

NCIS GUIDE

Documenting and Locking an MDM

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1 Introduction

Multidisciplinary meetings (MDMs) can be created and managed using the conference module in NCIS.Chart. The purpose of this training guide is to describe how to document the conference and lock it to prevent editing when the MDM has concluded.

2 Opening the conference appointment date

The NCIS training Guide, "Introduction to the conference module in NCIS.Chart" describes navigating the conference module.

In the conference module, click on the conference appointment date to open and view in more detail.

c37.TumorBoard UH Galway Client Short Online: casemanager Case Manager

Conferences

Add: no entry found

All conferences 4

Conferences per page 20

Current conferences

Restrict to client "All centres"

Conference name

Patient name

Conference date 10.12.2021 to 14.01.2022 >>> Search

Date	Time	Conference	Hospital	Location	Patients
16.12.2021	00:00 - 00:00H	Breast MDM Chair Prof Surgeon	GUH_MUH_LUH_SUH_PUH_SVUH_MRHT_SJH_MUHC_UHK_UHW	Meeting Room 1	4 Patients

Once the conference appointment is opened, the list of registered patients for discussion are displayed. If the MDM is being documented in real time, the screen below is the screen that will be displayed during the MDM. Documentation of the MDM begins in this screen. If more than one hospital participates in the MDM, the patients may be listed per hospital. The location of the patient is dependent on the location of the patient's tumour case in NCIS.

The screenshot shows the 'UH Gateway Client Short' interface. Annotations include:

- Meeting details**: Points to the header 'Breast MDM Chair Prof Surgeon on 16.12.2021 from 00:00 to 00:00 hours (Meeting Room 1)'.
- Patient List**: Points to the main table of patient cases.
- Patient navigation list**: Points to the right-hand sidebar showing a list of patients like 'MARY, MCKEON (76)'.
- Attendance list**: Points to the 'Attendance list' section on the right, showing checkboxes for 'Manager, Case (GUH)', 'Mr. Surgeon, Jack (Conference administrator)', etc.
- Documentation buttons**: Points to the bottom section containing buttons like 'List of patients', 'Anonymised list of patients', 'Anonymise agenda', 'Agenda', 'Outcome', and 'Detailed history'.
- Conference status**: Points to the bottom status bar with fields for 'in progress', 'User identification', and 'Password'.

3 Attendance List

Attendance list

- ☐ **Manager, Case (GUH)**
- Breast care nurse**
- ☐ **Nurse, Claire (MUH)**
- Oncology**
- ☐ **Dr. Bright, Barry (SLH)**
- Pathology**
- ☐ **Path, Layla (GUH)**
- Radiology**
- ☐ **Radio, Sandra (GUH)**
- Surgery**
- ☐ **Mr. Surgeon, Jack (GUH) (Conference administrator)**

The attendance list is created when the conference schedule is created (see NCIS training Guide.....).

If an attendee does not have a specialty, they are listed at the beginning without a heading. All attendees with a specialty are listed under their specialty heading.

When the attendance list is created, it is possible to mark an attendee as the "conference administrator". Some MDMs may use this to indicate who the meeting chair is.

The fastest way to record attendance is to click the "all attendees present" button. It is then possible to deselect anyone who did not attend.

The edit attendees button takes the user to the conference schedule set up where the attendance list can be edited.

The "print attendees" button will create a pdf sign in sheet that can be used if attendance is also required to be physically documented with a signature.

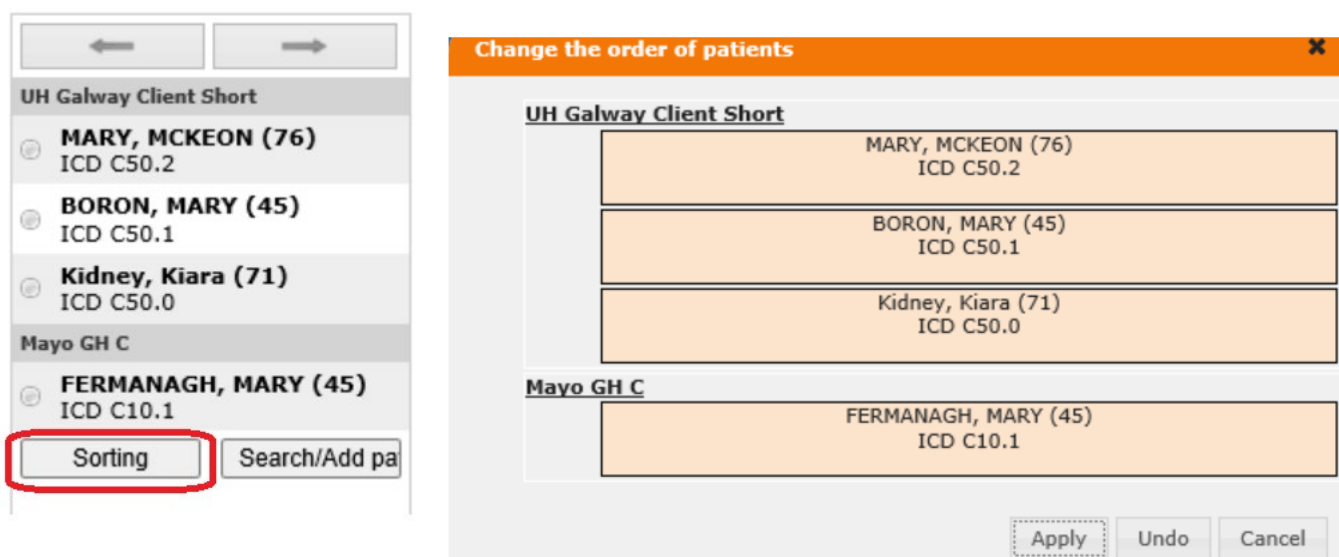
4 Patient navigation list

The patient navigation list can be used to:

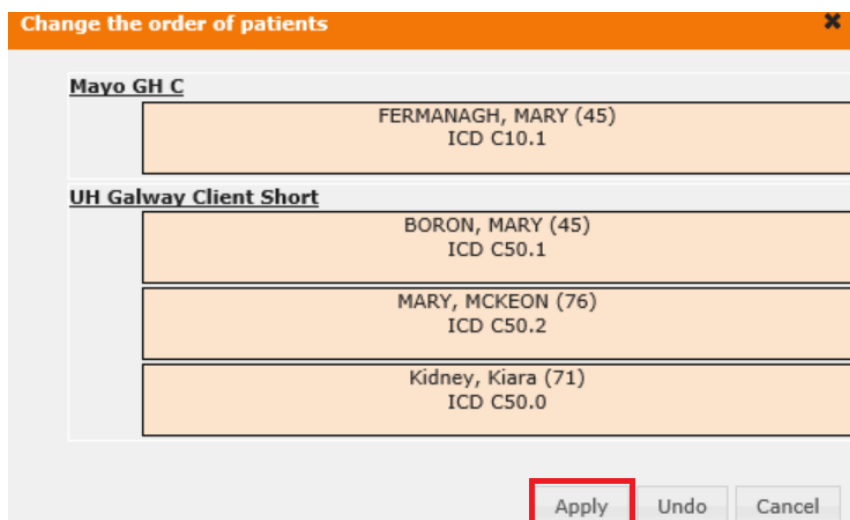
- Sort the patient list.
- Search for patients to add further registrations to the list.
- Navigate between patients when documenting the recommendations. View which patients have been discussed and have an outcome recorded

4.1 Sorting the patient list

Click the “Sorting” to open the sorting window and change the order of the patients cases listed for discussion:



Click on a patient to drag and drop them into the preferred position in the list. It is also possible to click on the hospital header, drag and drop the list for a hospital into a different order. This may be useful if patients from a particular hospital are discussed first. Click apply to save the changes.



The patient list on the left and the navigation list on the right will now display the new order:

Breast MDM Chair Prof Surgeon on 16.12.2021 from 00:00 to 00:00 hours (Meeting Room 1)

Patient	Diagnosis, question	Presented by
Mayo GH C		
FERMANAGH, MARY (f) * 15.08.1976	15.10.2019 Tumour Case Diagnosis: C10.1 Malignant neoplasm of anterior surface of epiglottis Clinical question to be discussed at MDM: Post surgery discussion	Mr. Jack Surgeon (GUH, Surgery)
Relevant examinations	Histology Resection: 30.11.2021	
UH Galway Client Short		
BORON, MARY (f) * 15.08.1976	20.11.2020 Other tumour(s): 17.03.2020 Tumour Case Diagnosis: C50.1 Malignant neoplasm of central portion of breast Clinical question to be discussed at MDM: Confirm staging and treatment option	Dr. Barry Bright (SLH, Oncology)
Relevant examinations	Pathology Biopsy: 05.10.2021 Radiology CT TAP: 02.11.2021	
MARY, MCKEON (f) * 12.03.1945	06.09.2021 Tumour Case Diagnosis: C50.2 Malignant neoplasm of upper-inner quadrant of breast Clinical question to be discussed at MDM: Please review biopsy and CT TAP to confirm staging. Discuss treatment options	Dr. Barry Bright (SLH, Oncology) Mr. Jack Surgeon (GUH, Surgery) (Prim. Exam.)
Relevant examinations	Pathology Biopsy: 25.11.2021 Radiology CT TAP: 30.12.2021, Mammogram: 19.10.2021	
Kidney, Kiara (f) * 14.02.1950	12.03.2021 Tumour Case Diagnosis: C50.0 Malignant neoplasm of nipple and areola Clinical question to be discussed at MDM: Review radiology and histology, query surgery first line treatment	Dr. Barry Bright (SLH, Oncology) Dr. Barry Bright (SLH, Oncology) (Prim. Exam.)
Relevant examinations	Pathology Biopsy: 02.12.2021 Radiology CT TAP: 02.12.2021, Mammogram: 23.11.2021	

Patient Overview

←
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Mayo GH C

FERMANAGH, MARY (45)
 ICD C10.1

UH Galway Client Short

BORON, MARY (45)
 ICD C50.1

MARY, MCKEON (76)
 ICD C50.2

Kidney, Kiara (71)
 ICD C50.0

Attendance list

☐ **Manager, Case (GUH)**

Breast care nurse

☐ **Nurse, Claire (MUH)**

Oncology

☐ **Dr. Bright, Barry (SLH)**

Pathology

☐ **Path, Layla (GUH)**

Radiology

☐ **Radio, Sandra (GUH)**

Surgery

☐ **Mr. Surgeon, Jack (GUH)**
 (Conference administrator)

4.2 Searching for patients to add further registrations to the list.

It is possible to search and add new patient case registrations to the list by clicking on the “search/add patient” button. This brings the user to the search/add patient screen where they search for patients, open their case, and create new conference registrations (see NCIS Training Guide: Registering a patient case to a conference appointment date).

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Mayo GH C

FERMANAGH, MARY (45)
 ICD C10.1

UH Galway Client Short

BORON, MARY (45)
 ICD C50.1

MARY, MCKEON (76)
 ICD C50.2

Kidney, Kiara (71)
 ICD C50.0

c37.CancerCenter
UH Galway Client Short

My Workspace
Work lists
Calendar

Patients list **Search/Add case** List of HIS patients

Search/Add patient

Please enter last name, first name or date of birth

Surname i

First name

Date of Birth

Health insurance number

or use a Hospital ID

Hospital ID

4.3 Navigating between patients when documenting the recommendations

Click on a patient in the list to open their registration and begin documenting.

Mayo GH C

- FERMANAGH, MARY (45)
ICD C10.1

UH Galway Client Short

- BORON, MARY (45)
ICD C50.1
- MARY, MCKEON (76)
ICD C50.2
- Kidney, Kiara (71)
ICD C50.0**

Sorting Search/Add pa

The patient list on the left will disappear and the chosen patient case registration is displayed on screen. The patient navigation list is always accessible on the right hand side and can be used to move on to the next patient by clicking the arrows at the top or by clicking another patient on the list. It allows the user to skip patients if an urgent discussion is required.

c37.CancerCenter
UH Galway Client Short

Patient **MS Kidney, Kiara**
D.O.B. 14.02.1950 (71)
NCIS ID 12638000120
Hospital ID 2009876 (GUH)

Online: casemanager
Case Manager

Breast MDM Chair Prof Surgeon on 16.12.2021 from 00:00 to 00:00 hours (Meeting Room 1)

NCIS med

case details

12.03.2021
Tumour Case Diagnosis

Malignant neoplasm of nipple and areola (C50.0)
right, Malignant primary site
Clin. staging from 17.11.2021:
Ductal carcinoma in situ, solid type (C50.0) (8230/2)

cT2 (1) cN2 cM0 stage IIIA
G3

Patient presentation type: Initial presentation/index discussion
Patient time point: New presentation of cancer/tumour
Conference type: Pre-Confirmed histology/cytology
Presented by: Dr. Barry Bright

Disease: Tumour Case Diagnosis: C50.0 from
Purpose: Treatment option
Oncology

Performance Status: ☒ ECOG ☐ Lansky score ☐ Karnofsky score 0

Previous medical progress [+ / -]
Family history of breast cancer. Confirmed histologically.

Patient Overview

Mayo GH C

- FERMANAGH, MARY (45)
ICD C10.1

UH Galway Client Short

- BORON, MARY (45)
ICD C50.1
- MARY, MCKEON (76)
ICD C50.2
- Kidney, Kiara (71)
ICD C50.0**

Sorting Search/Add pa

Attendance list

- ☐ Manager, Case (GUH)
- ☒ Breast care nurse
- ☐ Nurse, Claire (MUH)

4.4 View which patients have been discussed and have an outcome recorded

Green indicates that a recommendation has been recorded. Amber indicates that the patient has been recorded as adjourned. Red indicates that although the patient was adjourned the button 'new conference registry' was not selected (see section 5). Grey indicates that the patient has not been discussed yet or that it was a morbidity and mortality discussion.

5 Documenting the recommendations and discussion

To begin documenting, the user clicks on a patient in the list on the left or by clicking on a patient in the navigation list.

The right hand side of the screen will now display the registration details of the chosen patient. The beginning is the information from the tumour case and below it is the information entered on the conference form when the patient's case was registered for the discussion:

Case details
button

Information that was
entered in the patient's
tumour case and
automatically displayed
and documented for
the meeting.

Information that was
entered in the conference
form to register the
patient case for discussion

The screenshot shows the 'UH Galway Client Short' interface. At the top, patient information for 'MS Kidney, Kiara' is displayed. The main heading is 'Breast MDM Chair Prof Surgeon on 16.12.2021 from 00:00 to 00:00 hours (Meeting Room 1)'. A red box highlights the 'case details' section, which includes 'Tumour Case Diagnosis' for 'Malignant neoplasm of nipple and areola (C50.0) right, Malignant primary site'. Another red box highlights the conference form, which includes fields for 'Patient presentation type', 'Patient time point', 'Conference type', 'Presented by', 'Performance Status', 'Previous medical progress', and 'Clinical question to be discussed at MDM'. A third red box highlights the 'Relevant examinations' section, which lists 'Pathology Biopsy: 02.12.2021', 'Radiology CT TAP: 02.12.2021', and 'Mammogram: 23.11.2021'. On the right, there is a 'Patient Overview' section with a list of participants and an 'Attendance list'.

If required, it is possible to navigate to the patient's tumour case by clicking the "case details" button. This will open the tumour case, where edits can be made to the tumour case or other information can be viewed. To navigate quickly back to the discussion, click the conference module button. This will take the user back to the same place in the conference documentation:

The screenshot shows the 'UH Galway Client Short' interface with the 'Tumour case' tab selected. The 'Basic data' section includes fields for 'Referring physician', 'Primary consultant' (Dr. Barry Bright), 'Family doctor/Specialist', and 'Comorbidities'. The 'Primary diagnosis' section shows 'Primary diagn. date' as '12.03.2021' and 'Primary diagnosis' as 'C50.0 Malignant neoplasm of nipple and areola'. The 'Diagnosis' section on the right provides detailed information: 'Diagnosis: C50.0 (12.03.2021) Malignant neoplasm of nipple and areola (right)', 'ICD-O (morph.): Ductal carcinoma in situ, solid type (C50.0)', 'Clinical TNM: cT2(1)-cN2-cM0', and 'Vital status: Patient alive 16.12.2021 (Conference)'. Below this, there is a list of assessments: 'Assessment: Baseline(+)', 'Assessment: Extravasation(+)', 'Biopsy / Puncture(+)', 'Bone marrow transplantation', 'Clinical history', 'Conference', and 'CTCAE Record'.

The next section records the results of the conference. Recommendations are recorded using the drop down lists provided. Multiple recommendations can be selected by clicking the add recommendation button. There are a number of free text fields to record more information about the discussion. The study recommendation drop down menu can be used to recommend a patient for a clinical trial. This can be used if a hospital has entered the available clinical trials in NCIS using the study management function.

Results of the conference			
No.	Recommendation type	Recommendation/location	Information
1.	Adjuvant Systemic treatment ▼	Chemotherapy ▼ ☐ in-house ☐ external ☒ not specified	
2.	Radiotherapy ▼	Brachytherapy ▼	
Add recommendation Recommendation - text field [+ / -] Surgical intervention not possible, patient for chemo+radiotherapy			
1. Study recommendation Procedure [+ / -]			
Discussion [+ / -]			
Conference ended with			
Guideline-based treatment recommended ☐ yes ☐ no			

Complete the field “conference ended with”. There are three options:

- Recommendation
Selecting recommendation documents that the patient discussion concluded in a recommendation. The patient in the navigation list will turn green.

Conference ended with Recommendation ▼

Mayo GH C	
☐	FERMANAGH, MARY (45) ICD C10.1
UH Galway Client Short	
☐	BORON, MARY (45) ICD C50.1
☐	MARY, MCKEON (76) ICD C50.2
☒	Kidney, Kiara (71) ICD C50.0

- Adjournment
If adjournment is selected, other fields will appear to record a reason and to select the conference that the patient should be adjourned to

Conference ended with	Adjournment	▼
Reason		T
Conference for repeat presentation	---Please select a conference---	

Clicking on the “T” button will display a list of reasons that can be selected, however a reason can also be typed in.

Reason		T
Conference for repeat presentation		X
Guideline-based treatment recommended	Presenter not available Radiology not available Histology not available Conference overran MDM re-scheduled	
Conference outcome details		

A conference is selected from the list to adjourn the patient to. The user must click the “new conference registry” button in order for the patient to be registered. Once this is clicked the patient’s registration will now appear at the newly selected conference appointment date.

Conference for repeat presentation	Thursday (30.12.2021) 00:00 hours	▼
	New conference registry	

The patient will turn amber in the navigation list if adjournment has been selected:

Mayo GH C	
FERMANAGH, MARY (45)	ICD C10.1
UH Galway Client Short	
BORON, MARY (45)	ICD C50.1
MARY, MCKEON (76)	ICD C50.2
Kidney, Kiara (71)	ICD C50.0
Sorting	Search/Add pa

If a patient is adjourned but “new conference registry” button is not clicked then a red dot will appear beside patient name. Once “new conference registry” button is clicked to add the patient to the required conference it will change to an amber dot.

BORON, MARY (45)	ICD C50.1
MARY, MCKEON (76)	ICD C50.2
Kidney, Kiara (71)	ICD C50.0
Sorting	Search/Add pa

- Morbidity and mortality

If morbidity and mortality discussion is selected, the patient remains grey in the navigation list

Conference ended with Morbidity and mortality discus ▾

Mayo GH C

☐ **FERMANAGH, MARY (45)**
ICD C10.1

UH Galway Client Short

☐ **BORON, MARY (45)**
ICD C50.1

☒ **MARY, MCKEON (76)**
ICD C50.2

☒ **Kidney, Kiara (71)**
ICD C50.0

The final part of the screen shows if there have been any previous conference discussions. It is possible to click on previous discussions and view them in more detail. There is also a comments and notes section.

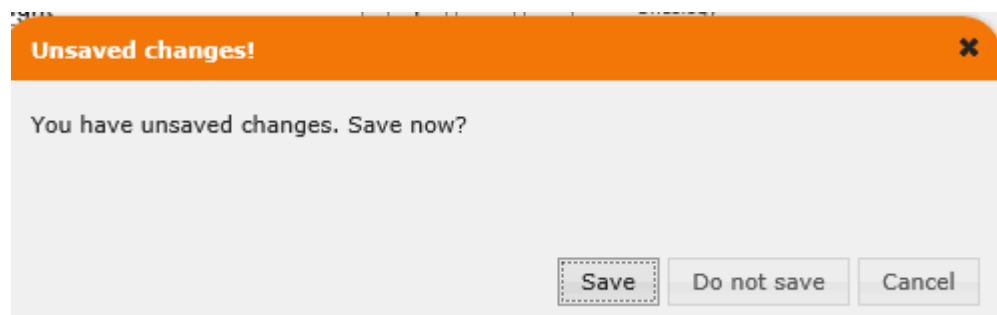
Conference history

16.04.2021 **ConferenceBreast -Chair Prof. Surgeon**
Conference ended with: **Recommendation.** Initial presentation/index discussion Benign Aetiology Pre-Confirmed histology/cytology.
Presented by: Dr. Barry Bright Oncology
Clinical question to be discussed at MDM: Mammogram showed possible mass. Biopsy negative. Discharge

Comments

Add note

Click “save” at the bottom of the screen to save any changes. If the user forgets to press save and clicks onto the next patient, a pop up will appear requesting to save changes.



6 Exiting the conference documentation

To get back to the overview of the patient list, click the meeting banner at anytime:



This will bring the user back to the patient list overview:

c37.TumorBoard
UH Galway Client Short

Online: casemanager
Case Manager

Breast MDM Chair Prof Surgeon on 16.12.2021 from 00:00 to 00:00 hours
(Meeting Room 1)

Patient	Diagnosis, question	Presented by
Mayo GH C		
<i>i</i> FERMANAGH, MARY (f) 15.08.1976	15.10.2019 Tumour Case Diagnosis: C10.1 Malignant neoplasm of anterior surface of epiglottis Clinical question to be discussed at MDM: Post surgery discussion	Mr. Jack Surgeon (GUH, Surgery)
Relevant examinations	Histology Resection: 30.11.2021	
UH Galway Client Short		
<i>i</i> BORON, MARY (f) 15.08.1976	20.11.2020 Other tumour(s): 17.03.2020 Tumour Case Diagnosis: C50.1 Malignant neoplasm of central portion of breast Clinical question to be discussed at MDM: Confirm staging and treatment option	Dr. Barry Bright (SLH, Oncology)
Relevant examinations	Pathology Biopsy: 05.10.2021 Radiology CT TAP: 02.11.2021	

Patient Overview

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Mayo GH C

●

FERMANAGH, MARY (45)
ICD C10.1

UH Galway Client Short

●

BORON, MARY (45)
ICD C50.1

●

MARY, MCKEON (76)
ICD C50.2

●

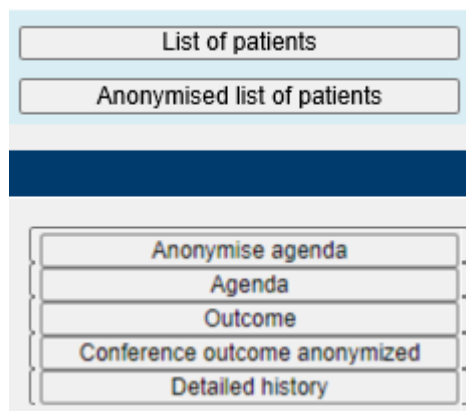
Kidney, Kiara (71)
ICD C50.0

Sorting

Search/Add pa

7 Documentation buttons

There are a number of documentation buttons that will generate pdf documents that can be printed or saved and emailed if required.

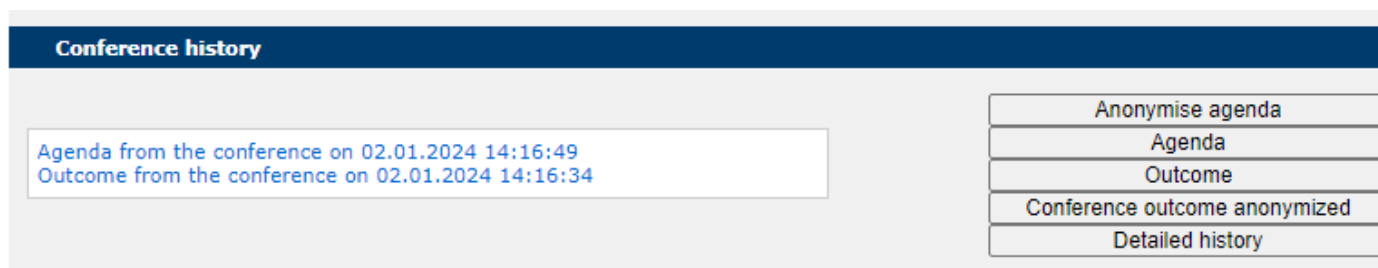


The patient list or agenda can be used as printed list to conduct the meeting if required. The outcome, often referred to locally as the meeting minutes has all the information that was documented about the patient at the conference. It includes the information from the tumour case that was automatically displayed at the conference, information that was entered at registration and the information that was recorded about the discussion including the recommendations.

List of patients →	A short list of patient cases registered for discussion
Agenda →	A longer list of patient cases registered for discussion
Outcome →	The detailed documentation of the conference.

Clicking on the outcome button will generate a document that includes all the patients from the meeting. This is also automatically generated as a final version when the meeting is locked. Individual outcomes are automatically saved to each patient case in NCIS.

Whenever an agenda or outcome is generated by a user, the version is recorded on the left:



By clicking on the “detailed history” button, the user can see the history of agendas and outcome that were generated.

Conference history

Prints

Agenda from the conference on 02.01.2024 14:16:49
Outcome from the conference on 02.01.2024 14:16:34

Activities

17.12.2021 17:49:12 (Manager, Case): Participant Nurse, Claire marked absent
17.12.2021 17:49:12 (Manager, Case): Participant Dr. Bright, Barry marked absent
17.12.2021 17:49:12 (Manager, Case): Participant Radio, Sandra marked absent
17.12.2021 17:49:12 (Manager, Case): Participant Path, Layla marked absent
17.12.2021 17:49:12 (Manager, Case): Participant Manager, Case marked absent
17.12.2021 17:49:12 (Manager, Case): Participant Mr. Surgeon, Jack marked absent

8. Locking the conference

When the documentation of the MDM has been finalised as per local policy, the conference can be locked in NCIS. Changing the status of the conference to “locked” means that a user can’t make any more edits to the documentation. The information that was present and entered in the tumour case at the time of the documentation is captured in the patient . If changes are required to be made after locking the conference, then the status is required to be changed back to “in progress”. Only users with special permissions can lock a conference (permission level casemanager or administrator).

The fields “conference ended with” must be completed for every patient on the list before the conference can be locked. To lock the conference, the user must change the status, enter their password, and click save:

Conference status

Locked

▼

User identification

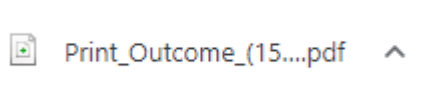
galwaycasemanager

Password

●●●●●●●●

Save

The outcome with all the patient documentation will automatically be generated. A pop up containing the outcome will appear at the bottom of the screen:



In the conference module, the conference appointment will now appear with a green status button and a lock symbol:

Date	Time	Conference	Hospital	Location	Patients	
16.12.2021	00:00 - 00:00H	Breast MDM Chair Prof Surgeon	GUH_MUH_LUH_SUH_PUH_SVUH_MRHT_SJH_MUHC_UHK_UHW	Meeting Room 1	4 Patients	

The individual outcome is saved to the patient’s case and can be viewed by clicking on the conference tab. Click the pdf symbol to generate the outcome pdf document. The user can also click on a conference date to open and view the information, however it will be locked for editing.

c37.CancerCenter

UH Galway Client Short

Patient

MS Kidney, Kiara

D.O.B.

14.02.1950 (71)

NCIS ID

12638000120

Hospital ID

2009876 (GUH)

General info

Diagnostics

Conference

Assessment

Therapy

Communication

Add:

-- Please choose --

Document upload

Date	PDF	Name	Status	Event
16.12.21		ConferenceBreast MDM Chair Prof Surgeon Conference ended with: Recommendation. Initial presentation/index discussion New presentation of cancer/tumour Pre-Confirmed histology/cytology. Presented by: Dr. Barry Bright Oncology Clinical question to be discussed at MDM: Review radiology and histology, query surgery first line treatment Recommendation: Surgical intervention not possible, patient for chemo+radiotherapy Procedure: test	in progress	
16.04.21		ConferenceBreast -Chair Prof. Surgeon Conference ended with: Recommendation. Initial presentation/index discussion Benign Aetiology Pre-Confirmed histology/cytology. Presented by: Dr. Barry Bright Oncology Clinical question to be discussed at MDM: Mammogram showed possible mass. Biopsy negative. Discharge		