



## NCIS GUIDE

# Creating a conference appointment schedule

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## 1 Introduction

Multidisciplinary Meetings (MDMs) can be organised and documented in NCIS.Chart using the conference module. A conference appointment schedule is a series of appointment dates for a particular MDM. It is possible to decide particular settings per conference schedule e.g. max number of patient registrations. The purpose of this NCIS training guide is to describe how to create and edit a conference appointment schedule.

## 2 Who can create a conference schedule in NCIS.Chart?

Users with special permissions can create and edit conference appointment schedules. These are users with permission level of “casemanager” and “administrator”.

## 3 Creating a new conference appointment schedule

Click the conference button to open the conference module and click “add conference”.



The form for creating the conference appointment schedule will open. There are various settings that can be selected for schedule being created. This guide will discuss each section in more detail.

The screenshot shows the 'Create conference' form in the c37.TumorBoard Training Hospital system. The form is divided into four sections: 'Appointment', 'Registration', and 'Display & Printing'. The 'Appointment' section includes fields for 'Conference date' (12.10.2023), 'Recurring appointment' (yes/no), 'Last conference', 'Duration of modification', 'Workgroup', 'Name', 'Location', 'Telephone number for conference', and 'PIN'. The 'Registration' section includes fields for 'Registration possible until', 'Patient registration limit', 'No. of patients', 'Restrict to a specific client', and 'Progression so far'. The 'Display & Printing' section is currently empty.

## 4 Appointment

The first section requires the user to enter information about the appointment

**Create conference**

**Appointment**

Conference date	12.10.2023	from	08	:	00	hours	to	09	:	00	hours
Recurring appointment	<input type="radio"/> yes <input checked="" type="radio"/> no										
	Last conference	<input type="text"/>									
	Duration of modification	<input type="text"/>									
Workgroup	<input type="text"/>										
Name	<input type="text"/>										
Location	<input type="text"/>										
Telephone number for conference	<input type="text"/>										PIN <input type="text"/>

Enter the planned start date and start/end time of the first conference in the schedule:

Conference date	12.10.2023	from	08	:	00	hours	to	09	:	00	hours
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If the conference will occur more than once, then recurring appointment should be selected as “yes”. The last conference date must be entered and the duration of modification (how often it occurs) i.e. every 2 weeks. These are required so that NCIS.Chart knows how many appointment dates to create. Consideration should be given as to the date of the last conference. If a date far in the future is entered, then many appointments dates will be displayed to user when registering the patient. It is possible to edit the conference schedule and change the last conference date in order for more dates to appear at a later time.

Recurring appointment	<input checked="" type="radio"/> yes <input type="radio"/> no	
Last conference	31.12.2023	
Duration of modification	weekly	

A workgroup should only be selected if the user is creating a schedule for a shared MDM (where more than one hospital in NCIS will be registering patients for discussion). The workgroups use hospital abbreviation in the naming convention and the hospital that appears first is the host hospital. If the schedule is not being created for a shared MDM then workgroup should be left blank. Please contact a local hospital Super User if the workgroup you need is not on the list.

Workgroup	Train/Mayo
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Enter the name and location of the MDM:

Name	Test Conference
Location	Conference room 1

Enter telephone number and PIN for conference. This number will appear in the banner containing the name, date and time of the conference.

Telephone number for conference	01 1234567	PIN	123
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## 5 Registration

The next part of the form deals with the registration settings for the conference appointment schedule.

**Registration**

Registration possible until  Hour(s)  Day(s) prior to the conference

Patient registration limit ☐ max. patients ☐ time period ☐ not specified  
No. of patients

Restrict to a specific client

"Progression so far" - fill this entry with data from "1. comorbidity" entries from tumour case ☐ yes ☒ no

"Registration possible until" allows the user to define a period of time before the start of the conference when registration will close. For example, if 1 day is entered; then 1 day before the planned and start time, users will no longer be able to register patients to that conference date for discussion. Consideration should be given here as to entering a time. If a patient needs to be added at short notice and the registration period is over, the person responsible for creating and editing the schedule will need to edit this section and remove the registration restriction, before another patient could be added. This can be left blank if no restriction is required.

Registration possible until  Hour(s)  Day(s) prior to the conference

A patient registration limit can be set to limit the amount of patients listed for a conference. A max number of patients can be defined. Once that number is reached, no more patients can be registered. They will be required to list the patient for another date.

Patient registration limit ☒ max. patients ☐ time period ☐ not specified  
No. of patients

The patient registration limit can be defined by time period. Two time periods can be defined, a "short time" and a "long time". When users register patients to the conference, they will need to select if the patient is a short or long discussion. As patient registrations are added, the time is added up and once the planned length of the conference is reached, registration will close.

Patient registration limit ☐ max. patients ☒ time period ☐ not specified  
Duration presentation-only case  minutes  
Duration of case for discussion  minutes

It is also possible to select "not specified" and have no limit on the number of registrations.

Patient registration limit ☐ max. patients ☐ time period ☒ not specified

If the MDM is not a shared MDM i.e. only one hospital participates, then the hospital must be selected for "restrict to specific client". If this is not selected, the MDM will show in all other hospitals in NCIS and allow registrations from other hospitals.

Restrict to a specific client

Comorbidities can be recorded in the tumour case of a patient. Select "yes" if comorbidities should be displayed at the conference:

"Progression so far" - fill this entry with data from "1. comorbidity" entries from tumour case ☒ yes ☐ no

If "no" is selected, the following field "previous medical progress" will appear when the patient is being registered and will be displayed at MDM. Information entered in this field will automatically appear in the same field at subsequent conferences allowing the user to add information about the patient's progress:

Previous medical progress [ + / - ]

## 6 Display and printing

The next section has settings regarding what can be displayed at the conference and what can be included in the documentation (patient list, agenda, outcome).

**↑ Display & Printing**

<b>Patient list</b>	
Sorting	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">▼</div>
Print template	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Standard ▼</div>
Display patient numbering	<input type="checkbox"/>
Display the patient's address	<input type="checkbox"/>
Hide oncologist	<input type="checkbox"/>
Font size	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">7 ▼</div>
<b>Agenda</b>	
Print version	<input checked="" type="radio"/> standard <input type="radio"/> compact <input type="radio"/> chronologically
	<input type="checkbox"/> Print released results
	<input type="checkbox"/> Print conference participants
<b>Outcome</b>	
Print version	<input type="radio"/> standard <input type="radio"/> chronologically
<b>Conference implementation</b>	
Tumour progress	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">▼</div>
Relevant examinations	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">standard ▼</div>
Automatically accept findings	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">▼</div>
Released results	<input type="checkbox"/> Outcome <input type="checkbox"/> Conference
	<input type="checkbox"/> Display 'Tumour conference outcome' header
Default letterhead for print	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">▼</div>
Order standard outcome	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">conference result before progress ▼</div>
Design of page numbering	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">▼</div>
Attendance list	<input type="checkbox"/> Printout conference participant
	<input type="radio"/> general <input type="radio"/> patient-dependent
	<input type="checkbox"/> Print only present participants

Click the drop down menu to select an option for sorting the patient list. If the patients should be listed in the order that they were listed, then this should be left blank. There is an option to manually sort a list when the user is in the conference documentation screen. The print template is standard. Click to include/exclude patient numbering, patient address, and oncologist from the printed patient list. The font size can also be selected for the printed patient list:

The agenda is a longer list of patient registration details that can be printed and used to discuss the patient. There are three templates. Compact and chronologically have an extra option of including the recommendations if present. Some MDMs may document a recommendation for particular patients at registration and during the conference will seek to confirm the recommendation.

If print released results is selected, then selected results will be displayed at the conference and printed on the agenda.

If “print released results” is selected, the user registering the patient case for discussion will see the following box. The person registering the patient for the MDM can decide which forms from NCIS they want printed/displayed for the patient. The forms can include:

- Assessments entered in NCIS e.g. height and weight
- Change of hospital
- Therapy forms

All forms will appear in the conference box. Need to decide which ones not to display, i.e. move them back to the “documents” box. After registration, any new form created in the patient’s case in NCIS.Chart will automatically be displayed at the conference.

If “print conference participants” is selected, then the attendee list will be printed on the agenda:

Agenda

Print version

☐ standard 
 ☒ compact 
 ☐ chronologically

☐ Print released results  
☒ Print conference participants  
☐ Print recommendations

There are two outcome templates to choose from. It is recommended that an example of each be printed in order to decide which is best for a particular MDM.

Outcome

Print version

☐ standard 
 ☐ chronologically

Tumour progress allows the user to make a decision on how much history of the primary diagnosis should be displayed at the conference. “Entire tumour history” should be selected if no restriction is desired. This will display all primary diagnoses that the patient may have (patients who have more than one primary):

Conference implementation

Tumour progress

entire tumour history

There are four options for relevant examinations. The first option is documented findings. If this option is selected in the set-up then “meeting relevant information about this conference” (see below) will be displayed to the user when registering the patient to the conference. The user can decide which forms in the patient’s tumour case should be displayed at the conference. Forms in the box on the right will be displayed.

**Meeting relevant information about this conference (Please select)**

[ + / - ]

**Information not in the Tumour Board:**

**Information in the Tumour Board:**

Telephone Triage  
 22.05.23 Height and weight  
 23.05.23 Therapy (NCIS med)  
 01.06.23 Pre SACT Continuation  
 07.08.23 Radiatio

The next option for relevant examinations is “dynamically depending on date”.

Relevant examinations

dynamically depending on date

If this is selected then a list of relevant examinations is displayed to the user when they are registering the patient for a conference. The headings can be decided locally per hospital. However, any MDM within that hospital that selects “dynamically depending on date” will have the same headings e.g. “pathology”, “radiology”.

**Relevant examinations**

	Examination	Date	
<input checked="" type="checkbox"/> Pathology	Biopsy	02.02.2021	+
<input checked="" type="checkbox"/> Radiology	CT TAP	03.02.2021	+



If dynamically depending on question is selected, then “questions for specialists” will be displayed to the user when they are registering the patient for the conference appointment.

Relevant examinations dynamically depending on question ▼

The headings can be decided locally per hospital. However, any MDM within that hospital that selects “dynamically depending on date” will have the same headings e.g. “histology”, “imaging”.

↑ Questions for specialists			
	Region	Examination	Clinical question to be discussed at MDM
<input checked="" type="checkbox"/> Histology	<input type="text"/>	<input type="text"/>	<input type="text"/> <span>+</span>
<input checked="" type="checkbox"/> Imaging	<input type="text"/>	<input type="text"/>	<input type="text"/> <span>+</span>
<input checked="" type="checkbox"/> Other investigation	<input type="text"/>	<input type="text"/>	<input type="text"/> <span>+</span>

There are several options for the drop down menu “automatically accept findings”. This allows the user to choose an option regarding how many “findings”, i.e. started forms in NCIS.Chart should be selected and viewed at the conference.

Relevant examinations Documented findings ▼

Automatically accept findings

All findings  
 Findings not older than half a year  
 Findings not older than one year  
 Findings not older than two years  
 Findings older than half a year  
 No automatic takeover  
Only the 10 latest findings

When the user has selected documented findings and has selected which findings to automatically accept then the following section “meeting relevant information about this conference” will appear in the conference form when the user is registering the patient.

**Meeting relevant information about this conference (Please select)**

[ + / - ]

**Information not in the Tumour Board:**

**Information in the Tumour Board:**

Therapy (NCIS med) (Initial disease, C50.2 22.12.21)  
 Therapy (NCIS med) (Initial disease, C50.2 22.12.21)  
 21.12.21 Conference - Recommendation Beaumont Hospi  
 06.01.22 Height and weight (Initial disease, C50.2 22.12.2

If released results is selected for outcome and conference then the forms selected at registration will also be displayed during the conference and in the protocol documentation.

Released results ☒ Outcome ☒ Conference

☐ Display 'Tumour conference outcome' header

Design of page numbering can be left blank

Design of page numbering

If “print out conference participant” is selected then the attendee list will be printed on the outcome. If the “print only present participants” is selected then only attendees who were present will be printed.

There are two options for taking attendance:

- General → attendance is only taken once overall for the meeting
- Patient-dependent → attendance is marked per patient discussion

Attendance list

☒ Printout conference participant  
☒ general ☐ patient-dependent  
☒ Print only present participants

## 7 Participants

Participants allows the user to create an attendance list for the conference. The attendance list will appear at all conference dates and allow attendance to be documented. Reports can also be generated on attendance in NCIS.Chart using the statistics module.

↑ Participants

Confer  
ence  
admini  
strator

Surname ▲

Location

Special. field

↑ Add participant

Search criteria

Surname

First name

Location

Special. field

☐ Only regular tumour conference participants

Search

Use the search fields to find the attendees. This will search the personnel file to find the record of the attendee to add to the list. Select multiple people and click “apply”:

↑ Add participant

Search criteria

Surname

First name

Location

Special. field



☐ Only regular tumour conference participants

Search

10, Doctor (Dr)	Oncology
Bright, Barry (Dr.)	Oncology
Consultant, Test (Dr.)	Oncology

Apply

This will add the selected people to the list. If you wish to mark a person as the conference administrator, click the symbol to the left of the person's name. Some hospitals may use this function to indicate who the Chair of the conference is.

↑ Participants				↑ ↓
	10, Doctor (Dr)	Oncology		
	Bright, Barry (Dr.)	Oncology		
	Consultant, Test (Dr.)	Oncology		

## 8 Saving the conference appointment schedule

When the form is complete, click save to create the conference appointment schedule.

Appointment dates will now appear in the conference module. Patients can now be registered to these dates:

c37.TumorBoard  
Training Hospital

Online: superadministrator  
caroline NCIS\_meade

Conferences

Add: -- Please choose --

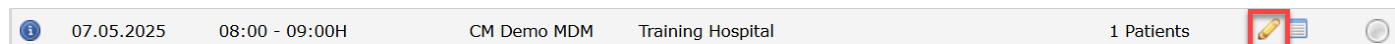
All conferences 33  
Conferences per page 20  
Current conferences

Restrict to client "All centres"  
Conference name  
Patient name  
Conference date 06.05.2025 to 10.06.2025 >>> Search

Date	Time	Conference	Hospital	Location	Patients
06.05.2025	08:00 - 10:00H	MDM Cork Oncology	Cork UH Training		0 Patients
06.05.2025	08:00 - 10:00H	Test CM 2	Training Hospital	Conference Room	0 Patients
07.05.2025	08:00 - 09:00H	CM Demo MDM	Training Hospital		1 Patients
08.05.2025	00:00 - 00:00H	CAR-T Review Meeting	St. James's Training	SJH	0 Patients
08.05.2025	09:30 - 00:00H	TEST MYELOMA MDM	Cork UH Training		0 Patients

## 9 Editing the conference schedule

Changes may need to be made to a conference appointment schedule. In the conference module, click the edit button to open the schedule for editing:



If you are making a change to a single date then “changes apply to all conference in the sequence” should be selected as “no”.

Changes apply to all conferences in the sequence? ☐ yes ☒ no

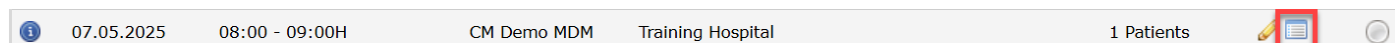
If changes are required to all dates in the schedule, then yes should be selected. This is very important when making changes. If you wish to change the date of the last conference and make additional dates appear, then last conference date should be amended here:

Changes apply to all conferences in the sequence? ☒ yes ☐ no  
Last conference 31.12.2021

Any other changes can then be made to the settings for the conference schedule. Click save to implement the changes.

## 10 Copy, Extend or End the conference series

To copy, extend or end a conference series click on the action button.



Copy a conference

Click the start button and it will bring you to a copied conference setup page and edit as appropriate.

**CM Demo MDM**

Copy conference | Extend conference series | End conference series

In which file do you want to copy the conference?

Training Hospital

**Start**

Time	Conference Name	Location	Room	Patient Count
08:00H	Test CM 2	Training Hospital	Conference Room	0 Pa
09:00H	CM Demo MDM	Training Hospital		0 Pa

**Copy conference (Target client: Training Hospital)**

**Appointment**

Conference date: 07.05.2025 from 08:00 hours to 09:00 hours

Recurring appointment: ☐ yes ☒ no

Last conference:

Duration of modification:

Workgroup:

Name: Copy of CM Demo MDM

Location:

Telephone number for conference:  PIN:

**Registration**

Registration possible until: 0 Hour(s) 0 Day(s) prior to the conference

## Extend Conference Series

Change the date to the date you want to extend the series to and click on extend.

**Shared MDM For GE**

Copy conference | **Extend conference series** | End conference series

Duration of modification: weekly

Last conference: 30.07.2025

Extend until: 30.07.2025

## End conference series

Click on delete appointment series from conference date. NOTE: You cannot delete the appointment series if there are any patients in the conference series. You will need to move them first.

**Test CM 2**

Copy conference | **Extend conference series** | End conference series

Delete appointment series from 06.05.2025?