

Chapter 19: The Contact List

The SEER*DMS Contact List contains identifiers, contact information, registry-defined fields, and professional affiliations for physicians and other individuals. These data are used in support of numerous tasks and processes; therefore, the maintenance of a current and complete Contact List is essential. Data for individual contacts may be updated in the SEER*DMS Contact Manager. Batch updates may be made using Mass Change Imports. Mass change imports are fully documented on the Imports help page within SEER*DMS.

The data in the Contact List are used by SEER*DMS to code physician data fields on incoming records; to identify physicians for follow-back letters, and in reports. Users access the Contact List throughout SEER*DMS to set physician data fields, abstractor fields, and to associate a contact person with an import or follow-back.

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

In this chapter, you'll learn about


- Accessing the Contact List
- Adding or Modifying a Contact
- Data Items for SEER*DMS Contacts
 - Name and Alias
 - Comments
 - Active Flag and Inactive Date
 - Contact Information: Method, Address, and Region
 - Roles (Abstractor and Editor)
 - Physician or Medical Practitioner Fields
 - Facility Affiliations
 - Facility Identifiers
 - Registry-defined Fields

Accessing the Contact List

Requires system permission: *contact_view*

To view a list of the contacts defined in SEER*DMS, select **View > Contacts**. Your user account settings will determine whether all contacts are shown or if inactive contacts are filtered out, by default. The contacts will be displayed in alphabetical order by last name. To sort the list by the data in another column, click one of the underlined column headers (you cannot sort by address). To reverse the sort order, click the same header again.

Use the filters to find a specific contact or to view a list of contacts meeting specific criteria. Instructions for using the filters are provide in *Chapter 3: Using SEER*DMS*. The data columns shown in the Contact Manager are listed below; other fields that are available as filters or in the Contact Editor are described in the remainder of this chapter.

- **T** – Type of contact.  Indicates that the contact is a medical practitioner. This column will be blank for all other contacts.

- **ID** – A unique Contact ID assigned when the contact was added to SEER*DMS. “PER” is used as a prefix for contact IDs. To view a snapshot of the contact’s information, click the information icon ⓘ next to the ID. To open the Contact Editor, click the ID.
- **Name** – The contact’s name is displayed as “last, first middle”. Aliases are supported for contacts and the name filters search against name and alias. However, only the primary name is displayed in the Name column. To view a contact’s alias, click the information icon next to the ID. The contact name is shown with a ~~strike-through font~~ if the contact is inactive; the name is shown in **red type** if they are flagged as “do not contact”.
- **Position** – The contact’s full title or position.
- **NPI** – National Provider Identifier, if available.
- **Address** – The street, city, state, and postal code designated for the contact.
- **Reg** – The value of region assigned to the contact. This column is only displayed if your registry supports multiple regions.
- **Phone** – The phone number and extension provided for the contact.
- **Primary Facility** – The primary facility with which this contact is affiliated.
- **S** – The status field indicating whether the contact is active or inactive.

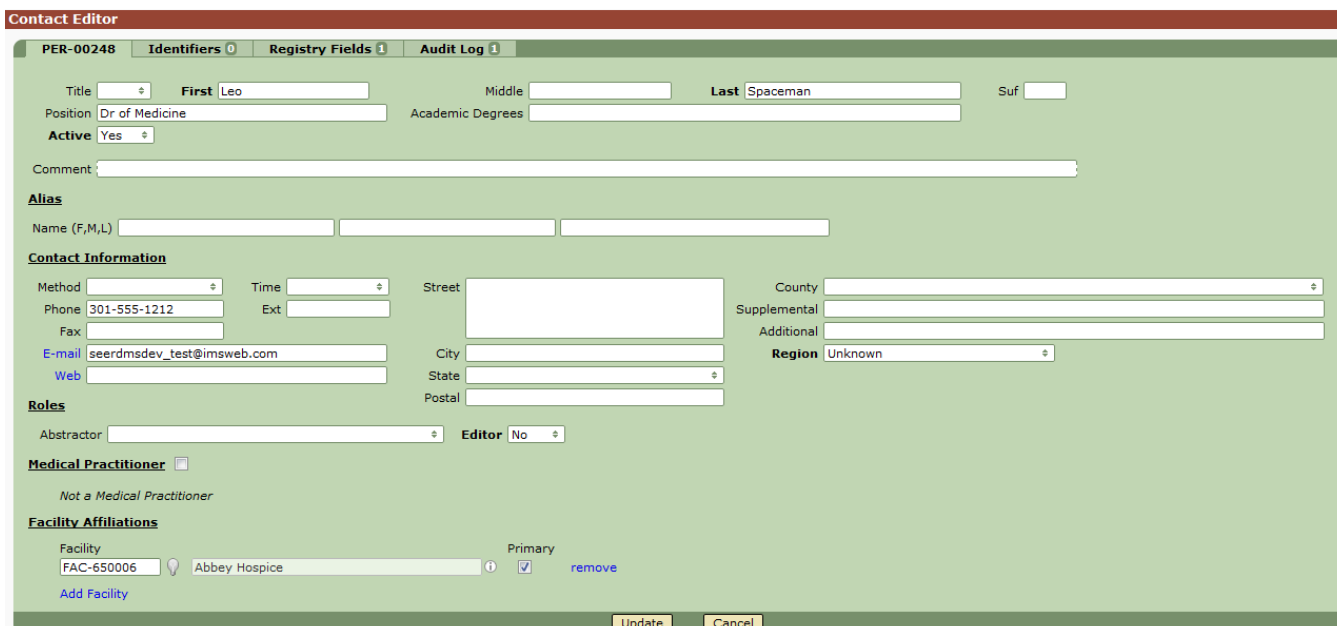
 **Active**

 **Inactive**

Use the Page links to move through the list or use the Filters to search the list.

Adding or Modifying a Contact

Requires system permission: *contact_add* and *contact_edit*



Contact Editor

PER-00248 Identifiers 0 Registry Fields 1 Audit Log 1

Title First Middle Last Suf

Position Academic Degrees

Active

Comment

Alias

Name (F,M,L)

Contact Information

Method Time Street County

Phone Ext Supplemental

Fax Additional

E-mail City Region

Web State

Postal

Roles

Abstractor Editor

Medical Practitioner

Not a Medical Practitioner

Facility Affiliations


Facility Primary [remove](#)

[Add Facility](#)

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.

In the Contacts popup, **Add** will be listed in the **Actions** menu if the user has the *contact_add* permission; an **edit** link will be shown for 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  Lookup for a physician data field.
2. To create a new contact, select **Actions > Add** (this will only be available if you have the *contact_add* permission). To modify an existing contact, use the filters to search the list and click the contact's ID.
3. Set the appropriate values for fields in the Contact Editor, including the Identifiers and Registry Fields tabs. The fields and the way in which they are used in SEER*DMS are discussed in the remaining sections of this chapter.
4. Click **Save** to save all changes and exit the Contact Editor.

Name and Alias

The top section of the Contact Editor page includes a title used as a salutation, first name, middle name, last name, name suffix, the person's full title or position, academic degrees, and an alias.

The suffix and position are not used by SEER*DMS. The salutatory title and academic degrees are included in SEER*DMS mail merge files that include Contact data. These may be used in registry follow-back letters and other correspondence.

In addition to being used in correspondence, the first, middle, and last names are used for manual and auto-coding tasks. The alias fields are used in lookups for manual coding, but are not used in auto-coding algorithms.

- Manual Coding of Data Fields – Several SEER*DMS fields are coded with a SEER*DMS contact ID (e.g., PER-12345). These include physician fields, abstractor fields, and contacts for follow-back and other correspondence. To code a field with a SEER*DMS contact ID, the user opens a lookup and searches the Contact List. If a name is entered as search criteria, the results will include matches to contact name and alias.
- Auto-coding of Data Fields – Physician data fields submitted to the registry are typically stored in coded fields that contain a standard identifier such as the National Provider Identifier or physician license; or an identifier defined by the registry or hospital. However, some organizations send physician names in data files that they submit to the registry. For example, some state death certificate data include physician names. In some registries, SEER*DMS matches the name in a data file against the physician names in the Contact List. If a match is found, the SEER*DMS physician field is auto-coded and the field is assigned a SEER*DMS ID with the PER prefix. Auto-coding is performed by SEER*DMS polishers. The algorithms used by your registry are documented in the Polisher help page. As of version 17, contact aliases are not used for auto-coding.

Comments

The comment may be used to document any information related to the contact. Registry managers will determine the type of information documented in this field. The comment may be used as a search field in lookups and the Contact Manager; comments may also be included in registry-defined reports.

Active Flag and Inactive Date

Some system and registry processes may be restricted to active contacts. For example, some registries prohibit the use of inactive contacts in letters or auto-coding. A preference in your user account gives you the option of hiding inactive contacts, by default, in lookups and the Contact Manager.

In the Contact Editor, the Inactive Date is only shown if the Active box is not checked. The Inactive Date is set to a default value of today's date if the contact is deactivated in the Contact Editor. The date may be modified to reflect the date that the contact officially became inactive due to an event such as retirement. The Inactive Date is not automatically set when the Active flag is modified via Mass Change Imports. If a value is required then it should be set in the same import that deactivates the Contacts.

SEER*DMS Contacts are permanently maintained in the database because 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 retire or are no longer affiliated with the registry.

SEER*DMS does allow you to enter the ID of an inactive physician, abstractor, or contact in a data field. However, registry staff may create edits to prevent you from using an inactive contact or to warn you when one is used in a data field.

Contact Information: Method, Address, and Region


The contact information section includes the method of contact, postal address, phone number, email address, web address, and region.

The **Method** field defines the contact's preferred method of contact. In some registries, this field determines whether the contact is included on follow-back phone lists or in follow-back letters. Registries may choose to exclude contacts from reports and letters if the method is set to "do not contact". You are required to provide information related to other methods of contact, e.g., if letters is the preferred method of contact then a postal **address** must be provided. If the contact prefers to be contacted at a certain time of day, it may be specified in the preferred contact **Time**.

A field to define **Region** will be displayed if your registry supports multiple regions. This field is used to facilitate the searching of the Contact list in lookups and may be used by registry programs that create contact lists or letters. It is rare, but possible, for a contact's region to be used in system polishers or import routines. For example, in one registry the region defined for a physician determines the record's region when other fields are not available.


The **Supplemental Address** and **Additional** data items may be used to store other information related to the contact's address such as a building name. These fields are included in SEER*DMS mail merge files, but are not used in any other way by the system. They may be used by registry-defined programs that create contact lists and letters. Registry policies dictate the type of data that are stored in these fields.

Roles (Abstractor and Editor)

In the Patient Set and record editors, Abstractor ID fields can be set to a Contact ID by using a  lookup. The lookup list includes all Contacts who are designated as an **Abstractor**, that is, their Abstractor field is not set to blank or *Not an Abstractor*. The Abstractor field is also used by SEER*DMS and registry reports that monitor abstractor activity.

In some registries, the Contact list includes SEER*DMS editing staff. The **Editor** 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.

Physician or Medical Practitioner Fields

If the contact is a physician, the **Medical Practitioner** box must be checked. This designates the contact as a medical practitioner regardless of whether professional credentials and specialties are provided. Once a contact is saved as a medical practitioner, the designation can never be changed. Contacts with this designation are available in the physician  lookups that are 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.*

The following fields are only displayed for Medical Practitioners:

- **License** – This is the state medical license number. Physicians may be identified by license number in data submitted to the registry. SEER*DMS will auto-code the SEER*DMS Contact ID in physician fields based on the license number. However, most registry auto-coding algorithms give a preference to NPI values. In some registries, a manual task is created if the license and NPI value conflict. The registry algorithms for auto-coding physician fields are documented on the Polisher help page.
- **NPI** – The National Provider Identifier is a standard unique identifier for health care providers. NPI data are stored in the NPI Registry maintained by the US Department of Health and Human Services. Physicians are frequently identified by NPI values in data files submitted to the registry. SEER*DMS auto-codes the SEER*DMS Contact ID in physician fields based on the NPI value submitted in abstracts and other data. NPI values may also be included in extract files created by the registry and submitted to other organizations.
- **NPI Date** – The date that the NPI Registry was last updated for this provider. This date is not used by SEER*DMS. Registry staff may use this field in order to maintain complete and current NPI values.
- **Specialties** – A list of Specialties can be defined for a physician. This list is used by some registries in registry edits. Consult with registry management to determine whether and how the list is used by your registry. Select all specialties that apply from the drop-down list. To remove a specialty, uncheck it.

Facility Affiliations

A contact may be associated with one or more facilities. These associations can be defined in the Facility Affiliations section. The use of these data varies by registry.


If a Contact is defined for an import, SEER*DMS validates that the Contact is affiliated with the import facility. If your registry assigns a Contact to imports then your registry should maintain Facility Affiliation data for abstractors and other contacts who would be associated with imports.

Primary and Alternate Contacts are defined for facilities in some registries. These fields can only be set to Contacts who are affiliated with that facility.

In some registries, the Facility Affiliations are used when SEER*DMS sets physician fields in a CTC-based AFL. In other registries, the physician fields are never assigned in CTC-based AFLs. If the fields are set, SEER*DMS attempts to assign the AFL doctor fields to physicians listed in the Medical Practitioner section of the CTC page. A physician will be coded in an AFL doctor field if the physician's entry in the Contact List has an affiliation with the AFL facility.

It is also possible that the Facility Affiliation data are used by the registry's abstracting tool or other external processes. Registry management must determine whether facility affiliations need to be maintained for abstractors, physicians, and/or other contacts.


*To define Facility Affiliations for a SEER*DMS contact:*

1. Click **Add Facility** in the Facility Affiliations section.
2. Use the  lookup to select a facility.
3. 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.
4. To remove a facility from the list, click the remove link next to the Primary column.

Facility Identifiers

Facility Identifiers are codes that other facilities may use to identify this contact. For example, a hospital that submits data to the registry may have their own ID for a physician or abstractor. The hospital may include that ID in data that they submit to the registry. SEER*DMS will auto-code the SEER*DMS Contact ID if the hospital's identifier is listed as a Facility Identifier.

*To add or modify a Facility Identifier for a SEER*DMS contact:*

1. Select the **Identifiers** tab.
2. Click **Add Identifier**.
3. Use the  lookup to select a Facility that the Identifier is Provide by.
4. Enter the Code or ID used by the facility for this contact.
5. To remove an entry from the list, click the remove link next to the Code or ID.

Registry-defined Fields

Use the **Registry-defined Fields** to define other attributes of any sort. You may create fields that are then used in external reports or registry applications that access the SEER*DMS database. In many registries, Registry-defined Fields are used in SEER*DMS to implement registry-specific logic in polishers, automated workflow tasks, and other processes. Registry-defined fields are also used in the Contact Manager filters.

A field is defined with "key = value" syntax. To create a registry-defined field:

1. Under the **Registry Fields** tab, click **Add a field**.
2. If defining a new variable, simply enter text for the **Key**. The Key must meet specifications defined by the person responsible for the report or query that uses this field. Or, use the lookup to select an existing key.
3. Enter the appropriate **Value** as defined by the specifications for the report or query using this field.
4. To remove an entry from this list, click the remove link next to the field's Value.