# Oracle® Health Sciences Central Coding

# Quick Start for Coders and Approvers

Release 7.0

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ORACLE®

Oracle Health Sciences Central Coding Quick Start for Coders and Approvers, Release 7.0

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# Contents

## 1   Getting started

## 2   Coding your coding requests

## 3   Working with queries, notes, and flags

# 4    Approving your coding requests

# Preface

This preface contains the following sections:

- Documentation accessibility
- Related resources
- Diversity and Inclusion
- Access to Oracle Support
- Additional copyright information

## Documentation accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

## Related resources

All documentation and other supporting materials are available on the Oracle Help Center.

## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through Support Cloud.

Contact our Oracle Customer Support Services team by logging requests in one of the following locations:

- English interface of Oracle Health Sciences Customer Support Portal (https://hsgbu.custhelp.com/)
- Japanese interface of Oracle Health Sciences Customer Support Portal (https://hsgbu-jp.custhelp.com/)

You can also call our 24x7 help desk. For information, visit http://www.oracle.com/us/
support/contact/health-sciences-cloud-support/index.html or visit http://
www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

# Additional copyright information

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held responsible for any such references should they appear in the text provided.

# 1
# Getting started

In this chapter:

## Launching the application

Your administrator sets the method of opening the Oracle Central Coding application. By default, you open the application by going to the following URL 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 Oracle Central Coding software is installed. This name is defined during installation.

- • In a single sign-on (SSO) environment, the URL is provided by your delegated administrator.

## Logging in and out of the application

1. Launch the Oracle Central Coding application.

   The Login page appears.

2. To log in:

   a. Enter your login name and password.

   > **Note:**
   >
   > If your Oracle Central Coding system is Federated, see Link your Oracle Health IAMS and Federated accounts.

    **b.** Click **Login**

    If logging in the application for the first time, a message prompting you to change your password appears.

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

        **ii.** 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.

        **iii.** 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 Oracle 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**.

- Link your Oracle Health IAMS and Federated accounts

# Link your Oracle Health IAMS and Federated accounts

If Federation authentication is set up for your account, either you or your organization must perform a one-time linking of your Oracle Health IAMS account and your Federated Identity Provider account.

If applicable, follow these steps to manually link your Oracle Health IAMS and Federated accounts:

**1.** Enter the Oracle Central Coding URL in your browser.

**2.** Click **Sign In with your Federation account**.

**3.** Enter your Federation user name, and click **Next**.

**4.** Enter your Federation password, and click **Next**.

The Link Accounts page appears.

**5.** Enter your Oracle Health IAMS SSO user account name and password.

**6.** Select **I have read the Legal Notice**.

**7.** Click **Link Accounts**.

# Getting started in an environment migrated to Oracle SSO authentication

If the Oracle Central Coding application has been migrated from an environment with native authentication to an Oracle SSO environment and you had a user account prior to the migration, the first time you log in with your new SSO credentials you are prompted to link your existing user account to the SSO environment. Enter the credentials for your existing account in the **Former User ID** and **Former Password** fields, and then click **Link**. The Oracle Central Coding application migrates your role and work team assignments to the SSO environment.

> **Note:**
>
> If you forget your former password before you link the accounts, contact an Oracle Central Coding user administrator to reset it.

If you are a new user or an existing user who was already assigned roles or work teams in the SSO environment, the Oracle Central Coding home page appears when you log in for the first time.

# Changing your password in an environment with native authentication

1. Log in to the Oracle 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 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 response to the challenge questions.

5. Click **Next**.

The Select a new password page appears.

6. Enter and confirm your new password.

7. Click **Save**.

# Changing your password in an SSO environment with a Federated account

If you are using a Federated login to access Oracle Central Coding, you must follow your organizations Federated account's process for changing your password.

# Getting help

You can access the entire Oracle Central Coding 6.3.x.x documentation set from the Oracle Help Center (OHC).

To open the OHC page for the Oracle Central Coding 7.0 release:

• In the upper right corner of the Oracle Central Coding user interface, click the Help ( **Help** ) icon.
The OHC page opens in a separate browser window.

Alternatively, go to the landing page for the Oracle Central Coding documentation on the OHC, and click the link for the release of your choice to open the associated documentation set OHC page.

• https://docs.oracle.com/en/industries/health-sciences/central-coding/index.html

# 2

# Coding your coding requests

In this chapter:

## 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.

    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 Oracle 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 Oracle Central Coding application clears the corresponding code values in the source application. If the source application is Oracle InForm or Oracle Clinical One Platform, the Oracle 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.

2. Perform one of the following:

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

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

   The Clear Code Reason dialog box appears.

   (Optional) Enter the result of the step here.

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** (📶).

2-4

# 3

# Working with queries, notes, and flags

In this chapter:

## 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 Oracle 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 Oracle 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 Oracle 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. Perform one of the following:

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

- 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 Oracle 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 Oracle 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 Oracle 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**.

# 4

# Approving your coding requests

In this chapter:

- Approving requests
- Disapproving 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. Perform one of the following:

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

   - 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. Perform one of the following:

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

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

4-2

The Disapprove Reason dialog box appears.

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

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

8. Click **Accept**.

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