

Chapter 6: Data Entry

The Imports module in SEER*DMS includes data entry screens that allow you to enter data using the keyboard. This feature is used to key in data printed on paper forms or images of scanned documents (referred to as “image files” in SEER*DMS). Image files may be uploaded in a data entry session, but it is more common to load image files via the import autoloader.

A record created via data entry is forwarded into the workflow processes designated for its record type, following the same path as if it were loaded from a data file. However, in many registries, Review Flags may be set during data entry but cannot be set in data stored in a file. If the person performing data entry sets a Review Flag to “reviewed”, edits associated with the flag will not trigger a Resolve Record Errors task when the record moves forward in the workflow. Registry managers must define standard operating procedures for those who manually enter new data; and must evaluate edits applied to record data.

In this chapter, you'll learn about


- Starting a Data Entry Session
- Image Data Entry Tasks
- Using the Record Editor
- Entering Values for the Data Fields
- Keyboard Functions for Data Entry
- Printing a Record in SEER*DMS
- Clearing Unsaved Data
- Reports Related to Data Entry

Starting a Data Entry Session

Requires system permission: *import_manual* and *contact_view* and *rec_edit*

You may enter a set of records from the same source facility during a single data entry session.

To start a data entry session:

1. Select **System > Imports**.
2. Select **Actions > New Data Entry**.
3. Use the  lookup for the **Facility** field to specify the facility that provided the data. You also have the option of specifying a **Contact** at that facility.
4. Enter the reference **Barcode** if applicable for this import.
5. You may enter notes regarding the import in the **Comments** field.
6. Click **Next**.

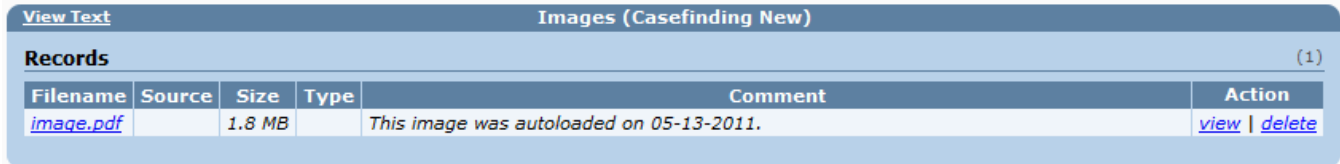
Follow the instructions in the *Using the Record Editor* section of this chapter to complete the data entry session. As each record is saved, SEER*DMS will assign a unique record ID and forward the record to the initial processing tasks in the workflow.

Image Data Entry Tasks

Requires system permission: *import_manual* and *contact_view* and *rec_edit*

When an image file is imported, SEER*DMS automatically attaches the image to an “empty” record and creates a manual Image Data Entry task that enables the user to enter data in critical fields. *Chapter 5: Importing Data Files* includes instructions for auto-loading image files.

When you open an Image Data Entry task, the Images page of the record editor will be shown.



The screenshot shows a web interface titled "Images (Casefinding New)". At the top left is a "View Text" link. Below the title is a "Records" section with a "(1)" indicator. A table with the following columns is displayed: "Filename", "Source", "Size", "Type", "Comment", and "Action". The table contains one row with the following data: "image.pdf", an empty source, "1.8 MB", an empty type, "This image was autoloaded on 05-13-2011.", and "view | delete" links.

Filename	Source	Size	Type	Comment	Action
image.pdf		1.8 MB		This image was autoloaded on 05-13-2011.	view delete

To complete an Image Data Entry Task:

1. The Images page will be displayed. Click **view** to open the image. The file will open automatically in its native application. For example, a PDF will auto-open in Adobe Acrobat or other PDF software installed on your computer. A picture stored as a JPG or BMP file will open in software associated with those files on your computer. If an image does not open, contact your registry's system administrators.
2. Move the image to your second monitor or to one side of your screen. You will need to view the image as you enter data into the record editor. If you prefer, you can print the image and refer to the paper copy as you enter data.
3. Click a link in the left navigation panel to open a data page.
4. Use the controls described in the *Using the Record Editor* section of this chapter to enter data into the record editor. You will not be required to enter all fields. The image itself will always be available in the record. Registry policies will determine which fields must be entered in an Image Data Entry task. Typically, these are the fields that are used to match an incoming record to patient sets and records in the database.
5. When you save the record, SEER*DMS will assign a unique record ID and forward the record to the initial processing tasks in the workflow.

Using the Record Editor

After initiating the data entry session as described in the previous section, SEER*DMS will display a record editor similar to the one shown below.

Use the links in the **Record Navigation Box** to access each page of record data. The number of pages and the layout of the fields in the body of each page vary by record type.

The following items are displayed in the **Info Box** during a data entry session:


- **Import ID** – A unique identifier assigned to all records entered in the same data entry session or imported in the same set of files. An Import ID will be assigned when you save the first record in a data entry session. The Import ID can be used to generate reports listing records entered during a data entry session (see *Reports Related to Data Entry*).
- **Import Type** – Data Entry.
- **Source** – The facility specified as the source of the data.
- **Record Type** – A drop-down list of the types of records that can be entered manually.

The **body** of the record editor displays the content for the currently selected page. The layout of the fields in the body of the page varies by record type. The NAACCR record type is consistent in all registry configurations, other record types vary. A variety of controls are used on the data pages to edit specific fields; these are described in the *Entering Values for the Data Fields* section of this chapter.

Entering Values for the Data Fields

Requires system permission: *import_manual* and *contact_view* and *rec_edit*

To enter values for the data fields:

1. Select the appropriate **Record Type** from the drop-down list provided in the **Info** box on the left side of the screen.
2. The editor displays data fields in different colors to highlight fields that generated an error based on SEER and local edits. At this point, errors may be indicated for missing data fields. You should limit your attention to entering the raw data provided on the paper records; errors should be addressed during visual editing tasks. *Chapter 7: Edit Errors* contains more information on the edits and the color codes used in the record editor.
3. Enter values for all data fields provided on the paper record:
 - a. Enter data into the fields on the current page. You may use your mouse or keyboard controls to move from field to field. The cursor may be difficult to see when it is the first character in a data entry box. Therefore, the field in which the cursor is currently located will be highlighted in green.
 - b. You may enter text directly into fields; for some fields you may use a lookup  to select a value from a list. See the *Keyboard Functions for Data Entry* section of this chapter for more information.
 - c. If entering data for a record with multiple pages, use the links in the Record Navigation Box to move between pages.
 - d. If the paper record does not provide a value for a field, leave the field blank.
4. If you mistakenly enter data for a record that you do not want to save, you may clear the data entry pages. For instance, you may use this feature if you realize that you are entering data for a record that you previously entered. Refer to the *Clearing Unsaved Data* section of this chapter for instructions.
5. Click **Save** when you have entered all available data for the record.
6. Enter **Comments** regarding the data entry session, if appropriate. Your comments will be accessible on this record's Audit Log page in all subsequent tasks.
7. Click **Save & Exit** to complete data entry for this record. A record ID will be assigned and displayed at the top of the page.
8. Enter data for the next record on the blank data entry screen that is displayed. Repeat data entry steps until all records are entered. You may enter data for different record types during a single data entry session.
9. After the last record has been entered and saved, click **Cancel** to end the data entry session.


Keyboard Functions for Data Entry

The table below lists keyboard functions that can be used to modify fields in the editor.

Use your mouse to go directly to a field or use the following keystrokes:

Use	To
Tab	Go to the next field
Shift + Tab	Go to the previous field

To edit a data field, type the new value into the text box or use the following controls:

Use	To
Click 	Open a lookup table to select a value from a list of the field's valid values. For some lookups, you will also be able to define new values (e.g., add a new physician or facility).
Ctrl + A	Select all text (highlight without using the mouse)
Ctrl + C	Copy to clipboard
Ctrl + X	Cut – deletes highlighted text and copies it to the clipboard
Ctrl + V	Paste from clipboard to cursor location
Ctrl + Z	Undo changes made in a field.
Ctrl + Y	“Redo” changes. This reverses changes made by Ctrl + Z.
Home and End	Go to beginning or end of current field

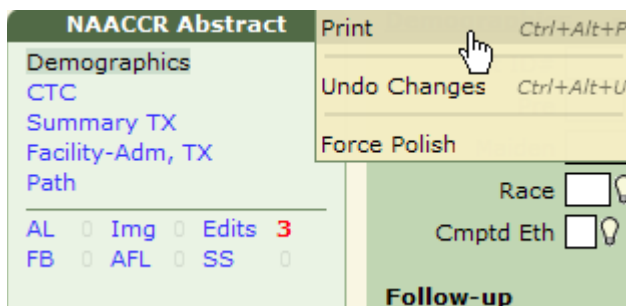
Printing a Record in SEER*DMS

Requires system permission: *rec_read_only* or *rec_edit*

Select print from the record menu to open a printable version of the record. Fields from all pages of the record will be included. You may print a record during a data entry session, when a record is opened in the editor during a worklist task, or when an unlinked record is opened from the Patient Lookup. You may also print a linked record when it is viewed in the patient set editor.

To print a record:

1. Click the  menu indicator in the Record Navigation Box to open the record menu:



- 2.
3. Select **Print** or press CTRL+ALT+P. A printable version will open in a new window.
4. Some record types have more than one data section. If you do not want to print a section, uncheck the box next to the section header.
5. Use the File menu in the report window to print the record.
6. Close the report window.

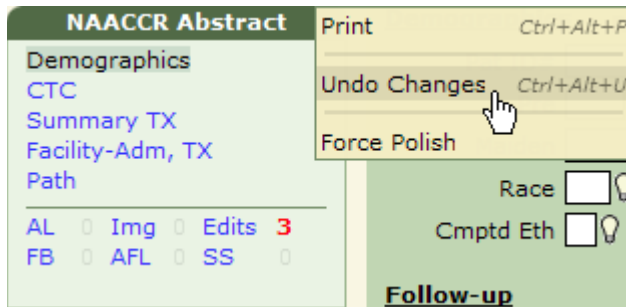
Clearing Unsaved Data

Requires system permission: *import_manual* and *rec_edit*

If you have mistakenly entered data for a record that you do not want to save, use the undo feature to clear the data entry pages. You may use this feature if you realize that you are entering data for a record that you previously entered.

To clear unsaved data:

1. Click the  menu indicator in the Record Navigation Box to open the record menu:



2. Select **Undo Changes**.

Reports Related to Data Entry

In SEER*DMS, a data entry session is considered to be a single, manual import. Therefore, each record saved during a data entry session is assigned the same Import ID. The Import ID can be used to generate reports regarding imported data files or data entry sessions. System reports related to data imports are listed in the table below. If you require additional information regarding imported data, you may query the database using the record's Import ID or Date Loaded; or query fields stored in the *Submission_file* table. See *Chapter 24: Creating Reports and Extracting Data* for further instructions; refer to the *SEER*DMS Data Dictionary* for information related to the database tables.

Report ID	Title	Description
RPT-009A	Imported Records	A listing of records in a specific import or records imported on a specific date.
RPT-061A	Workflow Location of Imported Records	For each imported record, this report lists the current location of the record in the workflow.
RPT-070A	Import Summary	Filenames, number of records, and comments for imports in a specified time period.
RPT-084A	Summary of Data Entry and Ad hoc Editing	The number of records and patient sets imported via data entry and modified via ad hoc editing. This report shows frequencies by user for a specified time period.