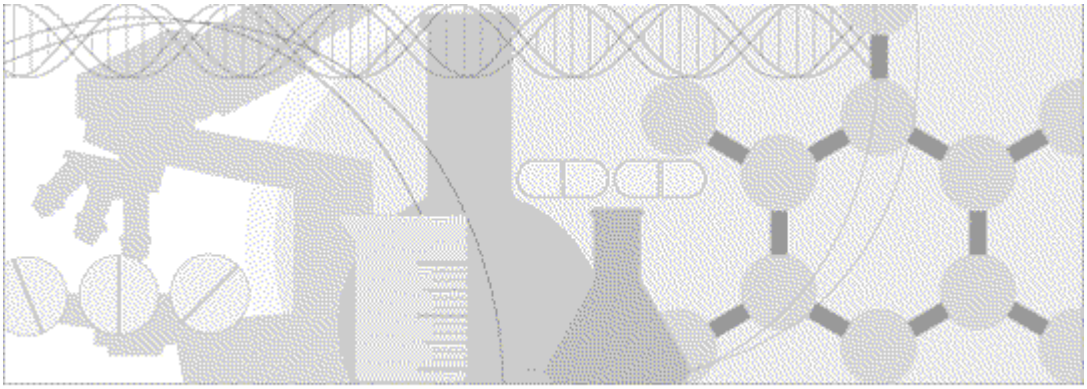
Quick Start for Coders and Approvers

Central Coding™ 3.0 SP1



ORACLE

Part Number: DC-CCD30-004-010

Copyright © 2009 - 2011, Oracle and/or its affiliates. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software -- Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This documentation may include references to materials, offerings, or products that were previously offered by Phase Forward Inc. Certain materials, offerings, services, or products may no longer be offered or provided. Oracle and its affiliates cannot be held responsible for any such references should they appear in the text provided.

Contents

Getting started 1

Logging in to the Central Coding application 1
Logging out of the Central Coding application 1
Changing your password 1
Getting help 2

Coding your coding requests 3

Coding an item 3
Resending an undeliverable request 4

Working with queries 5

Status icons in the user interface 5
Viewing queries and their statuses 7
Creating a query from the Coding Requests or Approvals page 8
Creating a query from the coding browser 9
Adding a flag to a request 10
Removing a flag from a request 10

Approving your coding requests 11

Approving a request 11
Disapproving a request 11

Viewing the job log 12

Viewing the job log for a specific adapter 12

Keyboards shortcuts 13

Getting started

Logging in to the Central Coding application

1 Launch the Central Coding application.

2 In the **User Name** field, type your system login name.

3 In the **Password** field, type your login password.

This password is used in conjunction with your user name to authenticate you to the system.

4 Click **Login**.

You are prompted to change your password. Proceed to step 5.

> **Note:** You are always prompted to change your password the first time you log in to the Central Coding application.

5 In the **User Name** field, type your system login name.

6 In the **New Password** field, type your new password.

7 In the **Confirm Password** field, retype your new password.

8 Click **Login**.

Logging out of the Central Coding application

1 In the **Main window**, click **Logout**.

A confirmation dialog box appears.

2 Click **OK**.

Changing your password

1 In the **Main window**, click **My Profile**.

The My Profile dialog box appears.

2 Click **Change password**.

The Change Password dialog box appears.

> **Note:** This link appears only when an administrator sets the account type to **SuperUser** or **User**. It does not appear if the account type is **Machine**.

3 Complete the following fields:

- **User Name**—Your system log in name. This field is read-only.
- **Old Password**—The log in password you are currently using. REQUIRED.
- **New Password / Confirm Password**—The new log in password you want to use. REQUIRED.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Note: Passwords can be from 1 to 32 characters. For security reasons, Oracle recommends using a combination of letters and numbers and a minimum of 6 characters. Passwords are case-sensitive. Passwords cannot be reused for a configurable amount of time.

4 Click **Save**.

Getting help

The Central Coding application provides extensive online help to give you easy access to procedural, conceptual, and detailed task-related information.

- **Central Coding Help Center**—Provides access to the Central Coding documentation from the user interface.

  To open the Central Coding Help Center page, click the **Help text** link (Help) in the top right corner of the main application window. The page appears in a second browser window that you can resize and move for easy viewing.

- **Page-level help**—Describes the page function(s) and fields for each page in the user interface.

  To open a help page, click the **Help** link ( ) button in the top right corner of any page or dialog box. The page-level help is part of the *User Guide*. The page-level help opens in a second browser window that you can resize and move for easy side-by-side viewing with other pages.

  Note: The popup blocker in your browser may prevent the help pages from opening. If this occurs, either turn off the popup blocker or press the Ctrl key before you click the Help button.

- **Hover Help**—Provides a brief description of what the selected menu item, action, button, or icon does, what, if any, keyboard shortcuts exist for the item, and displays the E2B data element if it is a field that appears in an E2B report.

  To display hover Help hold your mouse pointer over the item and the hover Help text appears in a popup window. When you move your mouse pointer off the item, the hover Help disappears.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Coding your coding requests

Coding an item

1 Select a request.

2 Do one of the following:

- To code the item and propagate the value, click the verbatim.
- To code the item without propagating the value, select **Actions > Code Single**.

3 Do one of the following:

- To code an item in the coding browser in Browse mode, expand each level of hierarchy as needed until you find an acceptable term and code value.
- To code an item in the coding browser in Search mode, continue to step 4.

4 In the **Search for** field, type the text that you want to code.

5 In the **In field** field, select the hierarchy level of the dictionary that you want to search.

6 To display all the matched terms in the coding browser, select **Return All Matches**.

7 Do one of the following:

- To run a search for matches that start with the text entered in the **Search for** field, click the **Starts With** button.
- To run a search for matches that contain the text entered in the **Search for** field, click the **Contains** button.
  - Optionally, to display only terms that match the verbatim in its entirety, select the **Contains whole words only** option.
- To run the autocode algorithm associated with the request, click the **Auto** button.
  - Optionally, if you want the system to ignore the step in the coding algorithm that looks for an auto-suggested code value, select the **Exclude Auto Suggestion step** option.

8 Optionally, if you are coding a verbatim at the Trade Name level in the WHO-DD dictionary, select the link in the **Drug Code** or **Trade Name** column to display the Medicinal Product information for the verbatim. The Medicinal Product information can further clarify which code is appropriate for the verbatim.

9 Select the **Use as Auto Suggestion** option if you want the system to use the new code value you accept for all new incoming requests with the same verbatim, dictionary, coding definition, and context information.

10 Click the **Accept** link to the left of the code value that you want to accept.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Resending an undeliverable request

1 Select **Coding Requests**.

The Coding Requests page appears.

2 Select one or more requests with a delivery status of **Undeliverable, retry** ( ).

View the hover Help over the icon to view the reason the delivery was unsuccessful.

3 Select **Actions > Retry Delivery**.

The delivery status of the request changes to **Completed, awaiting delivery** ( ).

All requests with a coding status of **Completed, awaiting delivery** ( ) are available for delivery to the InForm application. The job queue picks up the requests and delivers them to the InForm application at the next scheduled time.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Working with queries

Status icons in the user interface

You can view the status of a coding request or a query in the Central Coding user interface by viewing the associated icon. The following is a complete list of the status icons for coding requests and queries, and the icons' associated meanings.

Icon	Status	Description
Coding requests		
	Uncoded	The item is not coded.
	Partially coded	If coding to a primary autocode target and a secondary autocode target, the application found a single match for the primary target and multiple matches for the secondary target. You must manually select the code you want to use.
	Needs review	The request is successfully autocoded but must be reviewed.
	Recode	The request must be recoded. Requests with this status have been disapproved by an approver. By default, the disapproval reason appears in a note associated with the request.
	Coded, awaiting approval	The request is successfully coded but needs an approval.
	Completed, awaiting delivery	The request is successfully coded and approved, but is not yet delivered to the source application.
	Autocoded	The request was successfully autocoded.
	Completed, delivered	The request is successfully coded, approved, and delivered to the source application.
	Undeliverable, retry	The request may be successfully coded and approved, but the Central Coding application cannot deliver the request to the source application because of a communication issue.
Queries		
	Open/Open Pending	Entered in the Central Coding application by a Central Coding user to be addressed by an InForm user. • A query can enter the Open state if it is manually created by a Central Coding user or automatically created by the Central Coding application using the Allow Auto Query setting. • A query can enter the Open Pending state if the query is opened in the Central Coding application, but the change has not yet been transferred to the InForm application.
	Candidate	Entered by a Central Coding user. A Central Coding administrator can assign a Candidate query to the Open or Deleted state.
	Answered	Open query that was addressed by an InForm user.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Icon	Status	Description
	Closed/Closed Pending	Query on a verbatim that was successfully coded. • A query can enter the Closed state if it is manually closed by a Central Coding user or automatically closed by the Central Coding application using the Allow Auto Close Query setting. • A query can enter the Closed Pending state if the query is closed in the Central Coding application, but the change has not yet been transferred to the InForm application.
	Deleted	Candidate query that was deleted by a Central Coding user with the Issue Candidate Query right. **Note:** Only queries in the Candidate state can be deleted.
	Undeliverable, retry	The Central Coding application cannot deliver the query data to the source application because of a communication issue. The Central Coding application will retry delivery when the next Get Requests job runs.
	Undeliverable, cannot retry	The Central Coding application cannot deliver the query data to the InForm application because the form is unable to accept queries. This could happen if a form is locked or deleted in the InForm application. As a result, the query is closed in the Central Coding application.
Note: For each query, the hover Help displays the state of the query, the state of the query's delivery process to the InForm application, and the reason associated with the query.		

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Viewing queries and their statuses

1 Click **Queries**.

The Queries page appears.

2 Optionally, filter the list of queries to identify the items that you want to view, and click **Apply**.

You can do any or all of the following:

- In the **Study** filter field, select a study for which to view the associated queries.
- In the **Status** filter field, select one of the following:
  - **All**—Displays requests associated with queries that are assigned any status.
  - **Candidate**—Displays requests associated with queries that are assigned a status of **Candidate**.
  - **Opened**—Displays requests associated with queries that are assigned a status of **Open**.
  - **Answered**—Displays requests associated with queries that are assigned a status of **Answered**.
  - **Closed**—Displays requests associated with queries that are assigned a status of **Closed**.
  - **Deleted**—Displays requests associated with queries that are assigned a status of **Deleted**.
  - **Send Failed**—Displays requests associated with queries that are assigned a status of **Undeliverable**, retry or **Undeliverable, cannot retry**.
- In the **Issuer** filter field, select the name of a user to view all queries that the user entered in the Central Coding application.
- In the **Form** filter field, select a form to view all queries that were entered on items on that form.

For more information about the query status icons and their descriptions, see *Status icons in the user interface* (on page 5).

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Creating a query from the Coding Requests or Approvals page

1 Select **Coding Requests**.

The Coding Requests page appears.

or

Select **Approvals**.

The Approvals page appears.

2 Select a verbatim.

3 Select **Actions > Create Query Single**.

or

Click **Create Query**.

The Create Query dialog box appears.

4 Enter the following information:

a From the **Reason** drop-down list, select a reason for creating the query.

Note: The options that appear in the Reason drop-down list are configured by an administrator.

or

Click **Other**, and specify the reason for creating the query in the Other text box.

b Optionally, click the **Copy** icon ( ) to copy the reason from the **Reason** drop-down list to the **Other** field.

c Optionally, if you have the required rights, click **Add as standard reason** to add the reason to the standard list that appears in the **Reason** drop-down list in the Create Query dialog box.

d In the **Query State** field, click:

- **Open**—Creates the query in the Open state.
- **Candidate** (if you have the required rights)—Creates the query in the Candidate state.

For a description of each query state, see *Viewing queries and their statuses* (on page 7).

e Optionally, if you have the required rights, deselect **Auto Close Query upon Coding Complete** to indicate that you do not want the Central Coding application to automatically close the query if the verbatim successfully coded, or if it is deleted in the InForm application. If you deselect this option, you must manually close all queries.

f Optionally, if you have the required rights, deselect **Add to auto query list** to indicate that you do not want the Central Coding application to associate the query with every new instance of the associated verbatim that is entered in the Central Coding application.

The query appears for each instance of the verbatim in the study group.

Note: If you create a query on a hidden verbatim, an error may occur, and you must create the query manually in the InForm application.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Creating a query from the coding browser

1 Select **Coding Requests**.

The Coding Requests page appears.

or

Select **Approvals**.

The Approvals page appears.

2 Select a request.

3 Select **Actions > Code**.

or

Click the **Code** button.

or

Click the **Verbatim** link.

The Coding Browser dialog box appears. By default, the coding browser opens in Search mode. The dictionary elements that appear are configured for the coding definition in use.

4 Click the **Create Query** link.

The Create Query dialog box appears.

5 Enter the following information:

a From the **Reason** drop-down list, select a reason for creating the query.

> **Note:** The options that appear in the Reason drop-down list are configured by an administrator.

or

Click **Other**, and specify the reason for creating the query in the Other text box.

b Optionally, click the **Copy** icon ( ) to copy the reason from the **Reason** drop-down list to the **Other** field.

c Optionally, if you have the required rights, click **Add as standard reason** to add the reason to the standard list that appears in the **Reason** drop-down list in the Create Query dialog box.

d In the **Query State** field, click:

- **Open**—Creates the query in the Open state.
- **Candidate** (if you have the required rights)—Creates the query in the Candidate state.

  For a description of each query state, see *Viewing queries and their statuses* (on page 7).

e Optionally, if you have the required rights, deselect **Auto Close Query upon Coding Complete** to indicate that you do not want the Central Coding application to automatically close the query if the verbatim successfully coded, or if it is deleted in the InForm application. If you deselect this option, you must manually close all queries.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

f Optionally, if you have the required rights, deselect **Add to auto query list** to indicate that you do not want the Central Coding application to associate the query with every new instance of the associated verbatim that is entered in the Central Coding application.

The query appears for each instance of the verbatim in the study group.

Note: If you create a query on a hidden verbatim, an error may occur, and you must create the query manually in the InForm application.

Adding a flag to a request

1 Select **Coding Requests**.

The Coding Requests page appears.

or

Select **Approvals**.

The Approvals page appears.

2 Select a request.

3 Click **Actions > Add Flags**.

The Please select flags to add dialog box appears.

4 Select the checkbox for the flag to associate with the request.

5 Click **Accept**.

Removing a flag from a request

1 Select **Coding Requests**.

The Coding Requests page appears.

or

Select **Approvals**.

The Approvals page appears.

2 Click the flag icon to delete.

The Remove Flag confirmation dialog box appears.

3 Click **OK**.

 Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Approving your coding requests

Approving a request

1 Select **Approvals**.

2 In the **Show** filter field, select **To Do**, and click **Apply**.

3 Select one or more requests.

4 To approve the request and propagate its status, select **Actions > Approve**.

or

To approve the request without propagating its status, select **Actions > Approve Single**.

Disapproving a request

1 Select **Approvals**.

2 In the **Show** filter field, select **To Do**, and click **Apply**.

3 Select one or more requests.

4 Do one of the following:

- To disapprove the request and propagate its status, select **Actions > Disapprove**.
- To disapprove the request without propagating its status, select **Actions > Disapprove Single**.

A dialog box appears.

5 In the **Reason** field, specify a reason for disapproval.

6 Optionally, to attach a note that contains the reason for disapproval to the coding request, select the **Add as notes** checkbox.

The coding statuses of the requests change to **Recode** ( ). The disapproved requests are returned to the coder's queue, and the disapproval reason appears in a note attached to the coding request.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Viewing the job log

Viewing the job log for a specific adapter

1 Select **Administration > Management > Studies**.

2 Click the **Results Exists** icon ( ) in the **Get Verbatims** or **Return Codes** column for the adapter whose job log you want to view.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Keyboards shortcuts

To facilitate rapid data entry, you can use keyboard shortcuts instead of using the mouse to select folder pages, actions, and buttons. Keyboard shortcuts appear next to the corresponding command in the hover Help text. Information about additional keyboard shortcuts is also included in the page-level Help. For more information, see *Getting help* (on page 2).

Date or search fields	
Shortcut	Description
=	**Current date**—Populates a date field with the current date.
*	**Asterisk**—Matches any sequence of characters when used in a search field. For example, if you type ***aceta*** in the Verbatim field, the search returns any word that contains **aceta**, such as acetaminophen.
%	**Percent sign**—Matches any sequence of characters when used in a search field. For example, if you type **%aceta%** in the Verbatim field, the search returns any word that contains **aceta**, such as acetaminophen.

Admin folder	
Shortcut	Description
Alt+1	Opens the Users page, from which you can view information about the users that are defined in the application, and activate, deactivate, and terminate users.
Alt+2	Opens the Roles page, from which you can view information about the roles defined in the application, and remove roles from the application.
Alt+3	Opens the Work Teams page, from which you can view information about the work teams defined in the application, and remove work teams from the application.
Alt+4	Opens the All Requests page, from which you can view the complete list of coding requests in the Central Coding application, view the work teams assigned to requests, and run an audit history report for a request.
Alt+5	Opens the Study Information page, from which you can view and manage information about the adapters in the application and their associated studies.
Alt+6	Opens the Study Group List page, from which you can create and edit study groups.
Alt+7	Opens the View Job Log page, from which you can view detailed information about the get verbatims or return codes jobs, and to stop a running job.
Alt+8	Opens the Locks page, from which you can view the list of items in the application that are locked.
Alt+9	Opens the Adapters page, from which you can view information about the InForm Adapters that are defined in the application.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.

Admin folder	
Shortcut	Description
Alt+0	Opens the Reconciliation Options page, from which you can view the default selection options that appear on the Reconcile Verbatims page, which you use to reconcile the verbatims after running impact analysis.
Ctrl+1	Opens the System Configuration page, from which you can view the authentication, application, lock management, and impact analysis configuration options.
Ctrl+2	Opens the System Information page, from which you can view version information for the Central Coding product, the Oracle database, and the Windows system. You can also view copyright information for the software products used with the Central Coding application.
Ctrl+3	Opens the Query Standard Reason List page, from which you can manage the reasons that appear in the Reason drop-down list in the Create Query, Cancel Query, Close Query, and Reissue Query dialog boxes.
Ctrl+4	Opens the Coding Flags page, from which you can view the definitions associated with each coding flag.

Copyright © 2011 Oracle and/or its affiliates. All rights reserved.