NCIS GUIDE
Forms in NCIS Chart

1   Introduction

Records in NCIS.Chart are made up of forms where users can document information about their patients. These forms are in the various navigation tabs which are located on the top banner e.g., Assessment tab, Diagnostics tab. This guide provides an overview of the form status functionality.

2   Creating a form

When a new form is created in NCIS.Chart it is automatically assigned the status 'in progress' which allows the form to be edited or cancelled.
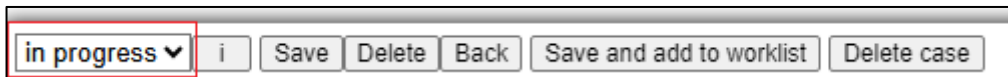

Figure 1: In progress status

In the form overview this will appear with the status 'In progress'.

Figure 2: Assessment overview

If a new version of a form is selected <u>no information</u> is transferred from the old form into the new form regardless of whether the previous version is signed or in progress.

A new version of a form is generated even when the previous version remains set to in progress *E.g., in the scenario of previous user not completing a form in full when subsequent visit occurs.*

3   Signing a form

Once the form has been completed the user may change the status to 'signed'. This is the equivalent of locking the form so it can no longer be edited or cancelled. **Note:** Signing the height and weight assessment is required for the transfer of height and weight values to populate elsewhere in the system.

Figure 3: Signed status

In the assessment overview this will appear as below with the status signed

Figure 4: Assessment overview

If an update to a signed form is required, the user who signed the form may return the status to 'In progress' for editing otherwise a user with local administrator or case manager permission may return the form to 'In progress'.

4   Cancelling a form

The user that created the form may cancel it by selecting the trash can icon which appears in the assessment overview as shown below.

Figure 5: Assessment overview

A drop-down list will appear in the pop-up to allow the user to select a reason to cancel the form which will appear in the audit log.
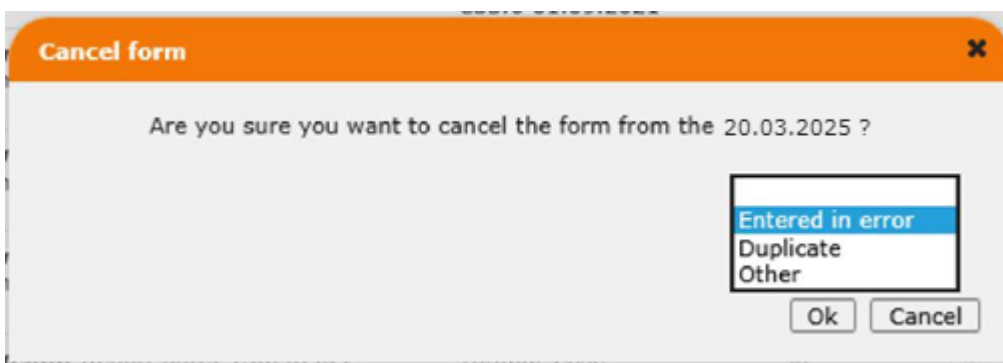

Figure 6: Drop down list

If the form was not created by the user, then a local administrator or casemanager will need to be contacted to cancel the form.

The form will disappear from the overview and cancelled forms button will appear.
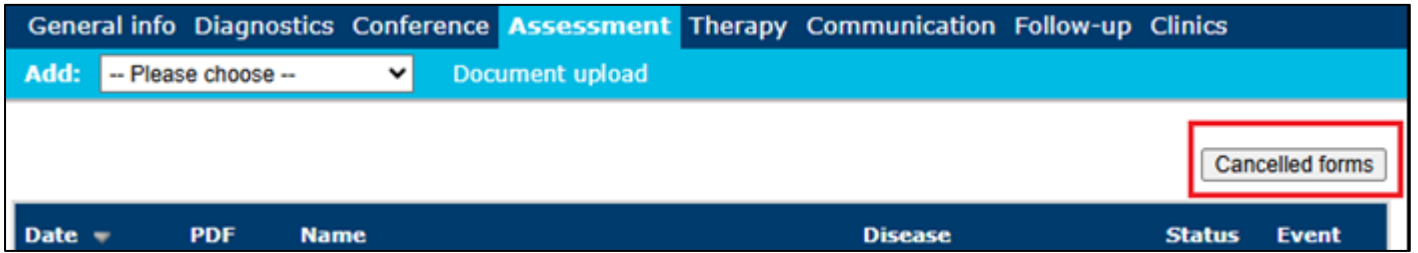

Figure 7: Cancelled forms button

5 Date and Time stamp

The date, time, and user details for when the form was created and last changed are captured in the audit log as shown below for all forms.

Figure 8: Form showing creator and last edit

Selecting the cancelled forms will bring the user to the history audit log for all cancelled forms for that patient

Figure 9: History Audit log

Local Administrators can restore cancelled forms using the event button. The event button can only be seen by users with Local Administrator permissions.