





NCIS GUIDE

Setting up Users on NCIS Training and NCIS Production

1. Background

This guide for Local NCIS Administrators is intended to explain the requirements for accessing NCIS. This guide includes step by step instructions on setting up user accounts within NCIS.

There are two environments that hospital users may need access to:

- NCIS Training used for practicing and training. Does <u>not</u> have live interfaces.
- NCIS Production the live environment with real patient data and live interfaces.

2. Requirements for accessing NCIS

NCIS is accessed via Citrix Storefront. To view the NCIS Icon(s), access needs to be granted to domain accounts using Active Directory Groups. Access is managed separately for NCIS Training and NCIS Production.

What is Citrix StoreFront?

Citrix Storefront is the HSE's portal for securely accessing applications such as NCIS.

What is a domain account?

A domain user is one whose username and password are stored on a domain controller rather than the computer the user is logging into. Hospital staff are given domain accounts so that they can log into any computer in the hospital using their username and password.

What is a HealthIRL Domain Account?

Nationally all local domain accounts are being migrated to HealthIRL. If your hospital has not migrated to HealthIRL prior to your NCIS Go Live, then HealthIRL accounts may need to be requested for your users to access NCIS.

What are Active Directory (AD) Groups?

For NCIS, Active Directory Groups are used to collect user domain accounts into manageable units. AD Groups are used for NCIS to determine which Icons are available to users in Citrix Storefront.

What are the NCIS Icons?

When a user logs into Citrix, they will see the NCIS Chart icon which will open NCIS Chart. Users can also be given a "direct access" icon for NCIS Med. This means they will be able to click on the direct access NCIS Med button and be taken directly to the NCIS Med application without needing to log into NCIS Chart first.

What are user accounts in NCIS Chart and NCIS Med?

A user needs an account in both NCIS Chart and NCIS Med so that they can be assigned the appropriate permissions and hospital(s) in each module.

Access to the NCIS application icon(s) is set up with the user's domain account.

To access **NCIS Training**, a user must have:

- 1. A Domain Account available in Citrix Storefront (usually HealthIRL)
- 2. Assignment to Active Directory Group(s) for access to the NCIS Training Icon
- 3. Username and Password details for training accounts used in the NCIS Training environment

To access NCIS Production a user must have:

- 1. A Domain Account available in Citrix Storefront (usually HealthIRL)
- 2. Assignment to Active Directory Group(s) for access to NCIS Production Icon(s)
- 3. A user account in NCIS Chart and/or NCIS Med in the NCIS Production environment

3. Logging into Citrix Storefront

Citrix Storefront is accessed using a web browser at the following address: <u>https://storefront.healthirl.net</u>

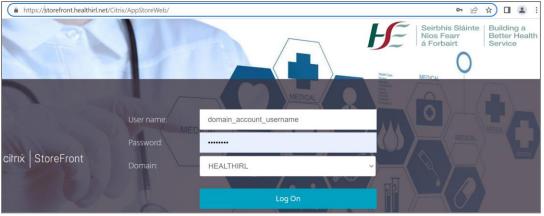
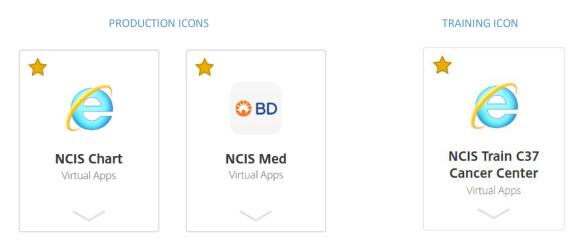


Figure 1: To access the NCIS icons in Storefront, the user enters their domain account username and password.

4. Active Directory (AD) Groups for access to NCIS Icons

When a user logs in Citrix Storefront they will be able to see the icon for NCIS Chart. Clicking on this icon will allow them to log into NCIS Chart and also transition to NCIS Med.

Users may also be able to see the direct access icon for NCIS Med in Production only. This will allow staff to log directly into NCIS Med.



To access the NCIS Icons the user needs to be added to the appropriate AD Group. Table 1 describes the NCIS environments, icons and associated AD Group Name.

Environment	Icon	AD Group Name
NCIS Training	NCIS Chart	CTX-MOCIS-Users-Train
NCIS Production	NCIS Chart	CTX-MOCIS-Users
NCIS Production	NCIS Med (Direct access)	e.g. CTX-MOCIS-Users-Pharm-GUH CTX-MOCIS-Users-Pharm-SLH

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5. Permissions

Application accounts need to be created in NCIS. The process for user set-up in NCIS Chart and NCIS Med is outlined later in this document. Before setting up accounts, the requirements will need to be determined for the role of each user in NCIS. Permissions need to be assigned in both NCIS Med and NCIS Chart. This determines what functionality a user has access to e.g. only pharmacists can assign the pharmacy verification status in NCIS Med.

Permissions in NCIS Med

NCIS Med has several user groups with associated permissions, which are assigned during user setup. The table below gives a high-level understanding of the main permissions associated with each user group.

NCIS.Med User Group	Permissions
NCIS_Physician	Permission to physician verify (prescribe).
NCIS_Physician _Level_I	Permission to physician verify (prescribe) and set "consultant verified"
	flag
NCIS_Nurse_Level_I	Permission to manage the bed manager and administration of
	medications.
NCIS_Nurse_Level_II	Permission to manage the bed manager and administration of
	medications with additional prescribing permissions (aligned with
	NCIS_Physician).
NCIS_Pharmacist	Permission to pharmacist verify, prepare/dispense medications, lot
	management, and certain reports.
NCIS_Pharmacy_Technician	Permissions to prepare/dispense medications, lot management, and
	certain reports.
NCIS_Transcription_Pharmacist	Permission to physician verify SACT medications for non-cancer patients
NCIS_Clinic_Ward_Clerk	Permission to manage the bed manager, view patients and therapy
	plans.
NCIS_Local_Administrator	Permission to create users, manage local units and cost centres, delete
	certain items, and access to reports.
NCIS_Read_Only_Access	Read only access to patients and therapy plans

Table 2: Permissions in NCIS.MED

Permissions in NCIS Chart

Most users will have the permission level of "doctor/documentary" in Chart. "Case manager" and "Administrator" have additional permissions and will be required for certain users e.g. MDM Coordinators and Local Administrators.

Access	Permissions
Doctor/documentary	Permission to view and amend patient cases, participate in MDM.
Case manager	Permission to view and amend patient cases, participate in MDM. Permission to create conferences, record conference outcomes and lock conferences. Also has permission to transfer patient cases to the hospital that they have access to. Permission to create personnel file entries and read only access to users accounts.
Administrator	Permission to view and amend patient cases, participate in MDM. Permission to create conferences, record conference outcomes, lock conferences. Also has permission to transfer patient cases to the hospital that they have access to. Permission to create users and manage user accounts, delete certain items.

Table	3.	Permissions	in	NCIS.CHART
Table	э.	r en inssions		NCIS.CHAN

Request:	AD Group	AD Group	NCIS.Chart account	NCIS.Med account
	NCIS.Chart Icon	NCIS.Med (Direct		
		Access Icon)		
NCIS	CTX-MOCIS-	Not applicable	Generic accounts are us	sed for access. These will
Training:	Users-Train		be given to sites at	the beginning of the
			implementation project	
NCIS	CTX-MOCIS-	Hospital specific e.g.	Username can be	Username can be
Production:	Users	CTX-MOCIS-Users-	locally defined but	locally defined but
		Pharm-GUH	must match	must match
			NCIS.Med username	NCIS.Chart username

Table 4. Requirements for training v's production

New Domain accounts and AD Group assignments are requested via your IT service desk or the HSE National Service Desk (NSD) nominated person depending on local arrangements. Prior to Go Live the NCIS Local Administrator or designee should clarify the local process with their ICT Department.

6. How to set up a user account in NCIS.Chart

While not necessary for functionality, it is recommended that the username used in NCIS.Chart matches that used for the domain login.

It is a requirement for transitioning from NCIS Med to NCIS Chart that the usernames between the two applications are equivalent.

The following steps explain user set up in Chart:

- 1. Log into NCIS Chart with NCIS Local Administrator account.
- 2. Go to Settings from the Menu at the right side of the screen



3. Select the "User" tab:

c37.CancerCenter TEST Hospital		Online: administrator A. Administrator
Personnel User Change password Def	ault entries Study management Exports Imp	ints
User > User (Found: 72)		New user
Filter options User/personnel User identification	Client Show all Facility Show all	automatically generated user search duplicate entries
Alternative HIS ID	User group Show all	Results per page 10
User 🛦 Identifier	Personnel 🜒 Access rights 🜒 Facilit	y Language Last login Action

4. Search for the user to ensure that a duplicate has not been created.

Personnel User (User User groups En	Change password Defa nergency access	ult entries Study ma	anagement Expor	ts Imports	(in) (in) (in) (in) (in) (in) (in) (in)
User > User (Found	: 0)				New user
Filter options User/personnel User identification Alternative HIS ID	Healthirl username	Client Facility User group	Show all Show all Show all	> > >	automatically generated user search duplicate entries Search Reset filter
User 🔺	Identifier	Personnel 🚳	Access rights	Facility	Language Last login Action
No entry found!					

5. If no entry is found for that user then select the new user button:

Personnel User	Change password Default ent	ries Study manag	gement Exports	Imports	
User User groups E	mergency access				[Help]
User > User (Foun	d: 0)				New user
Filter options					$\hat{\mathbf{h}}$
User/personnel		Client	Show all	\checkmark	automatically generated user
User identification	Healthirl username	Facility	Show all	~	Search
Alternative HIS ID		User group	Show all	\checkmark	Reset filter

6. In the "user" section enter:

- i. Title (if appropriate)
- ii. Surname
- iii. First name
- iv. Facility
- v. Language English (very important this determines what language the application will be in for the user)
- vi. Ensure active is ticked

The other fields are not required.

User		
Salutation	\checkmark	Corresponding med. personnel
Title	Dr.	Keine
Surname	Surname	Limit access to the following user's patients
First name	First Name	Keine
E-Mail address		Consultation group
Phone number (E.164 recommendation)		
Facility	Hospital name	Scheduled access control from to
Language	English 🗸	Restriction to tumor conference
Acronym		☑ active

7. If the user will complete patient assessment forms or are involved in MDM, then they should have their personnel record linked to their user account. This ensures that their name will autopopulate in patient assessment forms where the user who performs the action needs to be documented e.g. height and weight.

To link the personnel file to the user account, click the star beside the "corresponding med. Personnel" field. Search and select the correct Personnel Record to link it to the user profile.

If there is no personnel file for the user and one is required, it will be necessary to add a new entry to the personnel file (Please see separate guide).

Corresponding med. personnel		
Keine		
Limit access to the following user's pat	· · · · · · · · · · · · · · · · · · ·	
Keine		Add new med. personnel
Consultation group	Surname	🔎 bright
J	First name	P
Scheduled access control	Location	P
from 🔢 to	Special. field	<i>P</i>
Restriction to tumor conference	neiu	
☑ active	Bright, Barry	(Dr.), Oncology

8. Under the User Identification section, Ensure that the LDAP button is **NOT** checked. The "user identification" is the username that the user will log into NCIS with. <u>This must be exactly the same as the NCIS.Med username.</u>

Tick the check box "Password must be changed on next login" and complete a temporary password in the "Password" and "Repeat Password" boxes. The user will enter their temporary password on first login and are then required to change it.

1 User identification			
User identification	username		
Password		Repeat password	
Password must be changed on next login.			
User may only view anonym	nised patients		
Alternative HIS ID			

9. Under the User Group section, all users should be assigned the NCIS User group. This ensures that the NCIS View is assigned to the User at log in. Select the user group on the left and use the arrow button to move it to the right to assign the user group.

t User groups	
Available user groups	Assigned user groups
Search:	Search:
NCIS_Nurse (Nurse) NCIS_Pharmacist (Pharmacist) NCIS_Physician (Physician)	NCIS (NCIS)
	<

Additionally, some users may also be assigned an additional user group. The NCIS_physician, NCIS_pharmacist and NCIS_nurse user groups have the additional functionality of allowing the patients case notes to be filtered by user group (see the NCIS Quick Guide on Case Notes for a full description)

t User groups	
Available user groups	Assigned user groups
Search:	Search:
NCIS_Nurse (Nurse) NCIS_Pharmacist (Pharmacist)	NCIS (NCIS) NCIS_Physician (Physician)
	>>

10. Under "user permissions", select the appropriate permission level for the user.

1 User permissions		
Client		Role
Search		
Test Hospital	doctor/documentary	Save for all clients

11. Leave the preferred client blank and click save

Preferred client		
	\checkmark	
i Save Back		

The user account in NCIS Chart has now been created

7. How to set up a user account in NCIS.Med

While not necessary for functionality, it is recommended that the username used in NCIS.Med matches that used for the domain login.

It is a requirement for transitioning from NCIS.Med to NCIS.Chart that the usernames between the two applications are equivalent.

The following steps explain user set up in NCIS Med:

1. Log into NCIS Med with an NCIS Local Administrator account. Select the administration tab and select "users":

4	â	Ç	÷	i	-	Master dat	a Referen	ce data	Therapy	Preparatio	ns T	ools	Administration	
0) BC)											User groups	
													Users	
													Settings	
													Preparation set	ttings
													Safety cabinet	configuration
						8	PATIENTS/TH	IERAPY P	LANS			NE	Hardware conf	iguration
													Bed manageme	ent
						\checkmark	MEDICATION	I LIST				TH	Availability of t	beds

2. Perform a search to ensure that the user does not have an existing account.

Users	× ↑ ↓ @ ⊗ 凿 ⊕ へ
Can log on as user Ordering physician	Permissions
Name:	Permission Allowed Modify New Delete
Login: username 🔿	
Abbreviation: Barcode: 4	
UID:	
Physician number:	
User registration Unit assignment Preparation site assignment Personal data License administration method	
Group:	
Login:	
Password:	
Confirmation:	
Barcode:	
Password does not expire	
Do not block account when inactive	
Free text:	

3. Select the "new" button to create a new user:

5 A O 🖶 i	💄 🛛 Master data	Reference data Therapy	Preparations	Tools Admi	inistration			🕏
Users					م	🕀 🖁 🗵) 🗗 🗸	$\wedge \mathbf{X}$
Can log on as user		F	Ordering physician	Permissions	s	New		
Name:			Û	Permission	1	Allowed	Modify Ne	w Delete
Login			п					

- 4. The "can log on as user" button must be ticked. Also the following registration details must be entered:
 - Last name
 - First name
 - Abbreviation –Recommend that the first letter of the first name and the surname be used as the abbreviation so that it is obvious to identify the user. The system will only allow unique abbreviations in the system. If another user has the same abbreviation then add a number to the end.
 - Physician number: Any professional registration number can be entered here (this is not mandatory).
 - Group: Select the appropriate user group from the list.
 - Login: The "login" is the username that the user will log into NCIS with. <u>This must be</u> exactly the same as the NCIS.Chart username.
 - Enter a temporary password in the "Password" and "Confirmation" boxes. The user will enter their temporary password on first login and are then required to change it.

	Users	
⇔	Can log on as	s user 🗖 Ordering physician
⇔	Last name:	Last name
⇔	First name:	First name
⇔	Abbreviation:	FName Title:
	UID:	
⇔	Physician numbe	er: MCN11111
	User registration	Unit assignment Preparation site assignment Personal data License adm 💶 🕨
⇔	Group:	NCIS_Physician 🔿
⇔	Login:	username
	Password:	
⇔	Confirmation:	
	Barcode:	
	I	Password does not expire
		Do not block account when inactive
	Free text:	

5. These details must be saved before proceeding with the next steps. Select save on the top right.

	Q	÷	H	\otimes	ß	\checkmark	\uparrow	×
- Permissions			Save					
Permission			Allow	/ed	Modify	New	Dele	ete

6. Next, select the "unit assignment" tab. Select the drop down list for "Centre/unit". Select the appropriate units for the user.

User registration	Unit assignment	Preparation site assignment	Personal data	License administration method	d
Cost center:					₽
Center / unit:					Ŷ
Designation N P S S S S S S S S S S S S S S S S S S	Mayo University Ho Mercy University Ho Midland Regional H NCIS REGIMEN BUIL Portiuncula Universi South Infirmary Victo South Infirma	ity Hospital - Training (All units spital - Training (All units) ospital, Cork - Training (All unit lospital Tullamore - Training (A D - DO NOT USE (All units) ty Hospital - Training (All units) oria UH - Training (All units) - Training (All units) Dublin - Training (All units) ity Hospital - Training (All units) ity Hospital - Training (All units)	s) All units))		^ II
	'raining Hospital (A Jniversity Hospital I	2			~

Assigning all of the units of your hospital to the user means that they will be able to see all patients assigned to your hospital. Assigning "Specialities (All units) [All units]" means that the user will be able to see regimens from all the specialties i.e. oncology/haematology etc.

User registration	Unit assignment	Preparation site assignment	Personal data	License administration method	
Cost center:					Û
Center / unit:					Û
				Add D	elete
Designation					
TEST [All units]					
SPEC [All units]					

7. Next, select the "preparation site assignment" tab. Un-tick "access to all preparation sites" and select the preparation site of your hospital from the drop down list.

	User registration	Unit assignment	Preparation site assignment	Personal data	License administration m	nethod
⇒	Access to all	preparation sites				
⇒	Preparation sites					Û
					Adic	Delete
	Designation					
	TEST					

8. To complete the account set-up in NCIS Med, click the "save" icon.

		æ	B	\odot	. ה ו	J.	$\mathbf{\Lambda}$	$\mathbf{\mathbf{v}}$
- Permissions	~		Save			V		
Permission			Allov	ved	Modify	New	Dele	ete

The user account has now been created.

8. How to deactivate a user in NCIS

User accounts in NCIS cannot be deleted. They can only be deactivated. When a user finishes employment in a hospital, the NCIS Local Administrator can deactivate the user in NCIS. Managing leavers will be performed as per local hospital policy. The steps to deactivate a user in NCIS are outlined below:

1. Log into NCIS.Chart and un-tick "active". Remove the hospital from "facility"

Personnel User Change password Default entries Study management Exports Imports

User 10 Doctor		
NCIS ID	381	
Salutation	\checkmark	Corresponding med. personnel
Title		Keine *
Surname	10	Limit access to the following user's patients
First name	Doctor	Keine *
E-Mail address		Consultation group
Phone number (E.164 recommendation)		
Facility	TEST Hospital	Scheduled access control from to
Language	English 🗸	Restriction to tumor conference
Acronym		☑ active

2. Under user permissions, set the permission level to blank and remember to click save.

1 User permissions						
	Client		Role			
Search						
	Test Hospital (TEST)	doctor/documentary	Save for all clients			
Preferred client						
i Save Back						

3. Transition to NCISMed and look up the user. Un-tick the box, "can log on as user".

Users					
🗹 Can log on as u	user				Ordering physician
Last name:	Ten				
First name:	Doctor				
Abbreviation:	DOC10	Tit	tle:		
UID:					
Physician number:	:				
User registration	Unit assignm	ent Preparation site assignment	Personal data Li	cense administratio	n method

9. How to set up a user in Production who previously had an NCIS account

If a user has an NCIS account at another hospital, they will need to be re-assigned in the application to their new hospital. At this time it is not possible for the NCIS Local Administrator to do this directly in the application. This commonly arises when NCHD's rotate from one hospital where NICS is used to another.

The following process should be followed:

- All requests to move an user account must be made by the <u>receiving hospital</u> and include the following:
 - o First name,
 - o Surname
 - o MCRN
 - o Date of Transfer
- All requests are to be submitted to <u>NCIS@cancercontrol.ie</u> by the NCIS local administrator.

Issue	Possible Resolution
The User reports that their account has been	Ensure that the "can log on as a user" (NCIS
blocked	MED) and "active" (NCIS Chart) boxes are ticked
	in the user account.
Can't find an account in NCIS Chart	If Facility permissions were not selected when
	the account was saved, you will need to ask the
	NCIS office to assist and to assign the account to
	your facility. You will then have access to
	manage the account again.
User can't search for patients/regimens in	This is because the unit assignment(s) for the
NCIS.Med	hospital (providing patient access) and/or
	specialty (providing regimen access) were not
	added to the user account.
User getting error when logging in	This can happen as a result of a mistake in the
	username or password.
	This can also commonly occur if the user selects
	the wrong icon (i.e. Training) when logging in
	from Storefront instead of Production.

Appendix 1 - Troubleshooting