



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

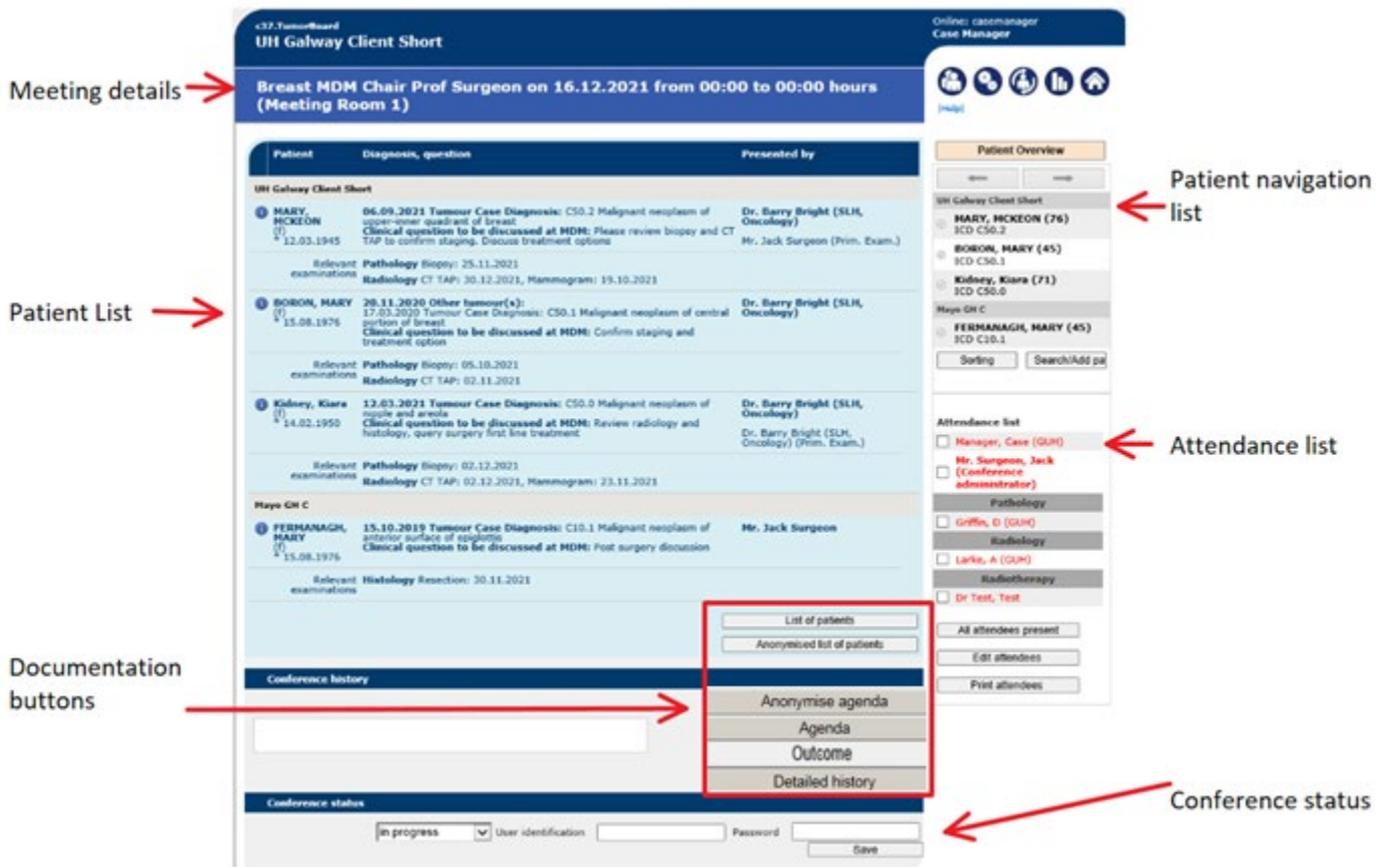
The NCIS training Guide, "Introduction to the conference module in NCIS.Chart" describes navigating the conference module.

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

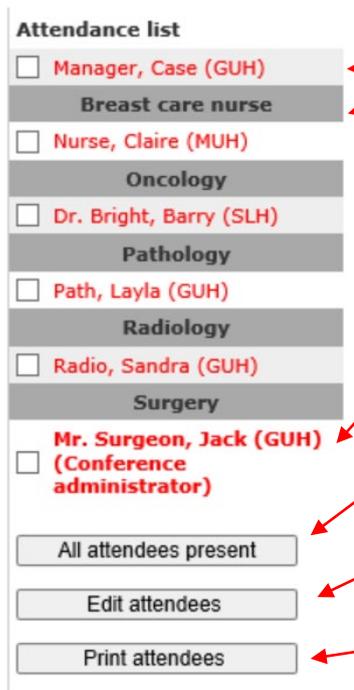
The screenshot shows the 'c37.TumorBoard UH Galway Client Short' interface. The top right corner indicates 'Online: casemanager Case Manager'. The 'Conferences' section shows 'Add: no entry found'. Below this, there are filters for 'All conferences' (4), 'Conferences per page' (20), and 'Current conferences'. To the right, there are search filters for 'Restrict to client' (All centres), 'Conference name', 'Patient name', and 'Conference date' (10.12.2021 to 14.01.2022). A table of conferences is displayed below, with one entry highlighted by a red box:

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.



3 Attendance list



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.

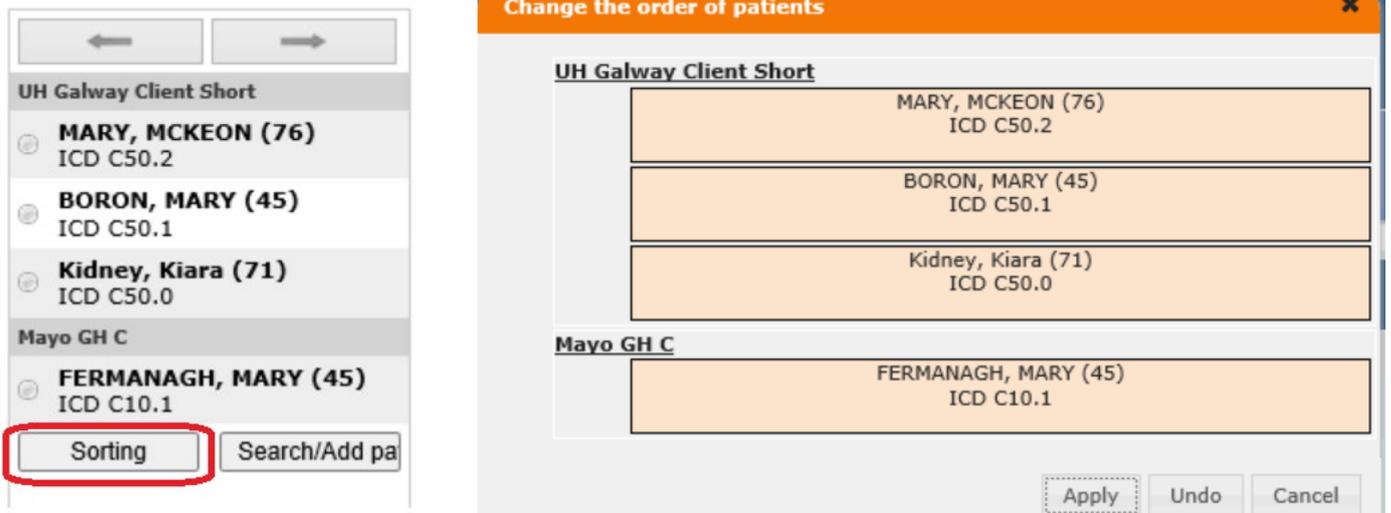
4 Patient navigation list

The patient navigation list can be used to:

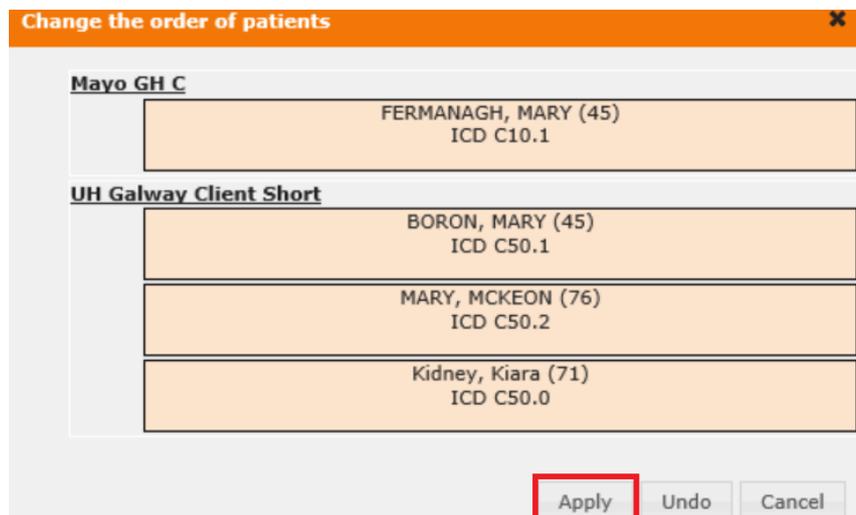
- Sort the patient list.
- Search for patients to add further registrations to the list.
- Navigate between patients when documenting the recommendations.
- View which patients have been discussed and have an outcome recorded.

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 epiglottitis 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	

Buttons: List of patients, Anonymised list of patients

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

Buttons: Sorting, Search/Add pa

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).

Mayo GH C

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ICD C50.2
- Kidney, Kiara (71)**
ICD C50.0

Buttons: Sorting, **Search/Add pa**

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

First name

Date of Birth

Health insurance number

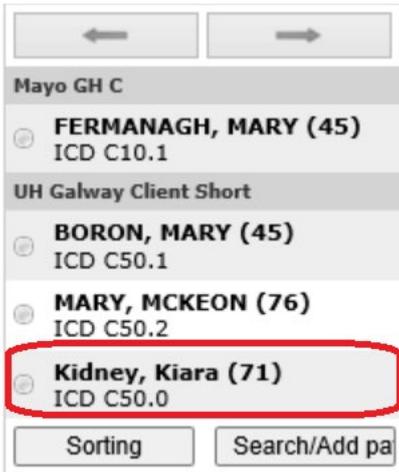
or use a Hospital ID

Hospital ID

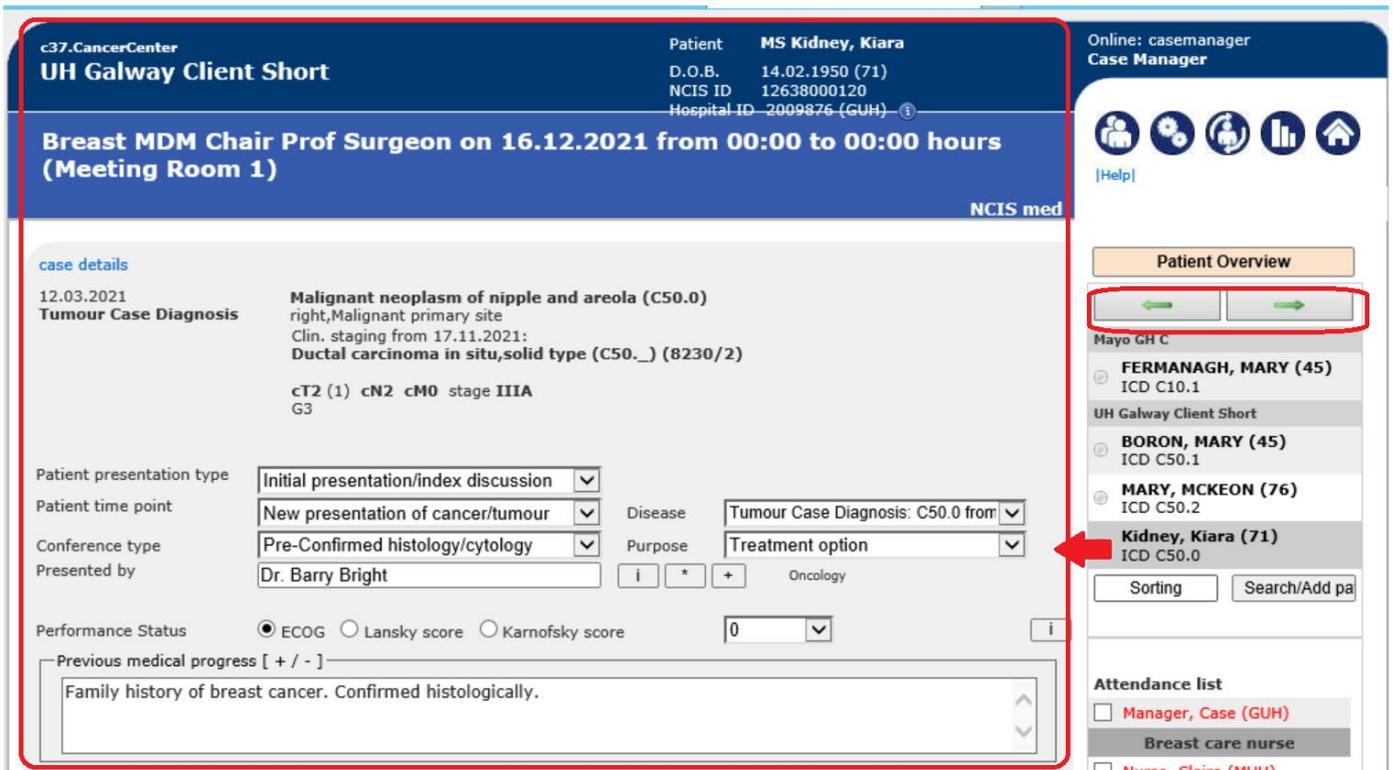
Buttons: Search, Emergency access

4.3 Navigating between patients when documenting the recommendations

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

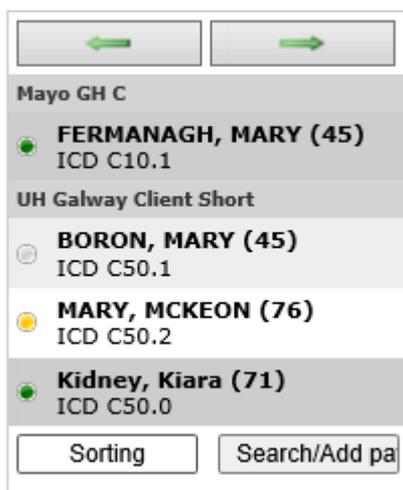


The patient list on the left will disappear and the chosen patient case registration is displayed on screen. The patient navigation list is always accessible on the right hand side and can be used to move on to the next patient by clicking the arrows at the top or by clicking another patient on the list.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



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

Green indicates that a recommendation has been recorded. Yellow indicates that the patient has been recorded as adjourned. 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 for patient MS Kidney, Kiara. The 'case details' section is highlighted with a red box and contains the following information:

- 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...) (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
- Performance Status:** ECOG 0
- Previous medical progress:** Family history of breast cancer. Confirmed histologically.
- Clinical question to be discussed at MDM:** Review radiology and histology, query surgery first line treatment
- Relevant examinations:** Pathology Biopsy: 02.12.2021; Radiology CT TAP: 02.12.2021; Mammogram: 23.11.2021

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 'case details' button is highlighted with a red box. The 'Tumour case' section is highlighted with a red box and contains the following information:

- Basic data:** Referring physician, Primary consultant (Dr. Barry Bright), Family doctor/Specialist, Comorbidities.
- Primary diagnosis:** Primary diagn. date: 12.03.2021; Primary diagnosis: C50.0; Malignant neoplasm of nipple and areola.
- Diagnosis:** C50.0 (12.03.2021) Malignant neoplasm of nipple and areola (right). ICD-O (morph.): Ductal carcinoma in situ, solid type (C50...). Clinical TNM: cT2(1)-cN2-cM0. Vital status: Patient alive 16.12.2021 (Conference).
- Assessment:** Baseline(+), Extravasation(+), Biopsy / Puncture(+), Bone marrow transplantation, Clinical history, Conference, 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 <input type="radio"/> in-house <input type="radio"/> external <input checked="" type="radio"/> not specified	
2.	Radiotherapy	Brachytherapy	
<div style="border: 1px solid red; padding: 2px; display: inline-block;">Add recommendation</div>			
Recommendation - text field [+ / -]			
Surgical intervention not possible, patient for chemo+radiotherapy			
1. Study recommendation			
Procedure [+ / -]			
Discussion [+ / -]			
Conference ended with			
Guideline-based treatment recommended <input type="radio"/> yes <input type="radio"/> no			

The field "conference ended with" is required to be completed for each patient in order to be able to close and lock the conference to editing. 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
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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:
Reason:
Conference for repeat presentation:

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

Reason:
Conference for repeat presentation:
Guideline-based treatment recommended:
Conference outcome details:
Comments:
Reason dropdown menu:
Presenter not available
Radiology not available
Histology not available
Conference overran
MDM re-scheduled

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:

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

Mayo GH C	
<input type="radio"/>	FERMANAGH, MARY (45) ICD C10.1
UH Galway Client Short	
<input type="radio"/>	BORON, MARY (45) ICD C50.1
<input checked="" type="radio"/>	MARY, MCKEON (76) ICD C50.2
<input type="radio"/>	Kidney, Kiara (71) ICD C50.0

Buttons:

- 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.

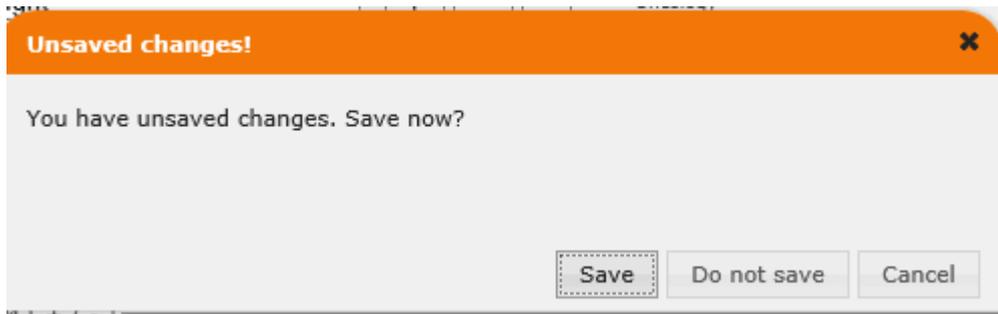
↑ **Conference history**

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

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	

Online: casemanager
Case Manager

ⓘ | Help

Patient Overview

← →

Mayo GH C

- **FERMANAGH, MARY (45)**
ICD C10.1

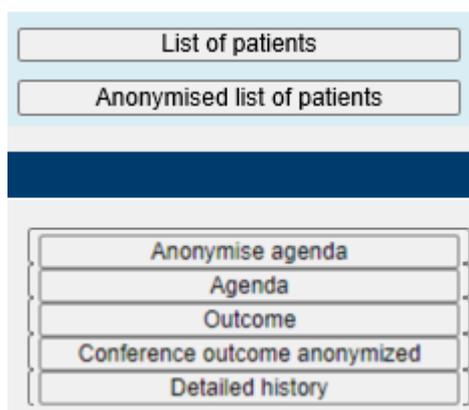
UH Galway Client Short

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

Sorting Search/Add pa

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.



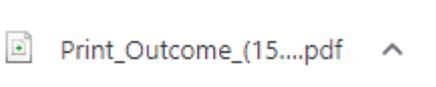
8 Locking the conference

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:



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: 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		