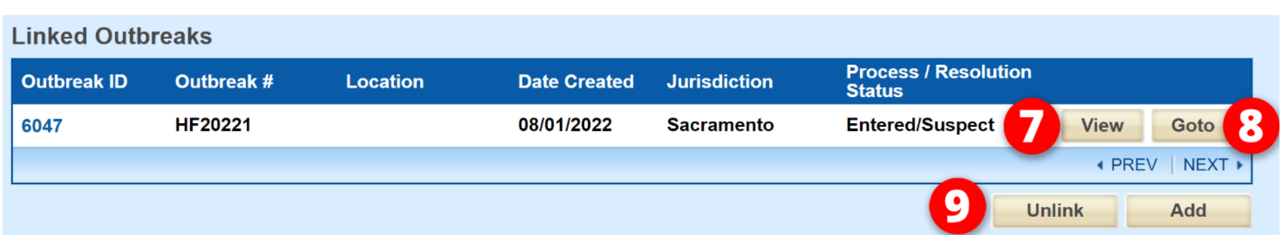


Figure 13.5: Linked Outbreak



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 you 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)

<u>Steps to Search the DISA (Figure 14.2):</u>

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.

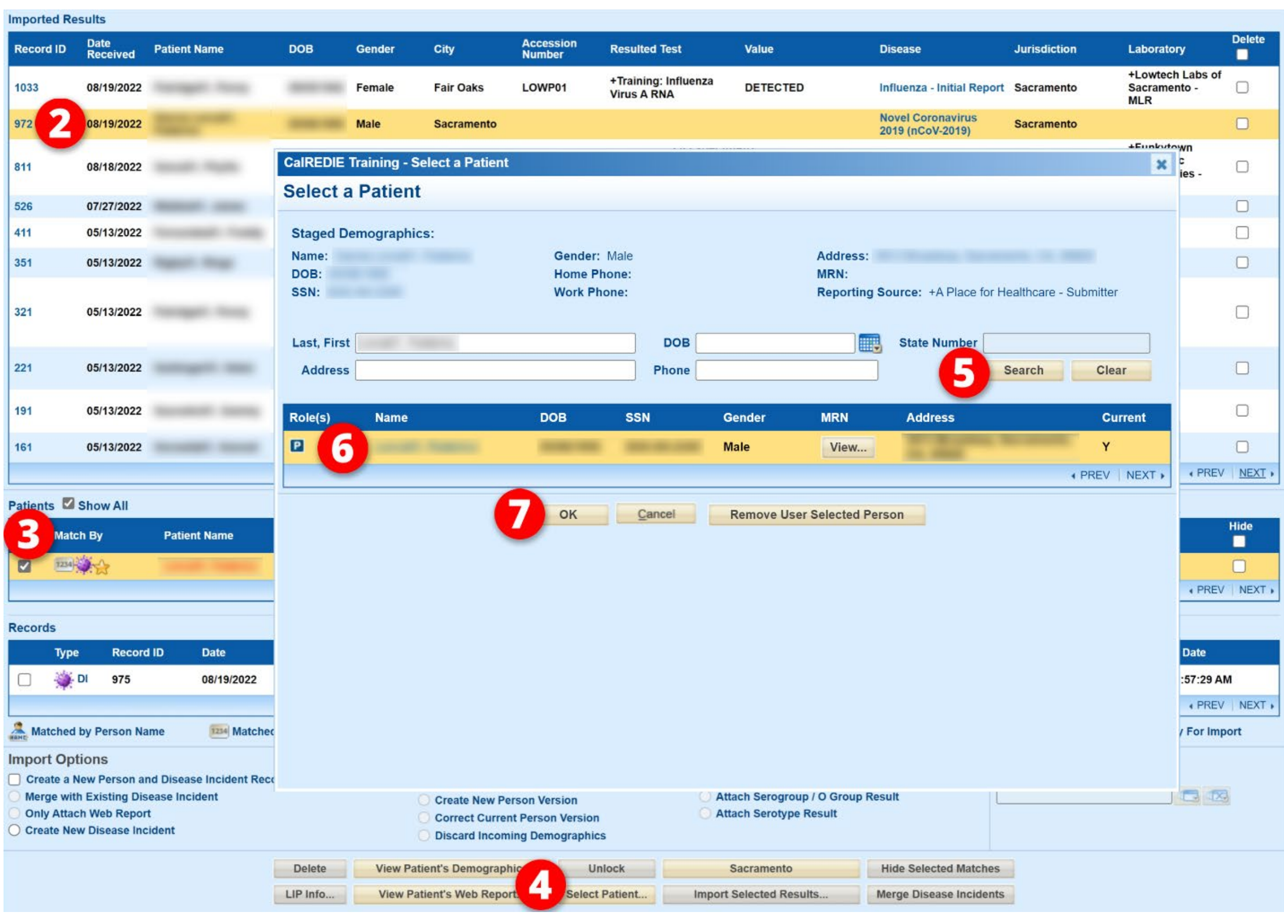
The DISA search options are particularly powerful because they may be combined for a narrower search.

Figure 14.2: Search Options

<u>Steps to Identify a Match between a Person in the DISA and an Existing Person in the MPI (Figure 14.3):</u>

1. Click on Staging in the Navigation bar.
2. Click on the <u>blue</u> Record ID for the record of interest. The record's row will become highlighted in <u>yellow</u>.
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 <u>blue</u> 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

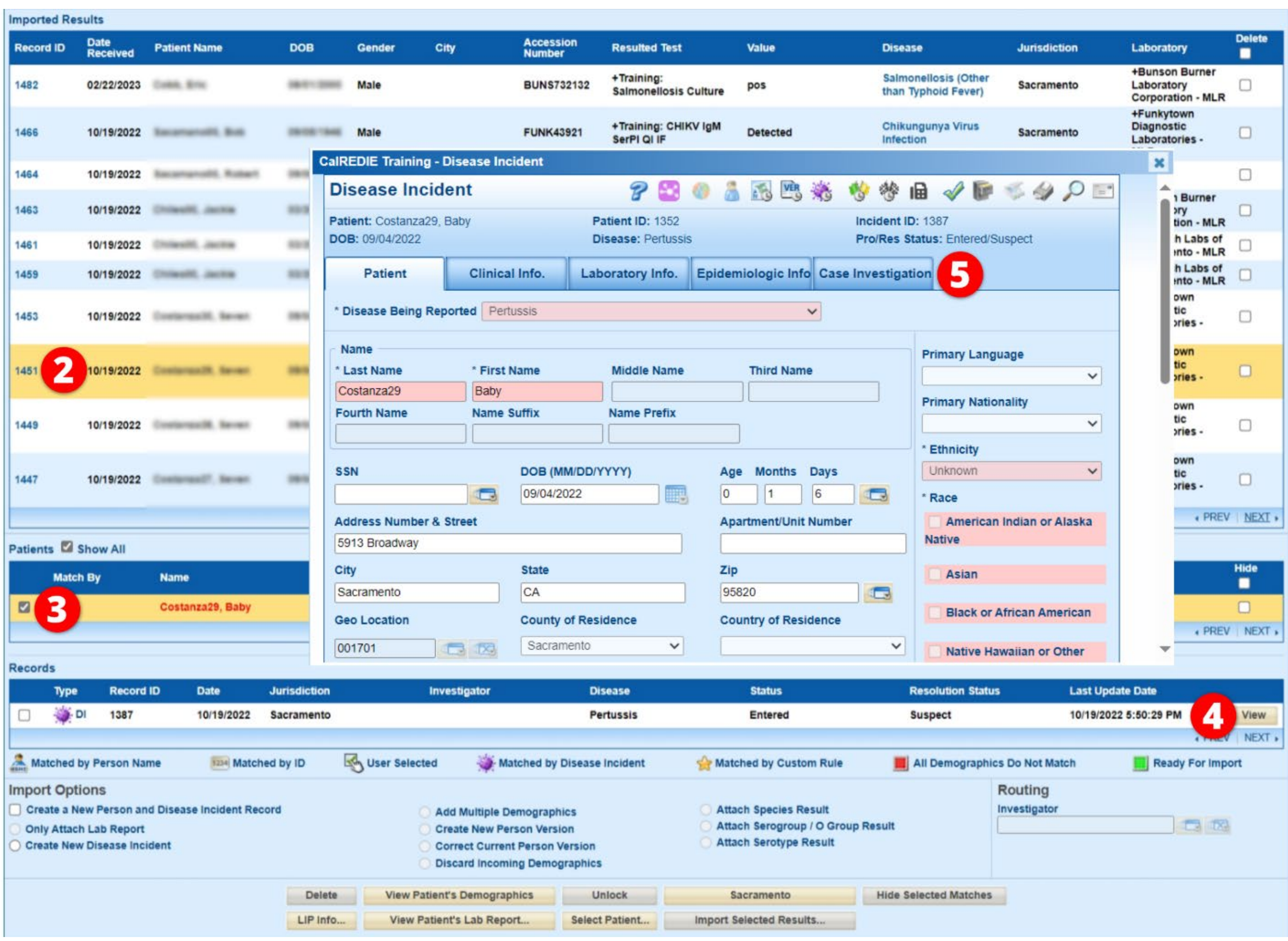


New in CalREDIE v2023.2, users can preview the target disease incident in a read-only format prior to importing a lab/web result into it. Users can navigate through all the available tabs, click on the icons to open tools such as the EFC and Audit Log, and see the full details of the incident before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



<u>Steps to Import a New Person and Disease Incident into CalREDIE (Figure 14.5):</u>

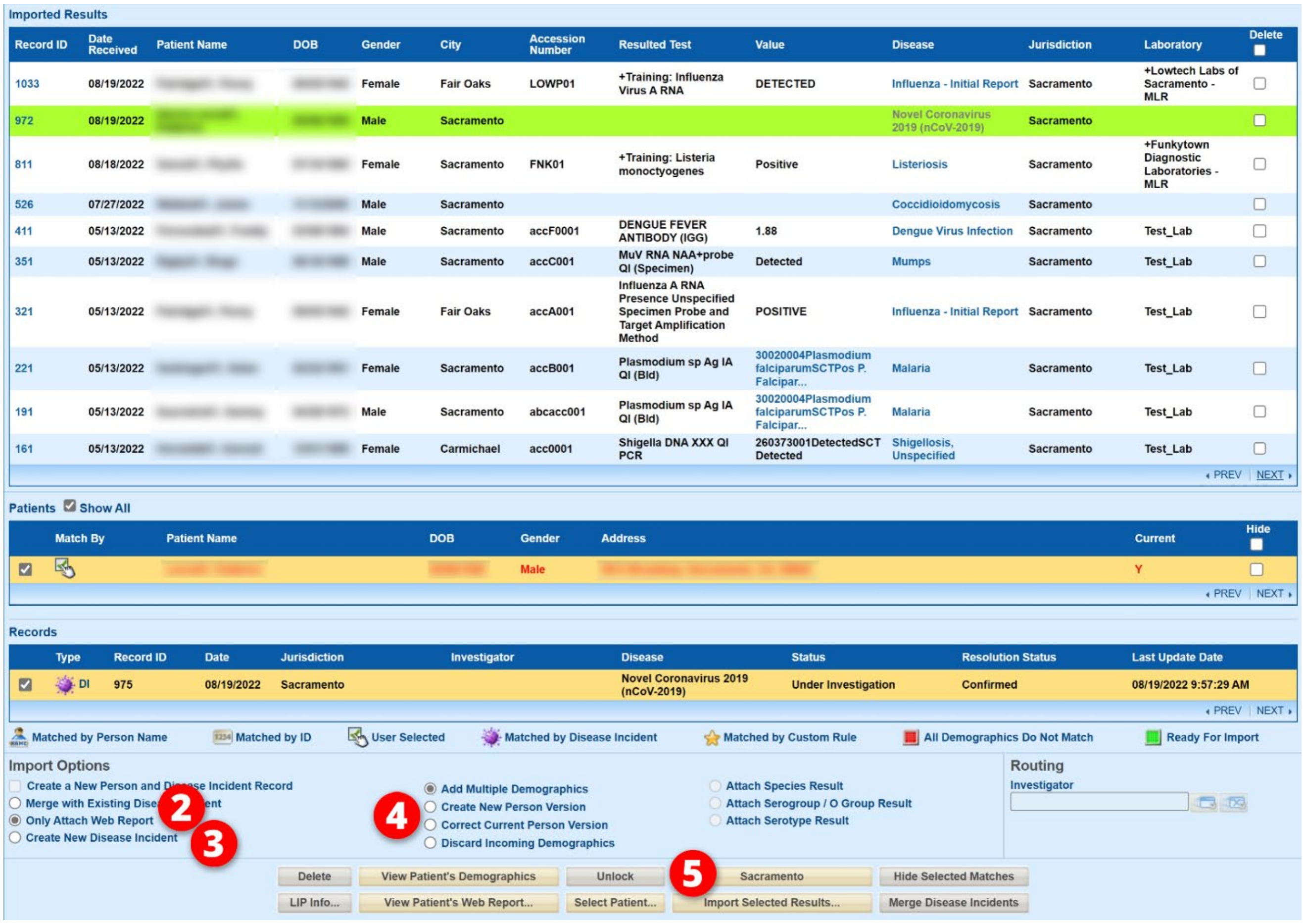
1. Click on Staging in the Navigation bar.
2. All results to be imported into CalREDIE are located under the Imported Results heading. Click on the <u>blue</u> Record ID for the person to be imported. The person's row will become highlighted in <u>yellow</u>.
3. Possible matches with existing persons 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 <u>green</u>.
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

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



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

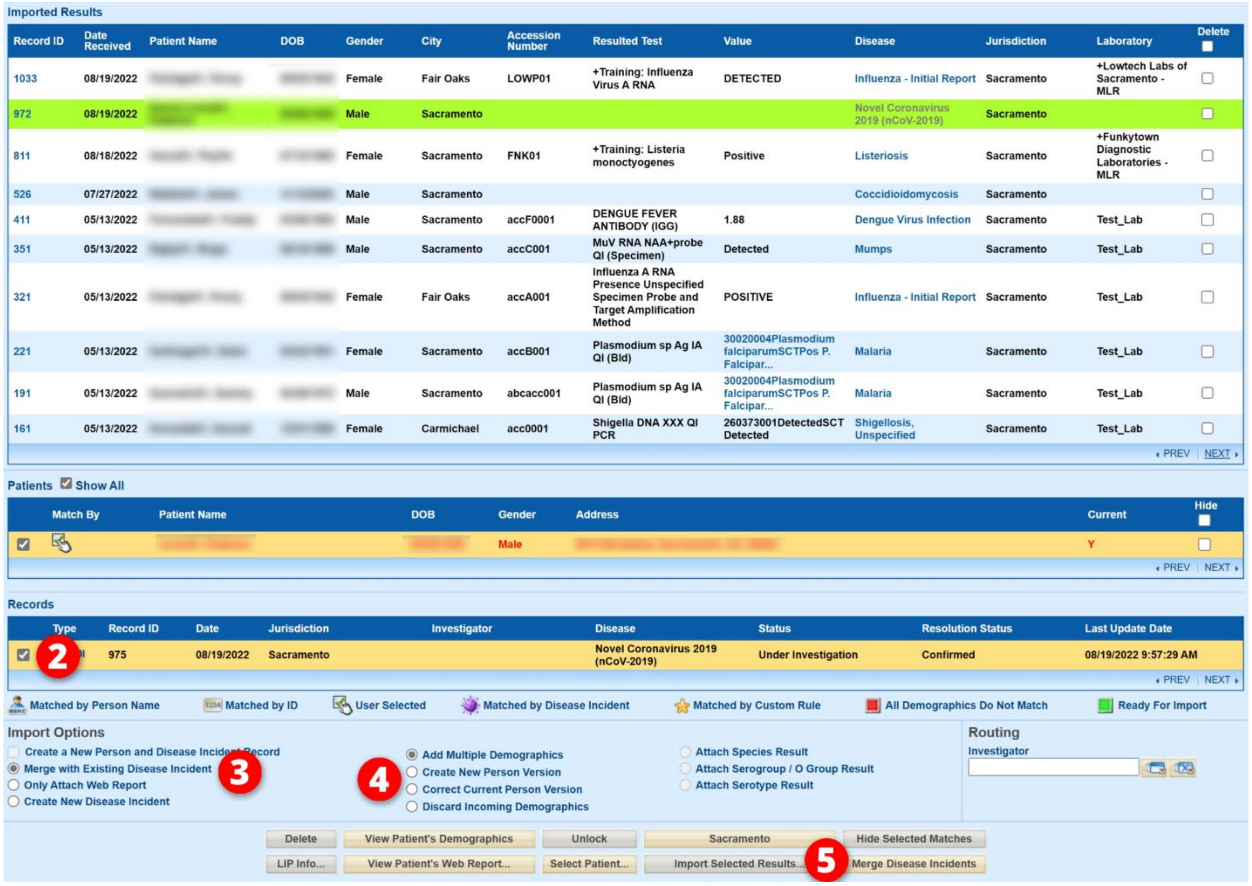
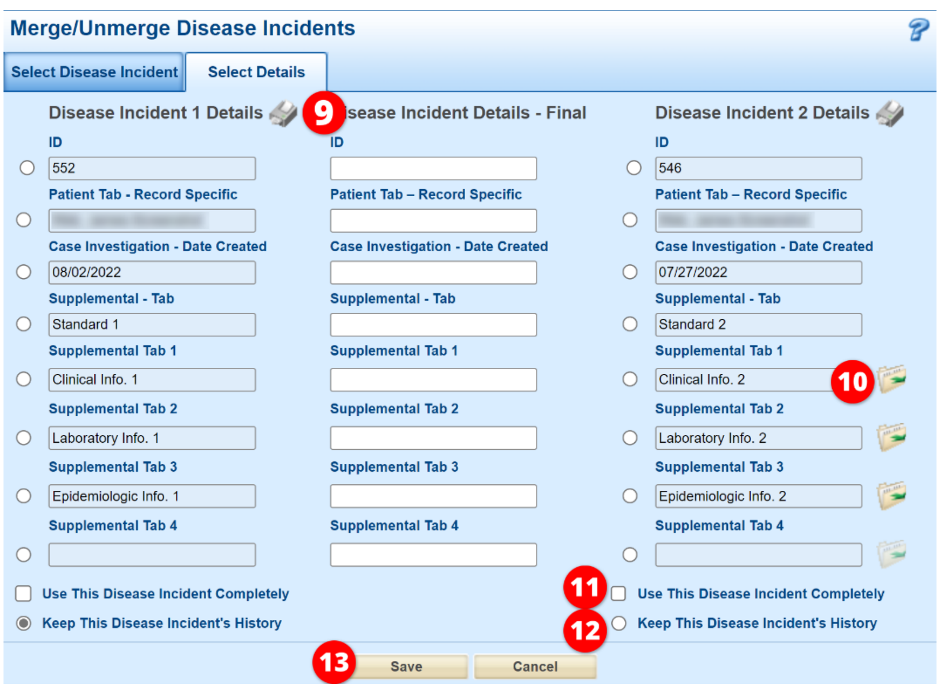


Figure 14.8: Merge Disease Incidents Pop-up



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.

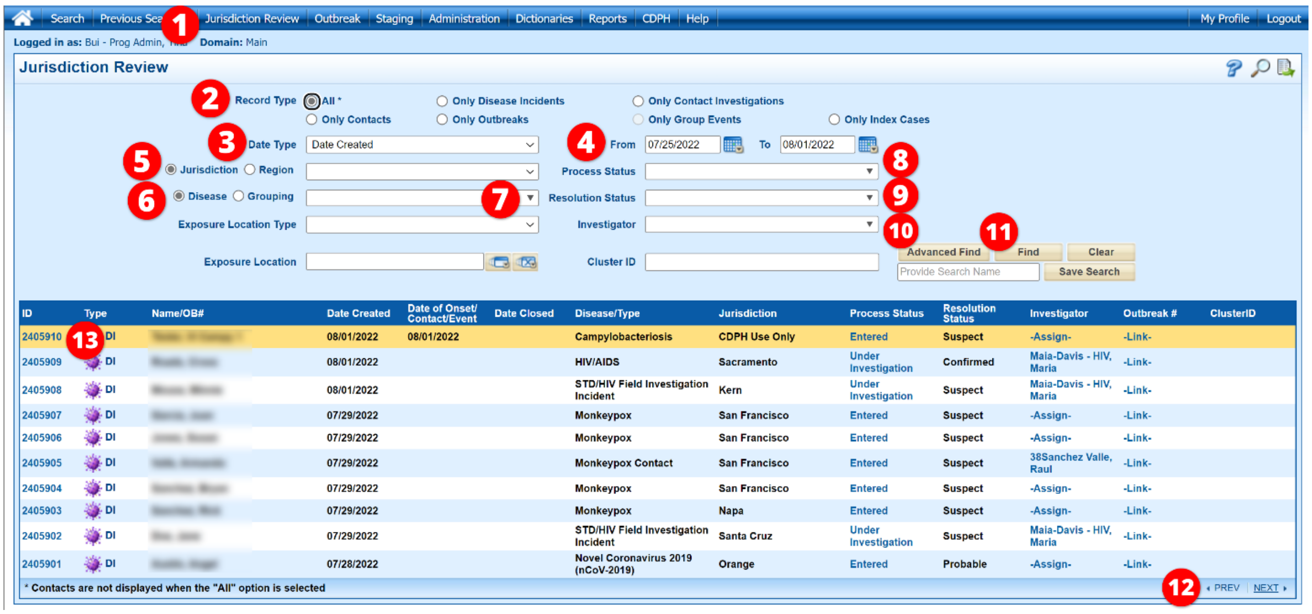
<u>Steps to Search for Incidents, Contact Investigations, and Outbreaks (Figure 15.1):</u>

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.

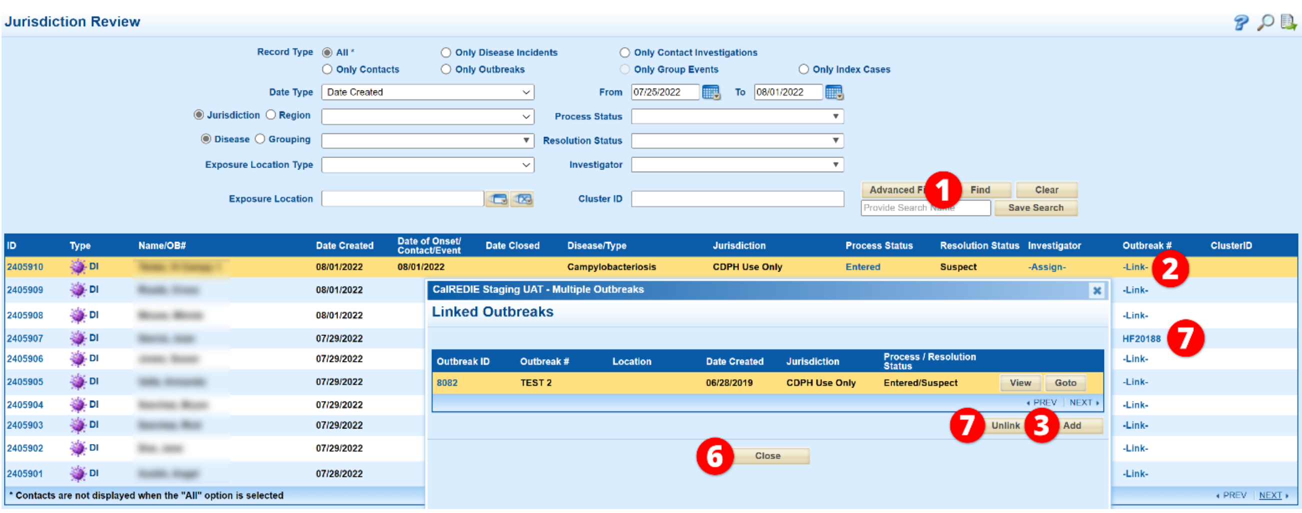
Figure 15.1: Jurisdiction Review Page



<u>Steps to Link an Incident to an Outbreak (Figure 15.2):</u>

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 <u>blue</u> 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 <u>blue</u> Outbreak Number. On the Linked Outbreaks pop-up, click the <u>blue</u> Outbreak ID so that the Outbreak is highlighted, and click ***Unlink***. Close the window.

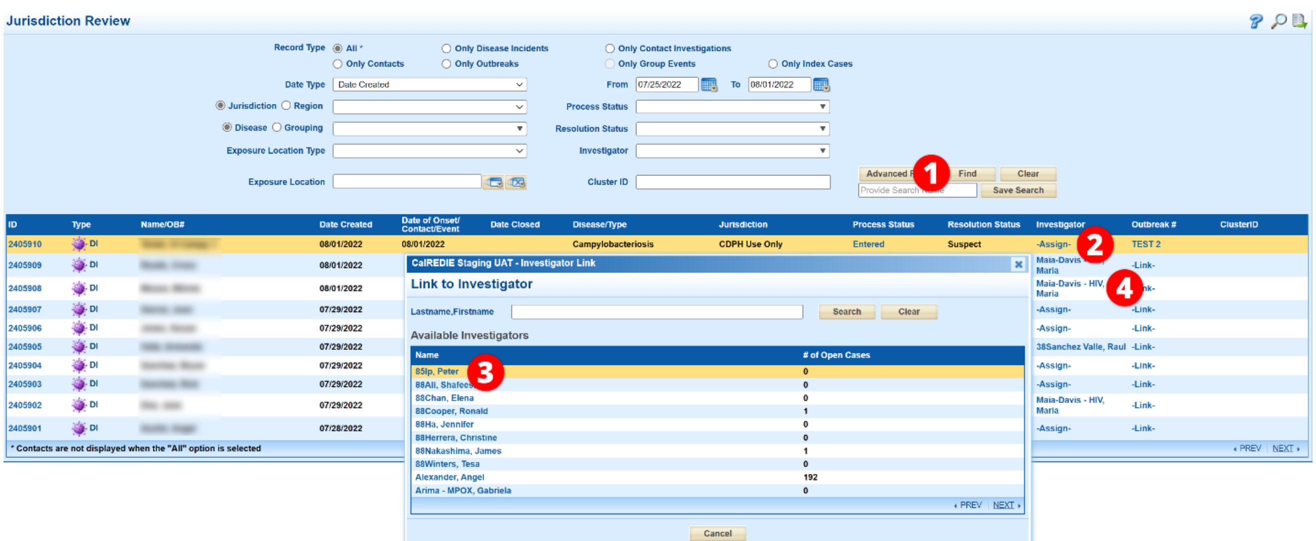
Figure 15.2: Linking to an Outbreak from Jurisdiction Review



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.

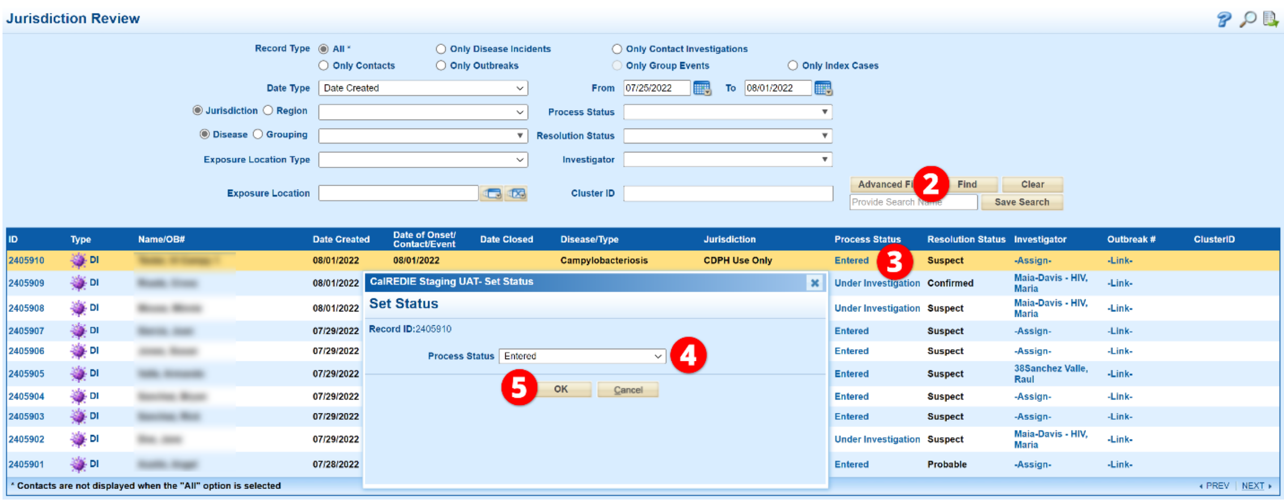
Figure 15.3: Assigning an Investigator from Jurisdiction Review



<u>Steps to update the Process Status (Figure 15.4):</u>

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.

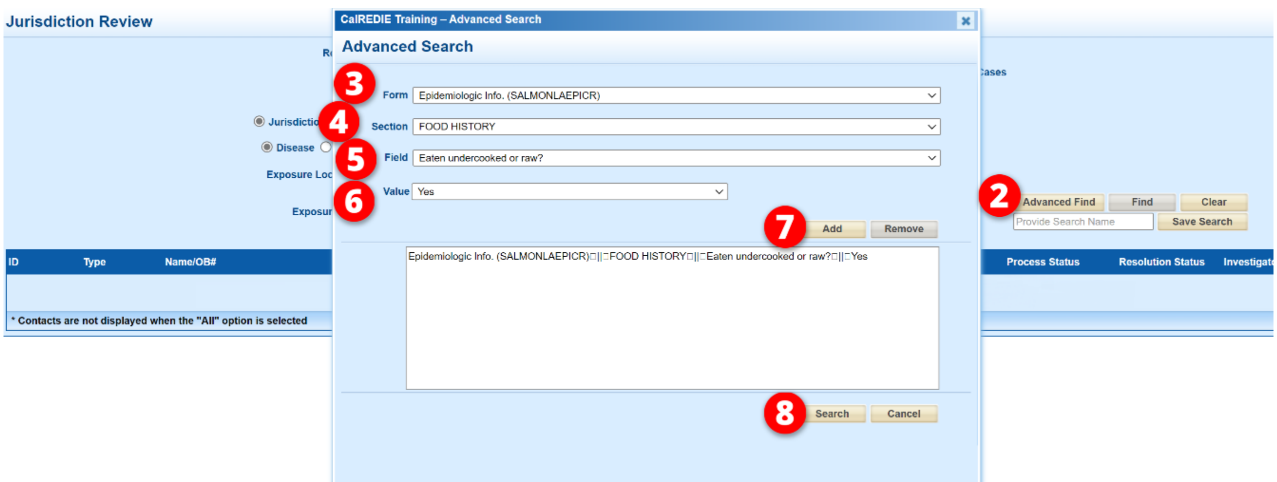
Figure 15.4: Updating Process Status from Jurisdiction Review



<u>Steps to search for records using Advanced Find (Figure 15.5):</u>

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



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.

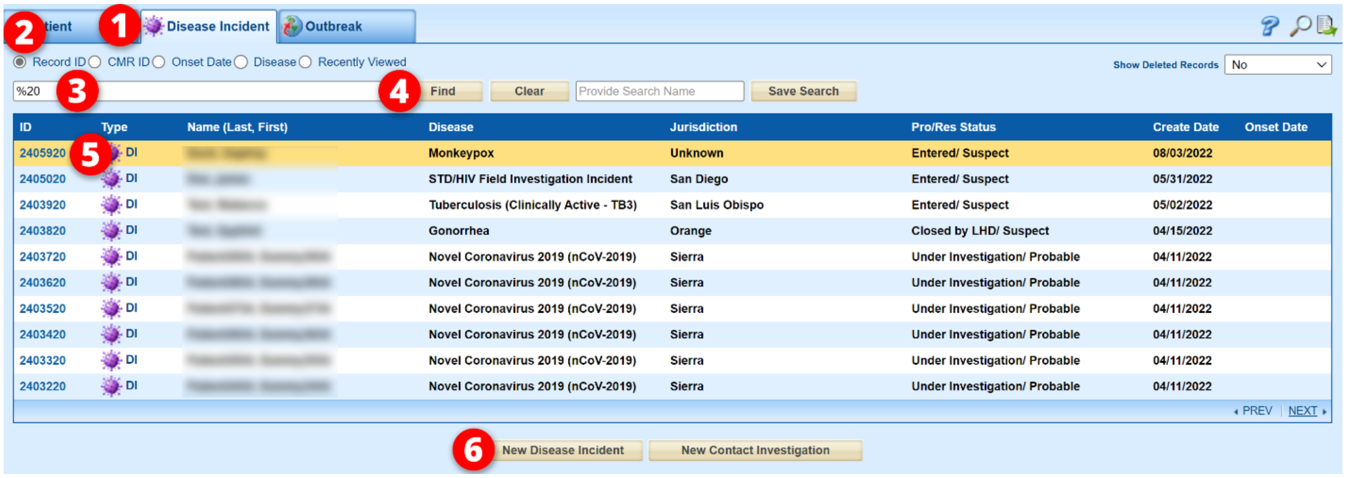
A Wildcard can be used when searching by ID number. To use the Wildcard, insert a *"%"* character where desired. Remember, the Wildcard represents 0 to ∞ characters, so a search for "%205" will pull up any results where the ID is or ends with "205".

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.

<u>Steps to Search by Record ID, CMR ID, or Onset Date (Figure 16.1):</u>

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 <u>blue</u> 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***.

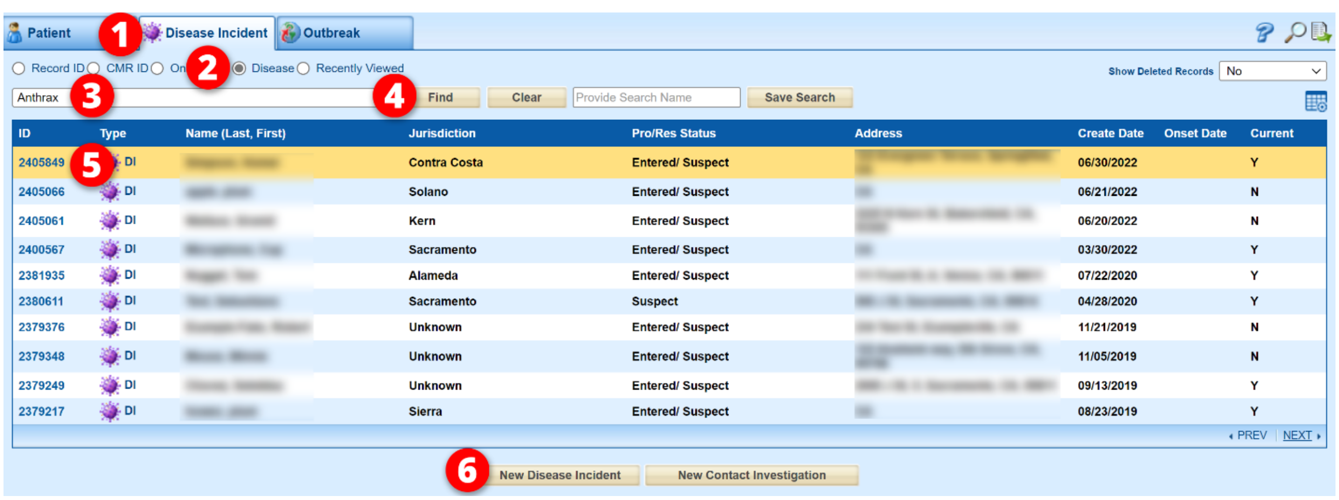
Figure 16.1: Searching by Record ID



<u>Steps to Search by Disease (Figure 16.2):</u>

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 <u>blue</u> 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.

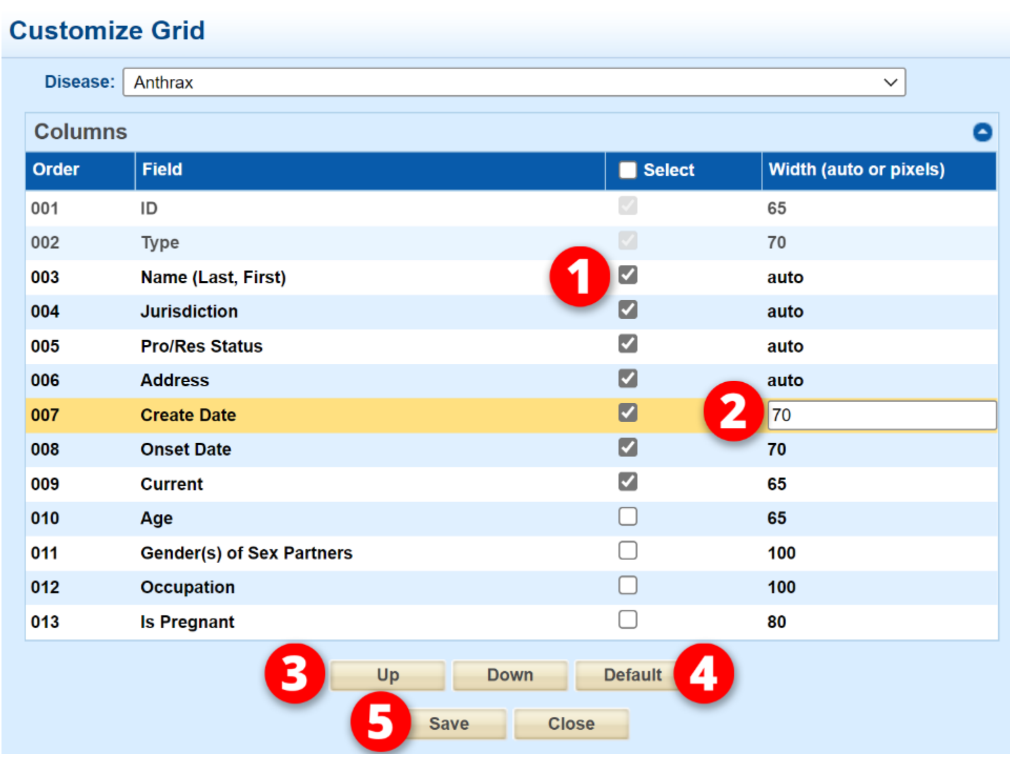
Figure 16.2: Searching by Disease



<u>Steps to Use the Customize Grid Screen (Figure 16.3):</u>

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 <u>yellow</u>, 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



<u>Steps to Search for Recently Viewed Incidents:</u>

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

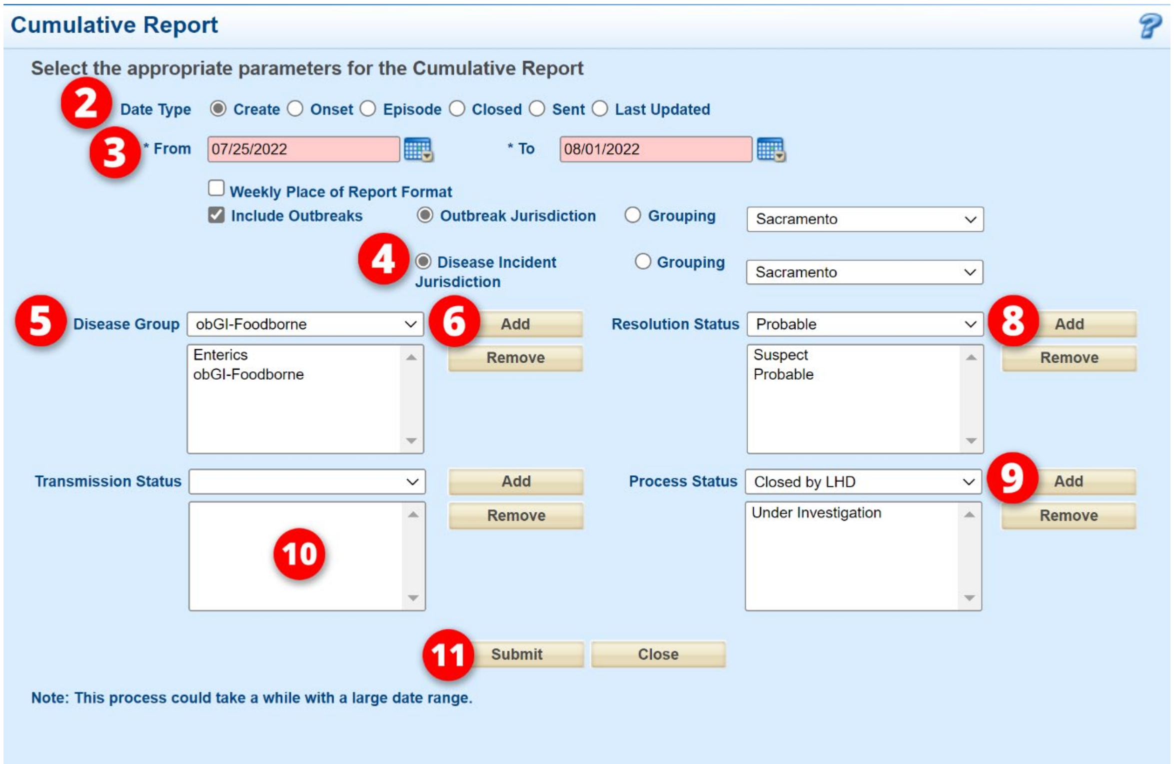
Users can generate several types of reports in CalREDIE. Each type of report contains different options for exporting data.

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.

<u>Steps to Generate a Cumulative Report (Figure 17.1):</u>

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

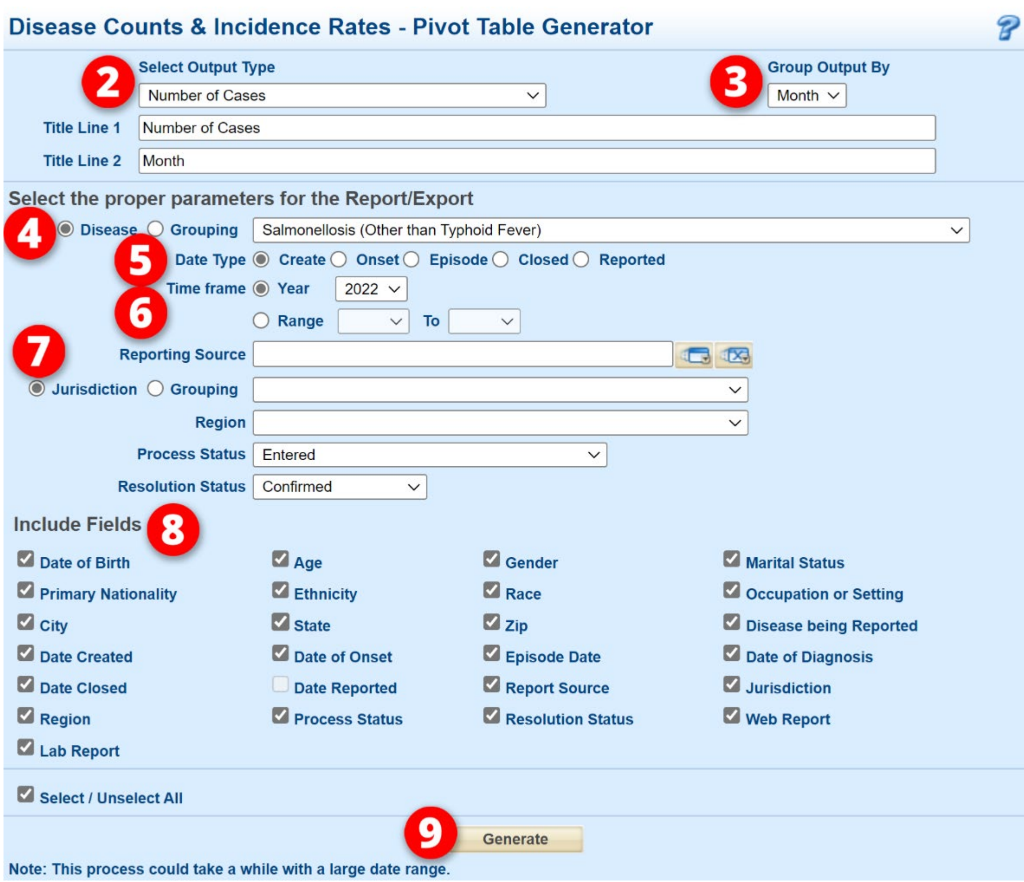


The De-Identified Report provides users the ability to generate reports of disease counts and incidence rates free of Patient Identifying Information, and can be filtered by various fields available in CalREDIE.

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 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

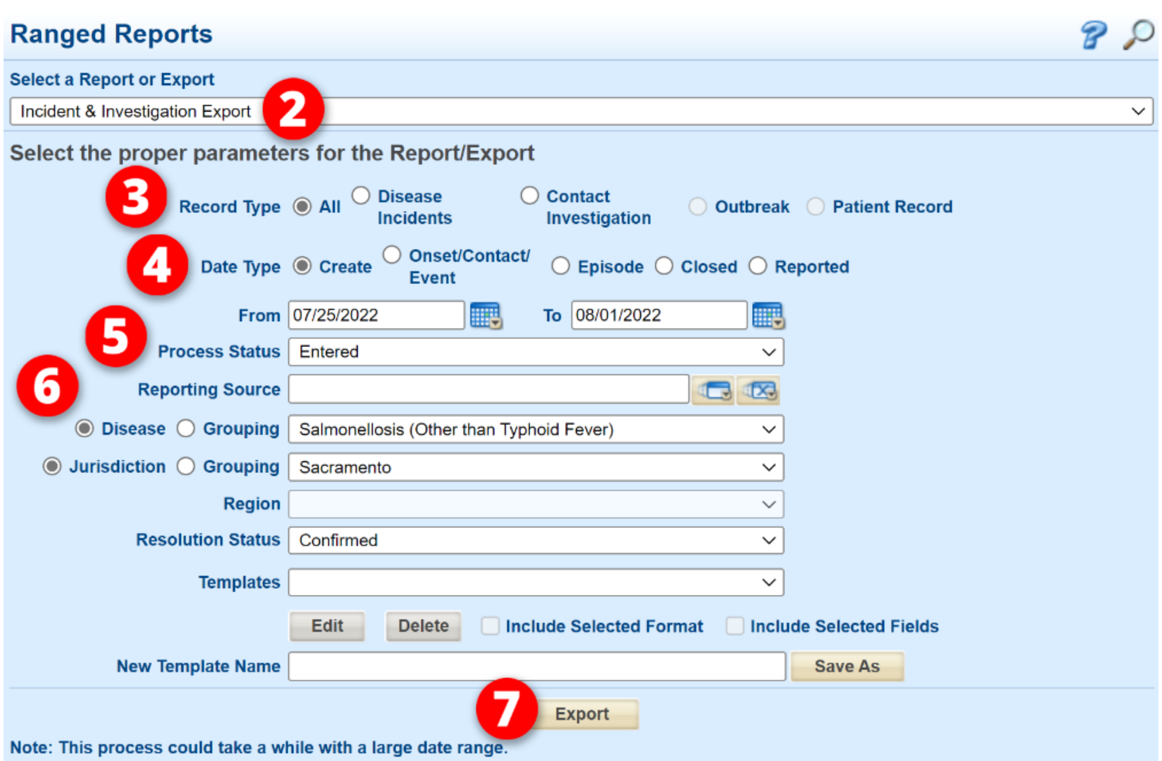
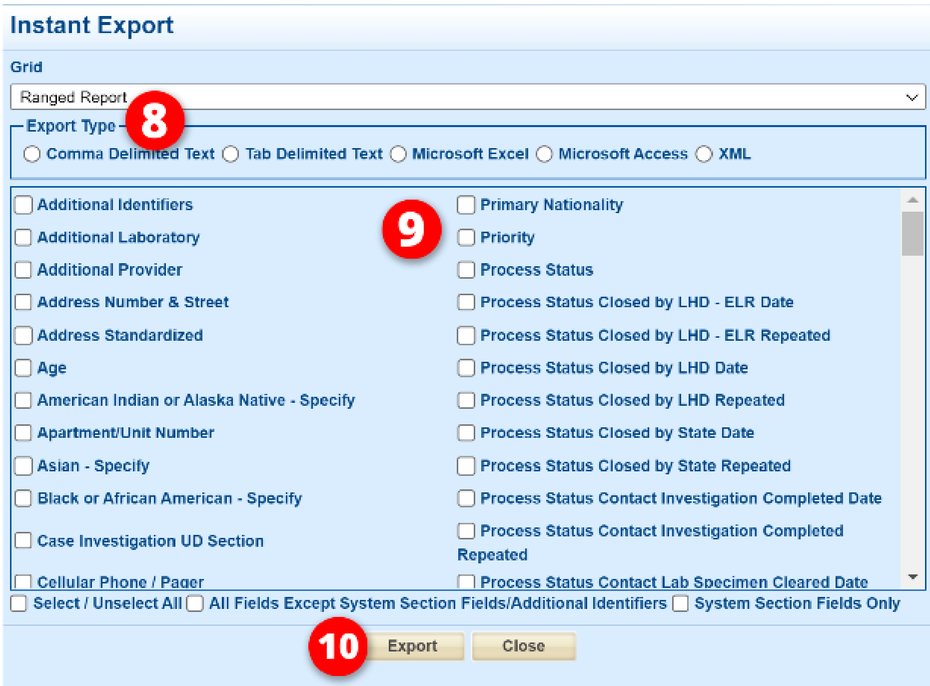


Figure 17.4: Selecting Export Type and Fields

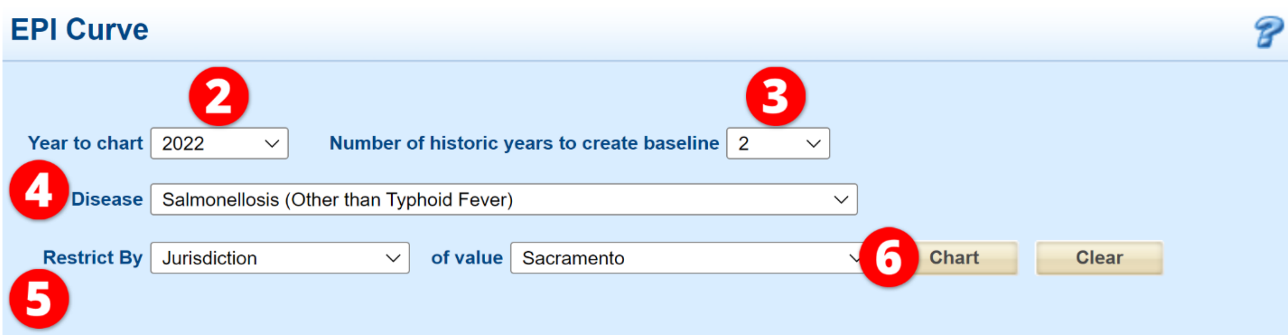


The EPI-Curve generates a graph which shows the volume of cases over a given year, and can be customized for specific years, diseases, and jurisdictions available in CalREDIE.

<u>Steps to Generate an EPI Curve (Figure 17.5):</u>

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



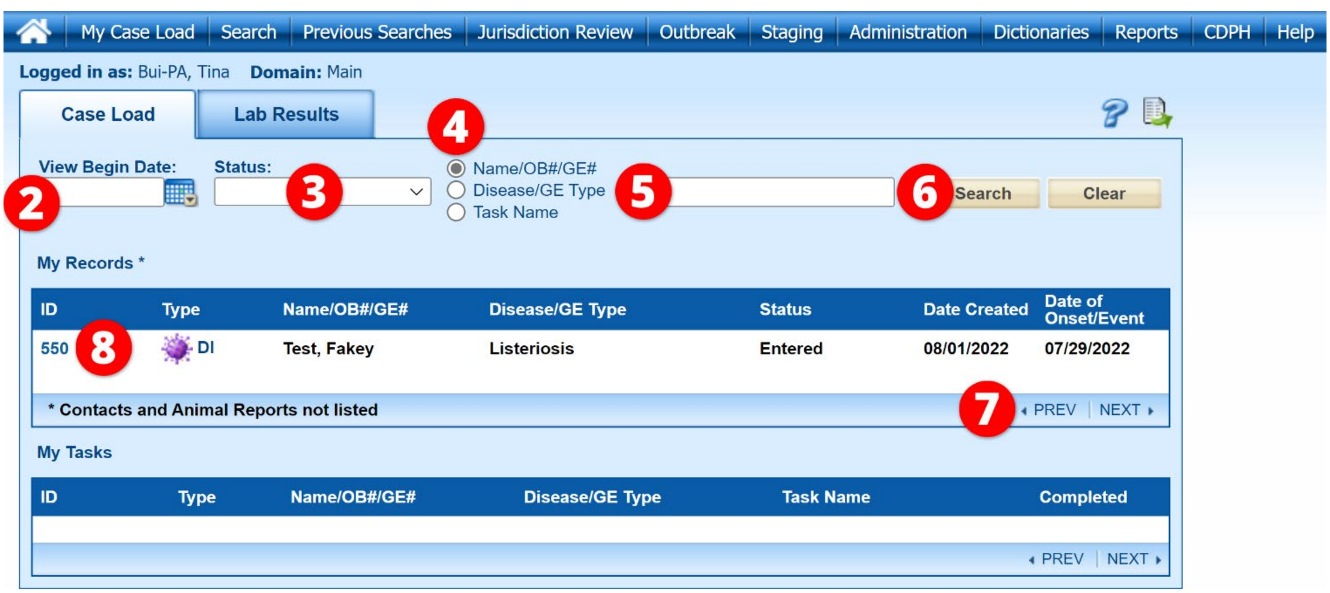
Section 18: My Case Load

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.

<u>Steps to use My Case Load (Figure 18.1):</u>

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 <u>blue</u> ID Number to open the Incident, Outbreak or Contact Investigation.

Figure 18.1: My Case Load Page



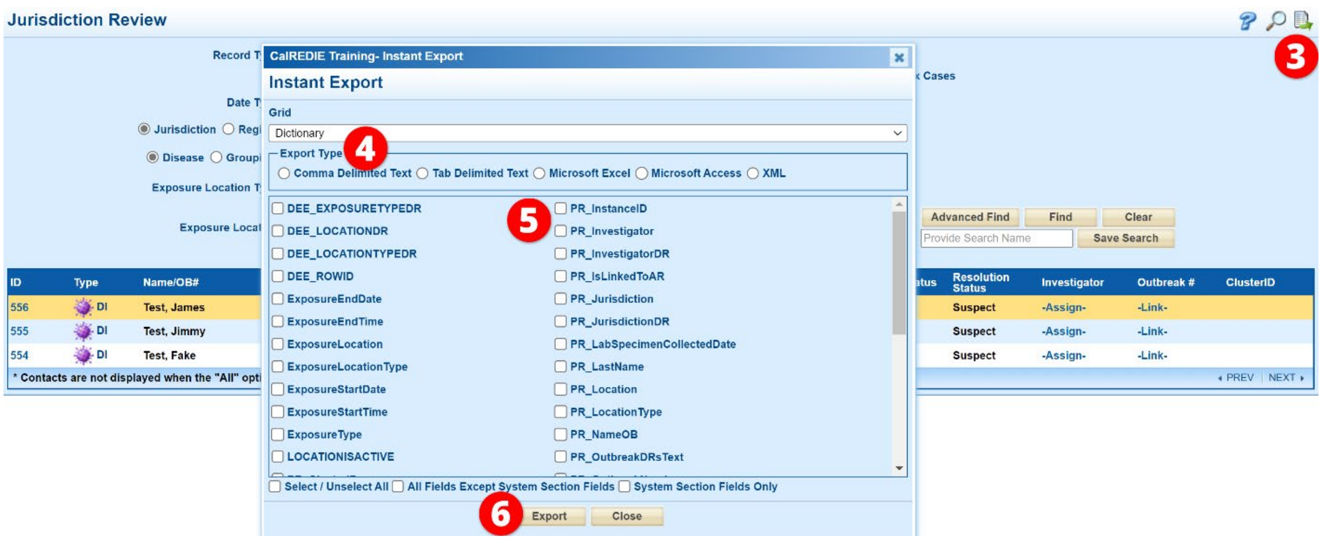
Section 19: Instant Export

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.

<u>Steps to Use the Instant Export (Figure 19.1):</u>

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



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.

<u>Steps to Mark Incidents for Merge (Figure 20.1):</u>

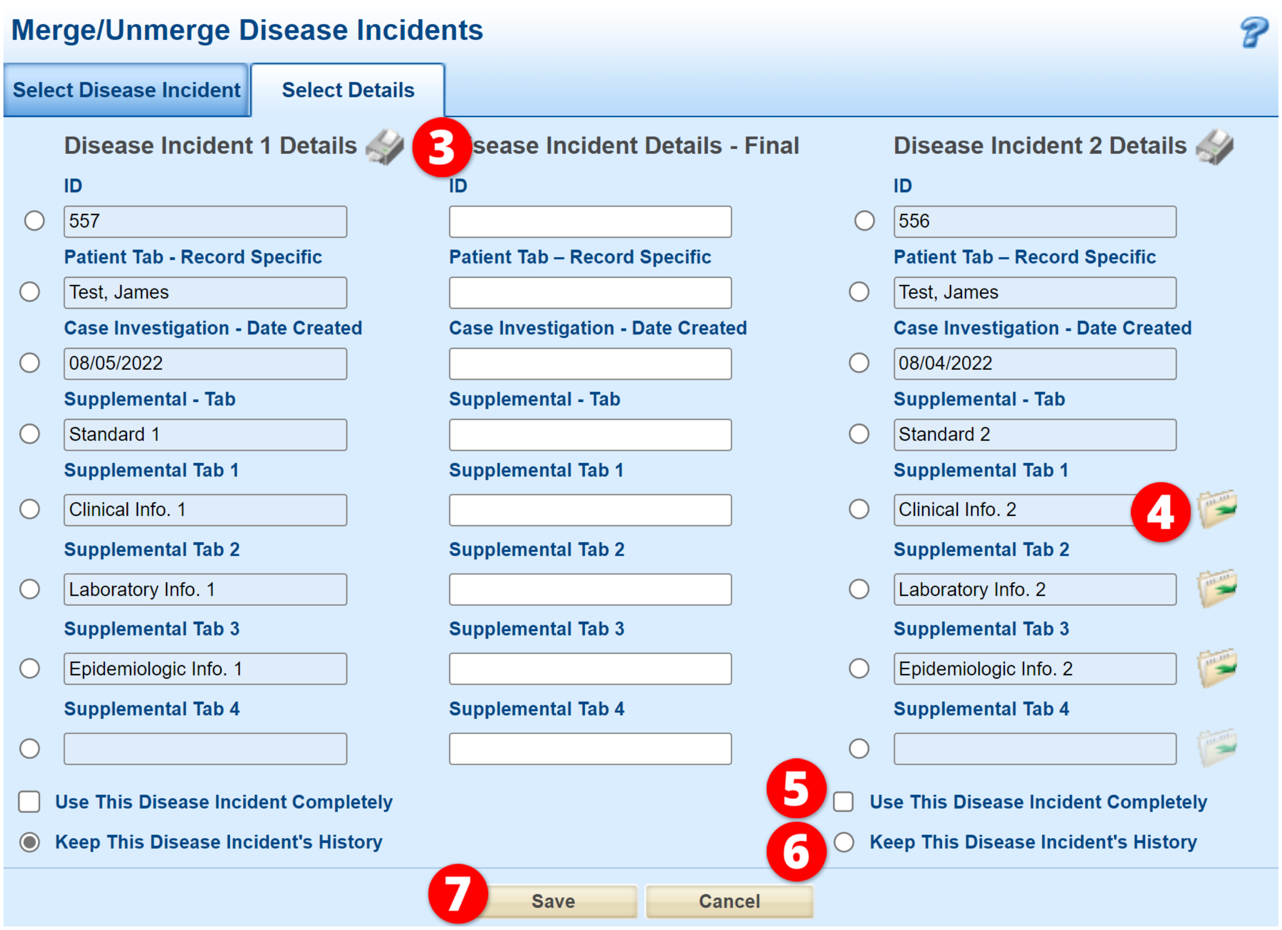
1. Search for the person in the MPI.
    a. Note: in order for incidents to be merged together, they must belong to the same Patient Record. Please contact the CalREDIE Help Desk for assistance with a Patient Merge.
2. Select the **Marked for Merge** checkbox next to the Incidents to be merged.
3. After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

Figure 20.1: Merging Incidents

<u>Steps to Merge Incidents (Figure 20.2):</u>

1. Select Administration, Record Management, Merge Incidents.
2. Select the person's name so that the row becomes highlighted in <u>yellow</u>. 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



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