CalREDIE Disease Incident Staging Area (DISA) Guide

Purpose of this Guide

1. To explain the various elements of the Disease Incident Staging Area and their role in importing reports.
2. To explain the process of importing a report from the DISA into CalREDIE Live.
3. To explain the various scenarios for managing records received in the DISA, and the consequences of different importing decisions.

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).[1] Here, local users can review information submitted by providers (called *Web Reports*) and laboratories (called *Lab Reports*) and import these reports into the CalREDIE Master Person Index (MPI). These reports can instantiate a new person and incident, a new incident for an existing person, or can be imported into an existing incident.

This DISA Guide is broken up into seven sections, corresponding to the six sections of the DISA page and a section with various walkthroughs:

1. The **Search** area, broken up into 10 search fields that can be used individually or in combination.
2. The ***Imported Results*** grid, which shows all web reports and lab reports waiting to be imported (or deleted).
3. The ***Patients*** grid, which shows potential matching patient records in the CalREDIE MPI.
4. The ***Records*** grid, which shows potential matching incidents belonging to the selected patient in the ***Patients*** grid.
5. The ***Import Options*** area, which allows a user to customize the way these results are reconciled with existing patient/incident information in CalREDIE.
6. The ***Administration*** buttons, which bring up pop-up windows and finalize decisions.
7. **Walkthroughs** for importing reports in multiple scenarios.

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[1] As of November 2021, twelve high-volume disease conditions—Coronavirus Disease 2019 – Non-positive ELR, Coronavirus Disease 2019 – Serology Result, Novel Coronavirus 2019, Influenza – Non-positive ELR, Chlamydia, Gonorrhea, Campylobacteriosis, Coccidioidomycosis, Giardiasis, Chronic Hepatitis B, Chronic Hepatitis C, and Tuberculosis (IGRA)—bypass the DISA and import automatically.
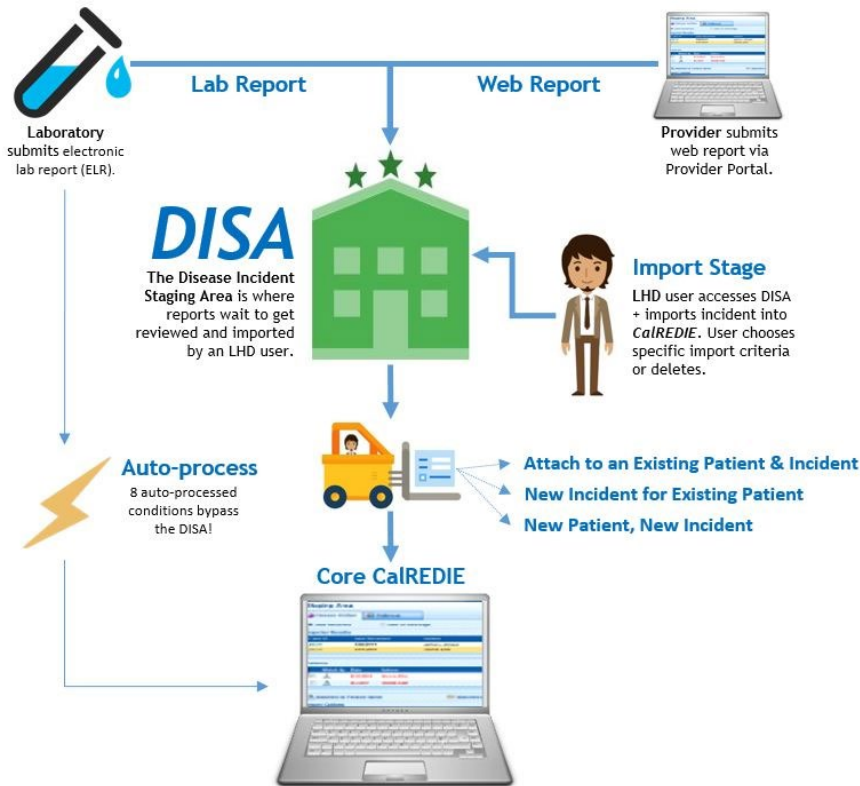
Figure 1. Infographic of how lab reports and web reports enter CalREDIE

Understanding the Search Area

The DISA Search area has a grid of 11 search fields which can be used individually or in combination to locate results for import. It also contains one set of qualifier radio buttons that allows the user to toggle between two date search options (Figure 2).

Figure 2. The DISA Search Area

Understanding the Imported Results Grid

The **Imported Results** grid is broken up into 13 columns, corresponding to 12 fields and a **Delete** column (Figure 3). The 12 fields are the same as those in the **Search** area, with the additions of **DOB, Gender,** and **City**. See below to better understand the function and significance of some of these fields. The grid will show up to ten results at once, and a user can navigate across pages using the **Prev** and **Next** links.

Imported Results

Record ID	Date Received	Patient Name	DOB	Gender	City	Accession Number	Resulted Test	Value	Disease	Jurisdiction	Laboratory	Delete ☐
6085867	07/12/2019	Retest, AutoImport	08/29/1985	Female	Sacramento	000792019158015213	Chlamydia trachomatis DNA Qualitative Unspecified Specimen Probe and Signal Amplification Method	POSITIVE	Chlamydia	Sacramento	Test_Lab	☐

◀ PREV   NEXT ▶

Figure 3. The Imported Results Grid

Record ID

Each lab report and web report is assigned an ID automatically by the CalREDIE system as it hits the DISA. Note that, after import, the **Record ID** in the DISA is **not necessarily** the same as the **Incident ID** in CalREDIE Live. If a record is imported into an existing CalREDIE disease incident, its DISA **Record ID** is discarded and the existing **Incident ID** is retained.

Date Received/Date of Message

The **Date Received** refers to the date the web report or lab report was received by CalREDIE, while the **Date of Message** refers to the date the message was transmitted. Note that by using the **Date Received/Date of Message** radio buttons in the *Search* area, you can change the column header and field values.

Accession Number

This is an identifier associated with the message sent from the laboratory. Sometimes you will see multiple rows with the same Accession Number: the only scenarios where this should occur are when a given lab report contains multiple results, or when a lab re-uses Accession Numbers for multiple messages for the same person in quick succession. This column will be blank for web reports.

Resulted Test

This field shows the name that the submitting laboratory gives to the test performed. This column will be blank for web reports.

Value

This field shows the name that the submitting laboratory gives to the result of the test performed. This column will be blank for web reports.

Disease

The CalREDIE system will automatically assign a disease condition to every incoming ELR based on the test performed and its result. In the case of web reports, the disease condition is specified by the Provider Portal submitter, much in the same way it is specified when creating an incident directly in CalREDIE. Users can, however, change the disease condition directly from the DISA by clicking the <u>blue</u> disease name, selecting a new condition from the dropdown, and

then clicking **OK**. Note that by using the **Disease/Grouping** radio buttons in the **Search** area, you can change the column header and field values.

Jurisdiction

The CalREDIE system will automatically assign a jurisdiction to every incoming lab and web report. In the case of lab reports, CalREDIE will first attempt to geocode the patient address to its respective local health jurisdiction; if the patient address cannot be geocoded, the report will default to the "Unknown" jurisdiction. In the case of web reports, the Provider Portal interface will attempt to geocode the entered patient address to assign a jurisdiction, however if the address is unable to geocode, the jurisdiction is assigned based on the provider's reporting facility.

The Jurisdiction can be changed in the **Administration** buttons area, by clicking the button with the name of the current jurisdiction, selecting a new jurisdiction, and then clicking **OK** (Figure 4).
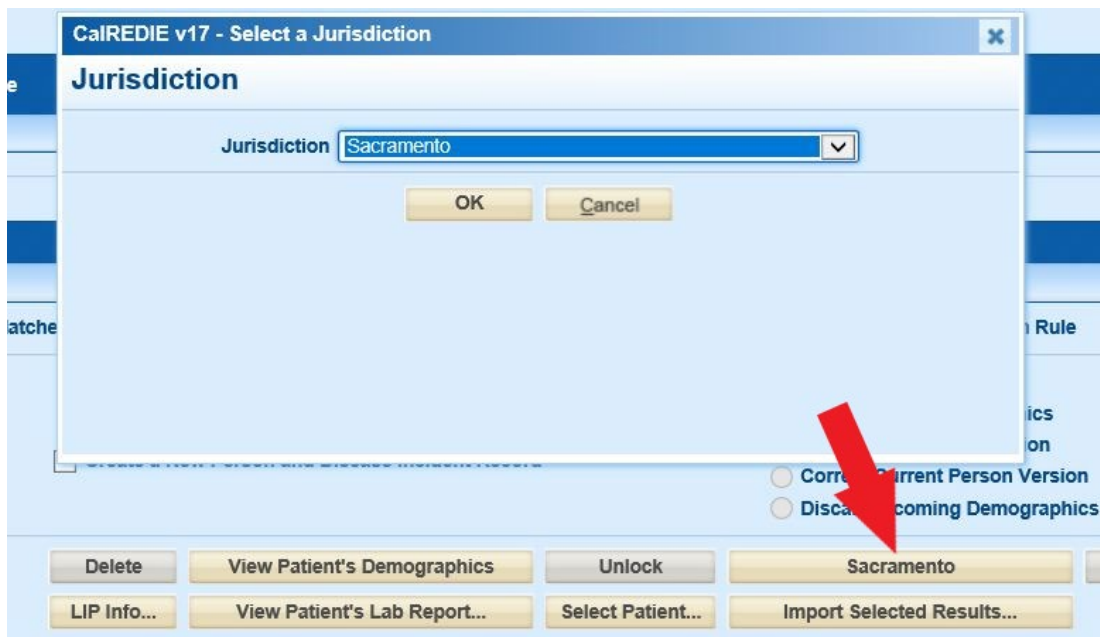

Figure 4. The Select a Jurisdiction pop-up

Understanding the Patients Grid

The Patients grid displays Patient Records in CalREDIE Live which are potential matches for the selected record in Staging. When a row is selected in the **Imported Results** grid, the **Patients**

grid will show by default any possible matches identified by CalREDIE's matching algorithm (Figure 5). Records can match one of the following ways[2]:

1. Last Name, First Name, DOB, and Gender.
2. Social Security Number, DOB, and Gender.
3. Medical Record Number, Reporting Source, and Gender.
4. If an Incident within that Patient Record has the same Accession Number as the record being imported, from the same Reporting Source (i.e. laboratory)

Imported Results

Record ID	Date of Message	Patient Name	DOB	Gender	City	Accession Number
6058764		Test, AllisonPP	01/01/1990	Male	Sacramento	

Patients ☑ Show All

	Match By	Patient Name		DOB	Gender
☐	👤 NAME	Test, AllisonPS		01/01/1990	Male
☐	👤 NAME	Test, AllisonSTATENO		01/01/1990	Male

Figure 5. The Patients Grid for the selected record

If a patient is an exact demographic match, it will appear with <u>black</u> text; if a patient is a potential match with certain demographic discrepancies, it will appear with <u>red</u> text. The **Match By** column will inform you of the basis for the match, using an icon explained in the DISA Legend below the *Records* grid (Figure 6). The match could be due to the person's name, due to a match on the Social Security Number/Medical Record Number, due to a Custom Rule, due to a match on the disease incident, or because it was selected by the user from the *Select Patient* screen. Check off the box to the left of the **Match By** column to select that patient record as the report's destination.

Note: Checking the box in the **Hide** column for a given row, followed by clicking the *Hide Selected Matches* box from the *Administration* buttons area, will temporarily remove it from the list of suggested patients. Unchecking the *Show All* box will hide non-current versions from the view[3]. To learn more about person versions, see the CalREDIE **Person Versioning Guide** or see the quick reference guides in the <u>Understanding the Import Options Section</u>.

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[2] The actual matching rules may vary slightly by disease, depending on whether or not custom matching rules have been applied.

[3] Hiding non-current versions can be helpful if you want to ensure that there is a one-row, one-patient system in place, since each matching version of a person will show up as a separate row in the grid, even if for the same Patient Record. The disadvantage of hiding non-current versions is that sometimes a

Figure 6. The DISA Legend

Select Patients

Users are not limited to only the pre-populated patient suggestions, however, and there are a variety of reasons why a matching person in the system might not be suggested (e.g. typo, use of a nickname, etc.). If no matching patient appears, users are encouraged to conduct a manual search of the MPI for a possible match prior to creating a new person in the MPI to minimize patient and incident duplication.

To Search for a Person in the Select Patient Screen

1. Click the ***Select Patient*** button at the bottom of the screen in the ***Administration*** buttons area (Select Patient...). This opens a pop-up window where the user can search the MPI using a combination of name, DOB, address, and phone number (Figure 7). Staff searching for HIV/AIDS records will also be able to utilize the new "State Number" field.

2. Enter your search parameters as desired. Consider creative combinations, such as last name + address street number, first name + DOB, last name and nickname, etc. Click ***Search***.

   a. Note: Like the Person Search screen, you must format your name search as *Last, First*. To search by first name only, enter a comma, then the first name (i.e. ",Jonathan").

   b. Note: The wildcard (%) does **not** work in the ***Select Patient*** screen.

3. If a satisfactory result appears, click the <u>blue</u> Name, then ***OK***. If no satisfactory result appears, try another search, or click ***Cancel***.

4. Selecting either will close the pop up and return you to the main DISA screen. If you selected a patient, she or he will now appear in the ***Patients*** grid, colored in <u>red</u> and with the ***User Selected*** icon in the **Match By** column. Check off the box next to the **Match By** column to select that patient as the report's destination.

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report will only match based on the demographics of a non-current version, so if you hide them you won't see those matches and may create a duplicate patient in the system.

Figure 7. The "Select a Patient" pop-up

Understanding the Records Grid

If a patient from the MPI was selected in the *Patients* grid, the next step is to determine if that patient has an existing disease incident that the selected report should be imported into. If no patient was selected in the *Patients* grid, there is nothing to do in the *Records* grid.

Unlike the *Patients* grid, where the system suggests possible matches out of the millions of patient records in CalREDIE based on certain criteria, the *Records* grid will show all disease incident records that belong to the selected person within the user's jurisdiction (e.g. STD staff at Alameda County would not see TB cases, or STD cases in Calaveras), absent any additional matching criteria. It is up to the user to make an appropriate selection based on program guidelines. To select a disease incident into which to import the lab report or web report, check off the corresponding box to the left of the **Type** column.

Understanding the Import Options Section

Once the user has identified any matching patients and incidents, there are still two[4] decisions left to make (Figure 8):

1. Does the record instantiate a new person + incident, just a new incident, or neither?

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[4] The third *Import Option* list (Species/Serotype) is not utilized in CalREDIE. Please ignore.

2. If the report will be imported into an existing patient record, how should the patient demographics of the incoming report be reconciled with the existing person?
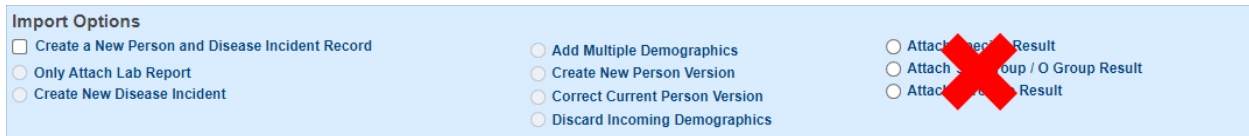

Figure 8. The Import Options Section

Import Options

If no matching patient is selected, the only import option available on the left will be *Create a New Person and Disease Incident Record*. This option will generate a new patient record in the CalREDIE system and a new disease incident.

If a matching patient is selected but no matching incident, you will also have the option to *Create New Disease Incident*, and the patient demographic reconciliation list will become active. This option will generate a new incident record for the selected patient.

If a matching patient **and** a matching incident are selected, you will also have the option to attach the report, or—in the case of web reports—to merge the report into the incident (Figures 9 & 10). Continue reading to understand the difference between importing lab reports and importing web reports.
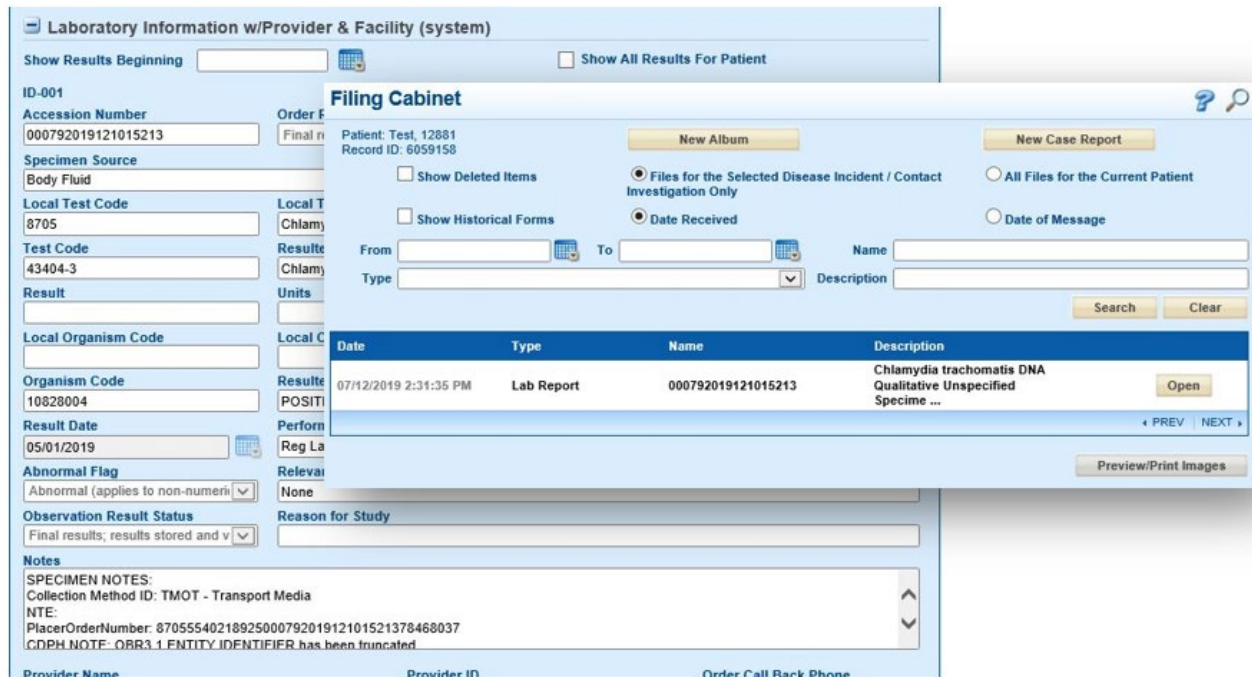

Figure 9. Import Options for Lab Reports

Figure 10. Import Options for Web Reports

Importing Lab Reports vs. Importing Web Reports

A lab report, once imported, can be found in two places within a disease incident: as an observation in the Lab (system) section of the Laboratory Info tab, and as a file attachment in the Electronic Filing Cabinet (EFC) (Figure 11).

Figure 11. The Electronic Filing Cabinet pop-up

Because the Lab (system) section is a System Add Section, multiple lab reports can be imported into a single incident without any existing data being overwritten. Multiple lab reports are stacked top-to-bottom in the order received. Similarly, additional lab reports are simply added as additional attachments into the EFC.
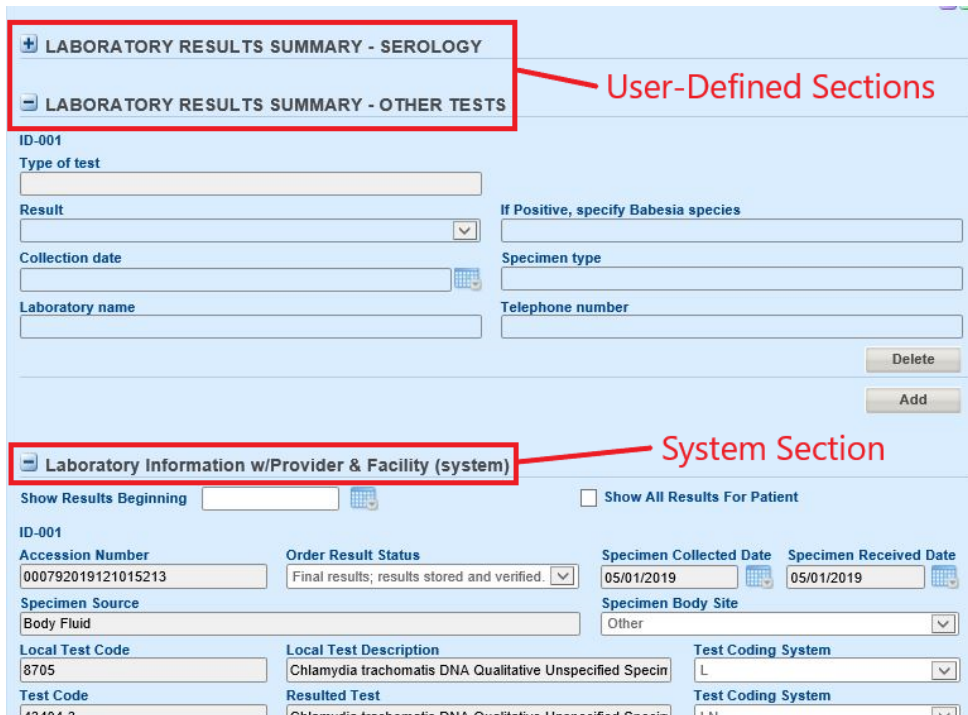
A web report, on the other hand, will import data into the user-defined forms themselves; that is to say, data would be imported into the same fields where local and state users could manually enter data. It is also uploaded as a PDF to the EFC. This PDF will look very similar to the CalREDIE user-defined forms. CalREDIE does not support multiple iterations of a form in a single incident, so whereas lab reports can stack non-destructively, importing web reports into existing incidents will often require a choice between—say—the Clinical Info tab of the existing incident in Live and the Clinical information on the web report in Staging. An incident cannot have two Clinical Info tabs, whereas an incident could have dozens of Lab (system) sections. To review (Figure 12):

1. User-Defined Sections
    a. Populated by Web Reports[5] or directly by local/state users
    b. Disease condition specific: varies depending on disease
    c. Destructive: only one iteration allowed

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[5] Web Reports do not necessarily populate all user-defined fields, sections or forms available for a given disease condition in CalREDIE.

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2. Lab (System) Section
    a. Populated by Lab Reports
    b. Always the same regardless of disease condition
    c. Non-destructive: infinite iterations allowed

Figure 12. User-Defined Sections vs. the Lab (System) Section

In the case of web reports, selecting to **Only Attach Web Report** simply uploads the web report into the EFC as a PDF that mimics the appearance of the UDFs, but leaves the UDFs themselves untouched. The **Merge with Existing Incident** option, on the other hand, will prompt you to select what information to keep from the incoming report vs. what to keep from the existing incident.

In the case of lab reports, selecting to **Only Attach Lab Report** will both upload the lab report into the EFC and populate a Lab (system) section, with no need for a merge option.

Importing Demographics

Each incoming lab report and web report contains at least a minimum amount of patient demographic information (e.g. name, DOB, gender, race, ethnicity). When importing a report into an existing patient record and/or incident, users will need to choose how to reconcile this patient demographic information with the existing patient. Users can compare the patient demographic information of the existing patient record vs. the incoming report by clicking on

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the **View Patient's Demographics** button in the *Administration* buttons area. Note that you will need to have first selected a matching patient from the *Patients* grid, otherwise only the demographics from the ELR will appear.

There are four distinct demographic import options to choose from, each with different costs and benefits. To best understand this section, you will want to first read the CalREDIE **Person Versioning Guide**, however a quick overview is provided below.

PERSON VERSIONING QUICK REFERENCE

A patient record can have multiple versions, each associated with 1+ incident. A version of a person is a snapshot of patient information at a given point in time that is relevant for its associated incidents but not necessarily relevant for other incidents. For example, a person gets Pertussis while living in Oakland but two years later gets Salmonellosis while living in San Mateo. As the San Mateo address is not relevant for the Pertussis incident, and the Oakland address is not relevant for the Salmonellosis incident, person versioning makes it possible for each incident to only show the address relevant to the disease incident.

By default, the patient record always displays the "current" version of the person, whereas "non-current" versions are only visible on the Patient Tabs of the incidents they're associated with. Each incident's Patient Tab is a representation of its associated version: making changes to the Patient Tab of any incident also makes those changes to every incident linked to that version but has no impact on incidents associated with a different version.

MULTIPLE IDENTITIES & ADDRESSES QUICK REFERENCE

Multiple Identities and Multiple Addresses (here MI&A) is a way of adding additional observations of patient demographics into a person version. It is particularly useful for two things: (1) Tracking changes to patients over time for a chronic disease condition, where versioning does not work; and (2) Preserving multiple observations of demographic information that may be simultaneously true as it pertains to an incident.

MI&A allows for things like nicknames, aliases, a secondary cell phone, or a temporary address to be kept in reference within a person version without overwriting the primary information (i.e. what appears on the Patient Tab) or relegating it to a non-current version. However, MI&A does provide the option to swap out the primary information with a multiple identity/address. Keep in mind that MI&A is tracked within a person version, meaning that any multiple demographics you add will only be added to that version and only be accessible from the incidents that associate with it.

Demographic Import Options

Add Multiple Demographics

This option maintains the demographics of the relevant person version as they are, but adds the new demographics of the web/lab report as a *secondary identity* into the Multiple Identities and Multiple Addresses section of the associated incidents' Patient Tab. **This is the least-disruptive option when importing a report into an existing incident.** It allows you to "file away" the lab report's demographics so that they are accessible, without replacing the contents of the Patient Tab.

When to Use

When you're importing a report into an existing person and/or incident, and one of three things occurs:

1. The patient demographics of the report contradict those in the person version, but in a way that suggests *concurrence,* rather than *change over time* or one observation being *wrong* in an absolute sense. For example, existing incident has a first name of "Joe" but the report says "Joseph".
2. [When importing a report into an existing incident for a *chronic disease condition* only]: The patient demographics of the report contradict those in the person version, but in a way that suggests *change over time*. For example, different residential addresses.
3. The patient demographics of the report contain useful information not already in the incident, but overall the existing incident demographics are superior.

Create New Person Version

This option creates a new person version of the patient record with the demographics of the web/lab report and associates it with the incident being generated, while all historic incidents retain their existing patient demographic information. **This is the least-disruptive and safest option when creating a new incident for an existing person.** If you select this option when importing a report into an existing incident, it does the same thing as *Correct Current Version*, except that it files away some of the information that was previously on the Patient Tab as a secondary identity. The previous *primary* demographics are retained in the Multiple Identities and Multiple Addresses sections as *secondary* demographics. In a sense, it tries to combine the best of both worlds between the **Add Multiple Demographics** and the **Correct Current Person Version** options.

When to Use

When creating a new incident for an existing person and the patient demographic information is distinct in a way that implies *change over time*, rather than *error* or *concurrence*. Use this

option if a reasonable person would look at the existing patient info and charitably assume it was at one point correct, even though it does not match the incoming information.

When importing into an existing incident, use when the lab report demographics are superior, but you do not wish to overwrite the existing demographics, potentially because they contain a piece of information that the lab report does not.

Correct Current Person Version

This option overwrites the patient demographic information of the current person version, replacing it with the information from the web/lab report. **Use with caution: this option overwrites the demographic information for all incidents associated with the current person version, not just the one you are adding the report to. Do not use if the existing information could reasonably be believed to have been, at one point, correct.**

When to Use

When importing a web/lab report into an existing person and/or incident, and the existing patient demographic information is not simply different, it is erroneous (i.e. it never was correct in the first place). Additionally, when importing a web/lab report into an existing person and/or incident, and the incoming report has all the same patient demographic information, plus more. For example, this method is useful for correcting typos in the patient name, or when the incoming record will only enrich the patient demographic data without overwriting or contradicting anything.

Discard Incoming Demographics

This option discards the demographic information from the web/lab report entirely, and relies upon the existing patient demographic information of the existing person version.

When to Use

When importing a web/lab report into an existing person and/or incident, and the existing patient demographic information is either the same as, or richer than and not contradictory to, the demographic information on the report. For example, you're importing a web report as a new incident for an existing person, and the current person version already has all the same information as the web report, plus more. **Use with caution: although this will often be the correct choice, always ensure you will not be losing useful patient data on the report by using the *View Patient's Demographics* window.**

Final Comments on Demographics

1. Note that the Patient Tab contains many fields than cannot be populated by a lab report, and which are not stored in Multiple Identities/Addresses. If you choose an

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option during import that will replace the demographics of the Patient Tab, **the data from these fields will be erased**, but can be referenced in the Audit Log.

2. Race and Ethnicity data will not be saved in the Multiple Identities section. If you select to *Add Multiple Demographics*, the Race and Ethnicity data from the report will be discarded.

Understanding the Administration Buttons

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

Figure 13. Administration buttons

Delete

Clicking this button will delete all the reports from the DISA for which you have checked the *Delete* box. They will be removed from the DISA and are **not** imported into Live.

View Patient's Demographics

Clicking this button will bring up a pop-up screen that shows the patient demographic information for the selected lab/web report ("Staging"), alongside the patient demographic information for the selected, matched patient record, if any ("Live"). (Figure 14) Use this to ensure you have selected a matching patient, and to inform your demographic reconciliation choice in the *Import Options* grid.
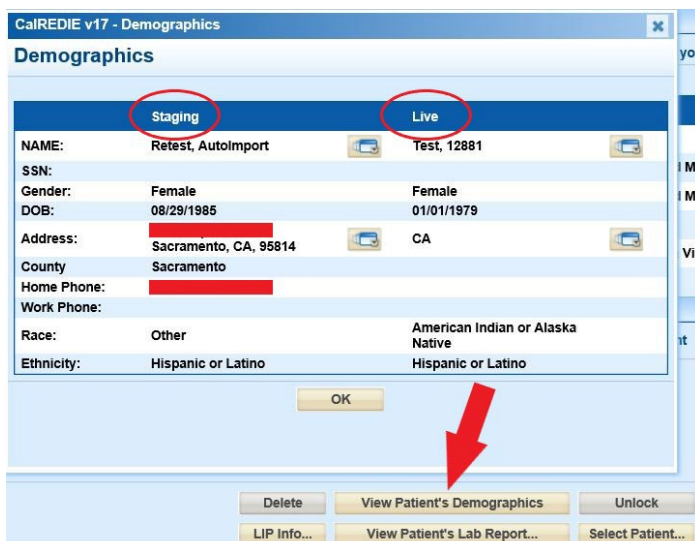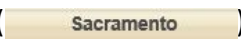
Figure 14. The Patient Demographics pop-up

Unlock

This button will only be enabled for system administrators. It enables them to unmask records in the Disease Incident Staging Area without having to leave Staging.

[Your Jurisdiction]

Clicking this button (Sacramento) will bring up a pop-up screen that allows you to re-assign the jurisdiction of the selected report. Keep in mind that re-assigning the report will result in your losing the ability to import that record.

Hide Selected Matches

Clicking this button will hide all patient matches from *Patients* grid for which you have checked the *Hide* box. They can be unhidden by selecting a different report from the *Imported Results* grid and returning to the original one.

LIP Info

Clicking this button will bring up a pop-up screen that allows you to see certain technical details of a lab report, such as the LOINC and SNOMED codes for the lab test. (Figure 15) It is only active when a lab report has been selected from the *Imported Results* grid.

Figure 15. The LIP Information pop-up

View Patient's Lab/Web Report

Clicking this button will bring up a pop-up screen that shows either the selected lab report as a structured HL7 message or the selected web report as a PDF, mimicking the appearance of CalREDIE user-defined forms.

Select Patient

Clicking this button will bring up a pop-up screen that allows you to search for a potential matching person in the CalREDIE Master-Person Index.

Import Selected Results

Clicking this button will import all reports into CalREDIE Live for which you have designated import criteria. Records that are ready to be imported will be highlighted in bright green when actively selected and dark green when not selected. (Figure 16)

Imported Results

Record ID	Date Received	Patient Name	DOB	Ge
6060047	07/12/2019	Retest, AutoImport	08/29/1985	Fei
6058764	05/06/2019	Test, AllisonPP	01/01/1990	Ma

Figure 16. Records ready to be imported are highlighted in green

Note: once you have queued a record for import, that puts a block on that record, such that no other user can import it. **This block will not clear when you exit the DISA or sign out of CalREDIE**. It is a good practice to ensure that you do not leave records queued for import for extended periods of time, as this may interfere with the work of others in your health program.

Merge Incidents

This button only appears when a user has selected a web report from the ***Imported Results*** grid. It only activates when a user has elected to import the web report into an existing incident and has selected the ***Merge with Existing Incident*** import option. Clicking this button will initiate a three-step process, by which the system imports the report as a new incident for an existing person, marks that incident for merge with the existing incident, and then opens a pop-up of the ***Merge Incidents*** screen for those two incidents (Figure 17), without leaving the DISA. That means that if you cancel the merge process, you will effectively have imported the web report into a new incident and marked it for merge with the existing incident, without completing the merge.

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Figure 17. The Merge Incidents screen

Routing

This is a new feature in CalREDIE Version 19. When creating a new incident (for either a new or existing person), it allows you to select a disease investigator to whom the new incident will be assigned once imported. (Figure 18)

Figure 18. The Link to Investigator pop-up

Walkthroughs

Importing a Record as a New Person and New Disease Incident

1. Click on **Staging** in the Navigation bar.
2. All results to be imported into CalREDIE are located under the ***Imported Results*** heading. Click on the blue **Record ID** for the record you wish to import. The record's row will become highlighted in yellow.
3. Verify that the person to be imported does not already exist in the system, looking both in the ***Patients*** grid and by using the ***Select Patients*** screen discussed above.
   a. Note: 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 for ***Create a New Person and Disease Incident Record***. The person's row will become highlighted in green.
5. Click ***Import Selected Results***.
   a. Note: You may also proceed to the next record by clicking on its Record ID, and then batch import when you are done. Your choices will be saved, even after you exit the DISA or sign out of CalREDIE.
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.

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Importing a Record as a New Disease Incident for an Existing Person

1. Follow the instructions from the *Patients* grid section of this document to identify a match between a record to be imported and an already existing person.
2. Click the checkbox to the left of the **Match By** column in the *Patients* grid to import the record into that patient.
3. In the *Records* grid, make no selection.
4. In the *Import Options* grid, select *Create New Disease Incident*.
5. Because this person already exists in CalREDIE, you have to reconcile the demographic information for the person. Choose one of the four options based on the explanations above and based on your program's guidelines.
6. Click *Import Selected Results*, or proceed to the next record and batch import at the end.
7. The Import Confirmation screen will appear. Click *Yes*.
8. Return to the MPI and search for the relevant person. Ensure that the new incident appears in that person's Incidents grid.

Attaching a Lab Report to an Existing Incident

1. Follow the instructions from the *Patients* grid section of this document to identify a match between a record to be imported and an already existing person.
2. Click the checkbox to the left of the **Match By** column in the *Patients* grid to import the record into that patient.
3. In the *Records* grid, click the checkbox to the left of the **Type** column to import the record into that incident.
   a. Note: Make sure it meets your programs date and disease requirements for importing into an existing incident.
4. To attach a lab report submitted by the laboratory to an existing incident, click *Only Attach Lab Report* in the *Import Options* section. This will upload the report as an attachment to the EFC of the existing disease incident in CalREDIE, as well as populate a new Add Section in the Lab (system) section of the incident's Laboratory Info tab.
5. Because this person already exists in CalREDIE, you must reconcile the demographic information for the person. Choose one of the four options based on the explanations above and based on your program's guidelines.
6. Click *Import Selected Results*, or proceed to the next record and batch import at the end.
7. The Import Confirmation screen will appear. Click *Yes*.
8. Return to the MPI and search for the relevant person. Open the relevant incident and access the Electronic Filing Cabinet. You will see a Lab Report. (Figure 19) Navigate to

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the Laboratory Info tab and scroll down to the Lab (system) section: you will see an Add Section (indicated as ID-###) corresponding to the report you just imported. (Figure 20)
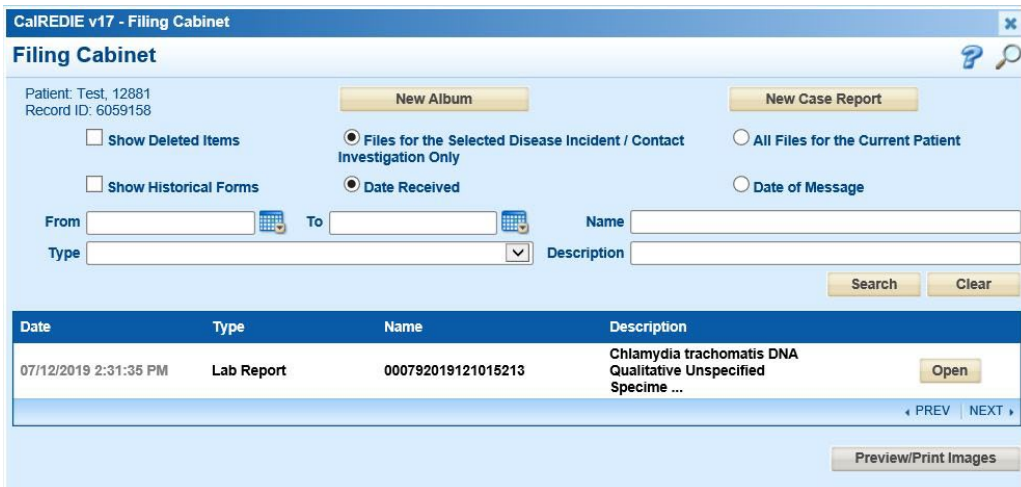

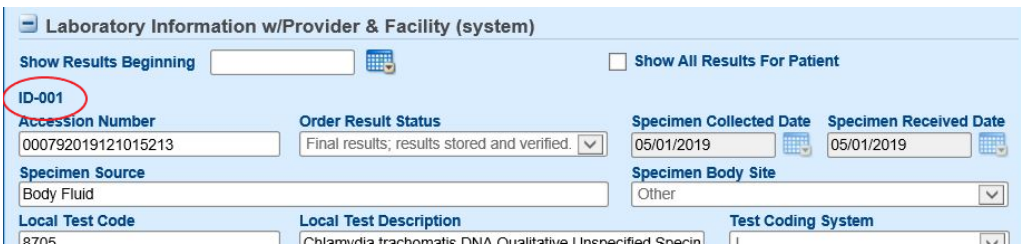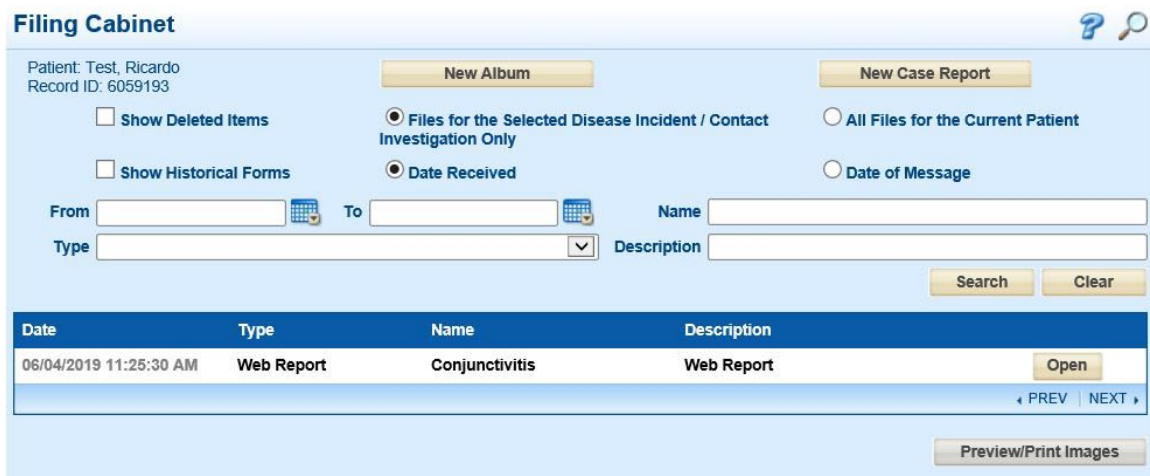*Figure 19. The Electronic Filing Cabinet showing the attached lab report*

Figure 20. The Laboratory Information w/Provider & Facility section showing the attached lab report

Attaching a Web Report to an Existing Incident

1. Follow the instructions from the *Patients* grid section of this document to identify a match between a record to be imported and an already existing person.
2. Click the checkbox to the left of the **Match By** column in the *Patients* grid to import the record into that patient.
3. In the *Records* grid, click the checkbox to the left of the **Type** column to import the record into that incident.
   a. Note: Make sure it meets your programs date and disease requirements for importing into an existing incident.
4. To attach the web report submitted by the provider to an existing incident, click *Only Attach Web Report* in the *Import Options* section. This will upload the report as an attachment to the EFC of the existing disease incident in CalREDIE, rather than attempting to populate the user-defined fields of any disease incident tabs (e.g. Clinical Info).

5. Because this person already exists in CalREDIE, you have to reconcile the demographic information for the person. Choose one of the four options based on the explanations above and based on your program's guidelines.
    a. Note: Generally, *Create New Person Version* is not a recommended selection when importing a web report into an existing incident.
6. Click *Import Selected Results*, or proceed to the next record and batch import at the end.
7. The Import Confirmation screen will appear. Click *Yes*.
8. Return to the MPI and search for the relevant person. Open the relevant incident and access the Electronic Filing Cabinet. You will see a Web Report. (Figure 21)

Figure 21. The Electronic Filing Cabinet showing the attached web report

Merging a Web Report into an Existing Incident

1. Follow Steps 1-3 from the *Attaching a Web Report to an Existing Incident* walkthrough above.
2. Under Import Options, select *Merge with Existing Incident*.
3. Select an option for how the demographics should be reconciled.
4. Click *Merge Incidents*.
5. 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 import will not be reversed and the incidents will appear as unique incidents that are 'Marked for Merge' in the MPI.
6. In the subsequent *Merge Incidents* pop-up, use the radio buttons on either side select which forms should be kept from each incident (see the Merging Incidents section of the **CalREDIE User Guide** for more information). You must keep the entirety of a form from either the existing incident or the web report: you cannot make field-level selections.

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a. Note: The "Case Investigation – Date Created" option only refers to the Date Created on the Case Investigation Tab, not the entire tab itself.

b. Note: The "Supplemental – Tab" is not used by CDPH so whatever is selected here will have no effect on the merge.

c. Note: Remember to select an ID to be kept with the final merged incident.

7. Click on the *Printer* icon to see a print preview of each incident.

8. Click on the *Folder* icon for each supplemental tab to compare the data for the two tabs.

9. To use one incident entirely, check *Use This Incident Completely*.

10. 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.

11. Click *Save*. Click *OK* in the pop-up.

12. Navigate to the MPI and verify that the incidents were merged correctly.

END OF GUIDE