



Feidhmeannacht na Seirbhíse Sláinte
Health Service Executive



NCIS Training Guide

Adding Patients to a Worklist

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Background

Work Lists are configured on NCIS by an NCIS administrator to support work flow steps for users. Worklists can be configured to be used on a global (national) level, at hospital level or at user level. The functionality is limited, and users should be aware of the limitations of worklists before they choose to use them.

Worklists are essentially a way of users being able to add patients to a particular list to prompt or provide a reminder to carry out a task. **Once a task has been completed and the patient is removed from the worklist, the entry is deleted and is not retrievable.**

There is no record held of worklist entries on the system and therefore they should not be considered for tasks which should be recorded as part of the patient record. Worklists should be considered as analogous to a stickygrantcar yellow note and be used as an aide memoire to carry out a task, not a record of a task to be carried out and when the action was completed.

Steps to add a patient to your Worklist

1. Log into NCIS Chart with appropriate user account
2. Open a patient record
3. Select 'Add to worklist' from the menu on the lower end of the screen

The screenshot displays the patient record interface. At the top, there is a navigation bar with tabs: 'General info' (selected), 'Diagnostics', 'Conference', 'Assessment', 'Therapy', and 'Communication'. Below this, there is a secondary bar with 'Personal info', 'Tumour case' (selected), and 'Clinical history'. The main content area is titled 'Basic data' and contains several input fields: 'Referring physician', 'Primary consultant', 'Family doctor/Specialist', and 'Comorbidities'. Each field has a search icon and a plus sign. At the bottom of the screen, there is a toolbar with buttons: a dropdown arrow, an 'i' icon, 'Doctor's letter', 'Save', 'Print', 'Back', and 'Add to worklist'. The 'Add to worklist' button is highlighted with a red rectangle.

4. This will bring you to a work list form with the patient name auto populated. Here the user can add details on the worklist entry and select which list to place it on.

Patient Joe Bloggs
 D.O.B. 10/10/1950
 NCIS ID
 Hospital ID X987654 (HospitalX)

My Workspace **Work lists** Follow-up care Calendar

All entries

Work list

Patient Bloggs, Joe
 Creator
 Date 02.04.2019
 Work list WORKLIST ABC
 Subject
 Comments

Save Back Delete Back to patient documentation

5. Click on Save: - The work list entry has now been created.
6. If the worklist entry is configured to display in the General Info tabs of the patient record it will appear like this:

General info Diagnostics Conference Assessment Therapy Communication
 Personal info Tumour case Clinical history

There are entries in the work lists for this case! completed
 04.02.2019, Test Work List for Hospital X: This is to test the personal worklist

7. If the worklist entry will also display in 'my workspace', it will appear like this:
 - a. This menu provides your work list content
 - b. You can edit entries by selecting the pencil icon

My Workspace Work lists Follow-up care Calendar
 Patients list Search/Add case List of HIS patients NCIS med [Help]

My last edited tumour cases

NCIS ID	Name	Primary diagn. date	Tumour
12638000009	Ms. Doe, Jane	not specified	not specified

My work list entries

Date	Name	Subject
02.04.2019	Ms. Doe, Jane	refer to physio/OT Comments: patient req... (b)

8. Editing the entry opens the work list form and where a user can update the message or delete the entry.

The screenshot shows a software interface for managing patient worklists. At the top right, patient information is displayed: Patient: Joe Bloggs, D.O.B.: 10/10/1950, NCIS ID, and Hospital ID: X987654 (HospitalX). Below this is a navigation bar with 'My Workspace', 'Work lists' (highlighted), 'Follow-up care', and 'Calendar'. A dropdown menu shows 'All entries'. The main form area is titled 'Work list' and contains fields for Patient (Bloggs, Joe), Creator, Date (02.04.2019), Work list (WORKLIST ABC), Subject, and Comments. At the bottom, there are buttons for 'Save', 'Back', 'Delete', and 'Back to patient documentation'.

9. The work list entry has now been updated/deleted.