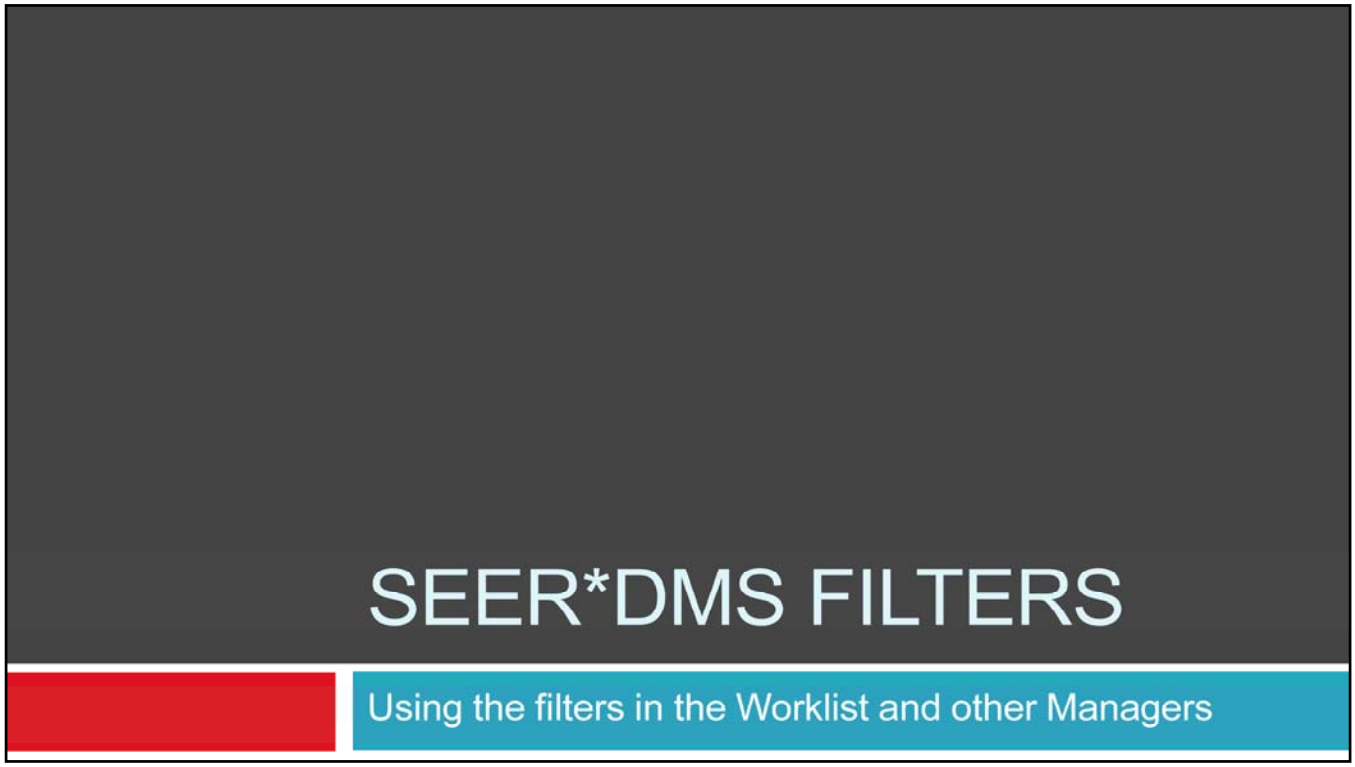


In this tutorial you will learn how to use filters to search for worklist tasks and other types of data in SEER*DMS.

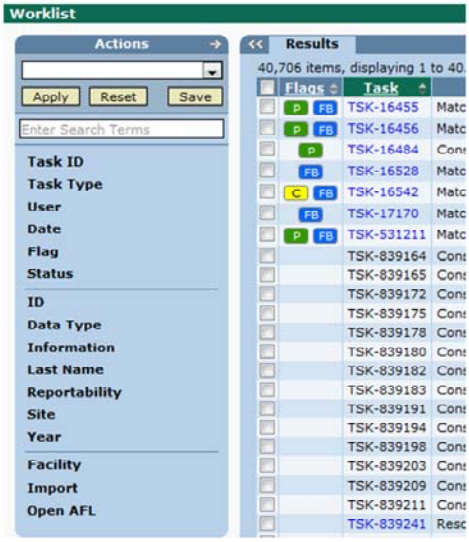
Manager Pages & Filters

- Manager Page - any screen that allows you to view, sort, and search for data:
  - Worklist
  - Facility List
  - Contact List
  - AFL Manager
  - Death Clearance Manager
  - etc
- Filters – field specific search tools.
  - Use a filter to reduce the list based on the value of a field.
  - The worklist filters are shown in the screen shot on the left.

In SEER*DMS, there are several “Manager Pages”. These are screens that allow you to view, sort, and search for a specific type of data. For example, the Worklist is a manager for tasks. Other managers in SEER*DMS include the Contact List, Facility List, AFL Manager, and Death Clearance Manager.

Each manager has a set of filters shown on the left side of the screen. The filters for the worklist are shown here as an example.

Using Filters

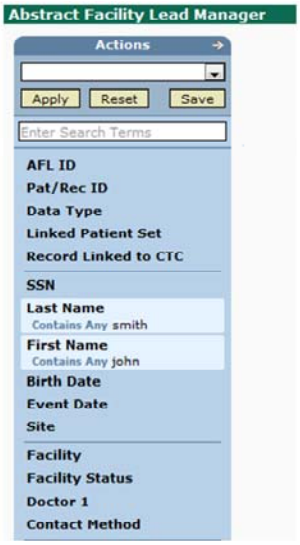


- A filter removes ("filters out") items
- Only set a filter if you want to reduce the list based on the value of that field
- Want to see all tasks?
  - Do not set any filters (clear each filter)

A filter removes or "filters out" items. You only need to set a filter if you want to remove items based on that field.

For example, you could set Task Type to "Match-Consolidate" to remove other types of tasks from your list. But if you want to see all tasks – then don't set any filters.

Quick Filters



- Type text into the search box
- Press Enter
- SEER*DMS will auto-set the appropriate filters and return results.
- Examples:
  - Type Smith, John to search by last name, first
  - Or REC-12345678 to search by Record ID
  - Or 123-45-6789 to search by SSN
- You can enter a single ID or a list of IDs
- You can enter more than one type of search term

When you need to find something quickly, use the search box above the filters. Your cursor will be in that box each time you go to a manager page. Simply enter text and press Enter.

SEER*DMS will auto-set the appropriate filters based on the format of your search text. For example, to search for AFLs by patient name: enter Smith, John into the search box and press Enter to apply the filters. The last and first name filters will be set.

If you enter a Record ID with the REC prefix, the ID filter will be automatically set. Or enter a full Social Security Number, including the hyphens, to quickly search by SSN.

Quick Filters (cont)

- You may use more than one field in the same search.
- In this example, "NA 2009" was entered into the search box.
  - Data Type was auto-set to NA
  - Year was set to 2009.
  - Results: tasks for NAACCR Abstracts with year dx = 2009

You may search on different fields in the same search. In this example, "NA 2009" was entered into the search box. The Data Type was automatically set to NA which is the abbreviation for NAACCR Abstracts. The year was set to 2009. This search returned tasks for NAACCR Abstracts with a 2009 year of diagnosis.

Quick Filters (cont)

- You can type or paste a long list of terms into the search box.
- For example, you could paste a list of IDs that you copied from a Data Search, the AFL Manager, or a report.
- Example:
  - 40 IDs were pasted into the search box.
  - The screen shot on the right shows the results:
    - ID filter was automatically set.
    - Tasks for 40 patient sets and records returned.

You can paste a long list of terms into the search box. For example, you could paste a list of IDs that you copied from a Data Search, the AFL Manager, or a report. Record and Patient Set IDs can be included in the same list.

In this example, 40 IDs were pasted into the search box. The screen shot on the right shows that the ID filter was automatically set and the tasks for 40 patient sets and records were returned.

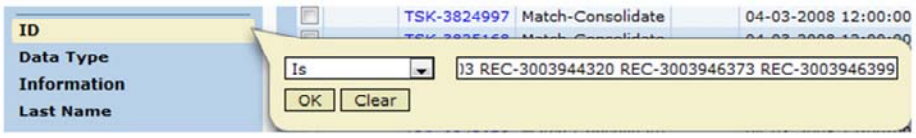
SEER*DMS Filters

- There are different filters for different types of data:
  - ID
  - List
  - List with Search Interface
  - Text
  - Text with Support for Ranges
  - True Date
  - 3-part Date

Each manager page has a long list of filters. You can use the search box to filter quickly, but sometimes you will need to build a more powerful search using the individual filters. There are different filters for different types of data; we will review each of them today.

ID Filter

- Search for one or many IDs
  - You can enter one ID or paste a long list



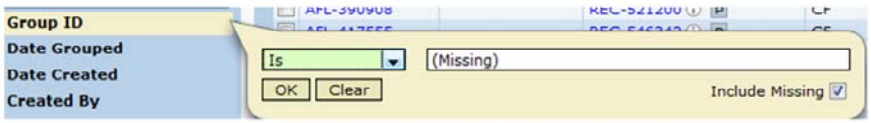
- Use “is not” to exclude certain data based on ID

Use an ID filter to search for items based on a SEER*DMS ID.

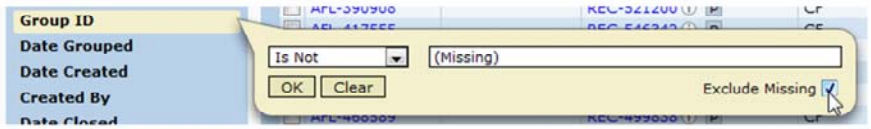
You can paste a long list of IDs into a filter. In this example – about 50 IDs were pasted into the box. You do not see the full list, but the filter will accept any number of IDs.

ID Filter – Include Missing

- Include Missing
  - Check “Include Missing” to auto-enter (Missing) in the search list
  - In this example – AFLs that do not have a Group ID will be *included*.



- Exclude Missing
  - The missing option becomes “Exclude Missing” when “is not” is selected
  - In this example – AFLs without a Group ID will be *excluded*



Some ID filters will include an option to handle blank or missing values. For example, Group IDs are assigned when you add an AFL or Follow-back Need to a group. If the ID is missing then it is not in a group.

You must enter the word Missing in parentheses to search for items that do not have a Group ID. Click the “Include Missing” checkbox to automatically add missing to the search text.

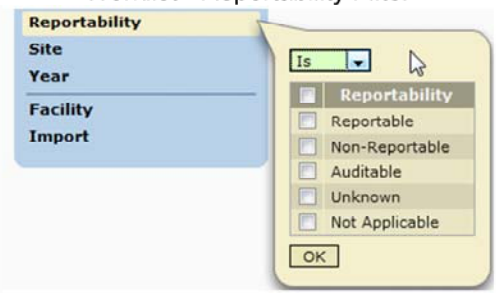
In the first example, AFLs that do not have a Group ID will be included in the results.

If you change the operator to “Is Not” then you can exclude missing. “Is not missing” would return items that have a Group ID.

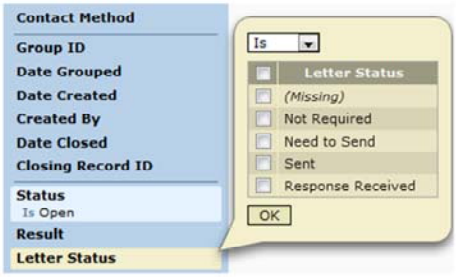
List Filter

- Fields with lookups use a List Filter
- Check one or more values in the list
- You can use the “is” or “is not” operator
- Missing will be included in the list if it is a valid value for the field

Worklist - Reportability Filter



AFL - Letter Status Filter

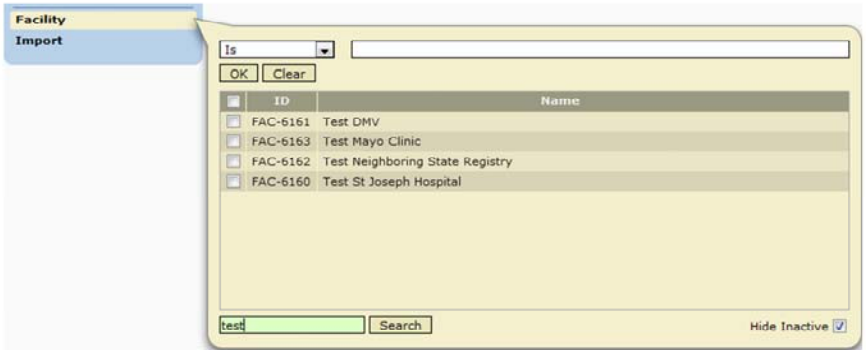


List filters are used for fields that have lookup values. You can select one or more values in the list; and you can either use the “is” or “is not” operator.

Missing will be included in the list of options for some fields. For example, missing is not an option for the reportability filter because the reportability field on a record cannot be missing. But the option is available for Letter Status because that field can have a missing value.

List with Search Interface

- Long lists have a search box at the bottom
- This type of filter is used for:
  - Facility
  - Contacts
  - Users
  - Imports



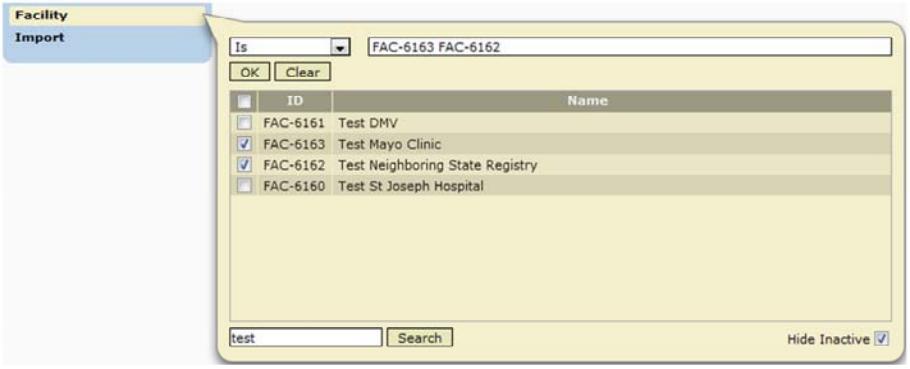
Some lists are too long to show. This example shows the filter for Facility ID. In this filter, you need to specify a list of IDs after the word “Is”. You can type the IDs directly into the box and, in most ID filters, the prefix is optional. You could type “FAC-6163” or just 6163 for the Test Mayo Clinic.

But if you don’t know a facility’s ID then you can use the search box.

In this example, the user searched for facilities with the word “test” in the name. This search is an open search against several fields. In a facility lookup you can search by ID, name, license, or NPI.

List with Search Interface

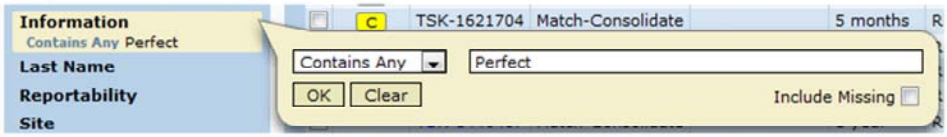
- You can type IDs
- Or use the search box to find the items
- As you check a box, the ID will be auto-entered into the filter list



In this example, the filter will be set to “Is FAC-6163 or FAC-6162” . You can manually enter the IDs; or you can check the boxes in the list. The ID will be added to the list at the top when it is checked.

Text Filter

- String comparison operators can be used to filter text fields
  - Is – exact match
  - Is Not – does not match exactly
  - Starts With – the first characters in the field
  - Ends With – the last characters in the field
  - Contains All – the field contains all words that you enter in the box
  - Contains Any – the field contains at least one of the words that you enter
  - Contains None – the field doesn't contain any of the words that you enter
  - Regex – regular expressions



You can search for a specific word or phrase in a text field like the worklist Information field.

"Contains Any" is the default operator. In this example, worklist tasks will be returned if the Information column contains the word "Perfect".

Text Filter

- Quotes are required if your search string contains blanks
  - In the example below, tasks will be included in the results if the Information column contains the phrase “perfect pat set”.
  - This can be used to find Match-Consolidate tasks for records that are perfect matches to Patient Sets.

Quotes are required if your search string contains blanks.

This example can be used to find worklist tasks for records that are perfect matches to Patient Sets.

Text Filter with Ranges

- Site and year are stored as text
- Special filters were added to support ranges for these fields
- If "Ranges supported" is under the box, you may enter a single value and/or ranges

- Or you can use the "Starts With" operator for ranges like C500-C509

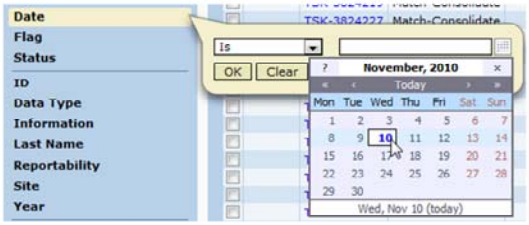
Site and year are two of the most commonly used filters. These data are stored as text in the database, but you will often want to specify a range in your search. Special filters were added to support ranges for these fields.

You may enter a single value or ranges in the box. Separate the entries with a space.

If you are entering a single range then you could use the "Starts With" operator. Starts with C50 is equivalent to C500-C509.

Filter for True Dates

- Dates set by the system are stored as “true” dates.
  - Always a valid date or missing
  - Never has a 9-filled, 0-filled, or 8-filled value
  - You can search by specifying the day (mm-dd-yyyy) or the exact time:
    - 05-21-2010 (mm-dd-yyyy)
    - 05-21-2010 10:15:24AM (mm-dd-yyyy hh:mm:ssAM)
- Enter a value or use the calendar control to set the filter

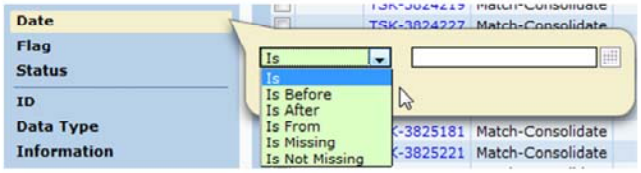


Dates set by the system are stored as true dates. The value of a true date field can be missing or it can be a valid date . It would never have a value that does not exist on the calendar. For example, it would never be 9-filled, 0-filled, or 8-filled.

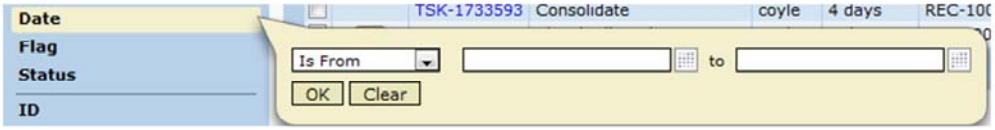
You can type a date into the filter or you can use the calendar control. Click the icon on the right to open the calendar and select a date.

Filter for True Dates

- Date operators that are based on a single value:
  - Is
  - Is Before
  - Is After



- Use “Is From” to specify a range

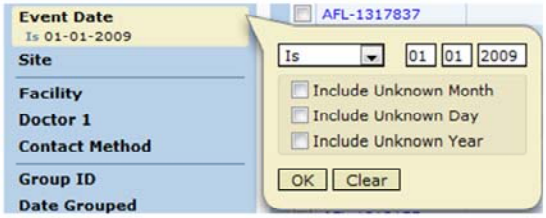


You can set the filter to include data with a specific date; or data with a date that occurs before or after a specific date.

When you select the “Is From” operator, the filter expands and allows you to specify a date range.

Filter for 3-part Dates

- Dates submitted to the registry are stored in 3 parts (month, day, year).
  - May have invalid values or many flavors of null (9-filled, 8-filled, 0-filled)
  - The full date may be unknown (99-99-9999)
  - Or any part of the date may be coded as unknown (99-99-2009)
- 3-Part Date Filter

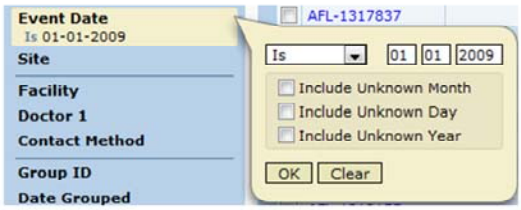


In data submitted to the registry, the date fields are stored in 3 parts. Month, day, and year are separate fields. This is necessary because the dates may have invalid values or they may be coded with all 9's, all 8's or all 0's.

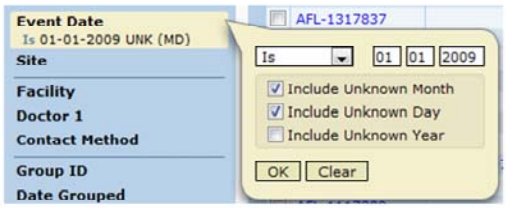
A special filter was designed for 3-part date fields. You can enter a value for month, day, and year; or you can enter a partial date and leave the other parts blank. You can use the checkboxes to indicate that you want to find want to include data with unknown dates in the results.

Filter for 3-part Dates

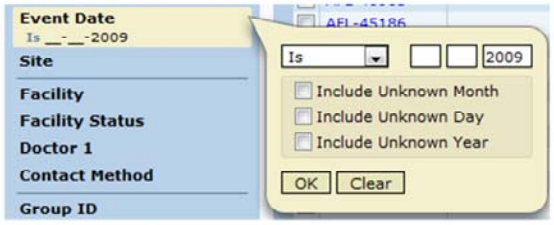
If the date must be 01-01-2009:



If the date can be 01-01-2009 or 99-99-2009:



For any date in 2009, including 99-99-2009

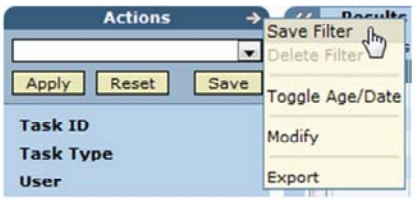


These examples illustrate the use of the "Include Unknown" checkboxes. The first example specifies that the date must be January 1, 2009. Dates with unknown parts will not be included in the results.

The second example is a search for data with an Event Date of January 1, 2009. The results will include data with an event year = 2009. The month may be January or it may be unknown. The day may be 01 or it may be unknown.

The third example searches for data with an event date in 2009. The results will include data with any value for day or month, including unknown.

Saving Filters



- Save time by saving filter settings
- Filter settings & the sort order are saved
- Select "Save Filter" from the Actions menu
- You will be prompted to "Create a New" or overwrite an existing filter
- Enter a name for the new filter

- If you have the *system_administration* permission, you can save it as a public filter so that others can use it

If you tend to use the same filter settings over and over, save them. The value of each filter and the sort order will be saved.

To save your filter settings, select "Save Filter" from the Actions menu.

You will be prompted to Create a New filter; or overwrite an existing filter.

If you are creating a new filter, enter a name. If you have the *system_administration* permission, you can save it as a public filter so that others can use it.

Using Saved Filters

- Filter Menu
  - Blank Line at Top
    - Shortcut to clear all filters
  - Public Filters
    - Filter settings that are available to all users
  - Private Filters
    - Filter settings that you saved and are only available to you
- Select a filter. Results matching that filter will be loaded.

The saved filters are listed in a drop-down menu below the word Actions. The first line is blank. Select the blank line to clear all filters.

The drop-down list includes a list of Public Filters and the private filters that you created.

Saved Worklist Filters

- Home Page – Tasks Summary
  - Shortcuts to worklist
  - Each tab shows counts by task type and flag
- Saved Tab
  - Drop-down menu of Public & Private Filters
  - Go directly to the worklist by clicking any of the task or flag names
    - Example: click Match-Consolidate to view the Match-Consolidate tasks for 2009 Reportable Abstracts

The Home page has four tabs that provide shortcuts to the Worklist. Saved worklist filters are available on the “Saved” tab.

The drop-down menu lets you select from the Public and Private filters. The number of tasks are shown by task type; and then by flag. You can go directly to the worklist by clicking any of the task or flag names.

In this example, click Match-Consolidate to view Match-Consolidate tasks for reportable abstracts with year of diagnosis equal to 2009