

Making Screen Names Searchable in CalREDIE

BACKGROUND

Although CalREDIE does provide a field for documenting a patient's internet screen name on the Patient tab, this field is not searchable. Therefore, if you were beginning a contact investigation but were only provided with a screen name by the original patient, you would be unable to search CalREDIE to locate previous incidents or identifying and locating information for that contact.

The screenshot shows the 'Disease Incident' form in CalREDIE. At the top, it displays patient information: Ewing, Gary; Incident ID: 333030; Process Status: Field Record Complete; DOB: 4/12/1969; Disease: Syphilis (Secondary); Resolution Status: Suspect. Below this is a navigation bar with tabs: Patient, Clinical Info., Laboratory Info., Hlth Dpt Follow-up, STD Contacts, and Case Investigation. The 'Patient' tab is selected. A dropdown menu labeled '* Disease Being Reported' shows 'Syphilis (Secondary)'. The main form area contains various input fields: Last Name (Ewing), First Name (Gary), Middle Name, Name Suffix, Primary Language (English), SSN, DOB (4/12/1969), Age (44), Months, Days, * Ethnicity (Not Hispanic or Latino), Address Number & Street (718 W University Ave), Apartment/Unit Number, City (San Diego), State (CA), Zip (92103), Race (American Indian or Alaska Native), Census Tract (000202), County of Residence (San Diego), Country of Residence (UNITED STATES), Date of Arrival (MM/DD/YYYY), Home Telephone (619-867-5309), Cellular Phone / Pager (619-867-5309), Work/School Telephone, Work/School Location (Time4Play@adam4adam), Work/School Contact, and E-mail Address (gary.ewing@yahoo.com). The 'Other Electronic Contact Information' field, which contains the value 'Time4Play@adam4adam', is highlighted with a red box.

SOLUTION

Utilizing the “Multiple Identities” feature on the Patient tab for both original patients and contacts to additionally capture screen name information allows screen names to become searchable in the patient index.

DOCUMENTATION PROCEDURE

Follow the steps below for entering patient screen names into CalREDIE.

1. Enter the screen name & website information in the “Other Electronic Contact Information” field (highlighted above).

2. Click the “Multiple Identities” icon

The screenshot shows the 'Patient' tab selected in a software interface. The 'Disease Being Reported' field is set to 'Syphilis (Secondary)'. The 'Last Name' field contains 'Ewing', 'First Name' is 'Gary', and 'Middle Name' is empty. The 'Name Suffix' dropdown is open. The 'Primary Language' dropdown is set to 'English'. The 'SSN' field is empty. The 'DOB (MM/DD/YYYY)' field contains '4/12/1969'. The 'Age' field is '44', 'Months' is empty, and 'Days' is empty. The 'Ethnicity' dropdown is set to 'Not Hispanic or Latino'. The 'Race' dropdown is empty. A red arrow points to the 'Ethnicity' dropdown.

3. Click “New”

The screenshot shows the 'Multiple Identities' screen. It lists one identity: 'Ewing' (Last Name), 'Gary' (First Name), '4/12/1969' (DOB), and 'X' (Is Primary). Below the list is a detailed form for adding a new identity. The 'Entry Date' is '7/1/2013', 'Identity Type' is 'Primary Identity' (checked), 'Source' is empty, 'Source Identifier' is empty, 'Source Description' is empty, and 'Last Updated' is '9/26/2013'. The 'Last Name' is 'Ewing', 'First Name' is 'Gary', 'Middle Name' is empty, and 'Name Suffix' is empty. The 'SSN' field is empty. The 'Date of Birth' is '4/12/1969', 'Gender' is 'Male', 'Home Phone' is '619-867', 'Cellular Phone / Pager' is '619-867-5309', and 'Work/School Telephone' is empty. The 'E-mail Address' is 'gary.ewing@yahoo.com' and the 'Other Electronic Contact Information' is 'Time4Play@adam4adam'. The 'From Date' is '7/1/2013' and the 'To Date' is empty. At the bottom are 'New', 'Save', and 'Close' buttons. A red arrow points to the 'New' button.

4. Enter “Last Name” per CalREDIE “Unk, Unk” protocols:

If...	Then...	Example
You are documenting a screen name for an Original Patient	Enter “Unknown-” followed by the Original Patient’s current CalREDIE incident #	Unknown-333030
You are documenting a screen name for a Contact	Enter “Unknown-” followed by the Original Patient’s CalREDIE incident #	Unknown-333567

NOTE: For this process, “Unknown” should **ALWAYS** be used even if the last name is known.

5. Enter "First Name" as the screen name followed by the website
6. Click "Save"
7. Click "Close"

* Last Name * First Name Middle Name Name Suffix SSN

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

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

 New Save Close

8. Click "Save" at the bottom of the Patient Tab

Occupation Describe/Specify

 Occupation Location
 Transgender (M to F) Transgender (F to M)
 Unknown Refused
 Next Cancel Save

SEARCHING PROCEDURE

Follow the steps below to search for patients in CalREDIE by screen name.

1. From the "Person Search" screen, enter "Unk," followed by the screen name
2. Check the box for "Additional Demographics" so that your search will include Multiple Identities
3. Click "Find"

Person Disease Incident Outbreak
 Name SSN DOB Address Phone Zip Create MRN SoundEx Source Identifier
 Find New Patient Clear Mark For Merge
 Client Type P =Patient C =Contact F =Family Member Additional Demographics
 Role(s) Last Name First Name DOB Current Address

4. If the screen name you are searching for has been previously entered according to the above protocol, any prior incidents associated with that screen name will be displayed.

5. Select the prior incident to obtain name, contact, and locating information for your current investigation and update the current incident as necessary (e.g., Last Name, First Name, Address, Phone, etc.)

The screenshot shows the CalREDIE software interface. At the top, there are tabs for 'My Case Load', 'Search', 'Jurisdiction Review', 'Outbreak', 'Staging', 'Administration', 'Dictionaries', 'Reports', and 'Help'. Below this, it says 'Logged in as: Egan, Jeffrey Domain: Main'. There are three tabs: 'Person', 'Disease Incident' (which is selected), and 'Outbreak'. A search bar contains 'Unk, Time4Play'. Below the search bar are filter options: 'Name', 'SSN', 'DOB', 'Address', 'Phone', 'Zip', 'Create Date', 'MRN', 'SoundEx', and 'Source Identifier'. Buttons include 'Find', 'New Patient', 'Clear', and 'Mark For Merge'. A checkbox for 'Additional Demographics' is checked. The main content area shows a table for 'Role(s)'. Below that is a table for 'Type' (Disease). The 'Disease' table has columns: Type, ID, Disease, Jurisdiction, Date Created, Pro/Res Status, User, and Marked For Merge. The highlighted row shows 'DI' as Type, '333030' as ID, 'Syphilis (Secondary)' as Disease, 'San Diego' as Jurisdiction, '7/1/2013' as Date Created, 'Field Record Complete/Suspect' as Pro/Res Status, 'Egan, Jeffrey' as User, and an unchecked 'Marked For Merge' checkbox.

SPECIAL NOTE

If you are able to obtain locating information from a previous incident associated with a screen name using the SEARCHING PROCEDURE described above and can therefore conduct a traditional contact investigation instead of referring the incident to an IPN Liaison, “*Was this client originally initiated as an internet investigation (i.e., screen name and/or email address only provided by the original patient)?*” under the Hlth Dpt Follow-up tab **should still be listed** as “Yes”.

The screenshot shows the 'Hlth Dpt Follow-up' form. It includes fields for 'Notified of possible exposure by' (dropdown menu with 'Anonymous 3rd party notification'), 'Named as a contact during' (radio buttons for 'Original interview' (selected) and 'Re-interview'), 'Original patient interviewer name (if not from NPJ or Out of State)' (text input field), 'First date of exposure to original patient' (text input field), 'Frequency of exposure' (text input field), and a dropdown menu for 'Was this client originally initiated as an internet investigation (i.e., screen name and/or email address only provided by the original patient)?' with 'Yes' selected.

QUESTIONS?

Please refer any questions related to IPN or CalREDIE-related IPN procedures to:

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