

Installation and Implementation of STD*MIS 4.x

INSTALLING STD*MIS 4.x

STD*MIS version 4.x can be installed from files downloaded from the CDC/STD*MIS Internet web site (<http://www.cdc.gov/nchstp/dstd/STD-MIS-Download.htm>). Instructions for downloading and installing the system files can be found on the Web download page. Reports for the system are downloaded and installed separately. Instructions for downloading and installing the reports files can also be found on the Web download page. Before downloading and installing Std*Mis, check the system requirements list below to make sure that your system is capable of running the application.

STD*MIS 4.x SYSTEM REQUIREMENTS

<u>Component</u>	<u>Minimum Requirements</u>
Computer	No specific requirement.
Operating system	Windows 95/98NT/2000/XP
Memory	No specific requirement.
Disk space	25 MB available for installation.
Network	Any Windows-compatible network (Novell, Windows 2000 Server, etc.)
Network Configuration	Requirements vary depending on the type of network and whether the Advantage Database Server product is installed on the server. See the section labeled <u>Configuring STD*MIS 4.x for Network Use</u> for more information.

ACCESSING STD*MIS 4.x ON WINDOWS 95/98/NT/2000 SYSTEMS

If STD*MIS has been installed on a network server, an assumption is made that your Network Administrator has mapped that folder to a drive letter and has told you what that drive letter is. To create an icon on your desktop to access STD*MIS 4.x, follow these steps:

1. Right click on your Windows Desktop and select New, Shortcut from the popup menus. This will start the Create Shortcut wizard.

2. From within the Create Shortcut wizard, press the Browse button to navigate to your new STD*MIS 4.0 folder. If the STD*MIS 4.0 folder is located on a server, there needs to be a drive letter mapped to that server.
3. Locate and click on the file labeled StdMis.exe. Click OK.
4. Next, enter a display name for the icon and click Finish.
5. An icon for STD*MIS should now appear on the desktop. Double-clicking on the icon will start the application.
6. If this is an initial installation and not an upgrade to an existing system, the User Id and Password for the initial login are STD and STD.

CONFIGURING STD*MIS 4.x FOR THE WORKSTATION

In order for STD*MIS 4.x to run in an optimal manner on any given workstation, there are three configuration parameters that need to be set. These parameters control the application display, access to SAS for running SAS reports, and setting up a printer for printing the Interview and Field record forms. All configuration parameters are stored in a file called WsConfig.dbf, which is located in the folder C:\StdTemp. Please note that this file and folder are automatically created when you start STD*MIS 4.x for the first time.

1. Application display – When starting STD*MIS 4.x for the first time, the application will use a default font for screen display. On most workstations, this display will be less than optimal. To set the display properly, follow these steps:
 1. Start STD*MIS and log in.
 2. From the Main Menu, select Configuration.
 3. From the Configuration Menu, select Change System Display.
 4. Follow the onscreen prompts for changing the display font.
You may need to try several fonts before finding one that looks the best.
2. Accessing SAS – In order to run the new SAS reports included with STD*MIS 4.x, STD*MIS must be able to access the SAS system. Because of the size and complexity of SAS, it is not bundled with STD*MIS 4.x but requires a separate installation (which is documented elsewhere). STD*MIS will, by default, look for the SAS software in the default location used by SAS during its installation process. If STD*MIS is unable to access SAS when attempting to run reports, there is a parameter that can be set manually to point STD*MIS to the location

where SAS is installed. To set this parameter, follow these steps:

1. Start STD*MIS and log in.
 2. From the Main Menu, select Configuration.
 3. From the Configuration Menu, select Update local configuration.
 4. From the menu, select Modify. Select the record where Setting = SASPATH.
 5. Select SASPATH for the Setting.
 6. In the Value field, enter a path to the SAS.exe file.
 7. Save the record.
3. Form printing – STD*MIS 4.x uses standard Windows-based printing for all printed output except for the Interview and Field Record forms. These forms are still printed in the same manner as in the DOS-based versions of STD*MIS, i.e., direct printing to the Lpt1 port. STD*MIS 4.x will automatically try to assign the Lpt1 port to the default Windows printer using either a NET USE command (for Windows networks) or a CAPTURE command (for Novell networks). If the system is unable to accomplish this, a message will appear during startup that states “Cannot assign printer for forms printing.” If this message appears, this means that all printing will still be functional except for forms printing. One way to solve this problem is to set a parameter to tell STD*MIS what command to use to assign the Lpt1 port properly. To set this parameter, follow these steps:
1. Start STD*MIS and log in
 2. From the Main Menu, select Configuration.
 3. From the Configuration Menu, select Update local configuration.
 4. From the menu, select Add.
 5. Select DOSPRINT for the Setting
 6. In the Value field, enter the command to assign the Lpt1 port to the appropriate printer.
 7. Save the record.

CONFIGURING STD*MIS 4.x FOR NETWORK USE

Generally speaking, installing STD*MIS 4.x on a server and configuring it for shared use by multiple clients only require a few minor changes to the server, the workstations, and the network environment. These changes will vary depending on the type of server (Novell vs. Windows) and whether the Advantage Database Server product is installed on the server. The Advantage Database Server is a product that is purchased separately from STD*MIS and if installed, will allow the STD*MIS system to access data in a true client-server mode. If you have purchased the Advantage Database Server for use with

STD*MIS, see the section entitled Configuring STD*MIS 4.x For Advantage Use for information on configuring STD*MIS to work in the Advantage environment.

If you will not be using the Advantage Database Server, see below for the network requirements for running STD*MIS in a non-Advantage environment.

1. All data files (those with .dbf, .cdx, and .fpt extensions) should have Shareable and Read/Write attributes and all users who will be accessing the data have the appropriate network permissions.
2. All workstations need to have a drive letter mapped to the server where the STD*MIS database resides.
3. Novell server – If you install STD*MIS for shared use on a Novell server, all workstations that will be accessing the STD*MIS database using the Novell Netware Client will need to be checked to be sure that local file caching is turned off. This setting is usually located on the Advanced tab under the Novell Network Client Properties.
4. Windows server – If STD*MIS is installed on a Windows NT or 2000 family server, there are 2 registry settings on the server that will need to be set in order for the server to properly support file-sharing under STD*MIS. They are:

HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\LanmanServer\Parameters

EnableOplocks REG_DWORD 0 or 1

The default value for Windows is 1, Oplocks enabled. This key should be set to 0 to disable Oplocks. If the key does not exist in the registry, it needs to be created with a value of 0 in order to disable the default setting.

HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\LanmanServer\Parameters

CachedOpenLimit REG_DWORD 0 or > 0

The default value for Windows is 5 open files per connection. This should be set to 0 to disable file caching. If the key does not exist in the registry, it needs to be created with a value of 0 in order to disable the default setting.

CONFIGURING STD*MIS 4.x FOR ADVANTAGE USE

The Advantage environment is a client-server architecture, where the client (STD*MIS) makes data requests of the server and the server receives the requests, processes them, and responds with data. This moves much of the data processing burden from the workstation to the server, resulting in reduced network traffic, higher performance, and greater database stability. Since this environment requires that the STD*MIS client be able to communicate directly with the Advantage server, some network settings may need changing in order to support that communication. Since these vary quite a bit from network to network, these changes are handled on a case-by-case basis, usually in consultation with STD*MIS technical support staff.

The Advantage version of STD*MIS contains all the client and communication software needed to work with the Advantage Database Server. The Advantage Database Server is a product of Extended Systems, Inc. and must be purchased separately. If you would like to know more about the Advantage product and the benefits it can provide, please the STD*MIS support team for additional information.

DATA CONFIGURATION FOR STD*MIS 4.x

There are several local reference files that you must customize before new data can be entered into STD*MIS. To complete this process, from your Windows desktop, click on the STD*MIS icon and log in to the system. From the Main Menu, select Configuration. Next, from the Configuration Menu, select "Set up system tables". You will then be presented with five menu choices.

- 1) Update state/site: If you have not converted data from an existing version of STD*MIS, you must enter in your state and reporting site codes. The system requires the state postal abbreviation code (e.g. GA = Georgia, FL = Florida) for your state, and a unique two-digit site code. Each installation of STD*MIS within your state must have a unique site code. Follow the screen prompts to complete these two fields. If you have converted data from a previous version of STD*MIS, DO NOT CHANGE THE VALUES IN THESE FIELDS.
- 2) Create city/county file: Choose this menu item and select your state from the list provided. We have provided a relatively complete list of your state's cities, by zip code. Additional information about editing this file is provided in a subsequent section titled Implementation Guide for STD*MIS 4.x.
- 3) Fix unknown zips: After creating your state's geographic reference file, a summary of this file appears on the left side of the screen under the heading "City/county file". Information provided includes: the number of records in this file, the number of records with unknown zip codes, and the number of records with blank district codes. Choose this menu option to add zip codes to the cities in this file with unknown zip codes.
- 4) Fix blank districts: Choose this menu option to assign a two-digit code that

identifies the district/area/region for each county in your state. All counties in the city/county file must be assigned a district code. **IMPORTANT:** Use a district code of "99" only for cities outside of your project area (e.g. out of state).

- 5) Create county agencies: This reference file is used to identify the source and destination for all field records entered into the system. Initially, this reference file will contain only the names of the 50 states and a number of foreign countries. Choose this menu option to automatically add to this list the names of all the counties in your state, as seen in the GEO_AREA file you created in item 2, above. When you choose this menu option, each county that appears in the GEO_AREA database will be presented to you, one-at-a-time. The decision that must be made is whether each county is considered Alocal@ to you (code as "Y") or is considered AOOJ@ to you (code as "N"). Later, within the Reference Files, additional codes designating local agencies can be added, if needed.

Installation and configuration of the system is now complete. The system is now ready for use.

After logging into the system, access System Utilities and enter in new User ID's and passwords for all staff that will be accessing the system. Passwords are scheduled to expire after 90 days. Review the Implementation Guide for an explanation of the various levels of rights that can be assigned to users. Be sure to assign at least one person with system administrator rights. After the new users are entered, delete the User Id 'STD'. This will prevent unauthorized users from using the default log in to access the system.

IMPLEMENTING STD*MIS 4.x

In preparation for beginning to use STD*MIS 4.x, without use of any previous versions, several decisions need to be made before using the system. These decisions fall into three functional areas:

- ! Determining what disease-specific data should become a part of the patient registry, what should become part of non-patient registry and what should be excluded altogether.
- ! Setting up (populating) and editing all of the reference files with locally approved choices.
- ! Setting up new local-use fields, which can be linked to morbidity, visit to clinic records, interview and field records. This allows creation of new variables that capture locally determined information that will be useful to the program, whether on a short-term research basis, or as an ongoing programmatic indicator. This is not a required activity unless the project area has made the decision to create their own locally determined variables.

The accomplishment of these tasks may take several days of work, and require the involvement of the STD/HIV program manager, surveillance coordinator(s), epidemiologist/data manager(s), data transcriber staff, STD/HIV supervisors and field staff. Decisions about the reference files, local use variables, and registry/non-registry decisions should be determined before proceeding with initial use or with this upgrade. Adding to the reference file values is not problematic, but deleting choices may require recoding of data already entered and can be quite time consuming. Building consensus and agreement in advance will save time in data replacement and recoding after the fact. Each decision will have implications for how data can be analyzed. The order in which you complete these tasks is not important, but it is important that all of these tasks be completed before you begin to use Version 4.x.

Decide what disease-specific data should become part of the patient registry

In Version 4.x of STD*MIS, all data entered by name (with the exception of interview-only field records) automatically become part of the patient registry. This use of the ADisease Registry@ concept means that both infected and uninfected persons will be linked to the registry. This will be of great program benefit, especially for the storage of marginal partners, high-risk negative patients and partners, suspects, and associates, and patient=s pending test results. This gives the program the ability to search in one place to find all Apatients@ and their related events.

Non-Registry Entry

Version 4.x also has a new option entitled "Non-registry entry". This allows for entry of disease-specific, line-listed morbidity, clinic, or laboratory data without entry of patient names or

specific street addresses. Variables captured in this "non-named" morbidity file include; sex, race, ethnicity, DOB, age, city, zipcode, county, census tract, date of diagnosis, provider, method of case detection, pregnancy status, diagnosis, PID, report date, and MMWR week and year, which is automatically calculated. An "events" selection is available so that laboratory test results and treatment information can be entered, if available. Using this data entry option may be appropriate for some project areas with large numbers of reported gonorrhea and chlamydia cases. This component would also be ideal for storage of data on Anon-reportable@ STD=s, such as scabies, trichomoniasis, and bacterial vaginosis.

All morbidity data, including data imported from remote sites and data entered in the "Non-registry entry" are used to generate required CDC reports (IE. CDC 998, 688 and 2638), generate standard reports on age, race, sex, and geographic area analysis, and create reporting data files to be sent via NETSS transmission to CDC=s Epidemiology Program Office. There are, however, important limitations to be considered. Because names are not present, you cannot easily identify duplicate case reports, nor evaluate repeat infections. However, a case number field is available in the non-named morbidity module that will allow for input of a unique identifier, if available. If a value is not entered in this field, the STD*MIS system will generate a case number. Morbidity that requires the initiation of field records should be entered via "Patient registry entry", since names and specific locating information is required. Some project areas may choose to enter all gonorrhea or chlamydia with documented treatment into the non-registry morbidity file, for example, and those that require field follow-up to confirm treatment entered into the named morbidity component. Morbidity for one type of disease can exist in both Patient Registry and non-Registry files.

Variables captured in the non-registry lab module include; date received, sex, race, ethnicity, DOB, age, city, zipcode, county, provider, date specimen collected, lab, date of lab analysis, test type, anatomical site, and qualitative and quantitative result. If laboratory results are entered, an "events" selection is also available, which will allow morbidity to be generated from positive tests, and treatment results to be added. The non-registry lab module allows for administrative closure of reactors. Entering (or in Version 4.x, importing) data into the non-named laboratory module will also allow for entry of positive, negative, and indeterminate tests. Ultimately, this can be used to generate reports with screening positivity and unsatisfactory rates by age, race, sex, city, county, district provider, and laboratory.

Variables captured in the non-registry clinic module include; sex, race, ethnicity, DOB, age, city, zipcode, county, provider, date of visit, clinician, reason for visit, type of insurance, pregnancy status, infertility status, and HIV pre and post test counseling. After entry of the main clinic screen data, you can access related events, and enter data on the related events of clinical signs, symptoms, risks, laboratory tests, treatment, local-use variables and diagnoses. The clinic module was designed to collect both basic medical record data and data elements collected through the Regional Infertility Projects. Our expectation was that data on patients not infected with chlamydia or gonorrhea would be stored in the Non-registry component, and those with positive tests would be stored in the Disease Registry.

Full Field Records or Interview-Only Field Records

The second registry/non-registry decision centers around the types of partner/cluster field records. From the Interview Record module, you may choose to enter related partners/clusters in one of two ways; AFull@ field record or AInterview-only@ field record. If you chose "Interview-only@ field records, these records will contain only the patient name, and initiation and dispositioning information, but they are not linked to the registry. "Full@ field records are linked to the patient registry. We recommend that "Interview-only@ field records should only be selected for ANCI=s@ or if only summary field record data (that found on the lower half of the interview record form) is available for data entry at the central STD office. Those areas that choose the "Interview-only@ field record option will only be able to view these field records when viewing the related interview record. However, both the "Full@ field records and the "Interview-only" field records will be used in the calculation of interview/field statistics.

Set up and edit system reference files prior to entering data into STD*MIS

There are many new reference files packaged with STD*MIS Version 4.x. Most of the reference files that are new to Version 4.x will come with some standard values included. The standard values included with the system are there to promote consistency across different project areas, when possible. The *Symptom* reference file, for example, has symptoms that are standard for use in many Regional Infertility Projects, and are fairly standard for early infectious syphilis. The *Risk Code* reference file contains most of the risk factors from the syphilis interview record, along with some additional risk classifications. The *Specimen Site* reference file contains standard anatomical sites for STD specimen collection and the *Geographical Area* reference files contain FIPS codes for cities and counties in your state.

With Administrative or Lead Data Entry Operator rights you may modify or delete existing choices in the Reference Files module with System Utilities. Also, all reference files, excluding the user reference file include the ability to add new choices Aon the fly@ if you have Administrative or Lead Data Entry Operator rights. The main consideration is to make sure that the value you are adding is not a near duplicate of an existing value, or a different spelling of the same value. For example, if you have both 2.4 MU of Bicillin, and 2.4 BIC in your *Treatment* reference file, analysis of treatment data will be more difficult. In the *Provider* reference file, while all fields may be modified, it is recommended that the provider name not be changed after records have been entered using this value. This is to allow for more uniform analysis. If these must be changed after data entry using these values has occurred, contact your STD support person for assistance with data replacement.

Some reference files included with Version 4.x are quite similar to those used in Version 2.2x. Existing reference file data will be brought over from Version 2.2x to 4.x during the conversion process, whenever possible. However, for many of these files, such as the *Provider* reference file, additional variables have been added. In this case, after the data has been converted, you may wish to access these additional records to update this information.

*STD*MIS Version 4.x reference files:*

Agencies - AGENCY.DBF

This new reference file contains two variables, "Agency" and "Local". A picklist containing the values included in this reference file will be displayed on the screen when you are prompted to enter the initiating and investigating agency fields on a field record. Initially, this reference file will contain only the names of the 50 states and a number of foreign countries. The STDSETUP utility program can be used automatically include all counties within your state in this reference file. After completing this process, we suggest that project areas delete the name of their state from the list provided. Unless a field record being entered into STD*MIS is an incoming OOI field record, the initiating agency for that FR must be coded in the Agency reference file as a "local" county. Field records entered at a state-wide level should assign all counties in the state a local value of "Y".

Clinic Providers - CLINICMD.DBF

The Clinic Provider reference file will need to be populated ONLY if you intend to use the clinic visit/infertility component of STD*MIS. The reference file contains two variables, "clinician name" and "clinician type". The clinician picklist will appear when entering a clinic visit record. This reference file will be initially empty and should be populated with the names of health care clinicians working at sites where STD*MIS is used to enter clinic visit records. This will allow you to collect information on the number of patients seen by an individual clinician, or the number of tests requested by clinician, etc. The "type" variable will allow you to group clinicians for analysis of their behavior. The clinician types include physicians (MD), registered nurses (RN), physician=s assistants (PA), nurse practitioners (NP), practical nurses (PN), others (OT), and unknown (UN). Some of the ways this information can be used include comparisons, such as the percentage of high risk STD clinic patients receiving HIV pretest counseling who were seen by doctors, and the percent seen by nurses and creation of quality assurance (QA) reports that evaluate the rate of unsatisfactory specimens collected by different types of clinicians.

Clinical Signs - SIGNCODE.DBF

The clinical signs reference file is also used ONLY if you intend to use the clinic visit/infertility component of STD*MIS. It contains clinical signs used by Regional Infertility Project participants. These may be modified or deleted as you may wish to include clinical signs listed on your STD clinic record, if different than those in this reference file. This file has contains two variables, "sign" and "sex". For those symptoms that are sex-specific, code male-specific symptoms as "1" and those that are female-specific as "2". Those clinical signs that are not sex-specific should be coded as "9".

Geographical Areas - GEO_AREA.DBF

The Geographical Area reference file now contains seven variables including city, city FIPS, county, county FIPS, zip code, district, and state. Using the STDSETUP utility program, all cities and counties in your state, along with the appropriate FIPS codes for those cities and counties, will be available to you. This reference file may contain records that need to be deleted, such as businesses and government agencies with unique zip codes. Additional cities within your state not included in this reference file may be added. You may also wish to add cities in project areas outside your area to this reference file if you have ongoing OOJ records related to this city. Be sure to code the district field as A99" when adding a city that is not in your project area. Some areas have created unique district codes for patients for which an exact address is not known, but whom they are assuming live within their state. This generally includes patients seen by a within-state provider. Often the district code used is A88" which is one standard code used for Aother@.

Labs - LABCODE.DBF

The Laboratory reference file has been expanded to now include street address, city, state, phone number, district, and zip code for each laboratory. This allows for analysis of laboratory data by city or zip code, but the primary purpose of adding these additional fields is to allow for generation of mailing labels and form letters. Another new variable in the reference file is "ID_NO". This allows for coding of laboratories by identification numbers. This may be useful if your state laboratory has already instituted a coding system for outside laboratories that send specimens to them, or if all laboratories in your state have been assigned a laboratory number. This will also be used when importing electronic laboratory data, when available in Version 4.x. Laboratory names and districts from your lab code reference file in 2.2a will be converted into the Version 4.x format. Address, phone, and ID_NO are not required items for laboratory names converted from 2.2a, and may be added to this reference file at a later time.

Priority - PRIORITY.DBF

This new reference file allows the user to establish priority codes for reactors (perhaps according to a local reactor grid). In Version 2.2x, the priority field was a hard coded choice within the Surveillance Log. In Version 4.x, this character field allows flexibility in assigning levels and types of priority.

Providers - PROVIDER.DBF

The new provider reference file is similar in format to the new laboratory reference file. Two exceptions to this similarity are the Acontact@ variable and the "type" variable,. The contact name field is very useful, because STD*MIS allows all provider information associated with a laboratory report or provider report to be automatically inserted into the notes section of a Field Record. The Atype@ variable has changed since Version 2.2a in that only standard provider type

coding from the CDC Interview record is accepted. Since different codes are used for this variable, alpha codes included in the Version 2.2x provider reference file will not be converted into the Version 4.x file structure. The utility program, STDSETUP, is provided to automate the process of selecting a provider type for each provider record in this reference file. A new variable, "study_type", is used to record participation in the Regional Infertility project. This variable is a one character field which will be coded "P" for prevalence sites, "S" for screening sites, and AO@ for all other sites. Providers who test for chlamydia but are not a part of the infertility project should be coded "O". The "P" and "S" coding will determine which clinic/infertility records are selected for export for the infertility data set to be sent to the Regional Infertility Program Data Manager. in your region. Choose **Modify** to add this information to prevalence and screening provider sites.

Race code - RACETYPE.DBF

This new provider reference file allows for the coding of ethnic, tribal or national subgroups. This is not a required reference file. If you establish no values in this reference file, you will automatically skip over the race code variable on the patient screen. Some possible selections for this group might include Navajo or Hopi, or Mexican, Puerto Rican, or Salvadorean..

Reason for Visit - VREASON.DBF

The Reason for Visit reference file is used ONLY if you intend to use the clinic visit/infertility component of STD*MIS. You may wish to ensure that the choices available correspond to the choices in your STD and/or Family Planning clinic medical records. At this time only one reason for visit may be entered. If you require additional reasons for visit, you may create a local use variable to capture this information.

Risk Types - RISKCODE.DBF

This new reference file is used to record risk categories on interview and clinic/infertility visit records. New risk factor categories can be created, such as "Crack cocaine use", or "Condom use (never)". Some areas may wish to create risk factor referents to capture data they are now collecting in the local use fields on the interview record. New risk factors may also be collected in the "program use" variables, a topic covered in detail in Task 3.

Specimen Sites - SPECIMEN.DBF

This reference file is linked to laboratory test records and provides the mechanism by which anatomical site of lab test is recorded. For example, a patient may have positive tests for gonorrhea at the pharyngeal, cervical, and rectal sites. Blood serum and spinal fluid are not considered specimen sites. As in several other reference files, a sex variable has been added so that specimen sites that are sex-specific may be so identified. Anatomical site of specimen is

also now included in the NETSS-exported records. If you add a new specimen site to your reference file you will be prompted to enter an appropriate NETSS translation code for this site from the NETSS Implementation Plan.

Symptoms - SYMPCODE.DBF

The symptom reference file is used by both the clinic/infertility and interview records and contains standard patient-reported symptoms. Project areas can add other symptoms if desired. Use of this file in conjunction with interview record data provides the ability to analyze symptoms reported by stage of syphilis diagnosis, for example, and duration of symptoms prior to seeking medical care. Use of this file with the clinic/infertility record provides the ability to determine duration and type of symptoms presented by patients using a particular STD or Family Planning Clinic. A sex variable has been added for the designation of sex-specific symptoms.

Test Types - TESTTYPE.DBF

This laboratory tests reference file format has been changed since Version 2.2x. The variables have been expanded to include "testtype", "disease", "quantifiable", "titer" and "entersite". You may wish to add additional test types, as new diagnostic and screening tests become available. The new "disease" variable groups test type by disease, and the "quantifiable" variable is coded "Y" for tests that have a numeric value and "N" for those that do not. The "titer" variable allows you to designate which quantifiable tests are also titrated tests. Because this is a numeric variable, no longer will results such as weakly reactive (WR) be permitted. However, a test result value of "0" is available to represent WR results. The Aquan.result@ field will be skipped, for example, in an FTA test since this test is coded as "quan.result = N@". The "entersite" variable allows you to code whether or not a test should be linked to an anatomical site. For those types of tests where "entersite" is equal to "Y", you will be required to enter a specimen "site" in the laboratory test file.

Treatments - RXCODE.DBF

The treatment reference file is unchanged from Version 2.2x.

Changes in Location of the User Reference File

Users - USERS.DBF

Users.dbf was previously bundled with all other reference files, and could be accessed through System Utilities, Update reference files. Because of changes made to strengthen security in STD*MIS 4.x, the Users.dbf file has been encrypted, so it cannot be read outside STD*MIS using another database application. To protect Users.dbf from access by anyone without Administrative rights, Users.dbf is now accessed through System Utilities, System Maintenance,

Update user file. The file structure of the Users reference file has been changed since Version 2.2x, and the level of rights for users has been expanded. To allow access to reference files from the local drive for persons using STD*MIS on a WAN or a LAN, a variable Aref.dir@ has been added. This allows entry of a drive and directory where the reference files are stored. This allows for faster access to the reference file picklists during data entry, especially when using STD*MIS 4.x in a WAN environment.

The level of users rights has expanded in Version 4.x. Those with administrative rights (A) may search records, enter, modify, and delete data. They also have access to the (F3) key, which allows for additions to reference files Aon the fly" and to System Utilities, allowing them to add, modify, and delete from reference files. Access to System Utilities allows a user with administrative rights to reindex data files, import and export data, purge the patient registry, view uploaded records, check generation of numbers, run duplicate patient maintenance routines, run data quality assurance programs, check the time and date stamps of files in STD*MIS, access users.dbf and create, modify, or delete locally created variables. The lead data entry operator (L) has fewer rights, however, they may add, modify and delete records, add items to the reference files Aon the fly@, run duplicate patient maintenance routines, import and export data, update all reference files, excluding AUSERS.DBF@, and view uploaded records. They may not access the System Maintenance Menu under System Utilities. Those with entry level rights (E) may search, add, and modify data, and those with search-only rights (S) may search the Data Management records. All users may run reports, use the F1 help key, F2 setup key, and the F4 soundex key.

Worker - WORKER.DBF

This reference file remains the same as in Version 2.2x except for the replacement of the "team" variable with a "type" variable. The new "type" variable will capture whether the worker is a DIS, nurse, HIV worker, manager, or support staff member. Worker activity reports include new, more flexible ways of grouping DIS (teams) for reporting purposes.

Setting up and editing local use files

Within the SYSTEM UTILITIES module of STD*MIS a new menu option has been added, **CREATE/UPDATE LOCAL USE FILES**. You may View, Modify, or Create an additional local use file structure for **Clinic Visits, Field Records, Interview Records, or Morbidity Records**. These files allow you to capture additional information you may want associated with any of these records. Using the Clinic Visit record as an example, you may wish to ask some questions of every patient, every visit. Alternatively, you may wish to ask sample questions, for the next month, of only a few of the patients seen in the clinic. These choices are now available to you should you wish to create local use questions associated with any of the four files listed.

After selecting one of the four local use files to edit, a menu appears offering choices for:

View Current Data in File: This provides a way to view all records already entered into this local use file. Using the arrow keys you can scroll to the right to view the field

names or any data that appear in this local use file. You may not modify or delete any data here.

Modify Existing Structure: Choose this menu option to view the existing fields in this file and, if you wish, add new fields. To add a new field, you must:

- 1) Provide a field name, up to ten characters long, starting with an alpha character, that contains only the letters A through Z and the numbers 0 through 9. The underscore (_) character is allowed, as well. Examples include: GANG_NAME, LMP_DATE, PEN_ALERGY, NO_SEXPART, representing character, date, logical, and numeric fields, respectively.
- 2) Select a field type for this field. Choices available include: C - character or text field for alpha or numeric entry; D - date, N - numeric (only numbers allowed); or L - logical (Yes = T, No =F).
- 3) Designate the field length you wish to allow. For Character fields, enter the maximum number of characters to be captured in this field, up to 255. For Numeric fields, enter the maximum number of digits allowed. For example, if the possible values to be entered in this field are from 1 to 99, choose a field width of two (2), etc. For Date and Logical fields, skip this and the following step by pressing the down arrow key. This allows you to add more fields.
- 4) For Numeric fields only, enter the number of decimal places you will accept in response to the question posed by this field. For example, if the possible range includes a value like 25.16, choose a field decimal width of two (2).

Continue adding new fields, as described above, until your new local use file is completed. Unlimited fields may be added to each local use file in Version 4.x. Press the F5 function key to view the structure of the fields already in this file. Pressing the Escape key to exit this screen will offer the following choices: to **Save All** modifications you have made, to **Return** to this screen to continue adding or editing a newly added variable, or to **Abort** this process without making any additions in the file structure.

Build New File Structure: Choose this menu option to create a new local use file. If a local use file already exists and contains data, a screen will appear with the message,

File Contains Data. Archive Data Before Continuing?
Yes No Exit

Choose **Yes** to retain data already entered. You will be prompted to supply a valid and correct Directory (Path) Name and File Name to copy the data to. The file will automatically be given a .DBF extension. After this archived file is created, you will be able to create a new, empty file structure following the same steps described above.

Choose **No** to begin creating a new file structure, as described above, without first

creating an archive of data already entered.

Choose **Exit** to terminate this process.