

NCIS QUICK GUIDE for Setting up Users on NCIS Training and NCIS Production

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1 Purpose

This guide is intended for the NCIS Local Administrator or designee at the start of their NCIS Project. The purpose of this document is to explain the requirements for accessing NCIS and the operational flow for user set up. This guide also includes step by step instructions on setting up user accounts within NCIS.

The information in this document is expected to inform the NCIS Local Administrator in determining their local process for managing NCIS user accounts at their hospital site.

2 Environments

There are two environments that hospital users may need access to:

- Training – used for practicing and training. Does not have live interfaces to PAS and the Lab.
- Production –the live environment with real patient data and live interfaces.

3 Requirements for accessing NCIS Training and Production

NCIS is accessed via the Citrix Storefront. The requirements for accessing training and production are different.

Where possible, it is recommended that access to the training application is set up with the user's local domain account so that the production and training applications are accessed using different accounts.

To access NCIS Training with a local domain account, a user must have:

1. Assignment to Active Directory Group(s) for access to NCIS Training Icon(s)
2. A user account in NCIS Chart and NCIS Med in the training environment

To access NCIS Production a user must have:

1. A HealthIrl Domain Account
2. Assignment to Active Directory Group(s) for access to NCIS Production Icon(s)
3. Assignment to an appropriate Active Directory Group for user role definition
4. An user account in NCIS Chart and NCIS Med in the production environment

What is Citrix StoreFront?

Citrix Storefront is the HSE's portal for securely accessing applications such as NCIS.

What is a local domain account?

A domain user is one whose username and password are stored on a domain controller rather than the computer the user is logging into. Hospital staff are given local domain accounts so that they can log into any computer in the hospital using their username and password for their local domain.

What is a HealthIrl Domain Account?

Nationally all local domain accounts are being migrated to HealthIrl. If your hospital has not migrated to HealthIrl prior to your NCIS Go Live, then HealthIrl accounts will need to be requested for your users to access production.

Why do users need a HealthIrl account to access NCIS?

HealthIrl accounts are needed to authenticate users in the NCIS application. This means that they will not need to re-enter their password when transitioning between NCIS Chart and NCIS Med. Users will be able to keep the same username and account when they move hospitals, the local administrator will only need to change the hospital they have permission to view in NCIS.

Why do some users need two HealthIrl accounts?

Some users may have more than one role in the system. A user may have their usual role e.g. Pharmacist and they may also be a Local Administrator. As the permissions connected to each of these roles in NCIS are different, it is necessary to have two different “log ins” i.e. it is necessary to have two HealthIrl accounts.

What are Active Directory (AD) Groups?

In the NCIS Project, Active Directory Groups are used to collect user domain accounts into manageable units. There are two types of AD Groups used by NCIS:

- AD Groups for user role definition
- AD Groups for access to NCIS Icons

What are the NCIS Icons?

When a user logs into Citrix, they will see the NCIS Chart icon which will open the NCIS application. Pharmacists and pharmacy technicians can also be given a “direct access” icon for NCIS Med. This means they will be able to click on the direct access NCIS Med button and be taken directly to the NCIS Med application without needing to log into NCIS Chart first.

What are user accounts in NCIS Chart and NCIS Med?

A user needs an account in both Chart and Med so that they can be assigned the appropriate permissions and hospital in each module.

4 Logging into Citrix Storefront

Citrix Storefront should be accessed using internet explorer at the following address:

<https://storefront.healthirl.net/Citrix/AppStoreWeb/>

- To access the Training environment the user should use their **local domain** username and password.
- To access the Production environment the user should use their **HealthIrl domain** username and password.

5 Active Directory (AD) Groups for access to NCIS Icons

When a user logs in Citrix Storefront they will be able to see the icon for NCIS.Chart. Clicking on this icon will allow them to log into NCIS.Chart and also transition to NCIS.Med.

Pharmacists and pharmacy technicians will also be able to see the direct access icon for NCIS.Med in Production only. This will allow pharmacy staff to log directly into NCIS.Med without needing to log into NCIS.Chart first.



Details



Details

NCIS Med Direct Access-TEST
Hosted Apps

To access the NCIS Icons the user needs to be added to the appropriate AD Group for access. Table 1 describes the NCIS environments, icons and associated AD Group Name.

Table 1. AD Group names

Environment	Domain account	Icon	AD Group Name
Training	Local	NCIS.Chart	CTX-MOCIS-Users-Train
Production	HealthIrl	NCIS.Chart	CTX-MOCIS-Users
Production	HealthIrl	NCIS.Med (Direct access)	CTX-MOCIS-Users-Pharm-GUH CTX-MOCIS-Users-Pharm-SLH

6 Permissions and Active Directory Groups for role assignment

Permissions need to be assigned in both NCIS.Med and NCIS.Chart. This determines what functionality a user has access to in NCIS e.g. only pharmacists can pharmacy verify in NCIS.Med. Please see below for the explanation of permissions in NCIS.Med and NCIS.Chart.

6.1 Active Directory (AD) Groups for role assignment in NCIS.Med

NCIS Med has several user groups with associated permissions which are assigned by the users AD group. The table below gives a high level understanding of the main permissions associated with each AD group. Line managers who complete the “add user to a group” form should have an understanding of these permissions.

Active Directory Group	Permissions
NCIS_Physician	Permission to physician verify (prescribe).
NCIS_Nurse_Level_I	Permission to manage the bed manager and administration of medications.
NCIS_Nurse_Level_II	Permission to manage the bed manager and administration of medications with additional prescribing permissions.
NCIS_Pharmacist	Permission to pharmacist verify, prepare/dispense medications, lot management, and certain reports.
NCIS_Pharmacy_Technician	Permissions to prepare/dispense medications, lot management, and certain reports.
NCIS_Transcription_Pharmacist	Permission to physician verify and pharmacy verify SACT medications for non-cancer patients

Active Directory Group	Permissions
NCIS_Clinic_Ward_Clerk	Permission to manage the bed manager, view patients and therapy plans.
NCIS_Local_Administrator	Permission to create users, manage local units and cost centres, delete certain items, and access to reports.
NCIS_Read_Only_Access	Read only access to patients and therapy plans

6.2 Permissions in NCIS Chart

Most users will have the permission level of “doctor/documentary” in Chart. “Case manager” and “Administrator” have additional permissions and will be required for certain users e.g. MDM Coordinator and Local Administrator.

Access	Permissions
Doctor/documentary	Permission to view and amend patient cases, participate in MDM.
Case manager	Permission to view and amend patient cases, participate in MDM. Permission to create conferences, record conference outcomes and lock conferences. Also has permission to transfer patient cases to the hospital that they have access to.
Administrator	Permission to view and amend patient cases, participate in MDM. Permission to create conferences, record conference outcomes, lock conferences. Also has permission to transfer patient cases to the hospital that they have access to. Permission to create users and manage user accounts, delete certain items.

7 Operational flow for new user set-up in NCIS

A user who has not previously been granted access to NCIS (in any hospital) is a new NCIS user.

Figure 1 describes the operational flow for new user set up in Production.

Figure 2 describes the operational flow for new user set-up in Training.

Figure 1. Operational flow of new user set up in Production

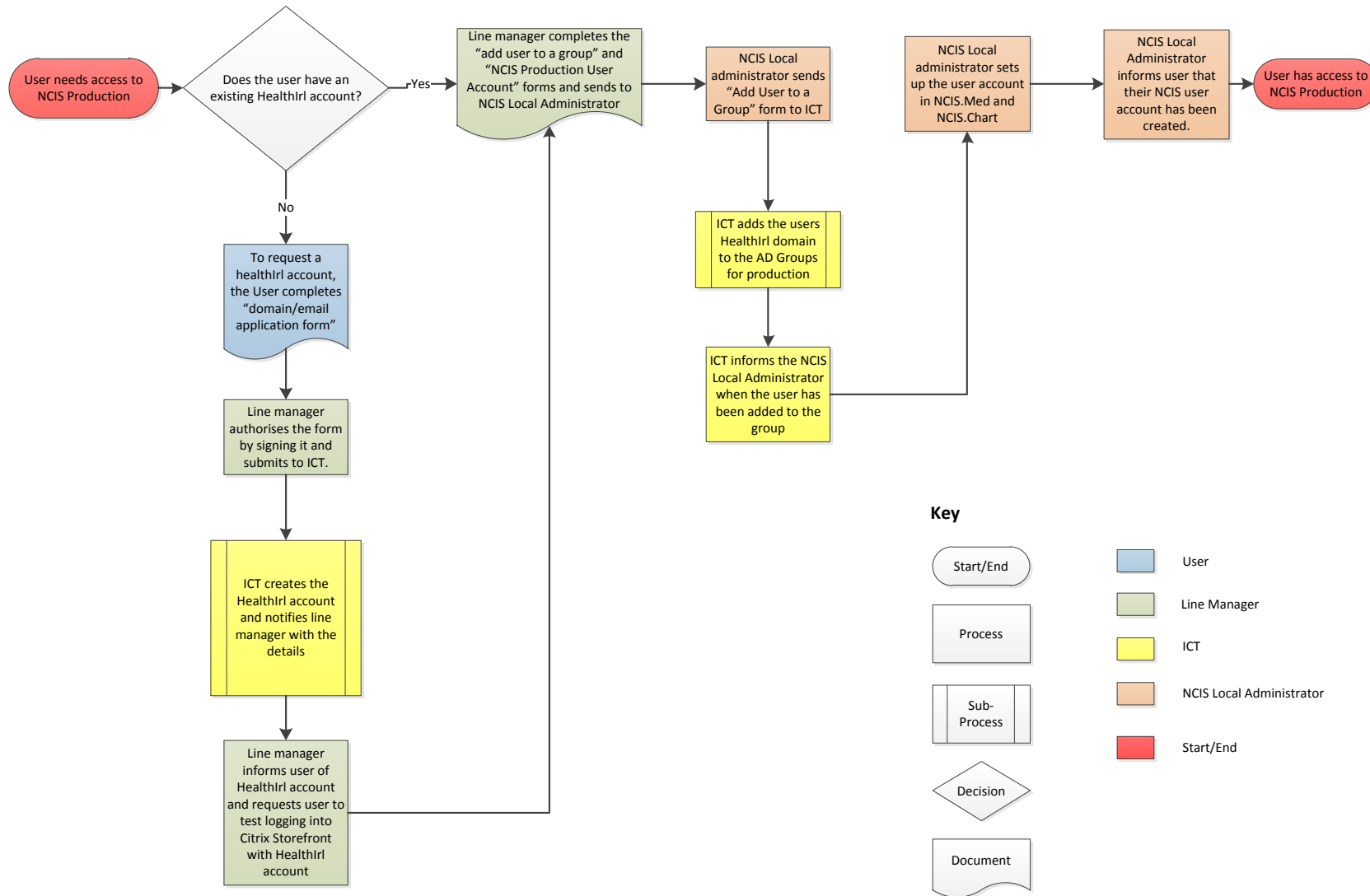


Figure 2. Operational flow of new user set up in Training

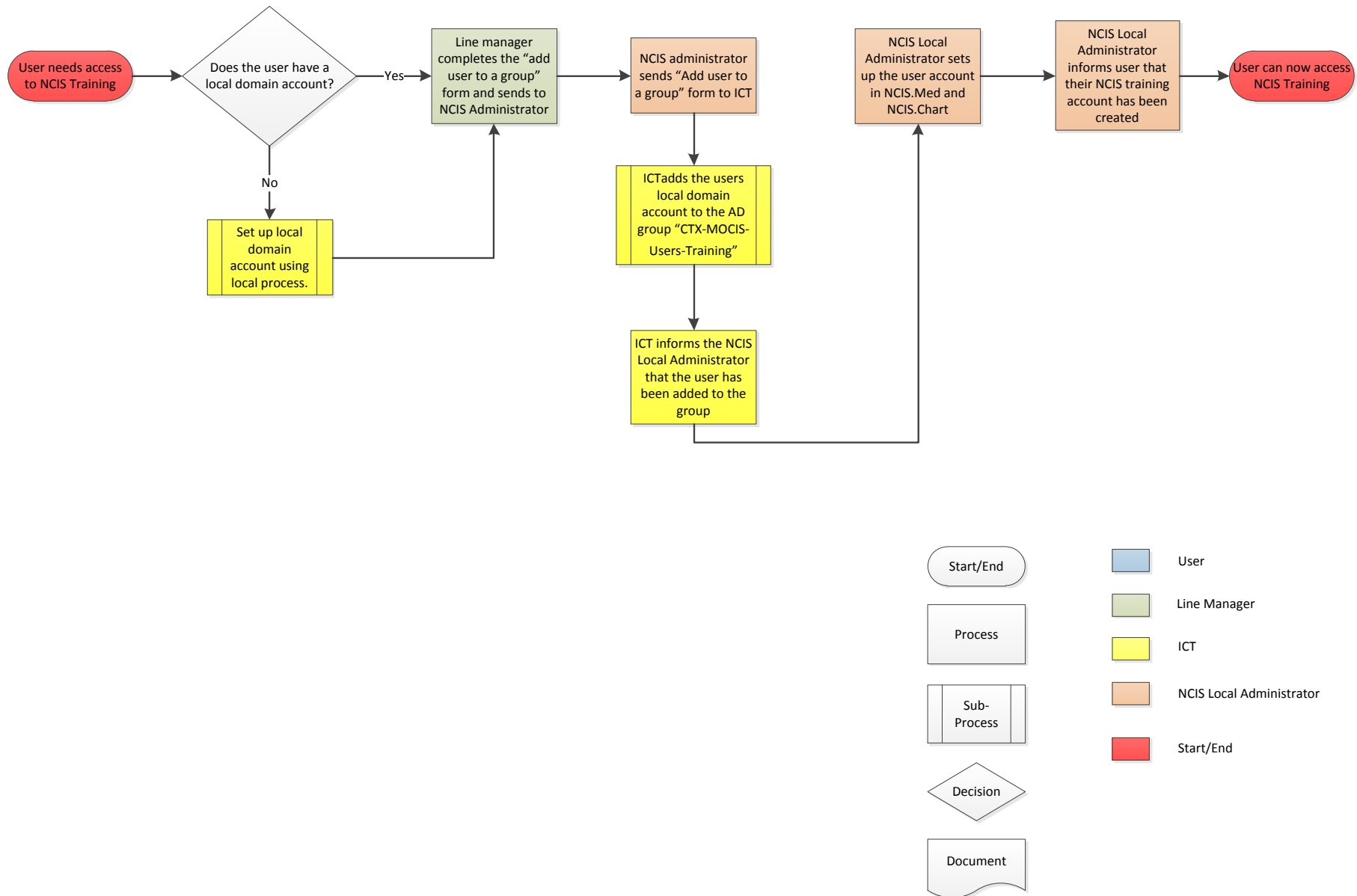


Table 2 outlines the specific requirements needed for training v's production. Table 3 outlines who should request each of the items and to whom the request should be sent to.

Table 2. Requirements for training v's production

Request:	Domain Account type	AD Group name for NCIS.Chart Icon	AD Group name for NCIS.Med Direct Access Icon	AD Group for user role definition	NCIS.Chart account	NCIS.Med account
Training:	Local Domain Account	CTX-MOCIS-Users-Train	Not applicable	Not applicable	Username can be locally defined	Username can be locally defined
Production:	HealthIrl Domain Account	CTX-MOCIS-Users	A hospital specific AD Group name will be made for direct access e.g. CTX-MOCIS-Users-Pharm-GUH	Required - see Active Directory (AD) Groups for list	Username must match HealthIrl username	Username must match HealthIrl username

Three forms are required to set up a user:

- Domain/Email Application ID form available at: http://hse.net.hse.ie/OoCIO/Service_Management/ICT_National_Forms/
- Add user to a group form: Will be provided to the Local Administrator at the start of the NCIS Project
- Production System Access Form: Will be provided to the Local Administrator at the start of the NCIS Project

Table 3. Description of request, associated form and where to send forms for user access to NCIS.

Request	Form Name	Who completes the form?	Who sends the form?	Send to
HealthIrl Domain Account	Domain/Email Application ID form	User completes form, line manager signs.	Line manager	Local ICT where applicable, otherwise HSE Service Desk (service.desk@hse.ie)
Addition to an ➤ AD Group for access to NCIS icons ➤ AD Group for user role definition	Add user to a group form	Line manager	NCIS Local Administrator	Local ICT where applicable, otherwise HSE Service Desk (service.desk@hse.ie)
NCIS application user account	Production System Access Form	Line Manager	Line manager	NCIS Local Administrator

Depending on local arrangements, some local hospital ICT departments will be able to set up HealthIrl domain accounts and add users to AD Groups. Prior to Go Live the NCIS Local Administrator or designee should clarify the local process with their ICT Department.

If your local hospital ICT cannot set up HealthIrl Accounts or add users to AD Groups then these requests must go through the HSE Service Desk (service.desk@hse.ie). **Please allow approx. 6 weeks for this to be completed.**

8 How to set up a user account in NCIS.Chart

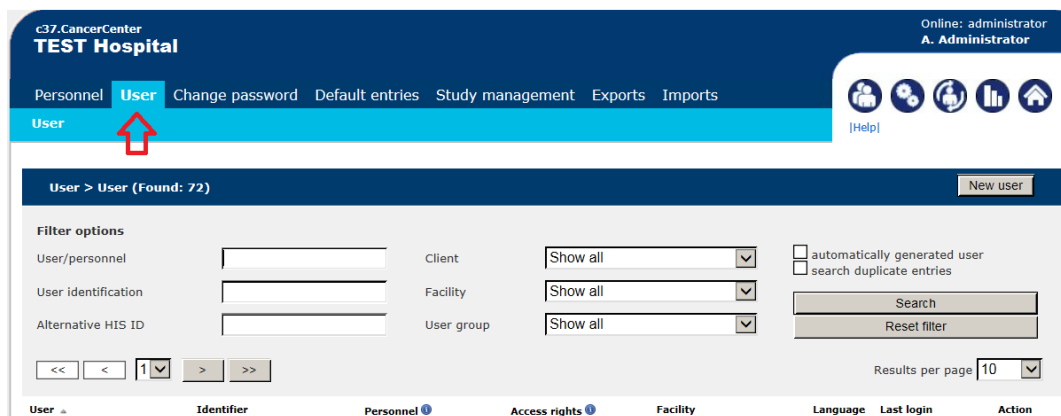
User accounts in the NCIS application can only be completed once the user has a HealthIrl domain account because **the NCIS username must match the HealthIrl username exactly.**

The following steps explain user set up in Chart:

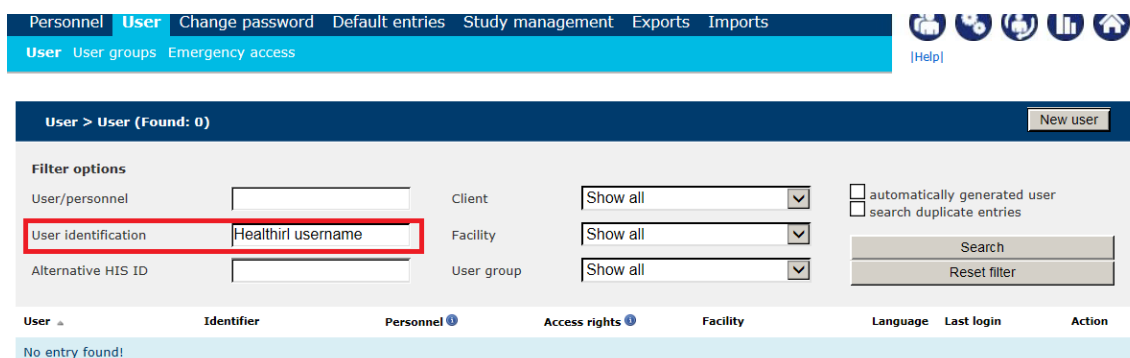
1. Log into NCIS.Chart with NCIS Local Administrator account.
2. Go to Settings from the Menu at the right side of the screen



3. Select the "User" tab:



4. Search for the user to ensure that a duplicate has not been created.



5. If no entry is found for that user then select the new user button:

6. In the “user” section enter:

- i. Title (if appropriate)
- ii. Surname
- iii. First name
- iv. Facility
- v. Language –English (very important –this determines what language the application will be in for the user)
- vi. Ensure active is ticked

The other fields are not required.

7. If the user will complete patient assessment forms in Chart, then they should have their personnel record linked to their user account. This ensures that their name will auto-populate in patient assessment forms where the user who performs the action needs to be documented e.g. height and weight.

To link the personnel file to the user account, click the star beside the “corresponding med. Personnel” field. Search and select the correct Personnel Record to link it to the user profile.

If there is no personnel file for the user and one is required, it will be necessary to add a new entry to the personnel file (Please see separate guide).

Corresponding med. personnel

Keine

Limit access to the following user's patients

Keine

Consultation group

Scheduled access control
from to

Restriction to tumor conference

active

* ←

Search for personnel

Add new med. personnel

Surname bright

First name

Location

Special. field

Bright, Barry (Dr.), Oncology

8. Under the User Identification section, Ensure that the LDAP button is checked. The “user identification” is the username that the user will log into NCIS with. **This must be exactly the same as the HealthIrl username.**

User identification

User identification username LDAP

User may only view anonymised patients

Alternative HIS ID

9. Under the User Group section, all users should be assigned either:
 - a. the NCIS User group.
 - b. NCIS_physician
 - c. NCIS_pharmacst
 - d. NCIS-Nurse

This ensures that the NCIS View is assigned to the User at log in. The NCIS_physician, NCIS_pharmacost and NCIS_nurse user groups have the additional functionality of allowing the patients case notes to be filtered by user group (see the NCIS Quick Guide on Case Notes for a full description)

The other user groups are not currently relevant; do not assign these to any users.

User groups

Available user groups

Search:

MDM (MDM)
Nurse (Nurse)
Consultant (Consultant)
Regional MDM (Shared MDM)

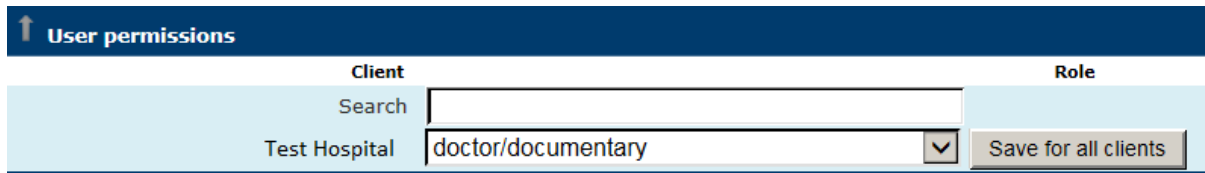
Assigned user groups

Search:

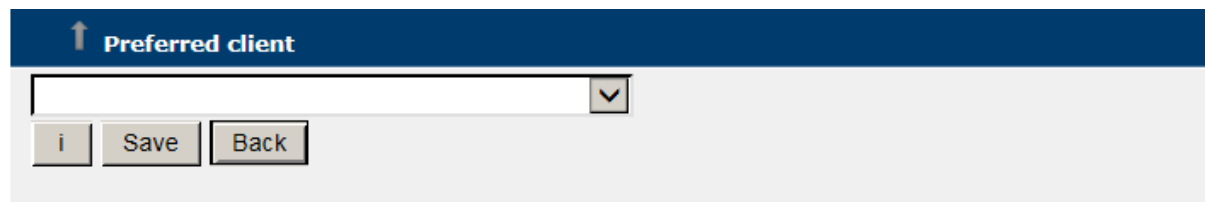
NCIS (NCIS)

<<
>>

10. Under “user permissions”, select the appropriate permission level for the user.



11. Leave the preferred client blank and click save



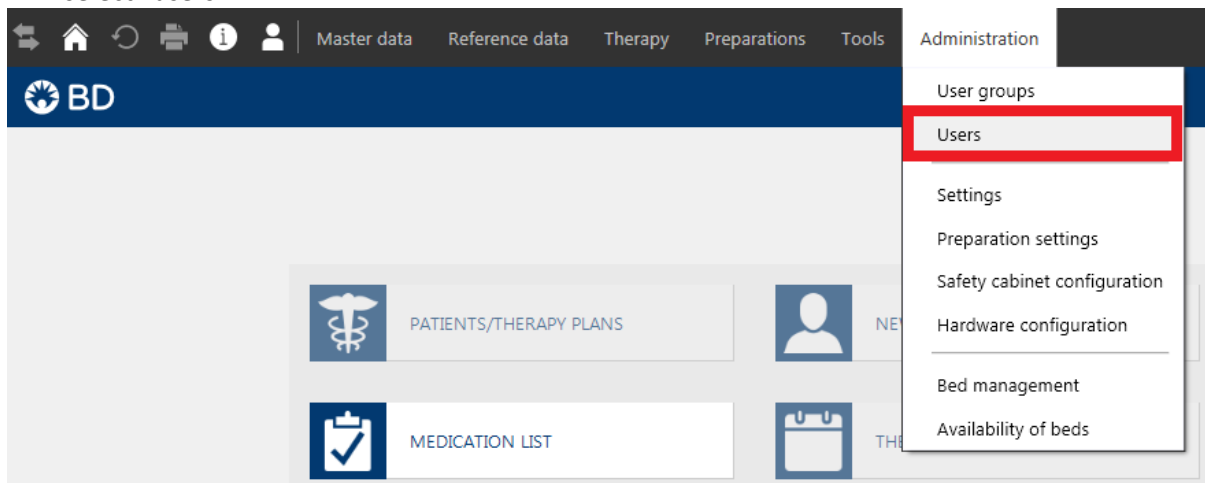
The user account in NCIS Chart has now been created

9 How to set up a user account in NCIS.Med

User accounts in the NCIS application can only be created once the user has a HealthIrl domain account because the NCIS username must match the HealthIrl username exactly.

The following steps explain user set up in NCIS Med:

1. Log into NCIS Med with an NCIS Local Administrator account. Select the administration tab and select “users”:



12. Perform a search to ensure that the user does not have an existing account.

The screenshot shows the 'Users' form with the following fields and options:

- Can log on as user
- Ordering physician
- Name: []
- Login: [username]
- Abbreviation: [] Barcode: []
- UID: []
- Physician number: []
- Registration tabs: User registration (selected), Unit assignment, Preparation site assignment, Personal data, License administration method
- Group: []
- Login: []
- Password: []
- Confirmation: []
- Barcode: []
- Password does not expire
- Do not block account when inactive
- Free text: []
- Permissions table: Allowed | Modify | New | Delete

13. Select the “new” button to create a new user:

The screenshot shows the 'Users' form with the 'New' button highlighted in a red box. The 'Can log on as user' checkbox is checked. The 'Login' field contains 'username'. The 'Permissions' table is empty.

14. The “can log on as user” button must be ticked. Also the following registration details should be entered:

- Last name
- First name
- Abbreviation –Recommend that the first letter of the first name and the surname be used as the abbreviation so that it is obvious to identify the user. The system will only allow unique abbreviations in the system. If another user has the same abbreviation then add a number to the end.
- Physician number: Any professional registration number can be entered here.
- Group: Select the appropriate user group from the list. These match the AD group names. This is required for user account set up but the user will not be able to log in unless the AD group has been assigned by ICT (outside of NCIS).
- Login: Enter the HealthIrl username.

Users

Can log on as user Ordering physician

Last name:

First name:

Abbreviation: Title:

UID:

Physician number:

User registration | Unit assignment | Preparation site assignment | Personal data | License adm

Group:

Login:

Password:

Confirmation:

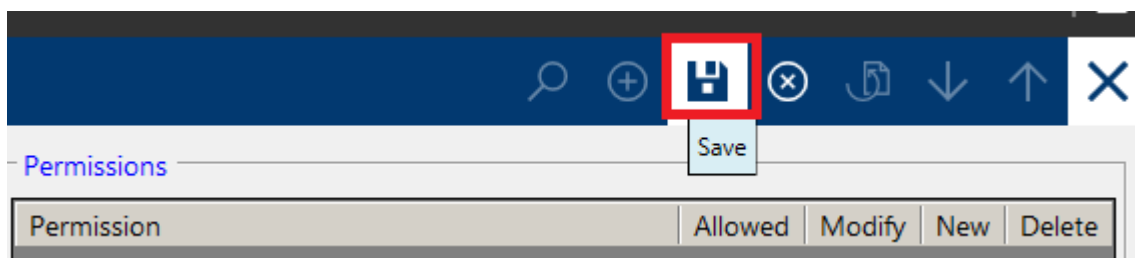
Barcode:

Password does not expire

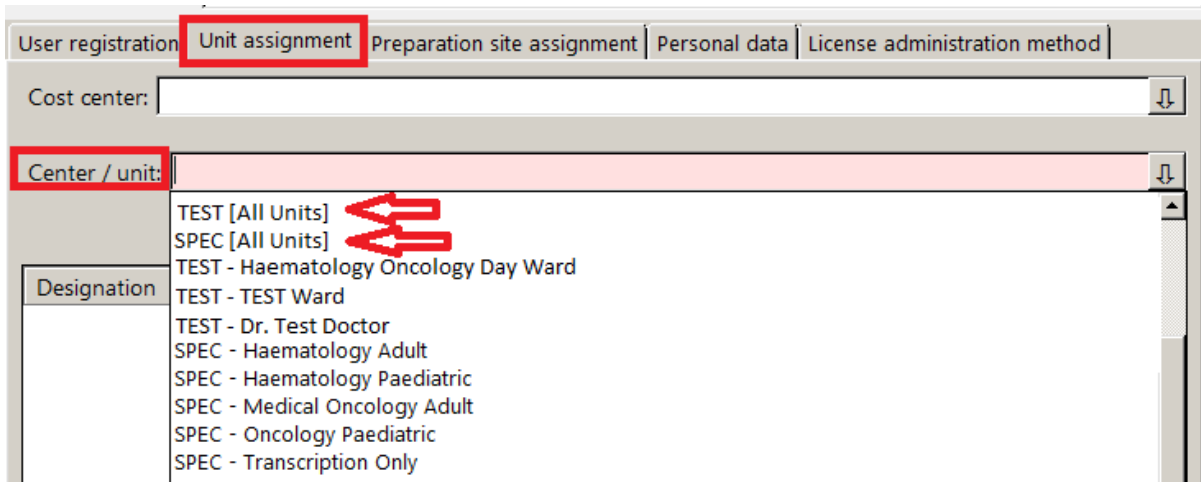
Do not block account when inactive

Free text:

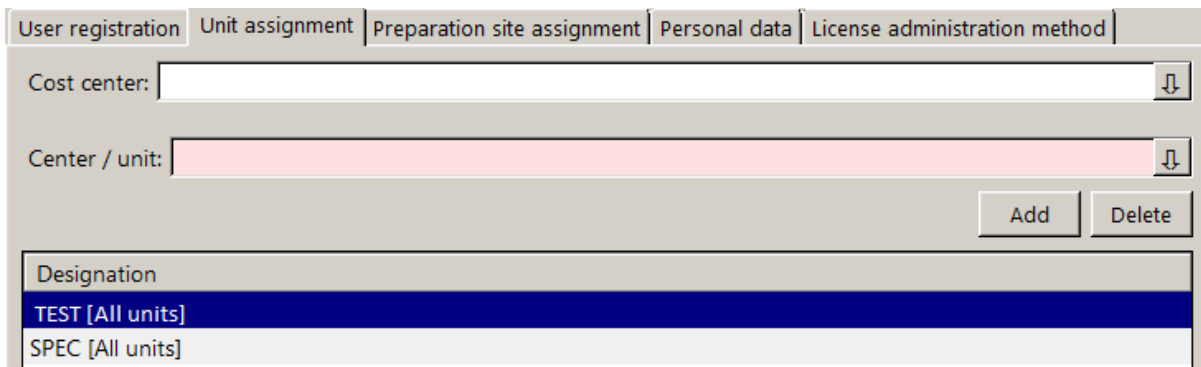
15. These details must be saved before proceeding with the next steps. Select save on the top right.



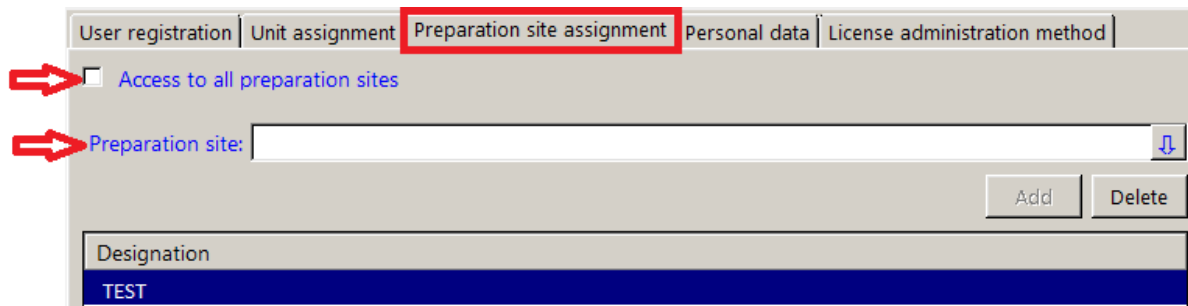
16. Next, select the “unit assignment” tab. Select the drop down list for “Centre/unit”. Select the appropriate units for the user.



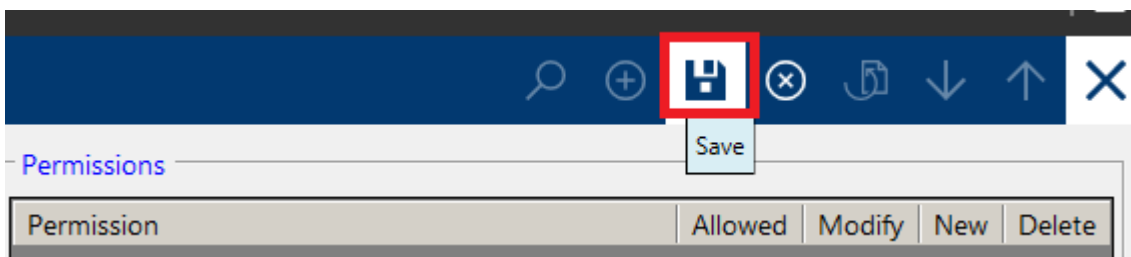
Assigning all of the units of your hospital to the user means that they will be able to see all patients assigned to your hospital. Assigning “SPEC [All units]” means that the user will be able to see regimens from all the specialties i.e. oncology/haematology etc.



17. Next, select the “preparation site assignment” tab. Un-tick “access to all preparation sites” and select the preparation site of your hospital from the drop down list.



18. To complete the account set-up in NCIS Med, click the “save” icon.



The user account has now been created.

10 How to deactivate a user in NCIS

User accounts in NCIS cannot be deleted. They can only be deactivated. When a user finishes employment in a hospital, the NCIS Local Administrator can deactivate the user in NCIS. Managing leavers will be performed as per local hospital policy. The steps to deactivate a user in NCIS are outlined below:

1. Log into NCIS.Chart and un-tick “active”. Remove the hospital from “facility”

The screenshot shows the 'User 10 Doctor' management page. The 'Facility' dropdown menu is set to 'TEST Hospital' and is highlighted with a red box. The 'active' checkbox is checked and also highlighted with a red box. Other fields include NCIS ID (381), Salutation, Title, Surname (10), First name (Doctor), E-Mail address, Phone number, Corresponding med. personnel (Keine), Limit access to the following user's patients (Keine), Consultation group, Scheduled access control, and Restriction to tumor conference.

2. Under user permissions, set the permission level to blank and remember to click save.

The screenshot shows the 'User permissions' section. The 'Client' dropdown menu is set to 'Test Hospital (TEST)' and the 'Role' dropdown menu is set to 'doctor/documentary'. Both dropdowns are highlighted with red boxes. There is a 'Save for all clients' button and a 'Preferred client' section with 'Save' and 'Back' buttons.

3. Transition to NCISMed and look up the user. Un-tick the box, “can log on as user”.

Users

Can log on as user
 Ordering physician

Last name:

First name:

Abbreviation: Title:

UID:

Physician number:

User registration
Unit assignment
Preparation site assignment
Personal data
License administration method

11 How to set up a user in Production who previously had an NCIS account

If a user had an NCIS account at another hospital, they will need to be re-assigned in the application to their new hospital. At this time it is not possible for the NCIS Local Administrator to do this directly in the application. The following process should be followed by the NCIS Local Administrator:

- Send the “add user to group” form to Local ICT where applicable or HSE Service desk. This only needs to be done if the user role in NCIS Med has changed.
- Send the “Production system access” form to the NCIS Office. The NCIS Office will be able to switch the user to the new hospital and will inform the NCIS Local Administrator.

Table 3. Description of request, associated form and where to send forms for users who previously had access to NCIS.

Request	Form Name	Who completes the form?	Who sends the form?	Send to
Addition to an AD Group for user role definition (only required if role needs to be changed)	Add user to a group form	Line manager	NCIS Local Administrator	Local ICT where applicable, otherwise HSE Service Desk (service.desk@hse.ie)
NCIS application user account	Production System Access Form	Line Manager	NCIS Local Administrator	NCIS Office NCIS@cancercontrol.ie