

Medical Office System

Chapter 13: The Record Selection Menu

This chapter discusses

- four ways to find records.
- the general functions on the record selection menu.
- the functions explained in this chapter are available when entering data in the support files.
- the browse functions that are available in the Daily Input.

Finding Records

In this chapter there are discussed the four ways to find records: by record number, by scanning, by using an index and by using fuzzy search.

1- Record Number

The fastest way to find a record is to search for it by record number. To select by record number, press **1** and then the following prompt appears:

```
Enter Record Number:
```

Type the desired record number then press **ENTER**. For record 1, simply press **ENTER**.

To move quickly through the data use the arrow keys or use the browse mode feature. For more information about the browse mode feature see the Toggle Browse section later in the chapter.

2 - Scan for Records

Scanning is a way to look through a file for records that match a certain criterion. The two ways to scan a file are: "short" and "extended" selection.

Short Selection

Use short selection to look for unindexed information or to select with only one or two criteria. For example, to find the record for provider "2" (criterion 1) with a procedure code of "100" (criterion 2) the short selection would be ideal.

Extended Selection

Extended selection provides a way to choose records using more than two criteria (using as many as 72 criteria, in fact). Use the extended selection, for example, to print labels for patients' since "01/01/92" (criterion 1) who have a doctor code of "2" (criterion 2) and a balance greater than "100.00" (criterion 3). To get to the Scan for Records Menu, press **2** at the Record Selection Menu. The two-item scan menu will be displayed:

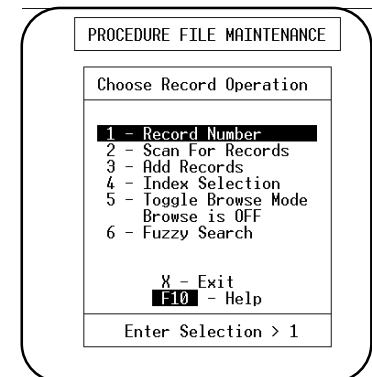


Figure 13-1 : Record Selection Menu

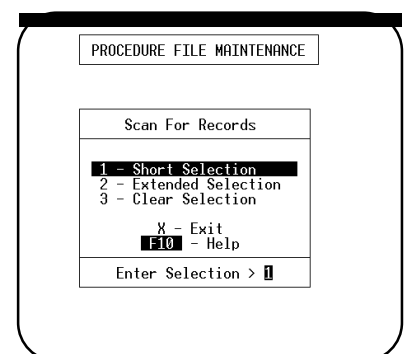


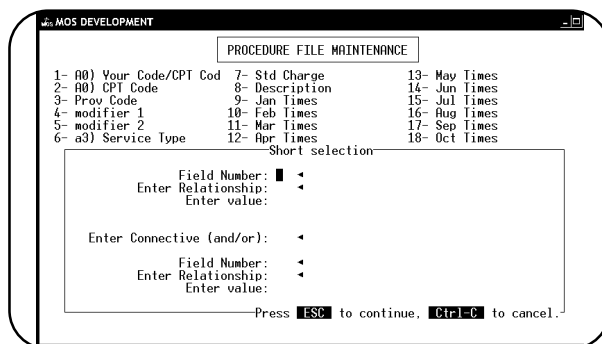
Figure 13-2 : Scan for Records Menu

For short selection, press **[1]** . For extended selection, press **[2]** .

How to use the short selection.

After pressing **[1]** , a new screen will be as shown at the right.

This example is taken from the procedure code file. Up to 18 of the file's fields are listed at the top. Press **[PG DN]** for the next set of fields, **[PG UP]** for the previous set.



The first prompt appears on the screen:

Figure 13-3 : Short Selection Screen

Enter Field to Select by:

Type a field number or system maintained field code (see Table 13.1 for a list of system-maintained fields) and press **[ENTER]** .

Table 13.1 System Maintained Fields		DOS/ Network	Unix
@ud	Date of last batch update, mm/dd/yy	yes	yes
@cd	Date record was created, mm/dd/yy	yes	yes
@cb	Record created by whom, (DOS always blank)	no	yes
@ud	Date record was last updated, mm/dd/yy	yes	yes
@ub	Record last updated by whom, (DOS always blank)	no	yes
@rn	Record Number	yes	yes
@td	Today's Date- System date of the computer	yes	yes
@bd	Batch Date, mm/dd/yy Date record was last used in a report or batch process	yes	yes

Then the prompt appears for relationship,

Enter Relationship (EQ, NE, GE, GT, LE, LT, RG, CO):

Enter a relationship code; to compare fields, add an "F" to the desired code, for example, "NEF" for "not equal to field." (See Table 13.2 for a list of relationship codes.) Pressing **[ENTER]** is the same as choosing "equal to."

Table 13.2 Relationship Codes	
EQ	EQ Equal to
NE	Not Equal to
GE	Greater Than or Equal to

GT	Greater Than
LE	Less Than or Equal To
LT	Less Than
RG	Range between (in short selection only)
CO	Contains the characters
xxF	to compare fields, add F to any relationship code (e.g., EQF)

Then this prompt appears,

Enter "field name":

The "field name" of the field shown will be displayed instead of the words "fieldname". Type in the information you are looking for and press .

Two hints:

1. Upper and lowercase letters are interchangeable.
2. Typing the entire name is not necessary. In fact, it's often better to type only the part you are sure about rather than trying to remember the whole word or name. The edit of the data field will be applied to any data typed so it must be appropriate to the field. Use the extended selection to select edited data with wildcards.

After pressing the following prompt will be displayed:

Enter Connective:

A connective allows two criterion and indicates how the criterion will be applied to the data. To begin the selection at this point, press and the program will start to scan the file. To select a second criterion, type a connective and the data selection prompts are repeated.

Connectives

Connectives are "and" and "or". "And" means that both criteria must be met before the record is accepted for the scan group. "Or" means that at least one criterion must be met. For instance, to find a procedure that contains the word "blood" in the description, you could type "and", then the field number of the description field, then "co" for the relationship and then "blood" for the value. The program will select only the procedures with a provider code of "2" and a description that contains the word "blood."

If you used "or" as the connective, the program will select any procedure with either a provider code of "2" or a description containing the word "blood".

Once you have supplied this second set of criteria, the program begins to scan. As the program is searching through the file, the record numbers will be changing in the lower right corner of the screen.

Once the first record that matches the scan criteria is on the screen, you can move to the next matching record by pressing or use the MOS browse mode feature described later in this

chapter. When you have exhausted the matches or when no matches are found, you are returned to the scan menu.

How to use extended selection.

Press **2** at the scan menu to get to the extended selection screen.

To set up selection criteria, press **U** (for "update") or **L** to load an already-defined set.

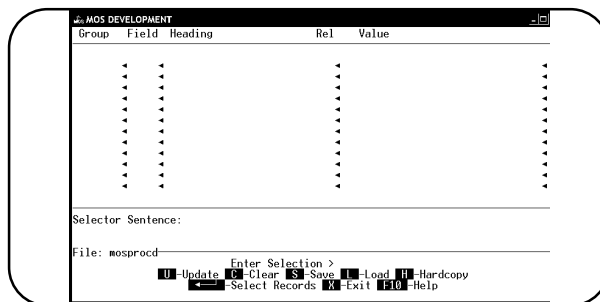


Figure 13-4 : Extended Selection Screen

Note: *The extended selection can be repeated and modified as long as you remain in the current file. Use an extended selection if you are not sure how to create the selection that is needed. It will then be possible to make changes and experiment until the correct combination is obtained. To accept the selection as it is, simply press **ENTER**.*

Group entries are used for two purposes:

1. To label or groups.
2. To write selection sentences.

Labels

If more than one selection criterion is listed, none of which has a group label, each criterion must be met for a record to be selected. If, on the other hand, you want to select records based on criterion 1 or criterion 2 or criterion 3 (and so on), you must make each criterion part of the same or group. To do this, simply give each criterion the same group name.

Note: *Do not use reserved words, "or," and "and" as group names or as the beginning of group names.*

For example, you could set up a group that selects patients with a doctor code as either "1" or "2" by giving both lines the same group name (say, "PROV"). Without the group name, the program would try to select patients that have both "1" and "2" as the doctor code. Since no patient would have both doctors, this would always select nothing.

To make each criterion connect with "AND" use a group name starting with the "+" symbol. This can be helpful if your selection is detailed and would require a combination of criterions with various connectives.

Sentences

Selection sentences are used to relate lines, groups and other sets to each other in a selection sentence. The sentence is usually used to relate groups, or groups and sets, to each other, but occasionally relating a group to an individual line may be necessary: for example, the PROV group and a patient since date of "01/01/93". In a case like this, the single selection line for "patient since date" must be given a name (a good choice might be SINCE). The selection sentence would be entered as "PROV and SINCE". The patient records selected would have a primary doctor code of either "1" or "2" and have been in the MOS only since "01/01/93". Selection sentences can use "and" and "or" to form relationships and parenthesis for grouping.

Note: *To get to the selection sentence, press **↓** if the cursor is near the bottom of the screen, or **↑** if the cursor is near the top (so that it wraps around the screen). The field column accepts field numbers. For*

the list of fields in your file, press **F6**. The program displays the current file's field numbers and headings.

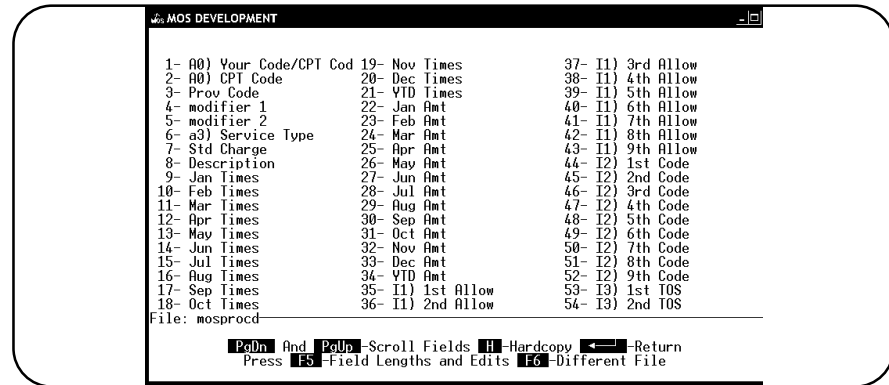


Figure 13-5 : Display Fields Screen

From the browse editing display, it is possible to:

- look at the current file's edit types and lengths (**F5**)
- look at another file's field numbers, headings, types and lengths (**F6**)
- return to the format screen (**ENTER**)

Use **PG DN** and **PG UP** to see fields beyond the edge of the video display. For field types and lengths, press **F5**. To switch to a different file, press **F6**. Enter the new file name. To see the new file's types and lengths, press **F5**.

Although it is possible to another file's fields, they cannot be used for selection in the current file. Use this feature for reference only. To return to the selection screen, press **ENTER**.

Once you have typed a field number and pressed **ENTER**, the program supplies its heading under "Heading." The cursor, meanwhile, jumps to the "Rel" (for relationship) column. Any of the relationship codes can be used here except RG, "range". Ranges are defined differently in extended selection than in short selection. The process is described later in this chapter.

In the "value" column enter the information that is required. Type in the desired information and then press **ENTER** to move to the next line. The field edits are not applied fully to the value so it is important that you position your data in the correct column and type it in the format of the field you are selecting.

To save the selection screen, press **ESC**. To cancel it, press **CTRL** + **BREAK**.

When you save a selection set, a window appears to show all the available selection sets for the current file. To save the set under a new name, make sure the name, "[NEW]," is highlighted, and press **ENTER**. Then type in the new name and press **ENTER**. To save the set under an existing name (and by that replace the existing set with the new set), highlight the existing name and press **ENTER**.

WARNING: Do not alter any selection tables installed with your Medical Office System. This could affect how your system works. If you think you might have changed one, reinstalling the last set of MOS diskettes that you received would restore the correct programming.

To load an existing selection set, press **L**. A window appears to show all the available selection sets for the current file. Highlight or type in the name of the set and press **ENTER**.

After saving or loading a selection set, press **ENTER** to start the selection procedure. During the scan, the record numbers will be changing in the lower right corner of the screen.

When the first selected record is displayed on the screen, press **ENTER** for the next record in the group or use the browse mode feature. When the group is exhausted, you're returned to the scan menu. For more information about browsing see the Toggle Browse section see Page 13-7.

Defining a Range

To select a range of records in short selection, for example, all procedures with codes between "100" and "199" or all patients with addresses from zip code "07000" to "10000" use the relationship "RG". Then you will be asked:

Enter Lowest Procedure Code:

Type in the low end of the range; for example, 100 and press **ENTER**. Then this prompt appears:

Enter Highest Procedure Code:

Type the high end 199 and press **ENTER**. From here the prompts are the same as for any other selection.

The range code (RG) is not available in an extended selection. Instead you would use two selection lines with the relationship code GE or GT for one line and LE or LT for the other line. For example, you want to select all patient's with a zip code between "07000" and "10000". Use the GE and LE codes if you want an inclusive test and use GT and LT if the test is exclusive of the ends.

4 - Index Selection

The second fastest way to find a record is by using an index (Option 4, Index Selection," on the Record selection Menu). An index is a reference chart that the program uses to look up a desired piece of information and find the record in which it appears.

A menu screen will be displayed showing the index(s) available.

Pick an index by moving the highlight or by pressing **A** - **H**, **0** - **9**, as appropriate.

Then this prompt appears:

Select by fieldname:

For the first record in the index, simply press **ENTER** or type in the information, then press **ENTER**.

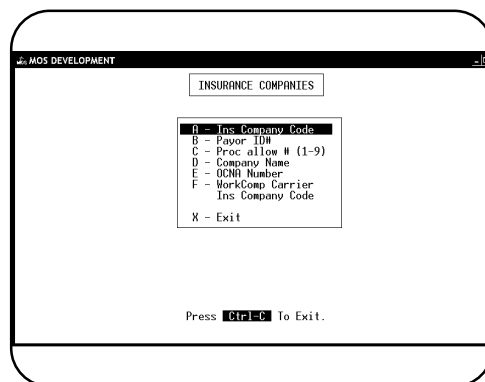


Figure 13-6 : Index Selection List

Note: *The filePro Plus wild-card character (=) cannot be used in indexed selections.*

The record that matches the criterion will appear immediately. Notice the words "Index Mode" at the bottom left. To move back and forth through the index, use the arrow keys, down for the next record, up for the previous record. To view multiple records start the browse mode feature. For more information about browse see the Toggle Browse section on Page 13-7.

The position of the data typed in the index select by field and format are critical to finding the information. This is one place where upper/lower case considerations are important. If finding information with the indexes is not possible, try the "Scan for Records" option to find the exact information better.

6 - Fuzzy Search

To use a fuzzy search, select the fuzzy search option "6" from the Record Selection Menu or press **Z** while in record browse mode. For more information about record browse mode see the Toggle Browse section on Page 13-7.

After choosing one method for fuzzy searches, a new screen will be displayed. Enter the field number that should be

examined during this fuzzy search, and press **ENTER**. Then a second prompt appears:

Enter "field name":

Where "field name" is the field heading for the field selected. Type in the value that should be matched next, then press **ENTER**. After pressing **ENTER** at the second prompt, the program begins the fuzzy search. The program displays 18 records (one full screen). The screen is continually updated so that only the best matches are displayed at any given moment. While the search is preceding, the record numbers are changing in the lower right corner of the screen.

When the search is completed, the records retrieved appear on the screen in best match order and the topmost record is highlighted. The browse mode commands are on the bottom of the screen. Refer to Toggle Browse for a complete description of these options.

To exit

To exit a fuzzy search, make sure you are in browse mode, then press **R** for reset. The records retrieved by fuzzy search are replaced by the normal browse listing for the file. Change the browse format to display different data during this fuzzy search as needed.

5 - Toggle Browse Mode

The "Toggle Browse" option on the Record Selection Menu, allows you to display multiple records on the screen in a columnar format. When a browse is on, you can scroll rapidly through your file in record-number, index, or scan order. When it is off, you go directly into the first record selected.

A browse displays each record as a line containing the first few fields in the file. This line can be reformatted to show different fields and system-maintained fields.

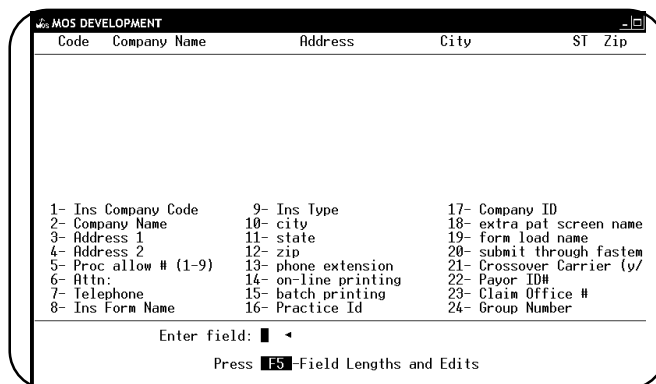


Figure 13-7 : Fuzzy Search Screen

There are two ways to turn browse on or off:

1. by pressing **[5]** at the Record Selection Menu
2. by pressing **[B]** when a full record is displayed and the browse option appears at the bottom of the screen

To turn the browse option on or off at the Record Selection Menu press **[5]** and a toggle message below option 5 will be either "Browse is ON" or "Browse is OFF" shows the status. Make sure browse is on, then press one of the other selection options: record number, scan, or index.

Once you have answered the relevant prompts, the browse screen appears. The records are selected and organized depending on the method used to locate them. If you used record number to start, then they are displayed in record number order. If scan was used to select certain records, then they are displayed in record order but will only include selected records. If you used an index to display your browse, the records will be ordered by the index. A lettered index would include all records at least once (possibly more than once on some types of fields). A numbered index may not include all records.

The browse feature can be started from record prompts displayed while viewing a record by pressing **[B]**, when the option "B - Browse" is displayed at the bottom of the screen. This is true even if the toggle message on the Record Selection Menu reads Browse is OFF.

Note that the extended selection screen can be called from the browse screen, adding another level to your search. With the **[S]** option, select records from whatever group of records you started with; from an index, from a scan group, or from a group of records in record-number order.

Once browse has been selected, you have a new set of prompts displayed at the bottom of the screen:

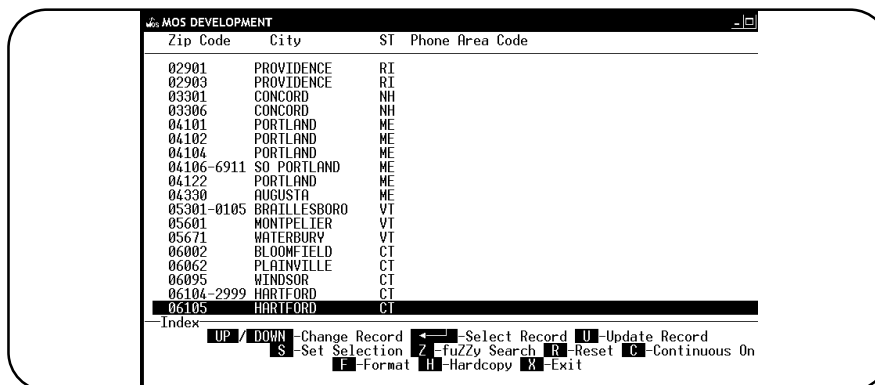




Figure 13-8 : A Sample Browse Screen



The Browse Screen Options

Scrolling options on the browse screen:




- [B]** To move the highlight to the bottom of the screen,
- [T]** To move the highlight to the top of the screen,
- [R]** To return to the top of the file,
- [PG UP]** Scroll up one screen,
- [PG DN]** Scroll down one screen,
- [↓]** Move highlight cursor down one record.

-  Move highlight cursor up one record.
-  To scroll continuously past the records, press again to pause during scrolling.

To modify the browse display or selection screen these options are available:

-  To change the information on the browse screen. The prompts within this function are explained below.
-  To select the extended selection screen. (For more information about extended selection refer to the scan for records section earlier in this chapter.)

Once a record has been found:


-  To view the full screen display of information
-  To update the highlighted record.
-  To hardcopy the browse screen currently displayed.

After completing the browse operation press:

-  To return to the Record Selection Menu.

How to change the browse default format.

A Browse Format will fit 76 characters across. Change the default format to display different fields, or literal characters, truncate fields, and show system- maintained fields. The new format can be saved for later use or as the default format.

To start, go to the browse screen and press  to select Format. The current file's field names and numbers are displayed at the top of the screen. The browse editing screen is displayed:

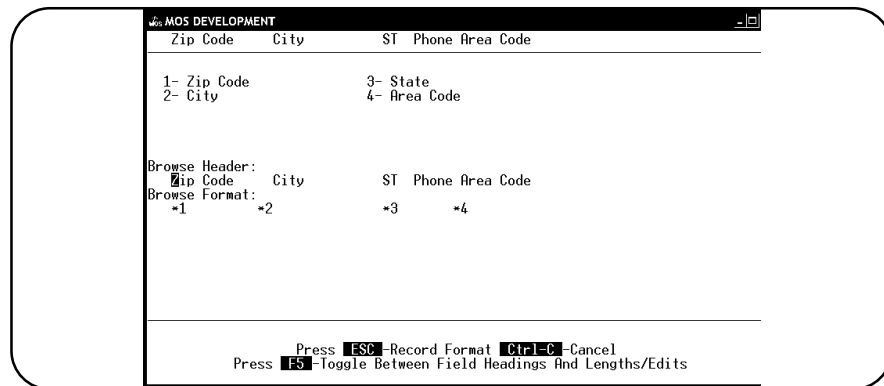






Figure 13-9 : Browse Format Screen

A one-line header and a one-line format appear below the list of fields. The following options are available at this time.

-  Move the field display down one column.
-  Move the field display up one column.
-  Display field lengths and field edits for fields currently listed at the top of the screen. Press again to return to the field headings.
-  Update or modify the currently displayed browse format. See “Updating the Browse Format” below.

- S** Save a browse format. You're asked for a name; format names can be up to 10 characters long on UNIX/XENIX systems, eight characters on DOS systems. Type in the name and press **ENTER**. To replace the default format, name your new format line "default" (all lowercase). If you change the default, you might also like to save your change with a second name that is not currently listed as a safe copy. Upgrades will reset your default browse to the original, but would not affect a name that did not originally exist.
- L** Load a previously saved browse format. A box showing existing formats will be displayed. Highlight the format or type in the name and press **ENTER**. Remember, on Unix/Xenix systems character case is significant.
- C** Clear the current browse format displayed. This does affect the browse format stored on the computer. This will not delete any formats written (saved).
- X** Exit Browse editing function. The new format will be used to redisplay the records.

Updating the browse format

Press **U** to update the browse. Move your cursor to any position in the header (the header is used as the column headings when the browse is displayed) and enter a heading for the fields that will be displayed, then press **ENTER**. Now edit the format line. Move your cursor to any position on the format line and type the field number, preceded by an asterisk (* is the field indicators) to indicate the data that should be displayed in the browse. Be sure to allow enough space after the field number for the data to be displayed that is contained in that field. If the fields are placed too close together, some data will be omitted.

To view all the data fields available, use **PG UP** and **PG DN** to scroll past all the fields. This function can do no harm to data, it only allows viewing.

Note: *Use the appropriate field indicators, leave enough space, add headings, etc. Another field indicator available is "<", for push-left.*

When finished, press **ESC** to record your changes or **CTRL** + **C** to cancel.

Notes: