



NCIS GUIDE

Introduction to the Follow-up Care Section in NCIS.Chart

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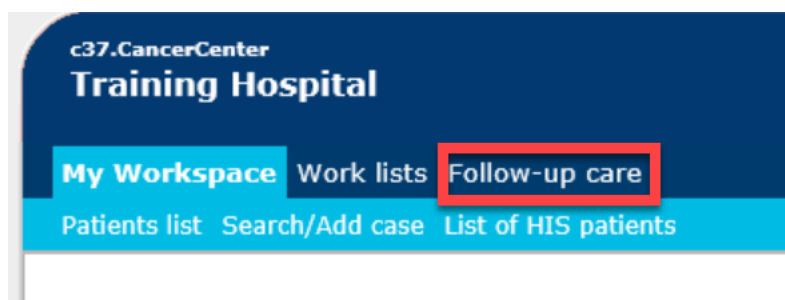
1 Introduction

Follow-up schedules can be created and managed within NCIS.Chart. The purpose of this guide is to provide an overview of the Follow-up care section and provide instructions on how to view patient Follow-up lists for particular dates.

NOTE: All screenshots in this Guide are from the Training and Test Environments of NCIS. All patients and hospitals are fictitious and are not intended to represent the identity, setup and functionality of real patients or facilities.

2 How to access the Follow-up care section and which users can access it

The Follow-up care section can be accessed by all NCIS users, by clicking the Follow-up care tab as indicated below:



3 Appointment list in the Follow-up care section

In the Follow-up care tab, a list of appointment dates for is displayed. The user can search by specific patient or can search using the filters.

A screenshot of the 'Follow-up care' section in the application. The top navigation bar shows 'My Workspace', 'Work lists', and 'Follow-up care' (highlighted with a red box). Below this is a light blue bar with 'Follow-up care' (highlighted with a red box), 'Calendar', and 'Follow-up missing'. To the right of the navigation bar are icons for users, settings, help, and a home icon. Below the navigation bar is a 'Patient search:' field (highlighted with a red box) and a '>> Search' button (highlighted with a red box). Below the search field is a 'Filter' button (highlighted with a red box). The main content area is titled 'Select filter' and contains two radio buttons: 'Period' and 'Extended filter (Follow-up care appointments, Follow-up care appointments - status, Letter status)'. The 'Extended filter' is selected. Below the radio buttons is a section titled 'Extended filter (Follow-up care appointments, Follow-up care appointments - status, Letter status, Personnel)'. This section contains four rows of filters: 'Follow-up care appointments' with a dropdown menu showing 'Appointments from year 2023'; 'Follow-up care appointments - status' with a dropdown menu showing 'Outstanding follow-up appointments'; 'Letter status' with a dropdown menu showing 'All'; and 'Personnel' with a text input field and 'i' and '*' buttons. At the bottom right of the filter section are 'Apply filter' and 'Reset filter' buttons.

4 Filtering the Follow-up care list

In the Follow-up care tab, the top of the screen has some options, which allows the user to filter the list of Follow-up appointment dates.

By default, the list will show the patients with Follow-up appointments scheduled for the hospital that the user has access to. It is also possible to:

1. Search by patient name
2. Filter by all, next 4 weeks, past 4 weeks, next 3 months, all future, all past dates, appointments from year xxxx
3. All, Conducted follow-up appointments, Outstanding follow-up appointments. **Note that if appointment is conducted before the scheduled date it will still appear as outstanding**
4. Letter Status (not currently formatted in the system)
5. Personnel refers to doctor conducting Follow-up care.

The screenshot displays the 'Follow-up care' tab in the NCIS system. At the top, there is a navigation bar with 'My Workspace', 'Work lists', and 'Follow-up care'. Below this, a sub-bar shows 'Follow-up care', 'Calendar', and 'Follow-up missing'. To the right of the navigation bar are several icons: a group of people, a gear, a person with a plus sign, a bar chart, and a home icon. Below the icons is a '[Help]' link. A search bar is located below the navigation bar, with a red '1' next to it. The search bar contains the text 'Patient search:' and a placeholder '(E.g. search by "first name, last name" or "first name last name")'. To the right of the search bar are two buttons: '>> Search' and 'Filter'. Below the search bar is a 'Select filter' section. This section has two radio buttons: 'Period' and 'Extended filter (Follow-up care appointments, Follow-up care appointments - status, Letter status)'. The 'Extended filter' option is selected. Below the radio buttons is a section titled 'Extended filter (Follow-up care appointments, Follow-up care appointments - status, Letter status, Personnel)'. This section contains four filter options, each with a red number next to it: 2. 'Follow-up care appointments' with a dropdown menu showing 'Appointments from year 2023'. 3. 'Follow-up care appointments - status' with a dropdown menu showing 'Outstanding follow-up appointments'. 4. 'Letter status' with a dropdown menu showing 'All'. 5. 'Personnel' with a text input field, an 'i' icon, and an '*' icon. At the bottom right of the filter section are two buttons: 'Apply filter' and 'Reset filter'.

5 Opening and viewing a Follow-up appointment

Double click on a Follow-up appointment to open and view the Follow-up form

The screenshot shows the 'Follow-up' tab selected in the top navigation bar. The 'Add:' dropdown is set to '-- Please choose --' and the 'Facility:' dropdown is set to 'UH Galway'. The 'Associated disease' dropdown is set to 'Tumour Case Diagnosis: C61 from 01.10.2022'. The 'Follow-up care' section contains the following fields:

- Scheduled date:** 13.04.2023
- Follow-up conducted:** ☐ yes ☐ no
- Primary consultant:**
- Recommendation from Tumour case:** dr test doctor [[save now](#)]

An 'Edit' button is located at the bottom right of the form.

6 Editing and completing a Follow-up form

Click on edit to allow user to end information on Follow-up form:

This screenshot is identical to the one above, but the 'Edit' button at the bottom right is highlighted with a red rectangular box, indicating it should be clicked to edit the form.

If Follow-up conducted field marked 'yes' then date box appears where conducted date can be entered. If this field completed then Follow-up form marked as conducted and will be removed from outstanding Follow-up appointment list, **as long as the scheduled date is not in the future.**

Once the form is completed as required click the save button.

This will bring the user back to the Follow-up care appointment list.

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7 Calendar and Follow-up care missing options

Follow-up care appointments can also be viewed on a calendar format. There are no filters options on this. To open the associated form click on the patient name.

My Workspace
Work lists
Follow-up care
Calendar

Follow-up care
Calendar
Follow-up missing

Month
☐ Show performed aftercare appointments

<< **May 2023** >>

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
CW 18	01 May Day	02 • Houston, Helen C50.0	03	04	05	06	07 • Sullivan, Paul C61
CW 19	08	09 • Yates, Frank C61	10	11	12 • Yates, Frank C61	13	14 Mother's Day
CW 20	15	16	17	18	19	20 • Yates, Frank C61	21

The final option is "Follow-up missing". This searches every patient with the hospital and so is only useful if every NCIS patient requires Follow-up, which is currently not the case.