Chapter 18: The Facility List

SEER*DMS maintains information about organizations and facilities that collaborate with the cancer registry. The facility list includes the registry itself, organizations that provide data to the registry, and those receiving data or other information from the registry. Each organization is uniquely identified by a Facility ID. The list is referenced throughout SEER*DMS to set facility information in data fields, track sources of data, manage abstracting assignments, and provide a mechanism for follow-back.

You can use the Facility Manager to view or manage the facility list. The Facility Lookup, available throughout the system, provides a convenient mechanism for setting data fields. If you have the appropriate permission settings, you can add facilities using either the manager or the lookup.

In this chapter, you'll learn about

- Accessing the Facility List
- Searching the Facility List
- Adding a Facility
- Modifying Facility Information

Accessing the Facility List

Requires system permission: *facility_view*

To view a list of the facilities defined in SEER*DMS, select **View > Facilities**. All active facilities will be displayed. You may use the filter to find a specific facility or to view a list of facilities meeting your search criteria. The filter is described in the *Searching the Facility List* section of this chapter.

The following data columns are shown.

- **T** – Type of facility (see the list of icons provided below).
- **ID** – The unique "Facility ID" assigned when the facility was added to SEER*DMS. "FAC" is used as a prefix for facility IDs.
- **Name** – The name of the facility.
- **Address** – The street, city, state, and postal code designated for the facility.
- **Phone** – The phone number and extension provided for the facility.
- **Area** – Displays I for in area and O for out of area. The definitions of "in area" and "out of area" are determined by registry policy.
- **S** – The status field indicating whether the facility is active or inactive (see the list of icons provided below).

The **T** column displays each facility's Type:

C Clinic
D Doctor Office
H Hospital
L Lab
N Nursing Home
O Organization
R Radiation Therapy Unit
T Treatment Center

No icons are currently used for:
- Hospice
- Medical Examiner's Office
- Other Facility

The **S** column displays the Status of each facility:

- Active
- Inactive (inactive facilities are displayed if **Hide Inactive** is unchecked)

Typically, the list will contain too many results to fit on the screen all at once and will be broken into several pages. Use the Page Selection links to view the rest of the list, or use the Filter controls to search or limit the list.

Searching the Facility List

Requires system permission: *facility_view*

To search for a facility:

1. Select **View > Facilities**. Active facilities will be listed in alphabetical order. Hide Inactive will be checked by default when you first go to the Facility Manager.

2. To sort the list by a field other than name, click one of the underlined column headers (you cannot sort by address). To reverse the sort order, click the same header again.

   Tip: In SEER*DMS, the sort order of a table is indicated by the column headers. A unique color is used for the sort field's column header. An up arrow will be displayed next to the column name if the table is sorted in ascending order; a down arrow will be displayed if the table is sorted in descending order.

3. To search for a facility by its SEER*DMS ID, enter search text into the **FAC-ID(s)** filter. To enter multiple IDs, click the down arrow to expand the filter.

4. Use the **Text** filter to search for a facility by name, address, National Provider ID (NPI), CoC Facility Identification Number (FIN), Facility Association Number (FAN), or Facility Identifiers used to refer to a SEER*DMS facility by other organizations.

5. To only search the list of active facilities, check **Hide Inactive**. Uncheck this box to include the inactive facilities in your search.

6. Check **Hide Out of Area** to search for facilities that have been classified as "in area"; uncheck this box to search for facilities regardless of their area classification.

7. To search for facilities of a specific type(s), select one or more items in the **Type(s**) filter.

8. Click **Apply**.

9. To view a snapshot of the facility's information, click the information icon next to the facility ID. To modify fields or to view all fields, click the associated **ID** or **edit** link (these links will only be available if you have the *contact_edit* system permission).

10. To do another search, you may return the filter to its default settings by clicking **Reset**.

11. To send a message to the facility's email address, click the **email** link in the **Action** column (this link will only be available if an email address is defined for the facility).

Adding a Facility

Requires system permission: *facility_add*

Facilities are typically added or modified using the Facility Manager (accessed from the **View > Facilities** menu). Hospitals and other facilities can also be added or modified while editing data or using other parts of the system. The Facility Lookup is used throughout SEER*DMS to set a data field or filter. If you have the appropriate permissions, you can add or modify a facility while using the lookup.

The Facility Lookup will include an Add button if the user has the *facility_add* permission; the lookup will include an edit link next to each facility if the user has the *facility_edit* permission.

*To add a facility in SEER*DMS:*

1. Select **View > Facilities**. Or if you are visually editing and need to enter an organization that is not currently a SEER*DMS organization, click the lookup icon next to the data field to open the Facility popup window.
2. Click **Add** (this button will only be shown if you have the *facility_add* permission).
3. If your registry requires a specific Facility ID for this facility, enter it into the **FAC-ID** field. Otherwise, an ID will be auto-generated when the new facility is saved.
4. Enter **Facility Name** and select the appropriate **Facility Type**. These fields are required.
5. Enter the CoC Facility Identification Number in the **FIN** field, if known.
6. Enter the National Provider Identifier in the **NPI** field, if known.
7. Verify that the **Active** box is checked (default setting).
8. Enter information into the Contact Information section:
   a. **Primary, Alternate and Casefinding Contacts**. For these fields, SEER*DMS will only allow you to select persons in the Contact List who are designated as an affiliate of the facility. No contacts in the Contact List could possibly be affiliated with this facility because the facility has yet to be saved. Therefore, you cannot specify primary, alternate, or casefinding contacts at this time. Once the organization is saved, you may designate people in the Contact List as affiliates of this facility (see *Chapter 19: The Contact List*). You will then be able to set the facility's contact fields by following the instructions below in *Modifying Facility Information*. The facility's contact fields are not used by SEER*DMS, but are available here for your convenience when contacting the organization.
   b. Enter information the facility's email address, phone, postal address, and geographical location in the appropriate fields.
   c. You may enter a **Web Address**, if desired.
9. The remaining data fields are described in detail in the Modifying Facility Information section of this chapter. After following the instructions provided there, click **Save** to create the new facility.

Modifying Facility Information

Requires system permission: facility_edit

The following are instructions for modifying all data items related to a facility. If you are setting a facility's Primary, Alternate, or Casefinding contact, the contact must first be defined in the Contact List as an affiliate of this facility. Use the Contact Manager (select View > Contacts) to verify that the contact is affiliated with this facility (see *Chapter 19: The Contact List*).

To modify a facility:

1. Select **View > Facilities**.
2. Use the **Filter** to search for the facility:
   a. To search for a facility by its SEER*DMS ID, enter search text into the **FAC-ID(s)** filter. To enter multiple IDs, click the down arrow to expand the filter.
   b. Use the **Text** filter to search for a facility by name, address, National Provider ID (NPI), CoC Facility Identification Number (FIN), Facility Association Number (FAN), or Facility Identifiers used to refer to a SEER*DMS facility by other organizations.
   c. To only search the list of active facilities, check **Hide Inactive**. Uncheck this box to include the inactive facilities in your search. (If you are modifying a facility that is designated as "inactive", you should correct the status setting.)
   d. If you know the facility' type, you may select it in the **Type(s**) list box.
   e. Click **Apply**.
3. Click the **ID** of the facility to be modified.
4. Update the fields identifying the facility, as needed.
   a. **Facility Name** and **Type** are required fields.
   b. CoC Facility Identification Number is stored in the **FIN** field.
   c. The National Provider Identifier is stored in the **NPI** field.
5. Verify that the **Active** box is checked for current Facilities. Uncheck this box to deactivate the Facility. If unchecked, the **Inactive Date** will be set to today's date. SEER*DMS Facilities are permanently maintained in the database. Inactive facilities can not be selected as the source facility in an import or as a source of follow-back. However, the ID of an inactive facility can be entered into a hospital or facility data field in patient data.
6. Update fields in the Contact Information section:
   a. To specify the **Primary** or **Alternate** contact, click the corresponding Lookup link. Use the filter to find and select the contact. You will be able to select from entries in the Contacts table which are affiliated with this facility.
   b. Enter information the facility's email address, phone, postal address, and geographical location in the appropriate fields.
   c. You may enter a **Web Address**, if desired.
7. Enter information into the Facility Information fields:

a. If you wish to track cost and logistical information related to visiting the facility, enter the **Cost to Visit ($)**, **Mileage from Registry**, **Season to Visit**.

b. Select the appropriate value for the Veteran's Administration (VA) flag. External extracts can access this flag in the NAACCR mart. System extracts use the following logic when interpreting this flag:

   i. **Not a VA Facility** – do not exclude a CTC from an extract if it includes an admission from a non-VA facility.

   ii. **VA Only Facility** – exclude data from an extract if the VA exclusion is used and all data are from this facility, other VA Only Facilities, or facilities designated as "Does not Override VA".

   iii. **Does not Override VA** – use this setting if the facility is not a VA facility, but its data should not impact the VA exclusion criteria for extracts.

c. Check **Out of Area**, if appropriate. This field may be used to identify organizations that do not serve the catchment area or to track other boundaries of interest to the registry.

d. Check **Under Contract** if the organization is a contract facility.

e. If you expect to receive data in specific file formats and wish to track this information, specify the information in the **Rec. Type Expected** field. Click **Add Rec Type** to specify multiple record types.

8. If the facility's type is set to Hospital, update fields in the Hospital Information section. Registry-defined configuration settings and algorithms determine whether these fields are used by SEER*DMS. They may also be used in system reports, external reports, or other external processes. Consult with registry management to determine if these fields are maintained in your registry.

   a. **FAN** - Facility Association Number.

   b. **Bill/Abstract ($)** – Cost billed for each abstract record.

   c. **Subm Schedule** – You may enter text that describes how often you expect data from the hospital (e.g., quarterly, monthly, etc).

   d. **Reporting** – You may use this field to track whether the facility is required to report data to the registry.

   e. **Report to State** - You may use this field to track whether the facility is required to report data to the state.

   f. **ACOS** – Check this field if the hospital is an American College of Surgeons facility.

   g. **Tumor Registrar** – Check this field if the hospital is a hospital-based tumor registry. This field should be checked if a Reference Date is provided.

   h. **Reference Date** – Hospital-based registries are required to have complete data for cases diagnosed on or after this date. A date should be provided if Tumor Registrar is checked.

9. If you wish to track relationships between organizations, add facilities to the **Affiliated Facilities** list:

   a. Click **Add Affiliation** in the **Facility Affiliations** section.

   b. Use the lookup to select a facility.

c. To remove a facility from the list, click the remove icon next to the facility.

10. To add a new casefinding contact:

    a. Click **Add Contact** in the **Casefinding Contacts** section (not available when adding a facility).

    b. Use the lookup to select a representative who will perform casefinding activities at this organization. You will be able to select from entries in the Contacts table which are affiliated with this facility.

    c. You may enter the **Department** and **Location** within the organization where this person will be casefinding, if appropriate.

    d. To remove a casefinding contact from the list, click the remove icon adjacent to it.

11. A facility may be referenced in data submitted by another facility. The referring facility may have its own set of facility codes or IDs. For example, codes identifying hospitals may be included in data from a pathology lab. Use the Facility Identifiers section to define IDs used by one facility to refer to another:

    a. Click **Add Identifier** in the **Facility Identifiers** section.

    b. Use the lookup to select a **Facility** that provides data related to the facility that you are currently editing. (In the example described above, this would be the facility ID of the pathology lab.)

    c. Enter the code in the **Facility Identifier** box. This is the code or ID used in data to reference the facility that you are currently editing.

    d. To remove an entry, click the remove icon next to the Facility Identifier.

12. Use the **Registry-defined Fields** section to define other attributes of any kind. You may use these fields in external reports and utilities that access the database. In some registries, a Registry-defined Field may be used in automated worklist tasks. A field is defined with "key = value" syntax.

    a. Click **Add a field** in the **Registry-defined Fields** section.

    b. Enter text for the **Key**. The Key must meet specifications defined by the person responsible for the report or query that uses this field.

    c. Enter the appropriate **Value** as defined by the specifications for the report or query using this field.

    d. To remove an entry from this list, click the remove icon next to the field's **Value**.

13. If your registry has a data exchange agreement with the facility, check the box for **Data Exchange Agreement**. To enter or update the information about the DEA:

    a. Enter the date that the data exchange agreement went into effect in **Start Date**.

    b. Enter the **End Date** for the data exchange agreement.

    c. Use the **Transfer Format**, **Transfer Schedule**, **Incoming Info**, **Outgoing Info**, and **Comments** to track information according to your registry's guidelines.

14. Click **Save**.