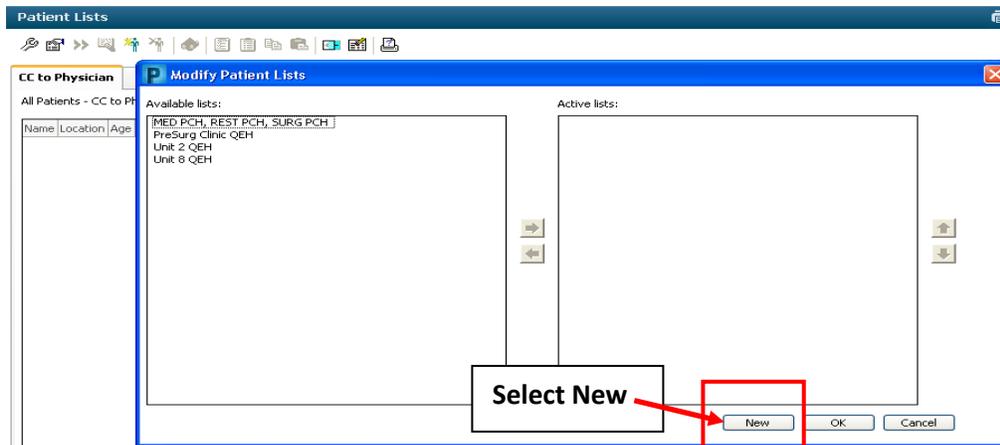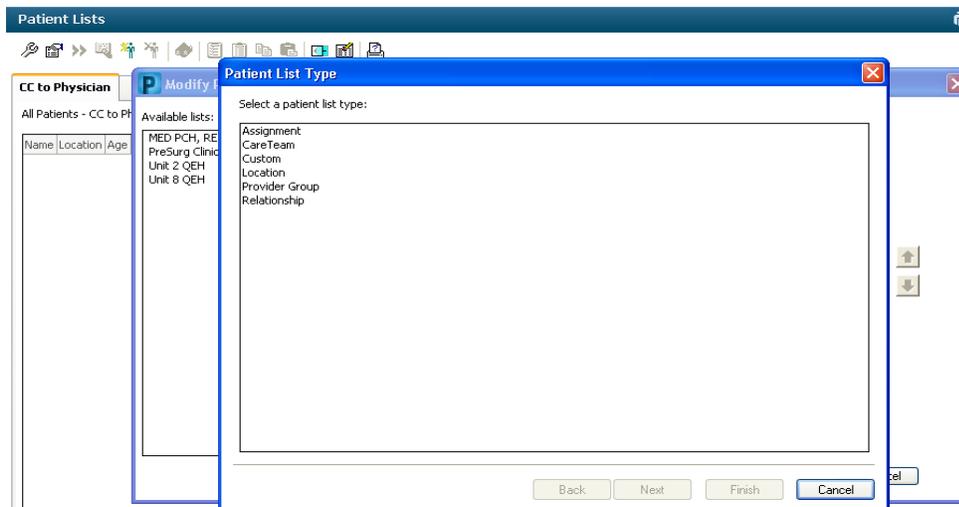# How to Create a Patient List

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 🔧 . This opens the Modify Patient Lists window.

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

Location List:

- List by unit name (eg: Unit 3 QEH).

- Recommend Med Students setup location lists

- 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.
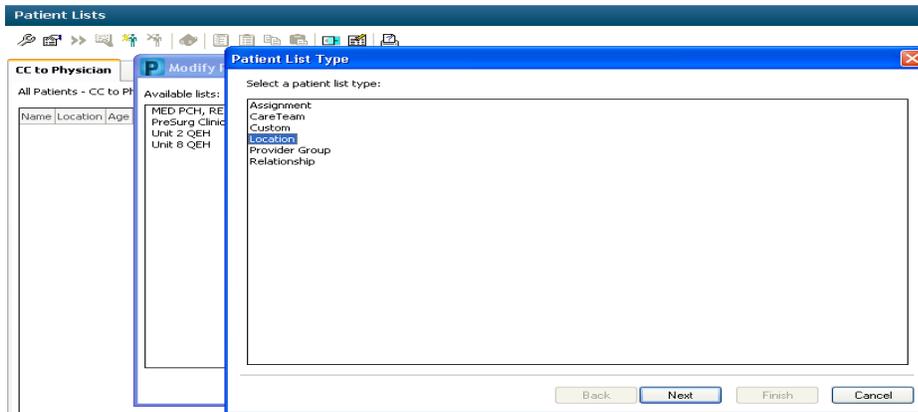
Now you have multiple filters you can set to determine what you wish to view on your Patient List
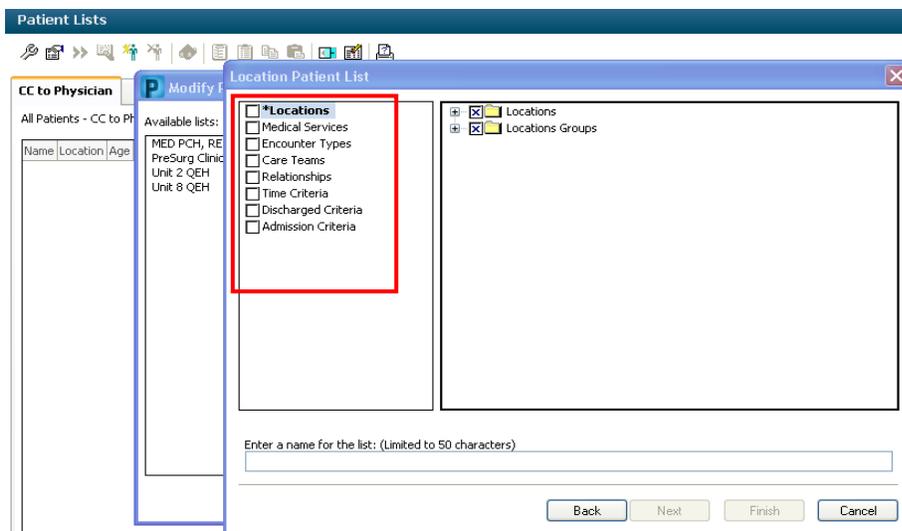
Note: When selecting a location, you can NOT choose an entire facility. This will cause a long load time for your list and slow the system down considerably.

You must click on the ⊞ to drill down further and make your selection.
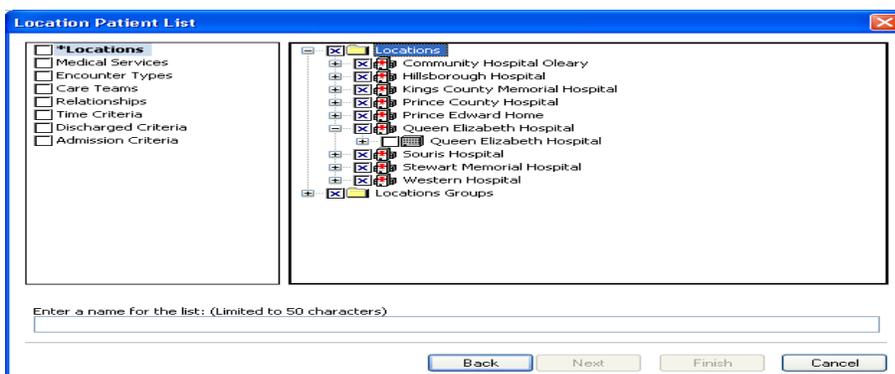
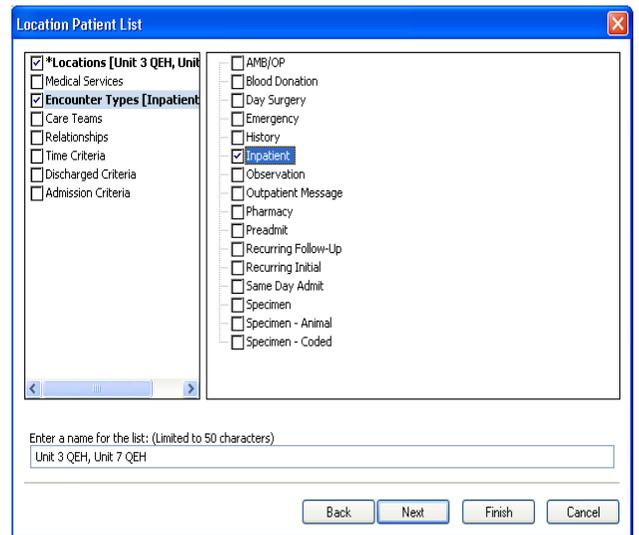As the BOXES beside each location are square, you can multi-select.
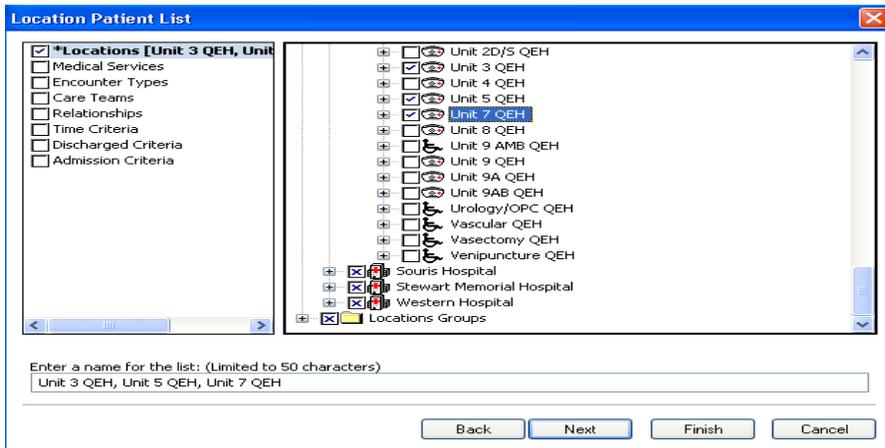
Now you can choose any other filter you wish to set, by clicking on the select. (The box beside the selection will populate with a check mark after you have chosen your selection.)
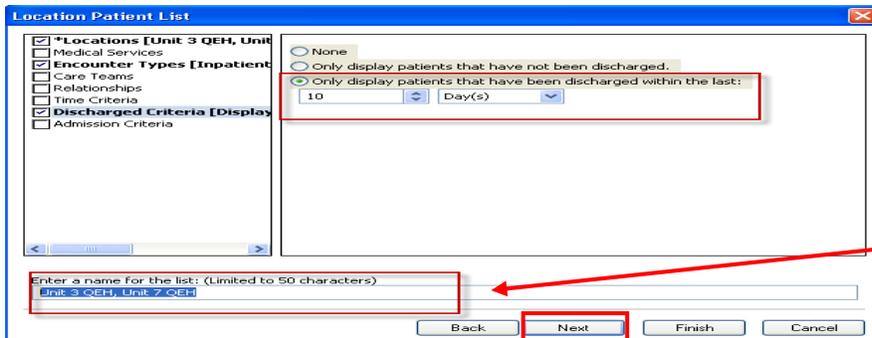
Before selecting encounter type   **After** selecting encounter type
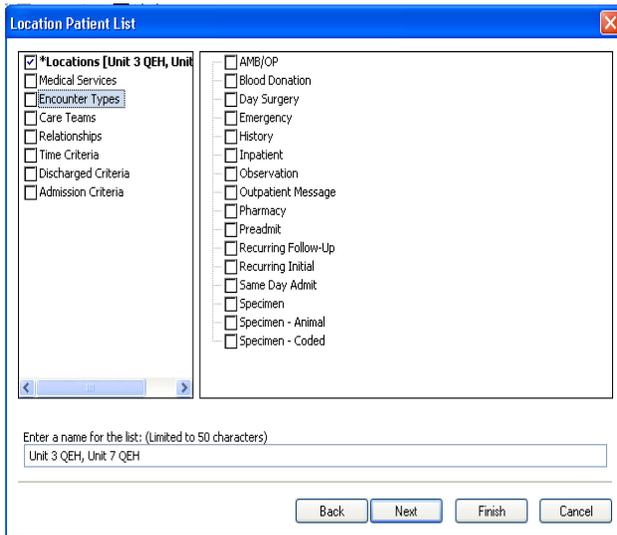
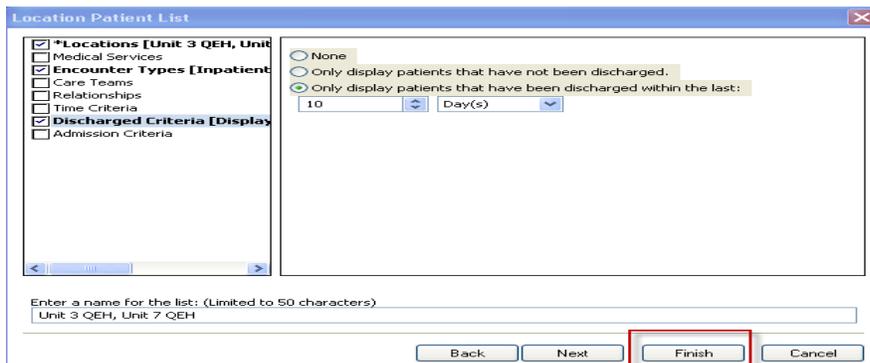You can also set the filter to view Pt's that have been recently D/C

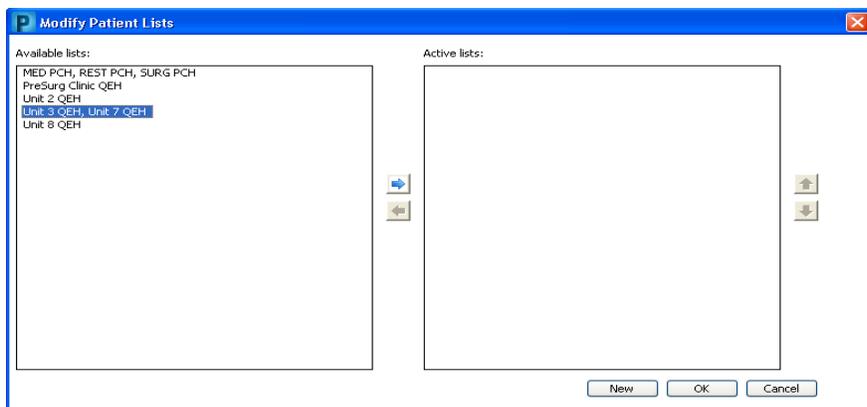The name of the List can be changed, by highlighting the name

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'.

You are then returned to the Modify Patient Lists window.

Highlight the newly created Patient List from the Available lists and select the ➡️ 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.
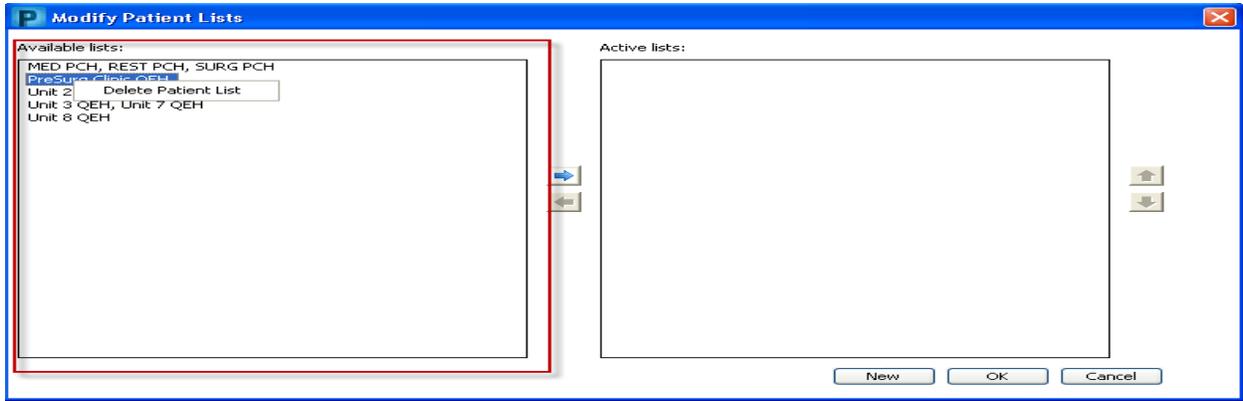
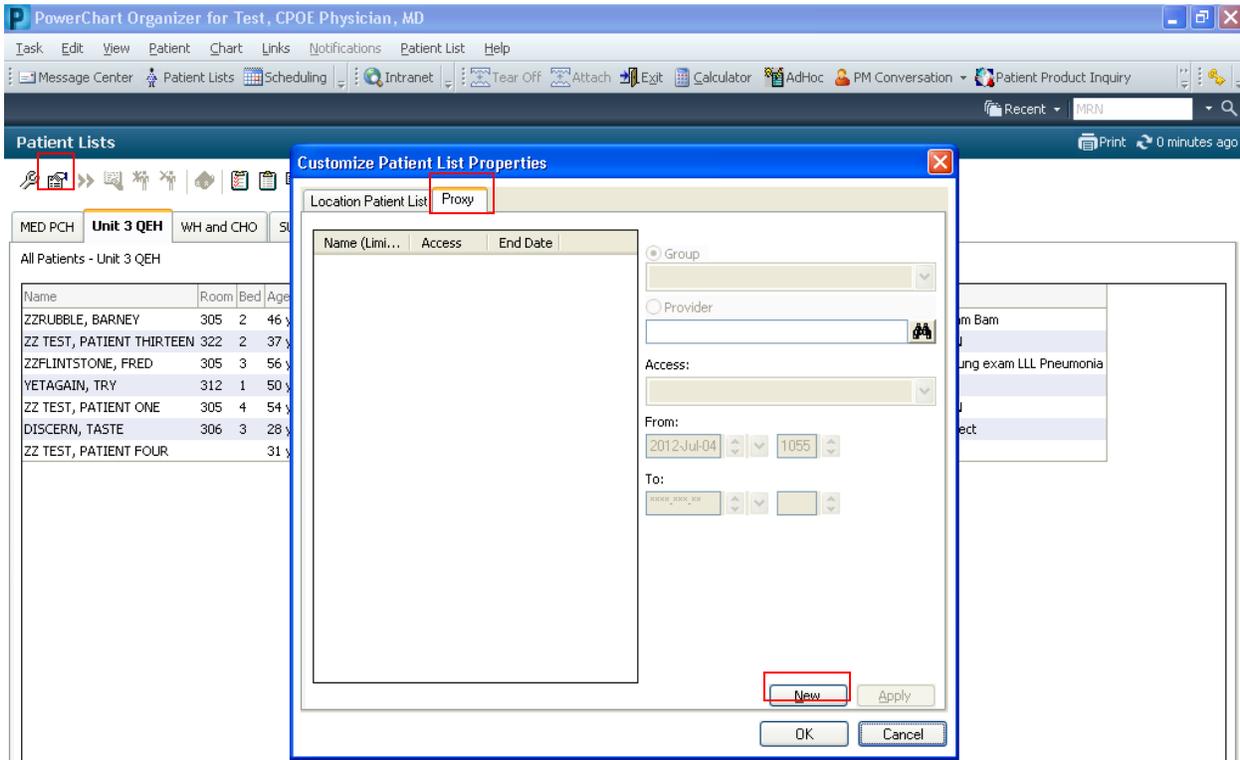## How to Proxy a Patient List

Open Patient List
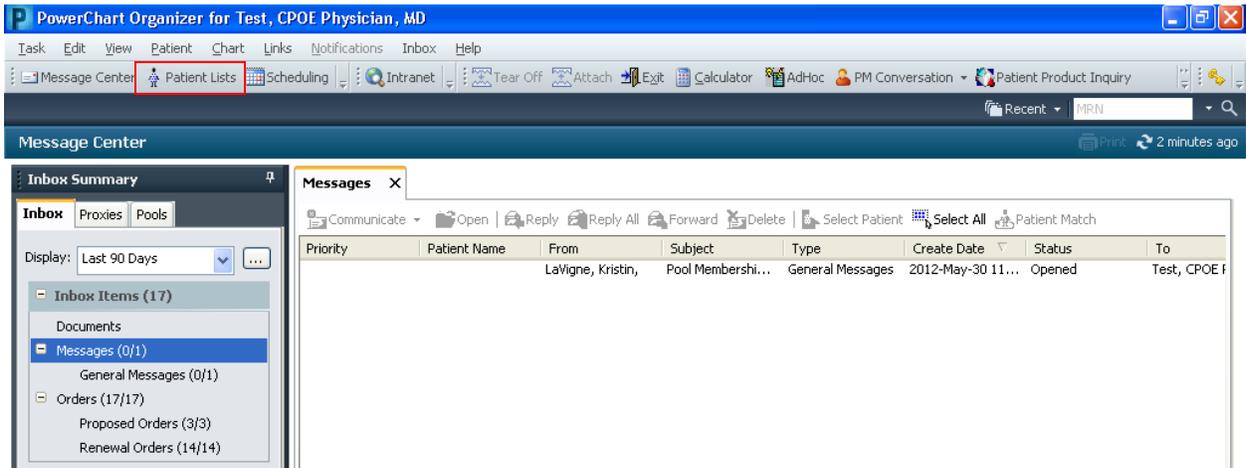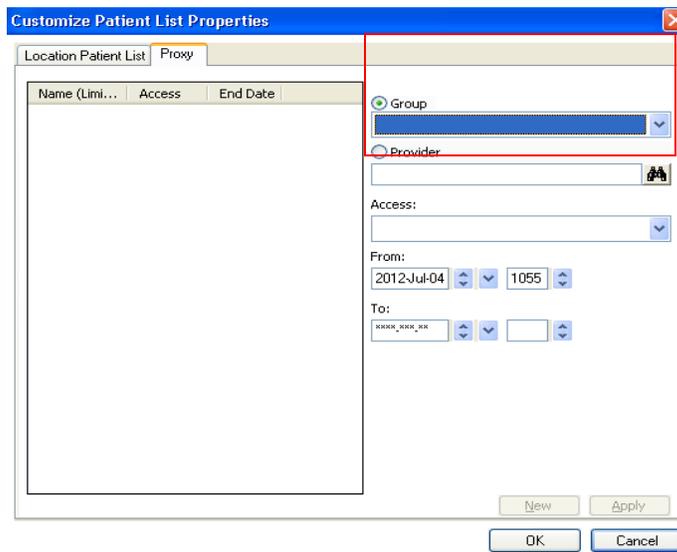

Click the Properties icon

Click Proxy tab

Click New button (lower right)

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

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

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

Click Apply & Ok.