NCIS GUIDE

Creating a conference appointment schedule

National Cancer Control Programme
NCIS Guide
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Document/Version no: NCISTRAIN36/2
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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

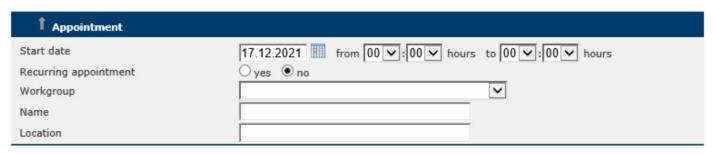Click the conference button to open the conference module and click "add conference".

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.

4   Appointment

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

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

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 i.e. how often does it occur. 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.

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.

Enter the name and location of the MDM:

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

5   Registration

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

"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.

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.

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.

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

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.

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

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

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, protocol).

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 only print template is standard.

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 some patients at registration and during the conference will confirm the recommendation.

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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:

There are two protocol 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.

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.

There are four options for relevant examinations. The first option is documented findings. When this is selected, the drop down menu "automatically accept findings" will appear. This allows the user to choose an option regarding how many "findings", i.e. started forms in NCIS.Chart should be selected.

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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

<<
>>

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		
☑	**Pathology**	Biopsy	02.02.2021	▦	+
☑	**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 question" will have the same headings e.g. "histology", "imaging", "other investigation".

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

"Display tumour outcome heading"

Design of page numbering can be left blank

If "print out conference participant" is selected then the attendee list will be printed on the protocol. If the "print only present participants" is selected then only attendees who were present will be printed.
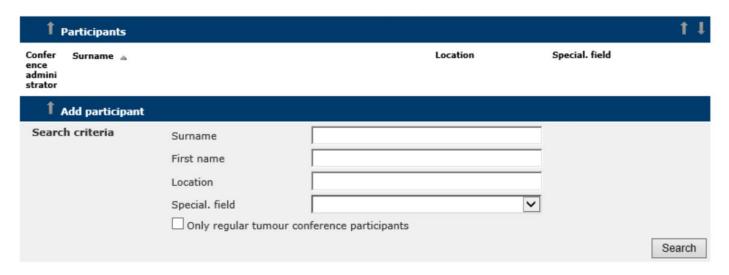
There are two options for taking attendance

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

7   Participants

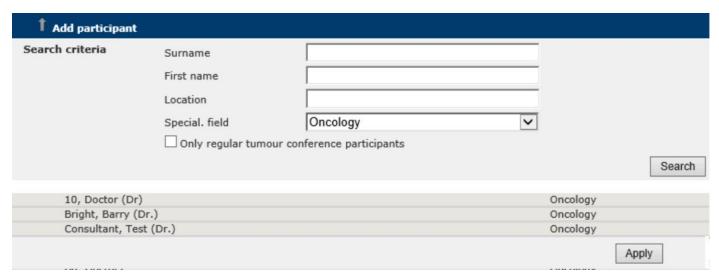Participants allows the user to create an attendance list for the conference. The attendance list will appear at all conference dates and allow attendance to be documented. Reports can also be generated on attendance in NCIS.Chart using the statistics module.

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Use the search fields to find the attendees. This will search the personnel file to find the record of the attende to add to the list. Select multiple people and click "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.

8   Saving the conference appointment schedule

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

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

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".

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:

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