



NCIS GUIDE

Managing the 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

Personnel file entries are created and edited by local administrators. A service directory file for General Practitioners and some consultants have been previously added into the system, however due to a lack of a centralised information source and limitations of this functionality a regular upload of this information is not possible.

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 table that this information is derived.

1.1 Personnel Files updated by Interface

Prior to system go-live a list of GP's in Ireland was uploaded to NCIS Chart. This was completed by uploading the Service Directory list of GPs available at the time. Presently there are no plans to continue uploading GP data into NCIS, however this will be kept under review, and if a reliable data source becomes available this process may be repeated.

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

Records for bulk upload are required to have two numeric values input into the BSNR and Doctor ID fields. It is important to note if a user inputs a personnel record and adds values to both the Doctor Identification and BSNR field the record will become locked.

BSNR is a German term which is equivalent to a premises number, or practise code, however given that the record is locked when this is entered 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

Surname

Title

Name of office/clinic

Gender male female unknown not specified

Facility

Special. field

Core area

Centre surgeon senior surgeon training assistant i

Doctor identification HIS-abbreviation BSNR

External ID Message ID

active

Address

Postal address

Country

Letter salutation

Closing

Contact

Telephone Telephone (business) Telephone (mobile)

Fax

E-mail address

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

Version

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

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
- Click on “New med. personnel” to create a new entry

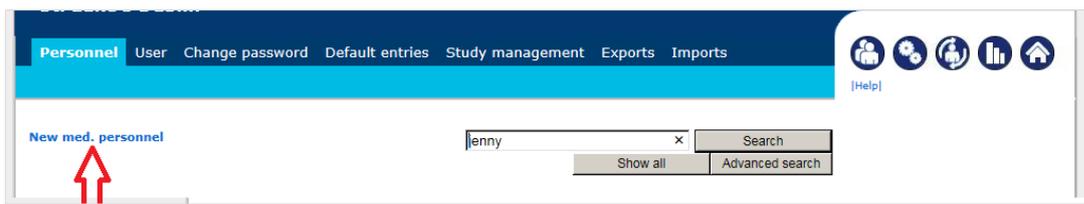


Figure 5: Select New med.personnel to add a new personnel file record

- Enter the appropriate details.
- For normal Personnel enter as a Doctor and ensure that the Active button is checked. Using the type “doctor” for users other than doctors (e.g. nurses), has no impact on permissions but ensures the most appropriate fields are available.

A screenshot of the 'Personnel Pratchett Jenny' form. The 'Type' field has radio buttons for 'Doctor' (selected), 'Department', 'Hospital', 'Community practice', and 'CHC'. The 'First name' field contains 'Jenny' and the 'Surname' field contains 'Pratchett'. The 'Gender' field has radio buttons for 'male', 'female', 'unknown', and 'not specified' (selected). The 'Facility' field is a dropdown menu with '--- Please choose ---'. The 'Special. field' and 'Core area' fields are dropdown menus. The 'Core area' field has checkboxes for 'Centre surgeon', 'senior surgeon', and 'training assistant'. The 'Doctor identification', 'HIS-abbreviation', and 'BSNR' fields are text boxes. The 'External ID' and 'Message ID' fields are text boxes. The 'active' checkbox is checked.

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: Facility (Training Hospital), Special. field, Core area, Centre surgeon, senior surgeon, training as, Doctor identification, HIS-abbreviation, External ID, and Message ID. The checkbox 'Limit this practitioner to the facility.' is checked and highlighted in yellow. The 'active' checkbox is also checked.

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 'Search for personnel' dialog box. The search criteria are Surname: pratch, First name: (empty), Location: (empty), and Special. field: (empty). The search results show 'Pratchett, Jenny' selected. The 'Add new med. personnel' button is also visible.

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). Under the "corresponding med. personnel" field, search for and select the correct Personnel record.

- Go to Settings → User
- Search for the user.

The screenshot shows the 'User Pratchett Jenny' page. The 'Corresponding med. personnel' field is set to 'Pratchett Jenny'. The 'Limit access to the following user's patients' field is set to 'Keine'. The 'Delete personnel' button is visible.

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

The screenshot shows the 'Basic data' section of the 'Tumour case' tab. The 'Edit' button is highlighted with a red arrow. The fields are:

Referring physician	<input type="text"/>
Primary consultant	<input type="text"/>
Family doctor/Specialist	<input type="text"/>
Comorbidities	<input type="text"/> <input type="text"/>
	<input type="text"/> <input type="text"/>

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

The screenshot shows the 'Basic data' section with a search dropdown open for 'Referring physician'. The search results are:

Search results [14]
, 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
Felix, Test , General surgery
MDM CO TEST (Ms) General surgery MDM office

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

General info Diagnostics Conference Assessment Therapy Communication
Personal info Tumour case Clinical history

Basic data

Referring physician [] i *

Primary consultant [] i * +

Family doctor/Specialist [] i *

Comorbidities 02.09.2019 [] F31.9 * + Bipolar affective disorder, unspecified

Primary diagnosis

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 in 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

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

Search for personnel

Add new med. personnel

Name []

First name []

Location []

Special. field []

Primary diagnosis

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
Personal info Tumour case Clinical history

Basic data

Referring physician Dr Test GP name Test GP surname i * General surgery, test gp practice

Primary consultant [] i * +

Family doctor/Specialist Dr Test GP name Test GP surname i * General surgery, test gp practice

Comorbidities 02.09.2019 [] F31.9 * + Bipo

Dr Test GP name Test GP surname
General surgery, test gp practice

Address Test GP name Test GP practice Contact Telephone: test telephone Fax: test fax E-mail address: test email

Primary diagnosis

By clicking on the plus button as shown below the user has the option to add additional medical personnel under the primary consultant field

Hospital ID S12434 (SLH) ⓘ

General info Diagnostics Conference Assessment Therapy Communication

Personal info **Tumour case** Clinical history

Basic data

Referring physician: Dr TEST name TEST surname [i] [*] General surgery, TEST office

Primary consultant: dr test name test surname [i] [*] + Oncology, test office name

Family doctor/Specialist: Dr Test GP name Test GP surname [i] [*] General surgery, test gp practice

Comorbidities: [] [*] +

↑ **Primary diagnosis**

Primary diagn. date: 18.05.2020 []

Primary diagnosis: C50.0 [*] Malignant neoplasm of nipple and areola

Further med. personnel [X]

Med. personnel 1 [] [i] [*]

Med. personnel 2 [] [i] [*]

Med. personnel 3 [] [i] [*]

Med. personnel 4 [] [i] [*]

Med. personnel 5 [] [i] [*]

Save Cancel

Primary diagnosis: cT4 pN1b cM1 (MAR) UICC IV G1 [Edit]

Path. staging: cT1c C1 cN2a cM0 UICC IIIA RR0 [Edit]

Laboratory(+)
 Letter(+)
 Patho-Histology(+)
 Personal info
 PIVC Record(+)
 Pre SACT Continuation(+)
 Print forms(+)

Hospital ID S12430 (SLH) ⓘ

General info Diagnostics Conference Assessment Therapy Communication

Personal info **Tumour case** Clinical history

Basic data

Referring physician: Dr Test GP name Test GP surname General surgery, test gp practice

Primary consultant: Dr TEST name TEST surname General surgery, TEST office

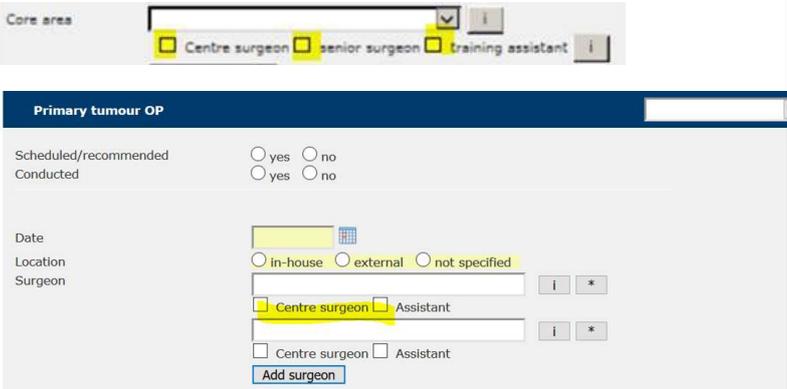
Further med. personnel
 TEST Client Registration Unit, General surgery
 TEST Clinical nurse specialist, General surgery
 TEST day ward name, General surgery
 TEST oncology pharmacist, General surgery
 TEST Radiology interventional department, General surgery

Family doctor/Specialist: Dr Test GP name Test GP surname General surgery, test gp practice

Comorbidities: 02.09.2019 F31.9 Bipolar affective disorder, unspecified

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	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 
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 any Physician associated with this record.
<i>Personnel entry</i>	<i>Centre surgeon, senior surgeon, training assistant</i>	<i>These fields allow pre-population of fields in the Primary Op form – not used in NCIS</i> 
<i>Personnel entry</i>	<i>IKNR</i>	<i>Institution registration number – not used in NCIS</i> 

Section	Fields Names	Definition/Purpose
Personnel entry	HIS-abbreviation	<i>Not used in NCIS</i>
Personnel entry	BSNR	Facility or Practice ID - required for upload. 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.