# Chapter 19: The Contact List

SEER*DMS maintains system IDs, contact information, and professional affiliations for physicians, representatives of collaborative organizations, and other individuals. These data are used to support numerous tasks and processes; therefore, the maintenance of a current and complete Contact List is essential. The data in the Contact List are used by SEER*DMS to code physician data fields on incoming records. The reporting engine uses contact IDs to identify physicians for follow-back letters, follow-up letters, and reports. Users access the Contact List throughout SEER*DMS to set physician information in data fields and associate organization representatives with data sets or queries. For example, contacts are used to assign a follow-up physician or surgeon during visual editing, to set the data source for an import, and to send queries to organization representatives during follow-back.

There are three system permissions which control access to the Contact List: *contact_add* (create a new contact), *contact_edit* (modify existing contacts), and *contact_view* (read only access to Contact List data).

In this chapter, you'll learn about

- Medical Practitioner and Organization Representatives
- Searching the Contact List
- Adding or Modifying a Contact

## Medical Practitioner and Organization Representatives

SEER*DMS enables you to designate a contact as a "Medical Practitioner" and/or a representative of a facility. The Medical Practitioner designation and facility affiliations must be properly maintained to ensure that current data are available in lookups used throughout SEER*DMS.

- **Medical Practitioner** – You must designate a contact as a Medical Practitioner in order to use the Contacts lookup to enter the ID into a physician or surgeon data field.
- **Facility Affiliations** – A contact may be associated with one or more facilities. In some screens, SEER*DMS will prompt for a representative of a specific facility. For example, when sending follow-back you are required to select a person affiliated with the facility designated for the follow-back bundle.

## Searching the Contact List

Requires system permission: *contact_view*

*To search or view the Contact List:*

1. Select **View** > **Contacts**. Active contacts will be listed in alphabetical order by last name.
2. To sort the list by the data in another column, click one of the underlined column headers (you cannot sort by fields such as address or phone number). To reverse the sort order, click the same header again.

   **Tip**: In SEER*DMS, the sort order of a table is indicated by the column headers. A unique color is used for the sort field's column header. An up arrow will be displayed next to the column name if the table is sorted in ascending order; a down arrow will be displayed if the table is sorted in descending order.
3. To search for a contact by their SEER*DMS ID, enter search text into the **PER-ID(s)** filter. To enter multiple IDs, click the down arrow to expand the filter.

4. To search for a contact by name, National Provider ID (NPI), Physician License number, address, academic degrees, position, or address enter search text into the **Text** filter (partial names and IDs can be used).

5. Use the **Fac-ID(s)** filter to search for contacts based on facility affiliations. Enter an ID or use the lookup to select a facility. You may enter multiple IDs separated by a space.

6. Check **Physicians Only** to search for contacts who are designated as Medical Practitioners.

7. Check **Hide Inactive** to search for contacts who are designated as active; uncheck this box to search for contacts regardless of their status.

8. Click **Apply**.

9. To view a snapshot of the contact's information, click the information icon next to the contact's ID. To modify the Contact's data or view all fields, click the associated **ID** or **edit** link (these links will only be available if you have the *contact_edit* system permission).

10. To send an email message to the Contact, click the **email** link in the **Action** column (this link will only be available if an email address is defined for the Contact).

The T (Type) column identifies contacts designated as Medical Practitioners:

**Medical Practitioner**

The S column displays the Status of each contact:

**Active**

**Inactive** (inactive contacts are displayed if **Hide Inactive** is unchecked)

## Adding or Modifying a Contact

Requires system permission: *contact_add or contact_edit*

Contacts are typically added or modified using the Contact Manager (accessed from the **View** > **Contacts** menu). Physicians can also be added or modified while editing record or patient set data. The Contacts Lookup associated with physician and surgeon data fields enables editors to add new physicians to the Contact List. The newly created ID may then be set in the data field.

The Contacts popup will include an Add button if the user has the *contact_add* permission; the popup will include an edit link next to each contact if the user has the *contact_edit* permission.

*To add or modify a SEER*DMS contact:*

1. Select **View** > **Contacts**. Or if you are editing record or patient set data, click the Contacts Lookup for the appropriate data field.

2. To create a new contact, click **Add** (this button will only be shown if you have the *contact_add* permission). To modify an existing contact, follow the instructions in the *Searching the Contact List* section of this chapter to find the contact. Click the **edit** link associated with the contact.

3. Enter information into the fields identifying the contact (**Title**, **First Name**, **Middle Name**, **Last Name**, **Suffix**, and **Position**). First Name and Last Name are required.

4. Verify that the **Active** box is checked for current Contacts. Uncheck this box to deactivate the Contact. If unchecked, the **Inactive Date** will be set to today's date. SEER*DMS Contacts are permanently maintained in the database. The contact's ID may have been used to code a physician data field. Therefore, you cannot delete a contact but you should deactivate contacts who retired or are no longer affiliated with the registry. SEER*DMS will not allow communications to inactive contacts. However, SEER*DMS does allow you to enter the ID of an inactive Medical Practitioner in a data field.

5. Enter values for the fields in the **Contact Information** section, as described below.

   a. If known, set the appropriate value for preferred contact **Method**. You are required to provide the corresponding information for the selected method, e.g., if e-mail is the preferred method of contact then a valid e-mail address must be provided. The contact method will be used as the default in SEER*DMS communications to this individual. (The user initiating the communication will be able to select an alternate method, if desired.)

   b. If the contact prefers to be contacted at a certain time of day, set it in the preferred contact **Time**. SEER*DMS will display this information on the communication page, if Phone is selected as the method of contact for the communication.

   c. **Phone, FAX, E-mail**, and postal address fields are used for SEER*DMS communications throughout the system, e.g., to send a follow-back query. Enter information for each communication method that you wish to allow for this contact. For example, if you wish to allow SEER*DMS users to send queries to this contact via e-mail then you must specify an e-mail address. SEER*DMS does not provide a method for encrypting e-mail messages, therefore communications that involve confidential data cannot be sent via e-mail. If this contact is to receive confidential information, you must specify a mailing address, fax number, or phone number.

   d. **Supplemental** address – use this data item to store other information related to address such as the name of a place or facility, a nursing home, or the name of an apartment complex.

   e. **Additional** – use this data item as specified by registry policies. For example, it may be used to store information defining a region or island.

   f. You may enter a **Web Address**, if desired.

6. Enter values for the fields in the Roles section, as described below.

   a. Select the appropriate value for **Abstractor**. This field is used in lookups that provide a list of the abstractors and system reports that monitor abstractor activity.

   b. If the contact is an editor, check the **Editor** box. This field is not used by SEER*DMS, but may be used by external reports and queries defined by registry staff. Consult with registry management to determine whether this field is used in your registry.

7. If this contact is a physician, check the **Medical Practitioner Designation** box. This designates the contact as a medical practitioner regardless of whether you provide professional credentials and specialties. Once a contact is saved as a medical practitioner, the designation can never be changed. Contacts with this designation are available in the "Medical Practitioners" lookup that is used to select a physician while editing a record or patient set. *Note: you must designate the contact as a Medical Practitioner in order to enter the contact in a physician or surgeon data field.*

8. To define professional credentials and specialties for a medical practitioner:

a. Enter **Physician License**, **Academic Degrees**, and National Provider ID (**NPI**), if known. Physician License and NPI may be used in automated worklist tasks. Consult registry management to determine whether these fields are required in your registry.

b. To add a specialty, click the **Add Specialties** link. Select a specialty from the drop-down list. This field is not used by SEER*DMS, consult with registry management to determine whether the field is required in your registry.

c. To remove a specialty, click the remove icon.

9. Create a list of the facilities to which this contact is associated. The contact's **Facility Affiliations** must be set to ensure that users can find this contact when using Contact lookups throughout SEER*DMS.

   a. Click **Add Facility** in the **Facility Affiliations** section.

   b. Use the lookup to select a facility.

   c. The primary affiliation will default to the first facility that you added. Check the button in the **Primary** column to change the value as necessary.

   d. To remove a facility from the list, click the remove icon next to the facility.

10. A facility that submits data to the registry may have their own set of IDs for physicians and other persons specified in coded data fields. In some registries, this information is used by SEER*DMS in the automated registry-specific coding task. Use the Facility Identifiers section to define IDs that other facilities may use for this contact.

    a. Click **Add Identifier** in the **Facility Identifiers** section.

    b. Use the lookup to select a **Facility**.

    c. Enter the ID used by the facility in the **Facility Identifier** box.

    d. To remove an entry from this list, click the remove icon next to the Facility Identifier.

11. Use the **Registry-defined Fields** section to define other attributes of any kind. You may use these fields in external reports and utilities that access the database. In some registries, a Registry-defined Field may be used in automated worklist tasks. A field is defined with "key = value" syntax.

    a. Click **Add a field** in the **Registry-defined Fields** section.

    b. Enter text for the Key. The Key must meet specifications defined by the person responsible for the report or query that uses this field.

    c. Enter the appropriate Value as defined by the specifications for the report or query using this field.

    d. To remove an entry from this list, click the remove icon next to the field's **Value**.

12. Click **Save** to save all changes and exit the Contact page.