# How to Create a Patient List

# A patient list can be defined by Location, Relationship, Provider Group, or Custom.

To build a Patient List, select the Patient Lists tab. From the patient list click on the list maintenance icon  $\overset{\mathscr{P}}{\sim}$ . This opens the Modify Patient Lists window.

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CC to Physician	P Modify Patient Lists	
All Patients - CC to Pf	Pr     Available lists:     Active lists:       Image: Presurg Clinic QEH Unit 2 QEH Unit 8 QEH     Image: Presurg Clinic QEH Unit 8 QEH	<b>*</b> *
	Select New C	K Cancel

This will open the 'Select a patient list **type**' window.

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CC to Physician All Patients - CC to Pt Availab Name Location Age HED Press Unit 8	Image: Construction of the second	×
	Back Next Finish Cancel	

#### Location List:

- List by unit name (eg: Unit 3 QEH).
- Recommend Med Students setup location lists

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 Managed by registration – patients are added when admitted and removed when discharged.

#### **Relationship List:**

- Recommend physicians/locums/residents setup a list for "Admitting Physician, Attending Physician, and Consulting Physician"
- Managed by registration patients are added when admitted and removed when discharged
- When they login to their PROD account this may already be setup and will be visible under the "Available Lists" column inside the wrench icon.
- Med Students would not use this type of list because they are not attached to patients as physicians.

#### **Provider Group List:**

- List by provider group (eg: Hospitalist, Oncology, etc)
- Managed by registration patients are added when admitted and removed when discharged.
- May need to request access to some of these groups via CIS Core group (eg: oncology group)

#### Custom List:

- List managed by user and is unique to them. Patients can be added to this list by clicking on te green person w/ start icon or by right clicking on a patients name in an existing list and selecting "Add to patient list"
- Not managed by registration so patients added will need to be removed by user.

Highlight which type of list you wish to build and click next.

Patient Lists
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CC to Physician       Patient List Type         All Patients - CC to Pl       Available lists:         Name Location Age       MED PCH, RE         Unit 2 QEH       Unit 3 QEH         Unit 8 QEH       Select a patient list type:         Assignment       Costom         Drate Corup       Product Group         Relationship       Product Group         Relationship       Product Group
Back Next Finish Cancel

Now you have multiple filters you can set to determine what you wish to view on your Patient List

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CC to Physician All Patients - CC to PH Available lists: Name Location Age Name Location Age Add to the provided of the provid	Bit List       Is       srvkes       'Types       ns       vips       vips       vic Criteria       'Criteria

**Note**: When selecting a location, you can NOT choose an entire facility. This will cause a long load time for your list and slow the system down considerably.

You must click on the **I** to drill down further and make your selection.

Location Patient List		$\mathbf{X}$
	Community Hospital Oleary     Community Hospital Oleary     Hilsborough Hospital     Fine County Hospital     County Hosp	
	Back Next Finish Cance	:

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As the BOXES beside each location are square, you can multi-select.

Location Patient List		×
*Locations [Unit 3 QEH, Unit Medical Services Counter Types Care Teams Relationships Discharged Criteria Admission Criteria	B - □ (S) Unit 2D/S QEH         B - □ (S) Unit 3 QEH         B - □ (S) Unit 5 QEH         B - □ (S) Unit 7 QEH         B - □ (S) Unit 9 QEH         B - □ (S) Souris Hospital         B - □ (S) Unit 9 QEH         B - □ (S) Souris Hospital         B - □ (S) Unit 9 QEH         B - □ (S) Unit 9 QEH<	
Enter a name for the list: (Limited to 5 Unit 3 QEH, Unit 5 QEH, Unit 7 QEH	0 characters) Back Next Finish Cance	

Now you can choose any other filter you wish to set, by clicking on the select. (The box beside the selection will populate with a check mark after you have chosen your selection.)

Before selecting encounter type encounter type

#### After selecting

Location Patient List	Location Patient List
*Locations [Unit 3 QEH, Unit     Medical Services     Encounter Types     Gare Frams     Relationships     Time Criteria     Admission Criteria     Admission Criteria     Admission Criteria     Specimen     Specimen     Specimen - Animal     Specimen - Coded	In the second seco
Enter a name for the list: (Limited to 50 characters) Unit 3 QEH, Unit 7 QEH Back Next Finish Cancel	Enter a name for the list: (Limited to 50 characters) Unit 3 QEH, Unit 7 QEH Back Next Finish Cancel

You can also set the filter to view Pt's that have been recently D/C

Location Patient List		
*Locations [Unit 3 QEH, Unit Medical Services     Ecounter Types [Inpatient Care Teams Relationships     Discharged Criteria [Display     Admission Criteria	<ul> <li>None</li> <li>Only display patients that have not been discharged.</li> <li>Only display patients that have been discharged within the last:         <ul> <li>10</li> <li>Day(s)</li> </ul> </li> </ul>	The name of the List can be changed, by highlighting the name
Enter a name for the list: (Limited to Unit 3 QEH, Unit 7 QEH	50 characters) Back Next Finish Cancel	

and then typing the new name.

**NOTE**: To Proxy the list, select **next** and enter the details of the Proxy.

If you choose not to proxy and you are satisfied with your filters you can click 'Finish'.

Locations [only of content of the second of the secon	None           Only display patients that have not been discharged.           Only display patients that have been discharged within the last:           10         Day(s)	
☑ <b>Discharged Criteria [Display</b> Admission Criteria		

You are then returned to the Modify Patient Lists window.

P Modify Patient Lists			
Modify Patient Lists Available lists:     MED PCH, REST PCH, SURG PCH     PreSurg Clink QEH     Unit 2 QEH     Unit 2 QEH     Unit 3 QEH	*	Active lists:	*
		New OK Can	cel

Highlight the newly created Patient List from the Available lists and select the is to move it to the Active list. Click OK to save changes and you are returned to the Patient Lists tab.

To Delete a Patient List, the list **must** be within the 'Available List' window. Highlight the list and right click.



## How to Proxy a Patient List

## Open Patient List

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Inbox Items (17)								
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Orders (17/17)								
Proposed Orders (3/3)								
Renewal Orders (14/14)								
Click the Properties	icon <sup>)</sup> 😭							

#### Click Proxy tab

Click New button (lower right)



This gives you a choice of sharing with a group, or with a single person (Provider)

ustomize Patient List Properties	<u></u>
Location Patient List Proxy	
Name (Limi Access End Date	Group  Provider  Access:  From:  2012Jul-0  Y 1055  To:  Exem_ema_ema_ema_ema_ema_ema_ema_ema_ema_e

Once you have chosen a Group or Provider, click the Access dropdown arrow, and select Full Access

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Enter the dates your List is to be shared. If you leave the "To" date empty, the proxy lasts indefinitely.

Click Apply & Ok.

Location Patient List Proxy	
Name (Limi Access End Date	Group PCH Surgery     Y     Provider     Access:     Full Access     Y From:     2012JuI-04
OK Cancel	