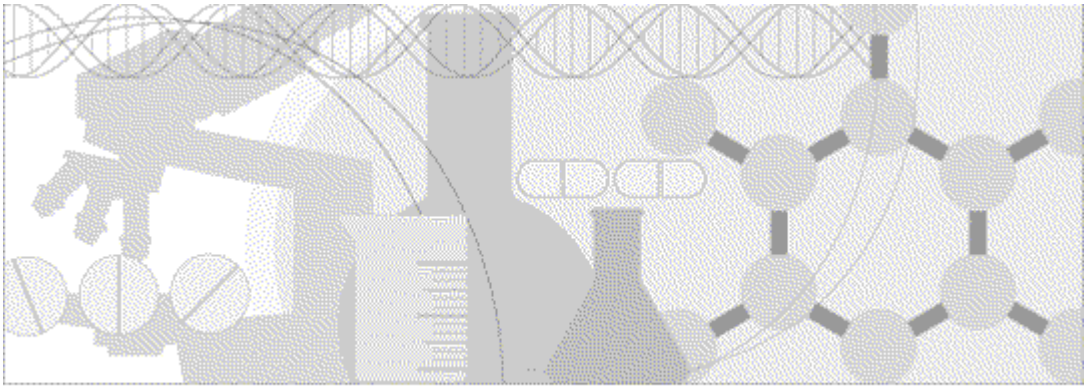
Quick Start for Coders and Approvers

Oracle® Health Sciences Central Coding
Release 3.1



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Getting started

Launching the application

Your administrator sets the method of opening the Central Coding application. By default, you open the application by entering the following command in your browser:

- In an environment with native authentication: **http://[server name]/[Coding virtual directory name]**

  Note: The **Coding virtual directory name** is the unique name for the application server where the Central Coding software is installed. This name is defined during installation.

- In a single sign-on environment, the URL is provided by Oracle.

Logging in and out of the application

1 Launch the Central Coding application.

The Login page appears.

2 To log in:

a Enter your login name and password.

b Click **Login**.

If you are logging in to the application for the first time, you might be prompted to change your password:

a In the **User Name** field, enter your login name.

b In the **New Password** and **Confirm Password** field, enter your new password.

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.

c Click **Login**.

The main application screen appears in a separate browser window and displays the folders you are allowed to access based on your user profile, role, and collection of rights.

Note: The Central Coding application is configured to allow a defined number of unsuccessful login attempts. If you exceed this number, you are locked out of the system. See your administrator for resetting your password.

3 To log out:

a On the main page, click **Logout**.

A confirmation dialog box appears.

b Click **OK**.

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Getting started in an environment migrated to Oracle SSO authentication

If the Central Coding application has been migrated from an environment with native authentication to an Oracle SSO environment, the first time you log in with your new SSO credentials you are prompted to link your existing user account to the SSO environment:

- If you had a Central Coding user account prior to migration, enter your credentials in the **Former User ID** and **Former Password** fields, and click **Link**.

  Note: If you forgot your former password, contact an administrator to reset it.

  The Central Coding application migrates your role and work team assignments to the Oracle SSO environment.

- If you did not have a user account in Central Coding prior to migration, click **Cancel** to return to the login page and log in as a new user.

  If you log in as a new user even though you had a user account prior to migration, your roles and work team assignments are not migrated to the new environment. If this happens, contact an administrator to reset your status, and then log in again and enter the credentials of your former user account to link it to your SSO user account.

Changing your password in an environment with native authentication

1. Log in to the Central Coding application.
2. On the main page, click **My Profile**.

   The My Profile dialog box appears.
3. Click **Change password**.

   The Change Password dialog box appears.
4. Complete the following fields:

   - **Old Password**—The login password you are currently using.
   - **New Password / Confirm Password**—The new login password to use.

   Passwords can be from 1 to 32 characters. For security reasons, Oracle recommends using a combination of letters and numbers and a minimum of 8 characters. Passwords are case-sensitive and cannot be reused for a configurable amount of time.
5. Click **Save**.

Changing your password in an Oracle SSO environment

1. On the login page, click **Forgot Password**.

   The Forgot Password page appears.
2. In the **User Login** field, enter your user name.
3. Click **Next**.

   The Answer Challenge Questions page appears.
4. Enter your responses to the challenge questions.

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5 Click **Next**.

The Select a new password page appears.

6 Enter a new password.

7 Click **Save**.

Getting help

The Central Coding application includes the following online Help options:

- Central Coding Documentation—Click the Help link ( ) in the top right corner of the main page.
- Page-level Help—Click the Help button ( ) in the top right corner of the page or dialog box.

  If the popup blocker in your browser prevents the Page-level Help from opening, turn off the popup blocker or press the Ctrl key before you click the Help button.
- Hover Help—Point to a menu item, action, button, or icon.

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Coding your coding requests

Coding a single item

Use this procedure to code a single verbatim against a dictionary using Search mode. Alternatively, click the Browse ( ) icon from the coding browser to examine the target coding dictionary from level to level, and select the relevant term.

You access coding requests from the Coding Requests or Approvals page.

1 Select a request, and then select **Actions** > **Code Single**.

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

2 In the **Search for** field, enter the text to code.

3 In the **In field** field, select the hierarchy level of the dictionary to search.

4 For the application to return more than 200 matched terms, select **Return All Matches.**

If this option is unavailable, contact your administrator.

5 Start the search.

- To run a search for matches for the text entered in the **Search for** field, click the **Starts With** or **Contains** button, or select **Contains whole words**.
- To run the autocode algorithm for the request, click the **Auto** button.

  To ignore the step in the algorithm that searches previous code values that were marked as auto-suggestions, select **Exclude Auto Suggestion step**.

Dictionary entries that match the search criteria appear in the display area.

6 To display additional Medicinal Product information for the verbatim when coding using the WHO-DD dictionary type, select the link in the **Drug Code** or **Trade Name** column.

7 Click the **Accept** link for a code value.

If the verbatim was previously coded, the Recode Reason dialog box appears.

a In the **Reason** field, specify a reason for recoding the verbatim.

b To indicate the reason should not appear as a note attached to the coding request, deselect **Add as notes**.

c Click **Accept**.

The application saves the code value for the selected coding request.

Coding an item and propagating the value

Use this procedure to code a single verbatim and propagate the code value to other matching verbatims using Search mode. Alternatively, click the Browse ( ) icon from the coding browser to examine the target coding dictionary from level to level, and select the relevant term.

You access coding requests from the Coding Requests or Approvals page.

1 Click the **Verbatim** link for a request.

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

2 In the **Search for** field, enter the text to code.

3 In the **In field** field, select the hierarchy level of the dictionary to search.

4 For the application to return more than 200 matched terms, select **Return All Matches.**

If this option is unavailable, contact your administrator.

5 Start the search.

- To run a search for matches for the text entered in the **Search for** field, click the **Starts With** or **Contains** button, or select **Contains whole words**.
- To run the autocode algorithm for the request, click the **Auto** button.

  To ignore the step in the algorithm that searches previous code values that were marked as auto-suggestions, select **Exclude Auto Suggestion step**.

Dictionary entries that match the search criteria appear in the display area.

6 To prevent the Central Coding application from using the code value you accept for new requests with the same verbatim, dictionary, coding definition, and context information, deselect **Use as Auto Suggestion**.

7 To display additional Medicinal Product information for the verbatim when coding using the WHO-DD dictionary type, select the link in the **Drug Code** or **Trade Name** column.

8 Click the **Accept** link for a code value.

If the verbatim was previously coded, the Recode Reason dialog box appears.

a In the **Reason** field, specify a reason for recoding the verbatim.

b To indicate the reason should not appear as a note attached to the coding request, deselect **Add as notes**.

c Click **Accept**.

The application propagates the selected code value to other uncoded requests with the same verbatim, coding definition, and context information.

Clearing code values

Use this procedure to remove the code value for:

- A verbatim.
- Other delivered or undelivered coded requests with the same verbatim, code value, coding definition, and context information.

The code value is cleared only for coded requests that are associated with unlocked studies.

Clearing the code values in the Central Coding application clears the corresponding code values in the source application. If the source application is InForm, the Central Coding application also clears approval details such as the approver name and approval date.

You access coding requests from the Coding Requests or Approvals page.

1 Select one or more requests.

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2 Select **Actions** > **Clear Code** to clear the code value for a single request.

or

Select **Actions** > **Clear and Propagate** to clear the code value for multiple requests.

The Clear Code Reason dialog box appears.

3 In the **Reason** field, specify a reason for clearing the code value, or for propagating the clearing of the code value to similar coded requests.

4 To indicate the reason should not appear in a note attached to the coding request, deselect **Add as notes**.

5 Click **Accept**.

The coding status of the requests changes to **Uncoded** ( ).

Resending an undeliverable request

Use this procedure to change the status of a request with a failed delivery to the source application to **Completed, awaiting delivery**. Changing the status allows the request to be picked up by the job queue so that it can be resent to the source application at the next scheduled time.

1 Select **Coding Requests**.

The Coding Requests page appears.

2 Select a request with a delivery status of **Undeliverable, retry** ( ).

To view the reason the delivery was unsuccessful, point to the **Undeliverable, retry** ( ) icon.

3 Select **Actions > Retry Delivery**.

Reviewing an autocoded request

If reviewing is configured by an administrator, you can apply the review process to coding requests that have been successfully autocoded and have a **Needs Review** status.

1 Select **Coding Requests**.

The Coding Requests page appears.

2 Select one or more requests with a status of **Needs Review** ( ).

3 Select **Actions > Review Complete**.

The request status changes to **Coded, awaiting approval** ( ) or **Completed, awaiting delivery** ( ).

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Working with queries, notes, and flags

Creating a query from the coding browser

You access coding requests from the Coding Requests or Approvals page.

1 Click the **Verbatim** link for a request.

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

2 Click the **Create Query** link.

The Create Query dialog box appears.

3 Select a reason from the **Reason** drop-down list or click **Other** and specify the reason for creating the query in the Other text box.

- To copy the reason from the **Reason** drop-down list, click the **Copy** ( ) icon.
- To add the reason to the standard list that appears in the **Reason** drop-down list, if you have the Manage Standard Reasons right, click **Add as standard reason**.

4 If you have the Force Close Query right, deselect **Auto Close Query upon Coding Complete**. If you deselect this option, the Central Coding application does not close the query if the verbatim is successfully coded. You must use the **Force Close Query** option to close the query.

Oracle recommends leaving this option selected.

5 To indicate that the Central Coding application does not associate the query with each new instance of the verbatim, if you have the required rights, deselect **Add to auto query list**.

6 Click **OK**.

The Central Coding application creates the query on the selected verbatim.

Creating a query from the Coding Requests or Approvals page

1 Select a verbatim.

2 Select **Actions > Create query single** to create a query on a single verbatim.

or

Click the **Create Query** button to create a query and propagate it to multiple instances of the verbatim.

The Create Query dialog box appears.

3 Select a reason from the **Reason** drop-down list or click **Other** and specify the reason for creating the query in the Other text box.

- To copy the reason from the **Reason** drop-down list, click the **Copy** ( ) icon.
- To add the reason to the standard list that appears in the **Reason** drop-down list, if you have the Manage Standard Reasons right, click **Add as standard reason**.

4 If you have the Force Close Query right, deselect **Auto Close Query upon Coding Complete**. If you deselect this option, the Central Coding application does not close the query if the verbatim is successfully coded. You must use the **Force Close Query** option to close the query.

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Oracle recommends leaving this option selected.

5 To indicate that the Central Coding application does not associate the query with each new instance of the verbatim, if you have the required rights, deselect **Add to auto query list**.

6 Click **OK**.

The Central Coding application creates the query on the selected verbatim, and also on other instances of the selected verbatim, if applicable.

Adding a flag to a request

You access coding requests from the Coding Requests or Approvals page.

1 Select a request.

2 Click the **Add Flags** button.

The Please select flags to add dialog box appears.

3 Select the checkbox for a flag.

4 Click **Accept**.

Removing a flag from a request

You access coding requests from the Coding Requests or Approvals page.

1 Click the flag icon to delete.

A confirmation dialog box appears.

2 Click **OK**.

Adding a note to a request

You access coding requests from the Coding Requests or Approvals page.

1 Select a coding request.

2 Click the **Add Notes** button.

The Add Notes dialog box appears.

3 In the **Notes** text box, enter the note text for the request.

4 Click **Accept**.

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Approving your coding requests

Approving requests

Use this procedure to approve the coding for the selected request and for other coded requests with the same code, verbatim, coding definition, and context information. The approval propagates only to requests associated with unlocked studies.

Approved requests are considered to be complete and available for delivery to the source application.

1 Select **Approvals**.

The Approvals page appears.

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

3 Click **Apply**.

4 Select one or more requests.

5 Click the **Approve Single** button to approve a single request.

or

Click the **Approve** button to approve multiple requests.

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

Disapproving requests

Use this procedure to disapprove the coding for the selected request and for all other coded requests with the same code, verbatim, coding definition, and context information. The disapproval propagates only to requests associated with unlocked studies.

Disapproved requests are returned to the coder's queue, and the disapproval reason appears in a note attached to the coding request.

1 Select **Approvals**.

The Approvals page appears.

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

3 Click **Apply**.

4 Select one or more requests.

5 Click the **Disapprove Single** button to disapprove a single request.

or

Click the **Disapprove** button to disapprove multiple requests.

The Disapprove Reason dialog box appears.

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

7 To prevent the Central Coding application from attaching the reason for disapproval in a note to the coding requests, deselect **Add as notes**.

8 Click **Accept**.

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The coding status of the requests changes to **Recode** ( ).

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About the documentation

Where to find the product documentation

The product documentation is available from the following locations:

- **My Oracle Support** (https://support.oracle.com)—*Release Notes* and *Known Issues*.
- **Oracle Technology Network** (http://www.oracle.com/technetwork/documentation/hsgbu-154445.html)—The most current documentation set, excluding the *Release Notes* and *Known Issues*.

If the software is available for download, the complete documentation set is available from the Oracle Software Delivery Cloud (https://edelivery.oracle.com).

All documents may not be updated for every Central Coding release. Therefore, the version numbers for the documents in a release may differ.

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Documentation

Document	Description	Part number	Last updated
Release Notes	This document provides information about system requirements and descriptions of new features, enhancements, and bug fixes for the current release.	E69155-01	3.1
Known Issues	This document provides information about known issues for the current release, along with workarounds, if available.	E69154-01	3.1
Secure Configuration Guide	This document provides an overview of the security features of the application, along with details about how to install, configure, and use the Central Coding application securely.	E69158-01	3.1
Installation Guide	This document provides an architectural overview of the Central Coding application, a description of system requirements, and step-by-step instructions for installing, uninstalling, managing and upgrading the Central Coding software.	E69159-01	3.1
User Guide	This document provides an overview of the Central Coding application, descriptions of all system functions, and step-by-step instructions for using and configuring the Central Coding application.	E69156-01	3.1
Quick Start for Coders and Approvers	This document provides a brief overview of the main tasks that coders and approvers perform in the Central Coding application, including step-by-step instructions for coding and approving requests.	E69161-01	3.1
Third Party Licenses and Notices	This document provides details about licenses and notices for third party technology that may be included in or distributed with the Central Coding application.	E69160-01	3.1

Note: If your environment is integrated with the InForm application, in addition to the items in the Central Coding documentation set, you must refer to the InForm Adapter *Installation Guide* for information about installing the InForm Adapter software.

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