

NCIS GUIDE

Personnel File in NCIS.Chart

Background

A Personnel file entry is required for all staff who complete forms, or who need to be identified in NCIS correspondence, the patient tumour record or the MDM record in NCIS.Chart. While some users will have their account linked to a Personnel file entry, there are also entries in the Personnel file that do not have a corresponding user account, e.g. MDM participants, referrers, places etc.

Personnel file data entry

There are two ways Personnel File entries appear on NCIS:

1. Personnel file entries are entered (and edited) manually by local administrators.
2. NCIS is interfaced with a Service Delivery File of General Practitioners and some consultants.

Personnel file data usage

The Personnel file has a wide-ranging use within NCIS.Chart and can populate many fields. Some forms have been configured so that the logged in user is auto populated as the creator of a form and it is from the Personnel File that this information is derived.

1.1 Personnel Files updated by Interface

The Personnel File is updated from the Service Delivery list of GPs by interface on a periodic basis.

When a Personnel file record has the following text, it indicates that the file has been uploaded through this mechanism. These records are unable to be edited by local administrators.

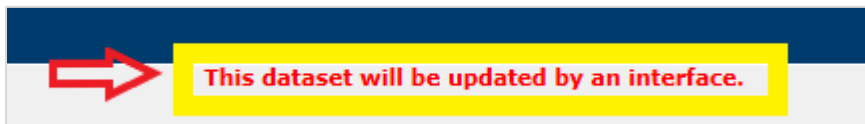


Figure 1: Text showing that a personnel record was updated by interface

Personnel Files that are created from the interface with the Service Delivery List are populated with numeric values in the Doctor identification and BSNR fields. BSNR is a German term for a premises number or practice code. When values are added to both the Doctor identification and BSNR fields the record becomes locked. **Therefore, it is strongly advised to leave the BSNR field empty when entering personnel records manually.**

Doctor identification	<input type="text" value="99999"/>	HIS-abbreviation	<input type="text"/>	BSNR	<input type="text" value="9999"/>
External ID	<input type="text"/>	Message ID	<input type="text"/>		

Figure 2: Interface records have both a Doctor Identification (MCRN number) and BSNR (Practise Code)

An example of an uploaded Personnel record is shown below.

Personnel
User
Default entries
Study management
Exports
Administration

Personnel

Type
☒ Doctor
☐ Department
☐ Hospital
☐ Community practice
☐ CHC

First name
Blogg

Surname
Joseph

Title
Dr.

Name of office/clinic
Local GP Clinic, Newtown

Gender
☒ male
☐ female
☐ unknown
☐ not specified

Facility
Please choose

Special. field

Core area
☐ Centre surgeon
☐ senior surgeon
☐ training assistant

Doctor identification
99999
HIS-abbreviation
BSNR
9999

External ID
Message ID

☒ active

Address

Postal address
Local GP Clinic, Newtown, Oldtown ABC123

Country

Letter salutation

Closing

Contact

Telephone
01-5432123
Telephone (business)
Telephone (mobile)

Fax

E-mail address
DrBlogg@email.com

Bank data

Name of bank

Account owner
☐ Get personnel name

BIC

IBAN

Additional information

Location
☒ in-house
☐ external
☐ not specified

Tumour conference participation
☐ regular participant
☐ no regular participant

☐ No longer practising

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Figure 3: Personnel File form updated by interface – note the Doctor Identification and BSNR fields are complete

1.2 Managing the NCIS Personnel File manually (local admin role)

- Log into NCIS.Chart with appropriate user account – only Local Administrators and Case Managers have access to add, edit or remove records from the Personnel File
- Go to Settings from the Menu at the right side of the screen

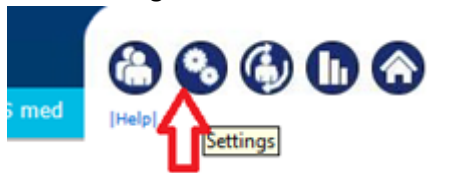


Figure 4: Setting Menu

- Select Personnel from the Menu Options
- Search for the personnel name to ensure that they have not already been entered. If you need to delete characters in the search field click 'Reset filter'
- Click on "New med. personnel" to create a new entry

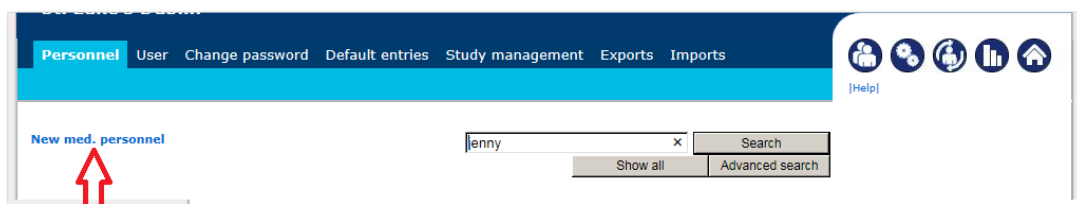


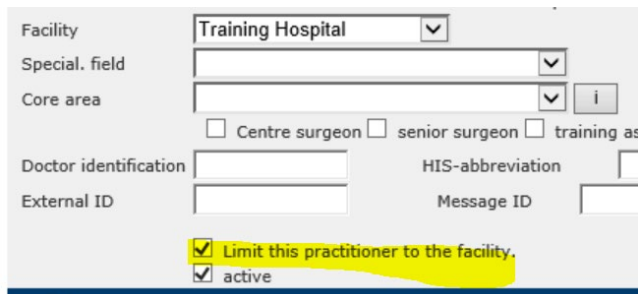
Figure 5: Select New med.personnel to add a new Personnel File record

- Enter the appropriate details. Select the type 'Doctor' for all personnel even if they are not a doctor. This is to distinguish that it is a person rather than a place (department/hospital etc.). This has no impact on permissions and ensures the most appropriate fields available
- Enter the 'Title' of the personnel i.e. Doctor/Nurse/Pharmacist

Type	<input checked="" type="radio"/> Doctor <input type="radio"/> Department <input type="radio"/> Hospital <input type="radio"/> Community practice <input type="radio"/> CHC				
Title	<input type="text" value="Nurse"/>				
Surname	<input type="text" value="Pratchett"/>				
First name	<input type="text" value="Jenny"/>				
Name of office/clinic	<input type="text"/>				
Gender	<input type="radio"/> male <input type="radio"/> female <input type="radio"/> unknown <input checked="" type="radio"/> not specified				
Facility	<input type="text" value="--- Please choose ---"/>				
Special. field	<input type="text" value=""/>				
Core area	<input type="text" value=""/> <input type="button" value="i"/>				
	<input type="checkbox"/> Centre surgeon <input type="checkbox"/> senior surgeon <input type="checkbox"/> training assistant <input type="button" value="i"/>				
Doctor identification	<input type="text"/>	HIS-abbreviation	<input type="text"/>	BSNR	<input type="text"/>
EFN	<input type="text"/> <input type="button" value="i"/>				
ASV number	<input type="text"/> <input type="button" value="i"/>				
External ID	<input type="text"/>	Message ID	<input type="text"/>		
	<input checked="" type="checkbox"/> active				

Figure 6: Enter record as Doctor and ensure Active is selected

- It is possible to restrict the Personnel file to a particular facility by selecting a facility and selecting "Limit this practitioner to the facility". This is not necessary and should only be utilised if the personnel record will not be required in another hospital.

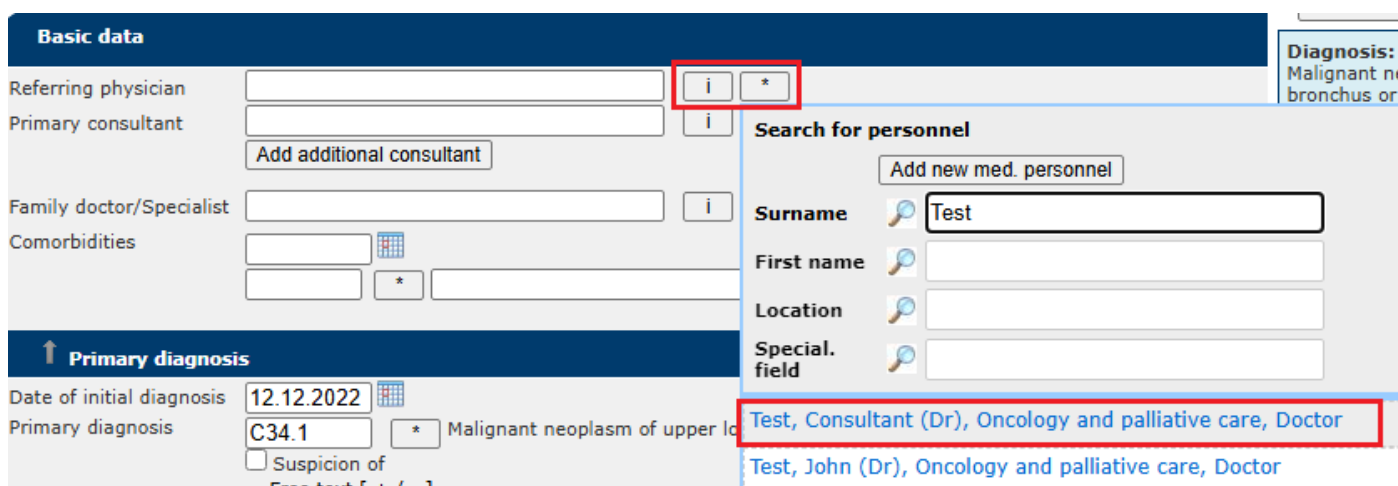


The screenshot shows a form with the following fields and options:

- Facility: Training Hospital (dropdown)
- Special. field: (dropdown)
- Core area: (dropdown)
- Options: ☐ Centre surgeon, ☐ senior surgeon, ☐ training as
- Doctor identification: (text field)
- HIS-abbreviation: (text field)
- External ID: (text field)
- Message ID: (text field)
- ☒ Limit this practitioner to the facility.
- ☒ active

Figure 7: Choose a facility and select "Limit this practitioner to the facility" to restrict the record to one hospital

- Click Save at the bottom of the screen to complete the Personnel record
- The Personnel record can now be selected from the search box in fields populated by the Personnel file throughout NCIS.Chart



The screenshot shows the 'Basic data' section of the NCIS.Chart form. The 'Referring physician' field is highlighted with a red box, and the 'Search for personnel' dropdown is open, showing a list of search results. The search results are:

- Test, Consultant (Dr), Oncology and palliative care, Doctor
- Test, John (Dr), Oncology and palliative care, Doctor

The 'Primary diagnosis' section shows the date of initial diagnosis as 12.12.2022 and the primary diagnosis as C34.1, Malignant neoplasm of upper lobe of lung.

Figure 8: Searching for a personnel record in an NCIS.Chart Form

1.3 Linking a Personnel Record to a User Account

If the user role involves creating and editing forms in NCIS.Chart, they should have a Personnel record created (see above).

- Go to Settings → User
- Search for the user

Figure 9: User Account showing linked Personnel Record

- Under the “corresponding med. personnel” field, search for and select the correct Personnel record
- Save the entry

1.4 Example of Personnel File Usage in the Tumour Case

In the patient’s general info section under tumour case and basic data the following fields can be recorded: Referring physician, primary consultant and family doctor/specialist.

By selecting edit as shown by the arrow below the user can then enter the fields.

If the medical personnel have a corresponding Personnel file entry their details will appear as below

The screenshot shows the 'Personnel File' interface. At the top, there's a navigation bar with 'General info' selected, and tabs for 'Diagnostics', 'Conference', 'Assessment', 'Therapy', and 'Communication'. Below this, a sub-navigation bar shows 'Personal info', 'Tumour case', and 'Clinical history'. The main content area is titled 'Basic data' and contains a search bar with the text 'test'. To the right of the search bar are buttons for 'i' and '*'. A dropdown menu is open, showing 'Search results [14]' with a list of results including 'TEST Client Registration Unit, General surgery', 'TEST Clinical nurse specialist, General surgery', 'TEST day ward name, General surgery', 'TEST oncology pharmacist, General surgery', 'TEST Radiology interventional department, General surgery', and 'Felix, Test, General surgery'. The interface also shows sections for 'Primary diagnosis' and 'Gynaecological cancer'.

If there is no corresponding Personnel file, the user can select the star button as shown below

The screenshot shows the 'Personnel File' interface with the 'Basic data' section. It includes fields for 'Referring physician', 'Primary consultant', 'Family doctor/Specialist', and 'Comorbidities'. Each field has an 'i' button and a '*' button. A red arrow points to the '*' button next to the 'Referring physician' field. Below the 'Primary consultant' field is a button labeled 'Add additional consultant'. At the bottom right, there's a text box with '60 chars remaining' and a '+' button.

Which will bring up the option to either search for the personnel record by searching by name (surname) first name, location or specialist field or the user can select 'Add new medical personnel' (if they are a local administrator or case manager) as shown below.

General info Diagnostics Conference Assessment Therapy Communication

Personal info **Tumour case** Clinical history

Hospital ID: S12430 (SLH)

Basic data

Referring physician: test *i* * Physician was not found in the database.

Primary consultant: *i*

Family doctor/Specialist: *i*

Comorbidities: 02.09.2019 F31.9 * + Bipolar aff

Primary diagnosis

Primary diagn. date: 10.12.2019

Primary diagnosis: C54.0 * Malignant neoplasm of isthmus

☐ Suspicion of

Search for personnel

Add new med. personnel

Name: *i*

First name: *i*

Location: *i*

Special. field: *i*

Once an entry is made the user can select the information button which will display the details recorded in the Personnel file for that entry

General info Diagnostics Conference Assessment Therapy Communication Follow-up Clinics

Personal info **Tumour case** Clinical history

Facility: Training Hospital

Basic data

Referring physician: Test DR GP *i* * General surgery, TEST DR GP long name

Primary consultant: *i*

Family doctor/Specialist: Test DR GP

Comorbidities: *i*

Add additional consultant

Test DR GP

General surgery, TEST DR GP long name

Address

Test DR GP name and address

Contact

Telephone: test telephone

Fax: test fax

E-mail address: test email

By clicking on the 'Add additional consultant' button as shown below the user has the option to add additional consultants.

Basic data

Referring physician: Test DR GP *i* * General surgery, TEST DR GP long name

Primary consultant: *i*

Add additional consultant

The additional consultants will appear as below:

Basic data

Referring physician: Test DR GP

Primary consultant: Dr Consultant Test

Consultant Test Dr Name Test Dr Surnam

Dr Consultant Test

General surgery, TEST DR GP long name


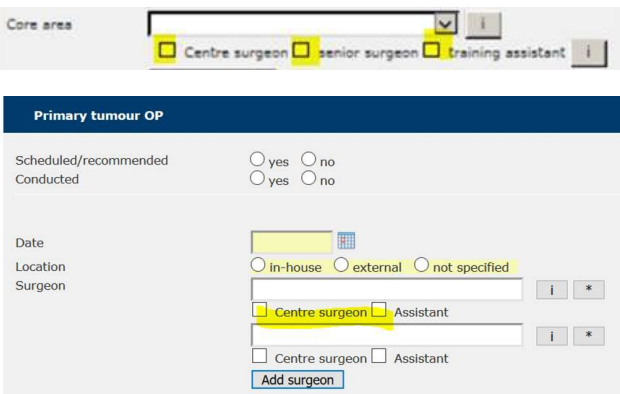

Oncology and palliative care

Oncology, Test office/clinic name

Oncology and palliative care

Appendix 1: Field Definitions in the Personnel File

Fields listed in this table in *italics* are not used in NCIS. No fields are mandatory; however, it is recommended to complete the first name and surname at a minimum.

Section	Fields Names	Definition/Purpose
Personnel entry	Type	<p>The type of personnel record being created. C37 recommend only selecting "doctor" as type. Community practice is only used if you have no real person you can name. For example, if community practice is selected, the fields change slightly: Drs (short) and Drs (long) is the name of the practice</p> 
Personnel entry	First name	First name of the person for whom the record is being created
Personnel entry	Surname	Surname of the person for whom the record is being created
Personnel entry	Title	Title of the person for whom the record is being created
Personnel entry	Name of office/clinic	Office or Clinic name with whom the record is associated
Personnel entry	Gender	Gender of the person for whom the record is being created
Personnel entry	Facility	Hospital associated with the person for whom this record is being created.
Personnel entry	Special. Field	Speciality of the person for whom the record is being created
<i>Personnel entry</i>	<i>Core area</i>	<i>This field is used for the OnkoZert evaluation. It marks the connection between a personnel and a core area. Does not impact on NCIS documentation.</i>
Personnel entry	Doctor identification	Medical Council Registration Number of Physician associated with this record.
<i>Personnel entry</i>	<i>Centre surgeon, senior surgeon, training assistant</i>	<p><i>These fields pre-populate fields in the NCIS Primary Op form which is a form currently not in use in NCIS</i></p> 
<i>Personnel entry</i>	<i>IKNR</i>	<p><i>Institution registration number – not used in NCIS</i></p> 

Section	Fields Names	Definition/Purpose
Personnel entry	HIS-abbreviation	<i>Not used in NCIS</i>
Personnel entry	BSNR	Facility or Practice ID – This field is prepopulated in the Personnel records that are received from the interface with the Service Delivery File. Assigns a user to a facility and in combination with doctor id creates a unique record, i.e. one doctor can have more than one site ID.
Personnel entry	External ID	<i>This field allows the recording of external ID from other IT-systems. Not used in NCIS</i>
Personnel entry	Message ID	<i>NCIS generate reports for different registers in Germany. This field allows clients to record the Id of the sender, thus it is a form of “reporting Id”? Not used in NCIS</i>
Personnel entry	Limit this practitioner to the facility	This limits the person for whom this record is being created, to facility selected above. Create one record for each facility that person requires access to.
Personnel entry	Active	This deems a record to be active or inactive
Address	Postal address	This is the postal address of the facility, with which this person is associated. The user information is generated by applying the letter frame.
Address	Country	<i>This is country in which the facility where this record is associated is located. This does not appear in any forms or letters therefore is not used in NCIS</i>
Address	Letter salutation	<i>This does not fill into the letter salutations in NCIS letters and so should not be filled in.</i>
Address	Closing	<i>This does not fill into the letter salutations in NCIS letters and so should not be filled in</i>
Contact	Telephone	The contact telephone number of the person for whom this record is being created - fills into letter templates. The user information is generated by applying the letter frame.
Contact	Telephone (business)	<i>Do not use as does not fill into the letter templates.</i>
Contact	Telephone (mobile)	<i>Do not use as does not fill into the letter templates.</i>
Contact	Fax	The contact fax number of the person for whom this record is being created - fills into letter templates. The user information is generated by applying the letter frame.
Contact	E-mail address	The contact email address of the person for whom the record is being created - fills into letter templates. The user information is generated by applying the letter frame.
Additional Information	Location	This specifies whether the person for whom the record is being created is in-house, external or not specified. This is not generally required for NCIS unless very specific reporting is being undertaken
Additional Information	Tumour conference participation	This must be selected for those users who will be participating in MDMs.
Additional Information	No longer participating	This is selected for those users who did participate in MDMs at one stage, but no longer do so.