Chapter 13: Visual Editing

In SEER*DMS, all data for a registrant are ultimately stored in a single packet of data known as a "Patient Set." Each Patient Set contains the data consolidated from the patient's source records and linkage information to enable access to the source records. Patient set data fields contain the consolidated and/or summarized values of the linked source records, and values that were derived or computed by SEER*DMS polishers. Original data values are maintained in record data fields.

Quality control of new data involves a visual review of data fields and the review of edit errors identified by the computerized edits. Primarily, these reviews are performed during one of the following worklist tasks:

- The Visual Edit Patient Set task enables registrars to visually review data when a new patient set is created from an incoming record. This task will also be created if a patient set or CTC is auto-created from a death certificate, casefinding, or short health record using one of the Build CTC system tasks.
- Consolidation tasks enable registrars to visually review incoming data as they consolidate the data with other data in the system. This includes the consolidation of new data received on multiple records; and the consolidation of a new record into an existing patient set.

The errors identified by the computerized edits may also be resolved in either of these tasks, or the patient set may be saved with errors and forwarded to a Resolve Patient Set Errors task.

In this chapter, you'll learn about

- Creating a Visual Edit Patient Set Task
- Visually Editing Patient Set Data
- Saving Changes to a Patient Set
- Requesting Follow-Back Information

Creating a Visual Edit Patient Set Task

The Visual Edit Patient Set task is designed for the review of a new patient set or CTC when created from a single record. The record is typically a reportable abstract, but may be a reportable death certificate, casefinding, pathology report, or short health record. In contrast, Consolidate tasks are created when data from two or more entities are combined (the consolidation of two or more records; or the consolidation of record data into an existing patient set).

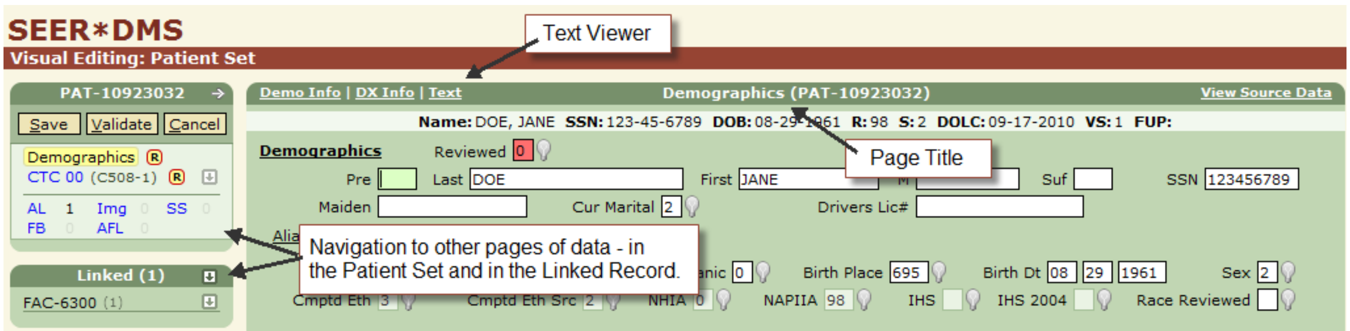
Visual Edit Patient Set tasks are created by the Build CTC system tasks that build CTCs from casefinding, pathology report, death certificate, or short health records. However, most Visual Edit Patient Set tasks are created at the conclusion of the manual Match-Consolidate task. This occurs when no matches are found for the incoming record and a patient set can be built. The Visual Edit Patient Set task will open automatically if you have the *vis_edit_pat* and *pat_edit* permissions. Otherwise, an unassigned task will be created in the worklist.

SEER*DMS auto-builds a patient set and assigns values to fields based on data in the record. Values are copied from record data fields to the corresponding patient set data fields, or the patient set values are computed based on record data. These algorithms are documented on the Auto-Build help page.

Visually Editing Patient Set Data

Requires system permission: *vis_edit_pat* and *pat_edit*

The screen shot below shows a partial page of a patient set in a Visual Editing task. The instructions that follow highlight the features typically used while completing a Visual Editing task. However, the process of adding Follow-Back and adding notes to the Comments tab are not discussed specifically. Follow-Back and Comments may be added at any point in the Visual Editing process. For instructions related to these and other features of the patient set editor, please refer to *Chapter 10: The Patient Set Editor*.



First, familiarize yourself with the patient set editor.

1. The patient set data are presented on multiple pages in the editor. You can use the links in the navigation box to move from page to page as you edit. To determine the name of the page and whether it is a patient set or record page, look at the page title or the navigation panel.

   a. The title of the page is shown in the top center. It includes the page name and the patient set or record ID. In the example above, the Demographics page of the Patient Set is being displayed.

   b. In the navigation panel on the left, the name of the current page is highlighted. In the example above, Demographics is shown with yellow highlighting.

To visually edit the patient set data:

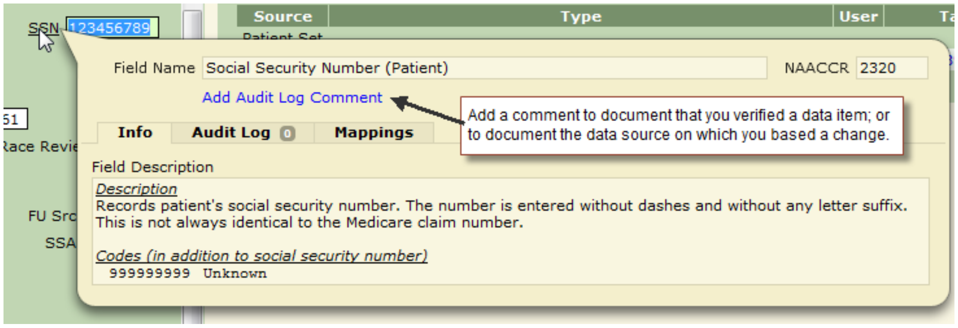
2. Review and resolve any issues reported on the Alerts tab in the right panel. For example, a warning will be posted if the SSN in the newly created patient set matches the SSN in an existing patient set. Investigate to determine whether these data should be consolidated into the other patient set or if one of the SSN values is incorrect.

3. Visually edit data on the Demographics page. If you are not viewing the patient set's Demographics page, click **Demographics** in the patient set section of the navigation panel.

   a. Review the text shown on the Text tab in the right panel. If you prefer, you may open the text in a separate window by clicking the Text link in the title bar of the main data panel.

   b. Verify the accuracy of key fields in accordance with visual editing guidelines defined by your registry managers. You may need to use external data sources to verify name, SSN, sex, race, or other fields that are important for data usage. The SEER*DMS patient set editor includes a tool for address verification. For more information, please refer to *Chapter 10: The Patient Set Editor*.

   c. If appropriate or required by registry policy, add a comment to document your findings. For example, you may note the data source used to verify SSN or document the reason that you made a change. You may add a comment whether or not you change the value. To add a comment, **click the field label** (SSN in the example below) and then click **Add Audit Log Comment**.



d. Resolve all edit errors for fields on the Demographics page. A data field is highlighted in a shade of red if it is associated with a failing edit. Hold your mouse over the field's value to view the edit message; or review information displayed on the Edits tab in the right panel. Refer to *Chapter 14: Resolving Patient Set Errors* for more detailed instructions for resolving edit errors.

e. When you have completed visual editing the Demographics page, set the Reviewed flag.

4. Visually edit the CTC data pages. Click **CTC** in the left navigation panel.

   a. Visually edit the data on the main **CTC** page. Compare the coded fields to the supporting text fields.

   b. Visually edit the data on the **Staging** page. Compare the coded fields to the supporting text fields.

   c. Click **Facility** and review the admission and facility data on the Facility/Admission page.

   d. When reviewing treatment data, work through each **TX** and **TXr** page. Visually edit the data on all TX and TXr pages before reviewing the **Summary TX** data. If you prefer, you may review the data on all TX and TXr pages at once by clicking the **SEER Course** link. All data for that course of treatment will be shown at once. The coded fields will be shown in a table and the text will be shown in the right panel. Complete instructions for using the Treatment Viewer are provided in *Chapter 11: The Patient Set Editor*.

   e. SEER*DMS will auto-update the Summary TX data fields based on changes to the underlying TX and TXr data. In SEER*DMS, polishers and edits are executed each time you click Validate or move to another page. The CTC Summary polisher will automatically recalculate Summary TX values if a TX or TXr value was modified. Documentation for the CTC Summary polisher is available on the Polisher help page.

5. Review and resolve any edit errors in the new patient set.

   a. Specific instructions for reviewing edits and modifying fields are provided in *Chapter 11: The Patient Set Editor* and *Chapter 14: Resolving Patient Set Errors*.

   b. You have the option of resolving all errors during the Visual Edit Patient Set task or forwarding the patient set to a Resolve Patient Set Errors task.

   c. You should ignore edit errors in record fields. In the patient set editor, records are displayed in read only mode by default. The errors only need to be resolved in the patient set data fields.

6. Once you have visually edited data on all pages, save your changes and exit the task according to the instructions in the *Saving Changes to a Patient Set* section of this chapter.

Saving Changes to a Patient Set

Requires system permission: *pat_edit*

When you complete a Visual Edit Patient Set task, the patient set is either forwarded to a Resolve Patient Set Errors task, or it exits the workflow. If all edit errors were resolved during the editing process, the final automated checks are performed and the patient set exits the workflow. To update or view the patient set once it is out of the workflow, search for the patient set using the patient lookup or data search (see *Chapter 20: Searching for Records and Patients*).

Review the following methods for saving changes and for exiting the Visual Edit Patient Set task. When saving the patient set, you may enter general comments about the task in the box at the top of the Review Changes page. Comments can also be entered to document changes to individual fields. Field comments that you entered while editing will be shown here.

To save changes to the patient set and continue editing:

1. Click **Save**.
2. Enter comments to document your changes.
3. Click the **Save** button at the bottom of the Review Changes page.

If you would like to save changes, but need to continue the task at a later time:

1. Click **Save**.
2. Enter comments to document your changes.
3. Uncheck the **Close the task on Save & Exit** box. When the patient set is saved, it will remain in a Visual Edit Patient Set task assigned to you.
4. Click **Save & Exit**.

If you have finished editing the patient set:

1. Click **Save**.
2. Enter comments to document your changes.
3. Check the **Close the task on Save & Exit** box.
4. Click **Save & Exit**. If there are edit errors, the patient set will be forwarded to a Resolve Patient Set Errors task. If there are no errors, the patient set will exit the workflow.

Requesting Follow-Back Information

Requires system permission: *pat_edit* and *fb_initiate*

In SEER*DMS, a request for follow-back information is referred to as a “follow-back need”. If you determine that additional information must be obtained from the reporting facility, you should submit a follow-back need. Your request will be maintained with the record or patient set, allowing all users to review pending follow-back issues when reviewing the data. After submitting the follow-back need, you may continue editing or save the patient set in a Visual Edit Patient Set task that can be continued at a later time.

You will receive an e-mail notification when a response to your request is processed and the follow-back need is closed. You or another staff member may update data fields based on the new information. As determined by registry policy, one staff member may be responsible for processing all follow-back responses, or the information may be given directly to the staff members who entered the follow-back needs.

If you suspended a task pending the receipt of follow-back information, you must re-open and complete the task to allow the data to move forward in the workflow. You must either make changes to data fields based on the new information or verify that the appropriate changes were made. If you completed the task but need to update the patient set with the new information, use the Patient Lookup to search for the patient set. Instructions for submitting follow-back requests and processing the responses are provided in *Chapter 22: Follow-Back*.