

NCIS GUIDE

Work Lists

Background

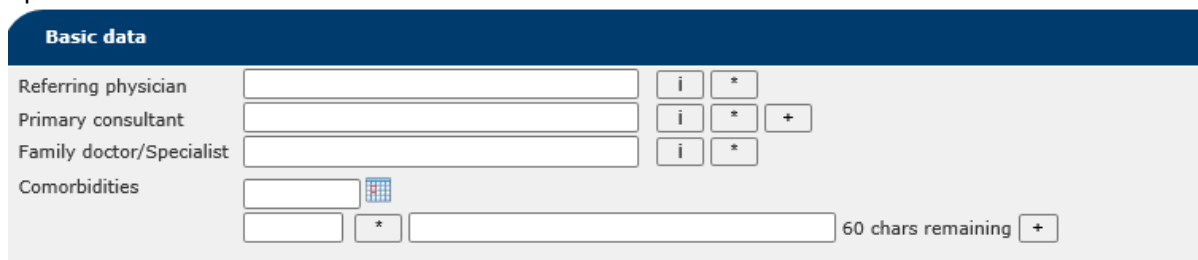
Work Lists are configured on NCIS by an NCIS administrator to support workflow steps for users. Work Lists can be configured to be used on a global (national) level, at hospital level or at user level. The functionality is limited, and users should be aware of the limitations of Work Lists before they choose to use them.

Work Lists are essentially a way of users being able to add patients to a particular list to prompt or provide a reminder to carry out a task. **If a worklist entry is “completed” it will remain searchable using the completed item filter on the worklist. However if the “Delete” option is used it will be gone completely.**

There are two sections to this Guide. The first section explains how to add a patient to a Work List and complete the entry. The second section is for local NCIS administrators and explains how to configure Work Lists in NCIS Chart.

Steps to add a patient to your Work List

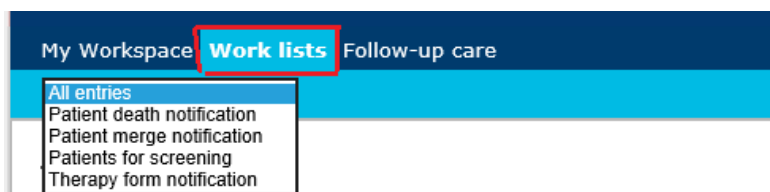
1. Log into NCIS Chart
2. Open a patient record
3. Select 'Edit'. Then select 'Save and add to worklist' from the menu on the lower end of the screen. This option is available in the tumour case and also in all forms.



Navigation bar: [Dropdown] [i] [Save] [Print] [Back] [Save and add to worklist] [Delete case] [Transfer to other client] [Clipboard]

4. This brings you to a Work List form with the patient's name auto populated. Here the user can add details on the Work List entry and select which list to place it on.
There are two types of Work Lists that are available as standard to all hospitals, which populate from PAS messages. These are:
 - Patient death notification
 - Patient merge notification

Additional ones can be added per hospital as outlined in section 2.



5. Click on Save: - The Work List entry has now been created.
6. If the Work List entry is configured to display in the General Info tabs of the patient record it will appear like this:

They will also appear at the top of any conference or assessment forms.

7. Once saved the Work List entry will display in My worklist entries in 'my workspace':
 - a. You can edit entries by selecting the pencil icon and also complete items directly from here.

The screenshot shows the 'My Workspace' interface. The top navigation bar includes 'My Workspace', 'Work lists', 'Follow-up care', and 'Calendar'. Below this, there are links for 'Patients list', 'Search/Add case', and 'List of HIS patients'. The main content area is divided into two panels. The left panel, titled 'My last edited tumour cases', displays a table with columns: NCIS ID, Name, Primary diagn. date, and Tumour. The right panel, titled 'My work list entries', displays a table with columns: Date, Name, and Subject. In the 'My work list entries' table, the first two rows are highlighted with a red box, and the 'Subject' column for the first row is also highlighted with a red box.

NCIS ID	Name	Primary diagn. date	Tumour
12655000360	mr. ZZTEST, SLHTOMPI	17.09.2025	plasma cell disorders
12655000145	MS Nciscase, Merge	not specified	not specified
12655000365	NCISOrCUpdateMinor, NCISTest	31.07.2025	not specified
12655000355	Mr NCISMarch25, NCISTest	not specified	Gastrointestinal stromal tumor, benign (8936/0)

Date	Name	Subject
20.09.2025	Mrs NewCitrix, NCIS	Patient: NEWCITRIX, NCIS... Comments: ...
19.09.2025	Mrs NewCitrix, NCIS	Patient: NEWCITRIX, NCIS... Comments: ...
11.09.2025	mr. ZZTEST, SLHTOMPI	test general
11.09.2025	mr. ZZTEST,	test personal 2

8. Editing the entry opens the Work List form and where a user can update the message or delete the entry.
9. The Work List entry has now been updated.
10. To complete a worklist entry from a patient's record you can do it from the my worklist entries as above or from the patient's record by clicking on edit button and then checking complete.

The screenshot shows the 'Pre SACT Assessment' form. The top section has a message: 'There are entries in the work lists for this case! 23.09.2025, CM Test 2024_12 Personal:'. Below this, there are fields for 'Date' (09.09.2025), 'Time' (17:25), 'Assessment completed by', 'Is there an interpreter present', and 'Patient's primary consultant'. The 'Treatment' section includes 'Chemotherapy', 'Radiotherapy', and 'Concomitant radiotherapy'. At the bottom, there are radio buttons for 'Has the patient been admitted to hospital' (yes, no, N/A) and a 'Comments' field. An orange dialog box is overlaid on the form, asking 'Do you want to mark the worklist item as done?'. The dialog box has 'OK' and 'Cancel' buttons. A red box highlights the 'OK' button.

11. Once completed the entry will disappear from this display box but is still available to view from the worklist tab under completed items.

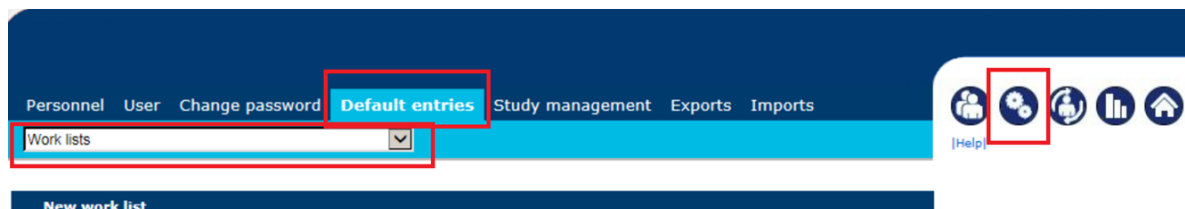
The screenshot shows the 'Work lists' interface. The top navigation bar includes 'My Workspace', 'Work lists', 'Follow-up care', and 'Calendar'. Below this, there is a dropdown menu for 'CM Test 2024_12 Personal'. The 'Patient search' section includes a search box and a 'Show completed entries' dropdown menu. The 'Results per page' section includes a dropdown menu set to '20'. The main content area displays a table with columns: from, ID, Name, Subject, Client, and Work list. The table shows four entries, each with a green checkmark icon in the 'Work list' column, indicating they are completed.

from	ID	Name	Subject	Client	Work list
23.09.2025	12655000145	Nciscase Merge		St Luke s Dublin	CM Test 2024_12 Personal
11.09.2025	12655000360	ZZTEST SLHTOMPI	Test personal	St Luke s Dublin	CM Test 2024_12 Personal
25.08.2025	12655000366	OrcMajorTwo NCIS		St Luke s Dublin	CM Test 2024_12 Personal
23.07.2025	12655000355	NCISMarch25 NCISTest	Test 4	St Luke s Dublin	CM Test 2024_12 Personal

Steps for Configuring Work Lists in NCIS Chart

This option is only available to users with Administrator accounts

1. Log into NCIS Chart with appropriate user account
2. Go to Settings → Default Entries
3. Select Work Lists from the drop-down list



4. Enter the name of the Work List
5. The Visibility Setting defines who can access the Work List.
 - a. Personal allows worklists to be restricted to a single user or group of users
 - i. Select Personal from the Visibility drop down list
 - ii. Enter appropriate User/s that the Personal Work List is created for
 - b. General worklists can also be created that are visible to all users within the hospital
It is not possible for local administrators to create General Work Lists. However, the NCIS office can create General Work Lists on behalf of the hospital. These can be requested by contacting NCIS@cancercontrol.ie
 - i. Select General from the Visibility Work List (option only available to super administrators in the national NCIS Office).



New work list

Name

Visibility personal ▼

User

<<"/>

☐ active

Display in General info ☐ Yes

Clearance ☐ Clients ☐ Facilities
(If empty only the work list for the current entity will be released)

6. Tick the Active Box

7. Tick the “Display in General Info” box if the Work List entry should be displayed in the General Info tabs (i.e., Clinical History and Tumour Case) of the patient record

The screenshot shows a patient record interface. At the top, there are tabs for 'General info', 'Diagnostics', 'Conference', 'Assessment', 'Therapy', and 'Communication'. Below these, there are sub-tabs for 'Personal info', 'Tumour case', and 'Clinical history'. A message box is displayed, stating 'There are entries in the work lists for this case!' with a 'completed' checkbox. Below this, there is a list item '04.02.2019, Test Work List for Hospital X: This is to test the personal worklist' with an unchecked checkbox.

8. Choose Clients. Select the appropriate client.
9. Click on Save
10. The Work List is now available for use by the appropriate user cohort