CalREDIE
California Reportable Disease
Information Exchange

CDPH
California Department of
PublicHealth

Provider Portal Quick Start Guide

Getting Started

Do not enter HIV/AIDS co-infection information for conditions other than Hepatitis B, Hepatitis C, HIV/AIDS, Meningococcal Infection, Tuberculosis, Gonorrhea, Chlamydia, and Syphilis.

1. Enter https://calredie.cdph.ca.gov in your web browser address bar and press enter *(Internet Explorer is not a supported browser)*.
2. Enter your CalREDIE username and password.
3. Click **Login**.

Please Note: Ensure your internet settings are up to date according to the **Provider Portal Browser Settings**, which can be found on our website:

https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/CalREDIE-Provider-Portal.aspx

Navigation Bar

1. *Click **Search > Disease Incident Search*** to return to the main incident search page.
2. *Click **Previous Search*** to perform the most recently conducted search.
3. *Click **New Incident*** to create a new incident.
4. Click **Dictionaries** to access the CalREDIE Report Source and Location Dictionaries.
5. Click **Reports -> Disease Incident Report** to generate a report of your submitted incidents.
6. Click **CDPH > CalREDIE Help** to go to the CalREDIE Help webpage.
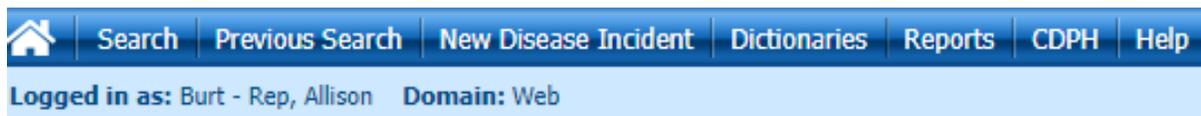
Using the Main Search Page

1. To create a new incident, click **New**, or click **New Disease Incident** from the Navigation Bar.
2. To view an existing record, search using the following criteria: Name (last, first), MRN, Disease, and/or Date Range; and filter by All, Submitted, or Saved (*Unsubmitted*); then click **Search**.
3. Click the desired **Case ID** to access a previously saved or submitted incident.

Note: After submission, changes cannot be made to the incident, and the record will be 'read only.' *If you upload documents to the EFC, the Local Health Department will NOT be able to access them if the LHD has already imported the record on their end.*

Disease Incident Search

Create a new CalREDIE record: **New**

Search for Disease Incidents by:
- Name (last, first):
- MRN:
- Disease:
- Date Range: From: To:
  - ● All ○ Submitted ○ Saved (Unsubmitted)

Search **Clear**

Select a CalREDIE record from below:

Entering Patient Information

1. Fields highlighted in <u>red</u> are required.
2. Enter *Disease Being Reported*.
3. Enter patient **Last Name** and **First Name**.
4. Enter patient's physical address, if available.
5. Enter remaining demographic information, if available.
6. Enter **Gender**.
7. Enter **Race/Ethnicity** information.
8. Select the **Reporting Source** for the incident.
9. If the Provider name displays the name of the facility, replace it with the name of the provider that the patient saw.
10. Click the *Next* button or select the **Supplemental** tab.

Entering Supplemental/Clinical Tab Info

1. Enter **Date of Onset** and other dates, if available.
2. Enter any **Notes/Remarks** (use the *Add* button).
3. Complete the **Clinical** tab, if applicable. Utilize the +/ buttons to minimize or expand sections on the form.

Dates Can Be Entered Three (3) Ways:

- Manually: CalREDIE will auto format to MM/DD/YYYY.
- Calendar Icon: Select date using the calendar icon.
- T-notation: Enter "T" for today. For X number of days prior, enter "T-X", e.g. "T-1" would be yesterday's date.

Incident Submission

1. Click **Submit** at the bottom of the last tab (**Supplemental** or **Clinical**), and the **Incident Submission** screen will appear.
2. To print the receipt, click **Print Receipt**.
3. To print a report of the incident, click **Print Disease Incident**.
4. To create a new incident, click **Create New Disease Incident**.
5. To upload documents to the Electronic Filing Cabinet, click **Add to Filing Cabinet**
6. To create a new incident for the same patient, click **New Incident for Same Patient**.
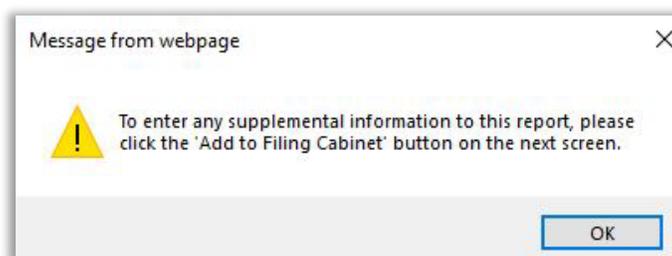
Uploading Files in the Electronic Filing Cabinet (EFC)

1. The filing cabinet will not appear until after you hit SAVE on the incident.
2. From the **Disease Incident** Submission page or from the **Disease Incident Submission pop-up**, click on **Add to Filing** Cabinet. From the incident record itself, click on the image of the EFC ( ) in the task bar, located at the top of the incident.
3. From the pop-up window, click **New Album**.
4. Enter the **Album Name**.

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5. Enter **Notes** as needed. Keep in mind that non-alphanumeric characters are not allowed.
6. Click *Simple (HTTP)* as the **File Upload Method**.
7. Click a *Browse* button and select a document to upload. Use the additional *Browse* buttons to upload up to five documents at once.
8. Click *Acquire File(s)*.
9. Uploaded file will display below **Files in the Album**.
10. To access the document, click on the file image.
11. Exit the *Acquire Files* window and the new album will appear in the *Filing Cabinet* window. Exit the *Filing Cabinet* window.

IMPORTANT: Once the LHD accepts the submission on their end, any documents uploaded to the EFC **will not be received by the LHD**.

Be sure to promptly upload pertinent records to the EFC after hitting the 'save' button. We recommend saving the incident, uploading records to the EFC, and waiting to hit 'submit' until everything has been uploaded.

Incident Reports

1. Go to *Reports > Incident Report*.
2. Choose whether your report should **include Accessible Reporting Sources** or **Primary Reporting Source**.
3. Enter **Name (Last, First)**, **Disease** or **Date Range**.
4. Click *Generate Report*.

END OF GUIDE