

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. **Once a task has been completed and the patient is removed from the Work List, the entry is deleted and is not retrievable.**

There is no record held of Work Lists entries on the system and therefore they should not be considered for tasks which should be recorded as part of the patient record. Work Lists should be considered as analogous to a post-it and should be used as an aide memoire to carry out a task, not a record of a task to be carried out and when the action was completed.

There are two sections to this Guide. The first section explains how to add a patient to a Work List. 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 with appropriate user account
2. Open a patient record
3. Select 'Edit'. Then select 'Add to worklist' from the menu on the lower end of the screen

Basic data

Referring physician *i **

Primary consultant *i ** +

Family doctor/Specialist *i **

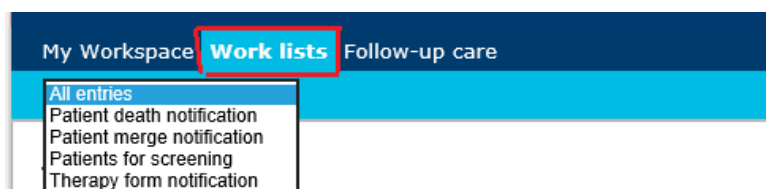
Comorbidities *** 60 chars remaining +

in progress *i* Save Print Back Add to worklist

4. This will bring 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 four different types of Work Lists.

- Patient death notification – These are auto populated
- Patient merge notification – These are auto populated
- Patients for screening
- Therapy form notification



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:

7. Once saved the Work List entry will display in 'my workspace', it will appear like this:
- a. This menu provides your Work List content
 - b. You can edit entries by selecting the pencil icon

The screenshot shows the 'My Workspace' header with tabs for 'Work lists' and 'Follow-up care'. Below the header, there are links for 'Patients list', 'Search/Add case', and 'List of HIS patients'. The 'NCIS med' logo and a '[Help]' link are also present. The main content area is divided into two panels. The left panel, titled 'My last edited tumour cases', contains a table with columns 'NCIS ID', 'Name', 'Primary diagn. date', and 'Tumour'. The right panel, titled 'My work list entries', contains a table with columns 'Date', 'Name', and 'Subject'. A red box labeled '(a)' highlights the 'My work list entries' panel, and a red box labeled '(b)' highlights the edit icon (a pencil) in the rightmost column of the table.

NCIS ID	Name	Primary diagn. date	Tumour
12638000009	Ms. Doe, Jane	not specified	not specified

Date	Name	Subject
02.04.2019	Ms. Doe, Jane	refer to physio/OT Comments: patient req...

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/deleted

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

The screenshot shows the 'Default entries' menu item highlighted in the top navigation bar. Below the navigation bar, there is a dropdown menu for 'Work lists'. A red box highlights the 'Default entries' menu item, and another red box highlights the 'Work lists' dropdown menu. The 'New work list' button is visible at the bottom of the page.

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).

Personnel User Change password Default entries Study management Exports Administration

Work lists

New work list

Name

Visibility **personal** ▼

User Search

>>

<<

☐ active
☐ Yes
☐ Clients ☐ Facilities

Display in General info
Clearance
(If empty only the work list for the current entity will be released)

Cancel Save

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

General info Diagnostics Conference Assessment Therapy Communication

Personal info **Tumour case** Clinical history

There are entries in the work lists for this case! completed

04.02.2019, Test Work List for Hospital X: This is to test the personal worklist ☐

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