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Setting up PowerChart Patient Lists

Overview

Your patient lists are associated with your login, so they are available wherever you are logged in. Also, devices on patient care units are typically set to have a default patient list for the location.

- You can have more than one patient list based on your work needs.
- Patient Lists are displayed as tabs and can be set to **Active** which is in view or **Available** which is not in view.
- The Patient Access List (PAL) and Task List differ from a Patient List. Refer to Completing Tasks in the PAL or the Single-Patient Tasklist

Types of Patient Lists

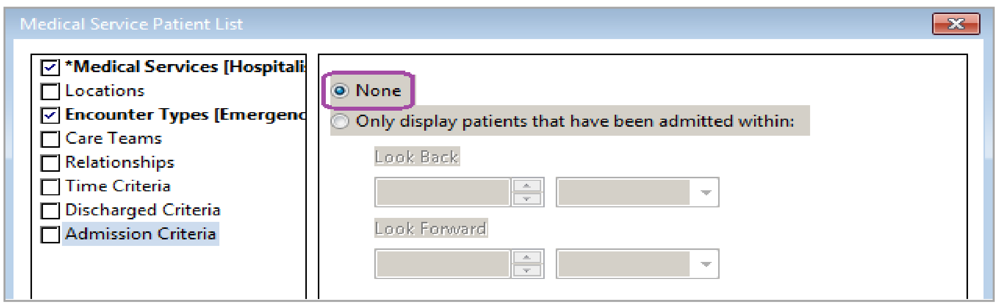
- **Assignment:** Displays patients assigned to nurses via the Clairvia acuity tool (only available to nurses and clinical support staff).
- **Care Team:** Displays patients added by the Care Team identified when setting up the list. The Care Teams are set up on campuses for specific uses, and by specific groups. Patients are manually added and removed from the lists. Since this type of list is used by a larger group, it is best to set filters to hide patients rather than removing them from the list. For example, set a Discharged criteria of **only see patients that are currently in the hospital.**
- **Custom:** A list you can modify and use to populate your PAL or Task List. You will need to manually add and remove patients from this list.
- **Location:** Displays patients according to the unit (or multiple units).
- **Medical Service:** Displays patients, regardless of their location, based on the provider Medical Service identified when the patient is admitted or when the service is updated via an order.
- **Provider Group:** Displays patients, regardless of their location, based on the relationship of a provider to a patient. A Provider Group is set up for a group of providers who work together. You need to be part of a Provider Group to see this option. This type of list set up includes relationships the provider might have to the patient, i.e., Attending, Consulting.

Patient List Filters

Each patient list type also includes criteria that you can set up to further define the patients displayed:

- Include or exclude **Encounter Types** or visit types; for example, ED, Inpatient, Observation, etc.
- **Care Teams** criteria: A Care Team member adds patients that are being followed by that team.
- **Relationships** criteria: Include or exclude Visit Relationships and/or Lifetime Relationships.
- **Time** criteria (include or exclude dates, times, date ranges): Can be used to filter other criteria (for example, apply a date range to other results).
- **Admission/Discharge** criteria: Use this to filter patients based on admission/discharge criteria.

To clear criteria from the Time, Discharge and Admission Criteria: Highlight the criteria on the left, then select **None**.



Suggested Patient List Filtering and Types of Lists for your work

ED: Use a Location Patient List. Set it up to show Encounter Types: Emergency Dept, Inpatient, Observation, Outpatient, Outpatient in a Bed.

SSU (SPS): Use a Location Patient List. Set it up to show Encounter types of **Day Surgery, Inpatient, Observation, Outpatient and Outpatient in a Bed.**

CPN Providers, Residents: Use a Care Team Patient List. A Care Team member adds patients that are being followed by the team.

Hospitalists, Trauma team, Clinic Providers who also see inpatients: Use a Medical Service Patient List. Set it up to display **Inpatient**, **Observation**, **and Outpatient in a Bed** Encounter Types (to filter out Pre-reg patients). A Provider Group list using the same Encounter type filters.

St Paul Clinic RNs: Use a Care Team Patient List.

Inpatient RNs: Set up both an Assignment List and a Custom list. Then, set up the Custom List to pull into your PAL. Patients can be removed from the list once your shift is over.

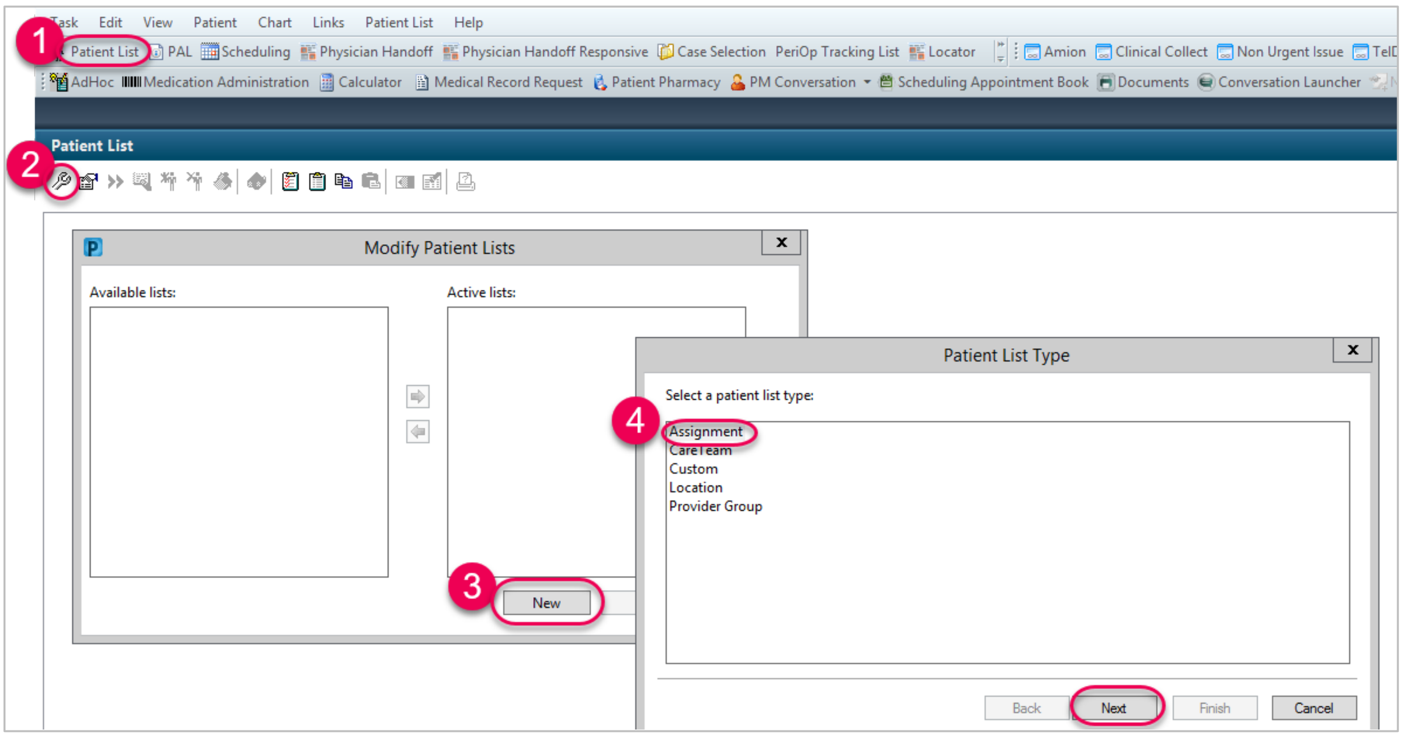
Inpatient care staff: First, set up a Location list for your home unit. Then, set up a Custom List to pull into your PAL or Task List.

Outpatient Clinic staff: Use your Ambulatory Organizer for day-to-day work, but a Patient List can be set up for a longer date range. For example, to know the number of patients seen in a specific time frame, use a Location list to see all patients discharged since140 days ago.

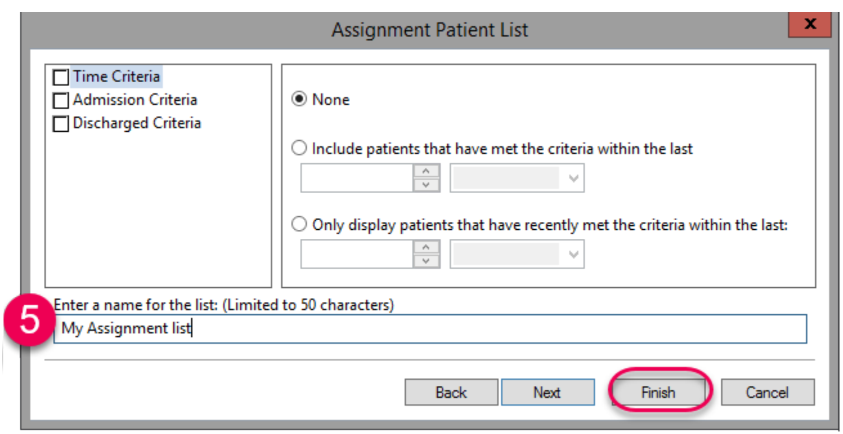
Student Nurses: Use a Location Patient List based on your clinical assignment.

Setting up an Assignment Patient List for a PAL (RNs Only)

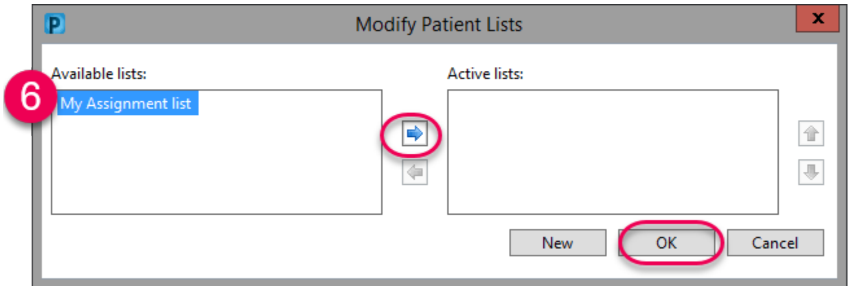
1. Click **Patient List**.
2. From the **Patient List** window, click the **wrench** (List Maintenance) icon.
3. This opens the **Modify Patient Lists** window. Click **New** at the bottom.
4. On the **Patient List Type** window, click **Assignment**, then click **Next**.



5. Enter a list name and click **Finish**.

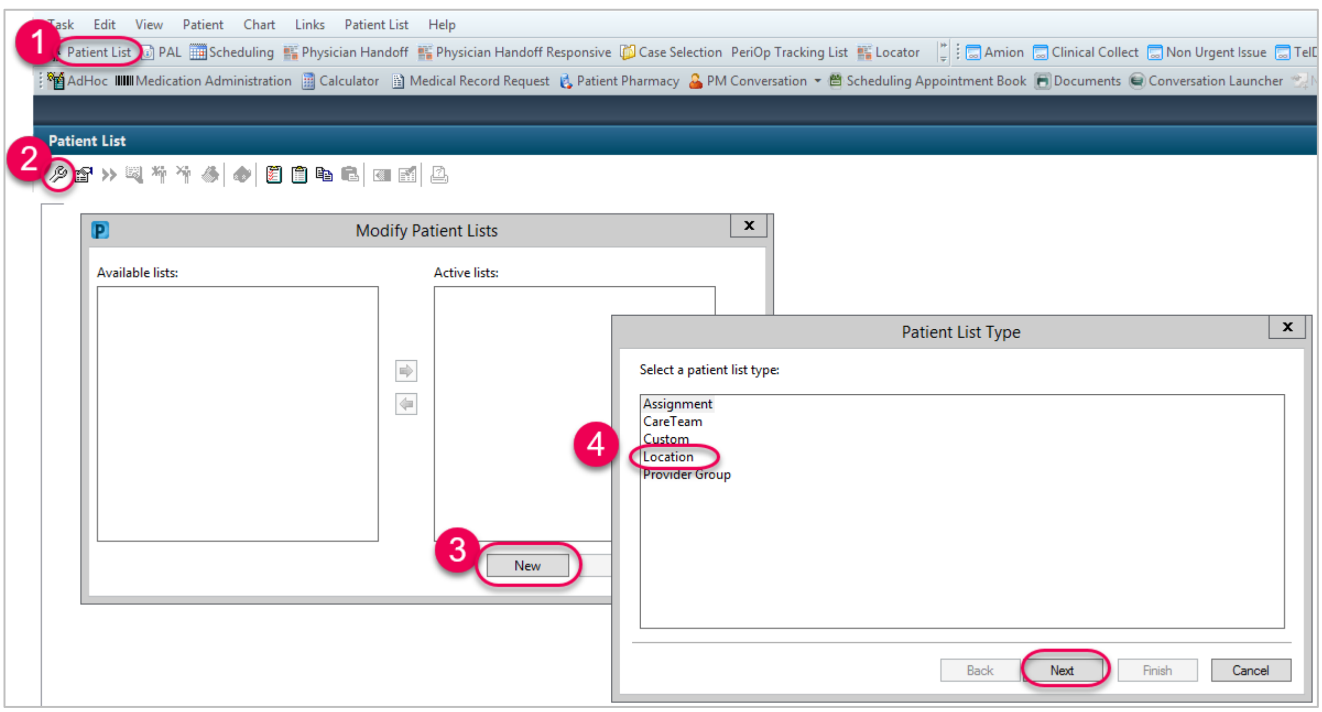


6. Move the list from **Available Lists** to **Active Lists** and click **OK**.



Setting up a Location Patient List

1. Click **Patient List**.
2. From the **Patient List** screen, click on the **wrench** (List Maintenance) icon.
3. This opens the **Modify Patient Lists** window. Click **New** at the bottom.
4. On the **Patient List Type** window, click **Location**, then click **Next**.

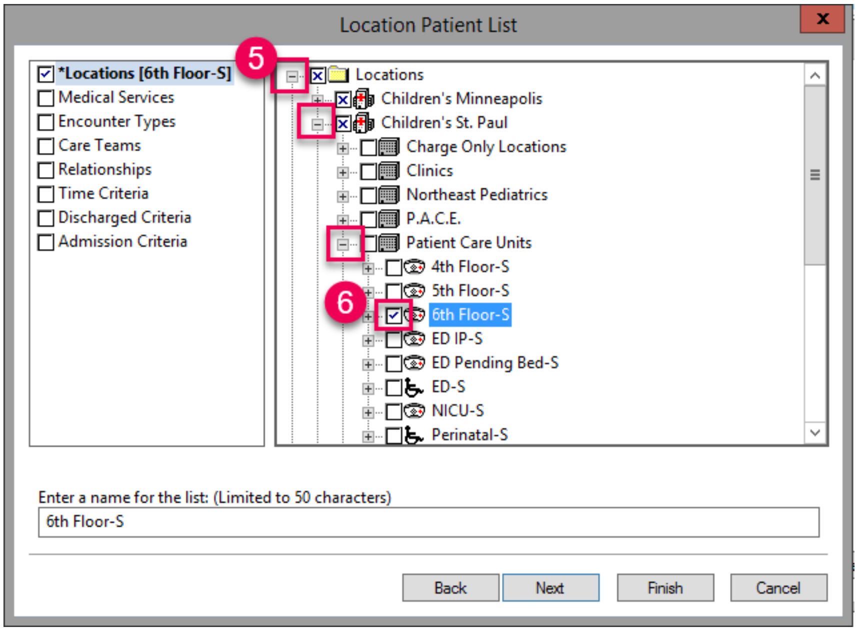


5. In the **Location Patient List** window, click + next to **Locations**. Continue to click + to select your campus. Drill down until you find the location.

   Note: Inpatient units can be found in **Patient Care Units**.

   Example shown is for St Paul Campus, Patient Care Unit, 6th Floor:

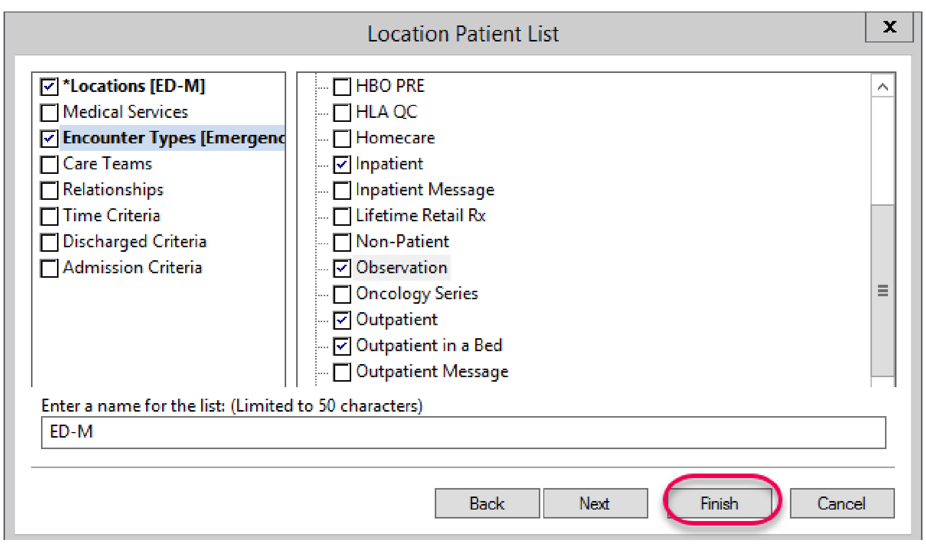
6. Click to check the unit or clinic to select it.



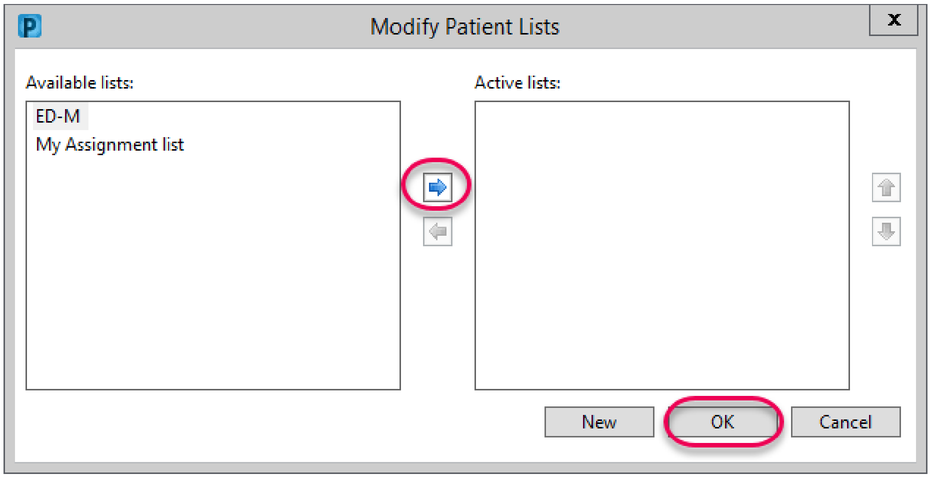
7. Other criteria can also be added from this window.

   - Encounter types or visit types of **Emergency Dept**, **Inpatient**, **Outpatient in a bed** and/or **Observation** should be used, when applicable for your unit.

8. Click **Finish**.

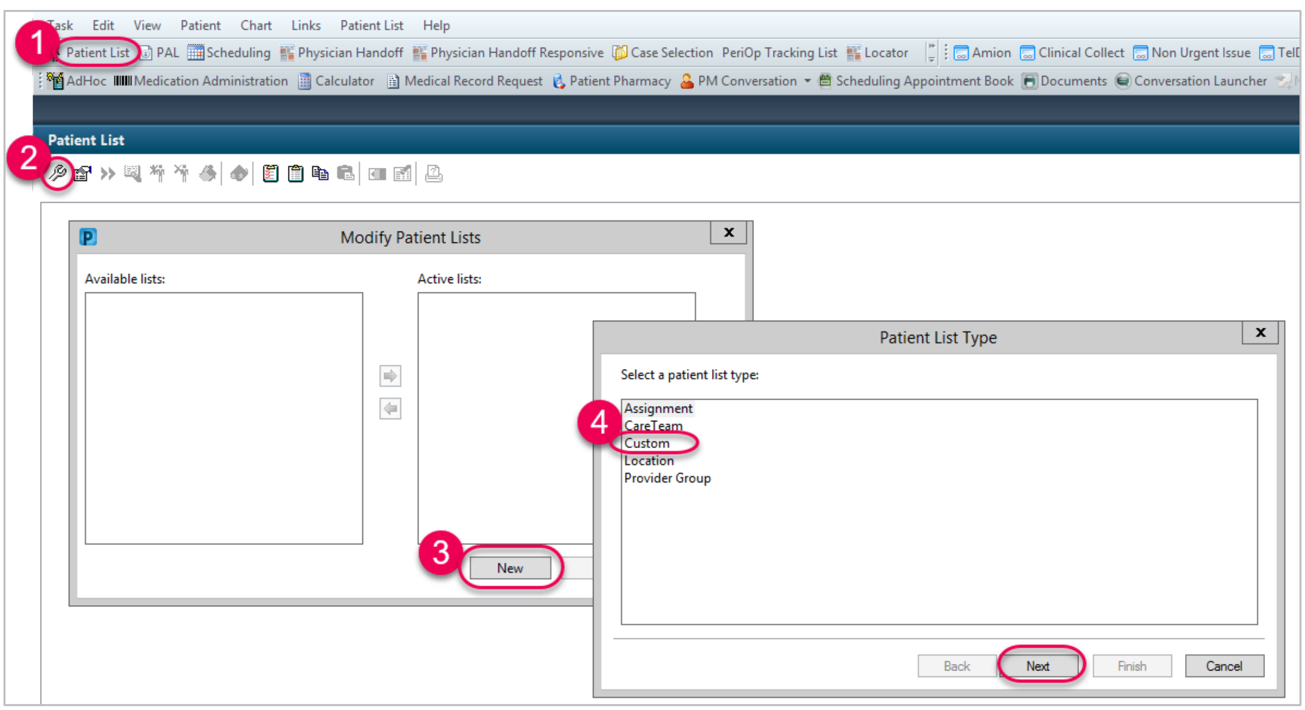


9. From the **Modify Patient Lists** window, find the list on the **Available lists** column and use the blue arrow to move it to the **Active lists** column.
10. Click **OK**. The list will display on the **Patient List** tab.

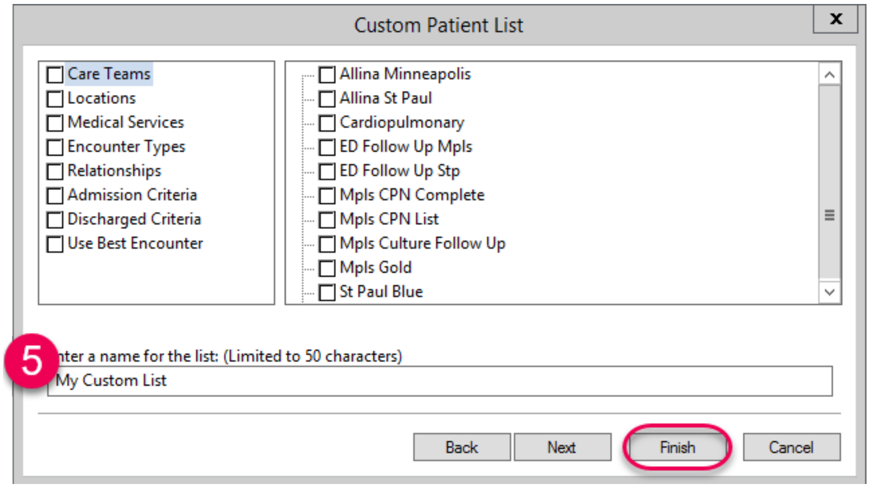


Setting up a Custom Patient List

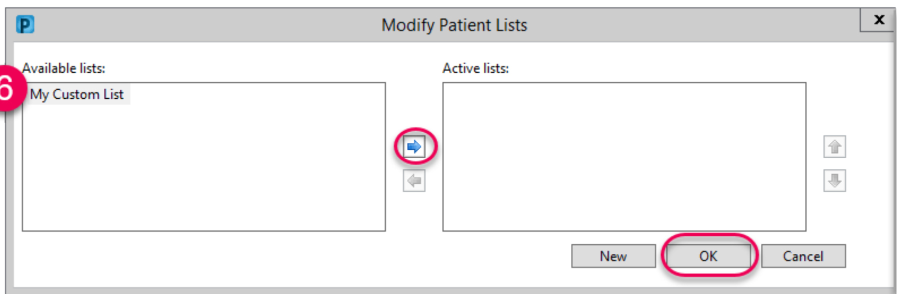
1. Click **Patient List**.
2. From the **Patient List** screen, click the **wrench** (List Maintenance) icon.
3. This opens the **Modify Patient Lists** window. Click **New**.
4. In the **Patient List Type** window, click **Custom** and then **Next**.



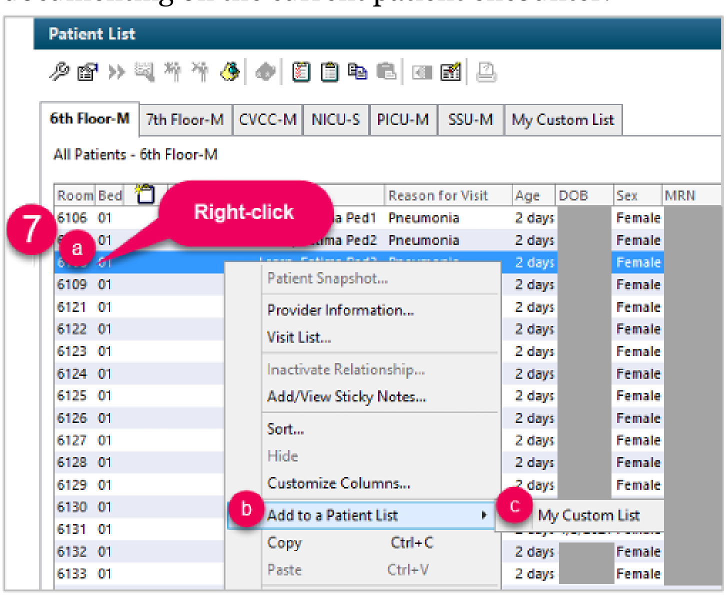
5. Enter a list name and click **Finish**.



6. Move the list from **Available Lists** to **Active Lists** and click **OK**.

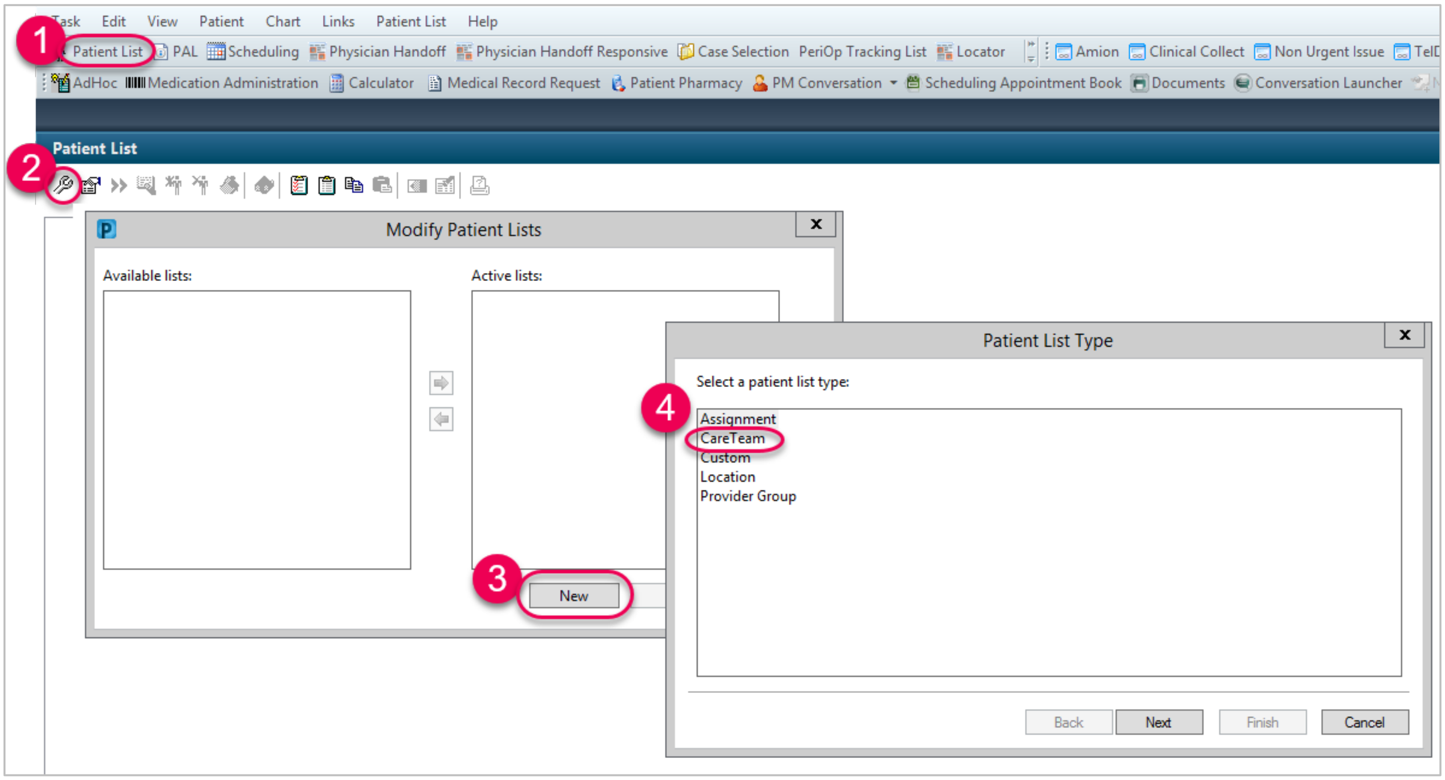


7. To add patients to the list with a patient chart open:
   a. From the menu, right-click to select **Patient**.
   b. Select **Add Patient to a Patient List**.
   c. Or, right-click on the patient name in another list (for example, a Location list) and select **Add to a Patient List**, and select your new list (in this example, My Custom List). This assures that you are documenting on the current patient encounter.

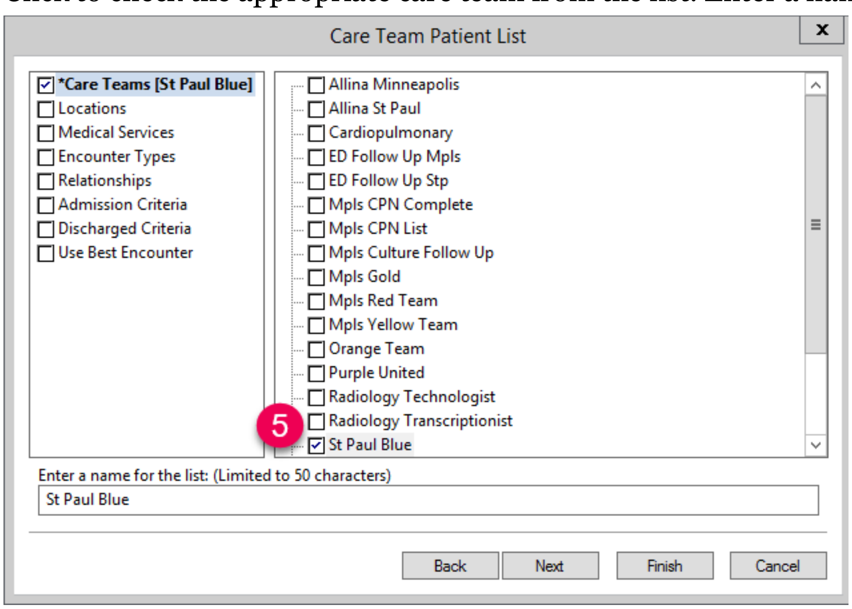


Setting up a Care Team Patient List

1. Click **Patient List**.
2. From the **Patient List** screen, click on the **wrench** (List Maintenance) icon.
3. This opens the **Modify Patient Lists** window. Click **New**.
4. In the **Patient List Type** window, click **CareTeam**, and click **Next**.

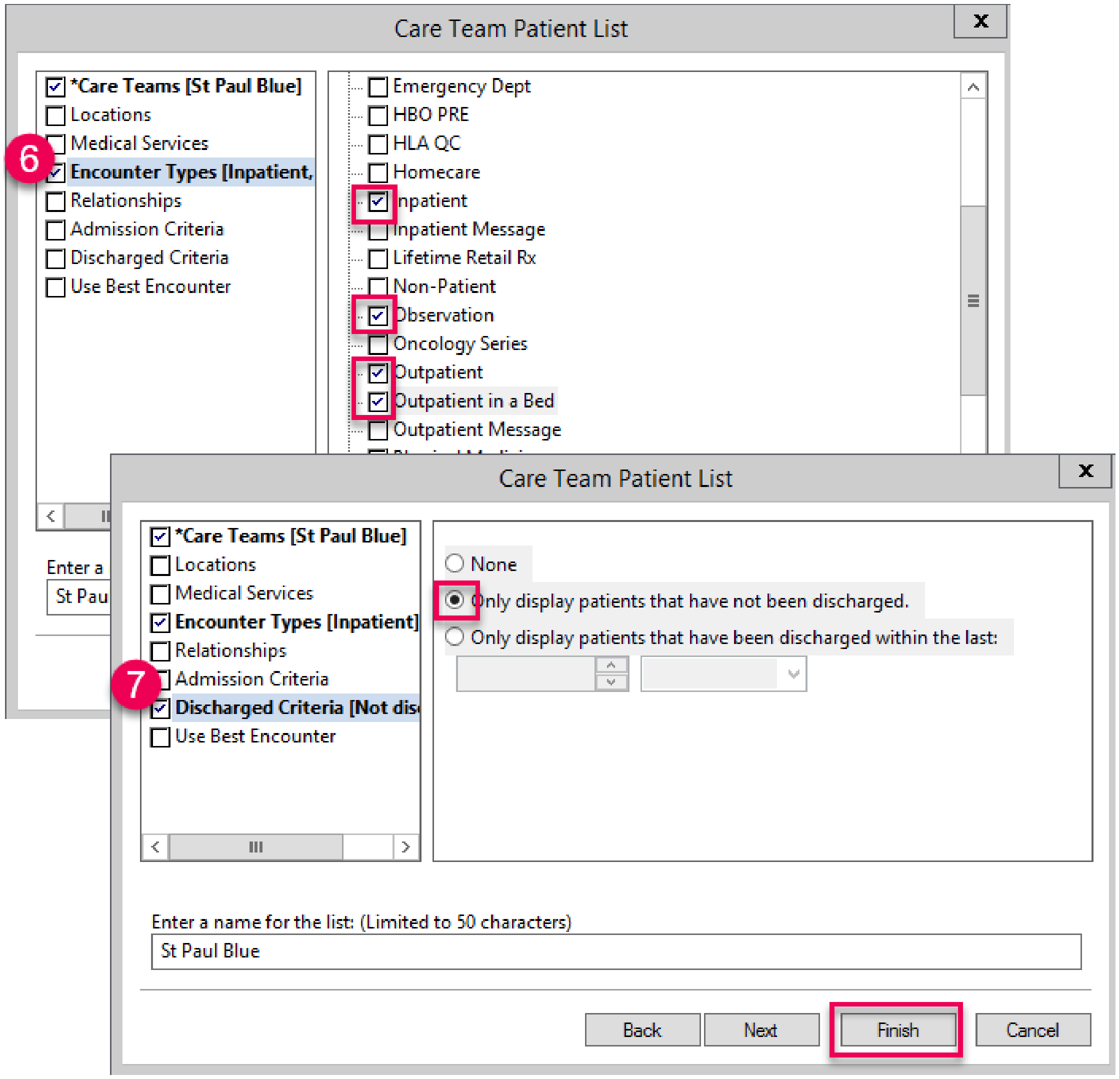


5. Click to check the appropriate care team from the list. Enter a name for the list, if applicable.

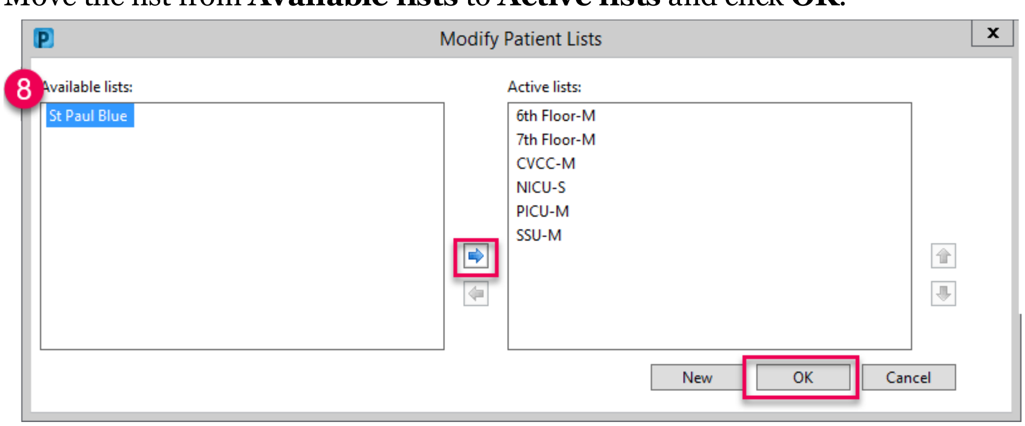


Next, set your Encounter types and Discharge Criteria**.**

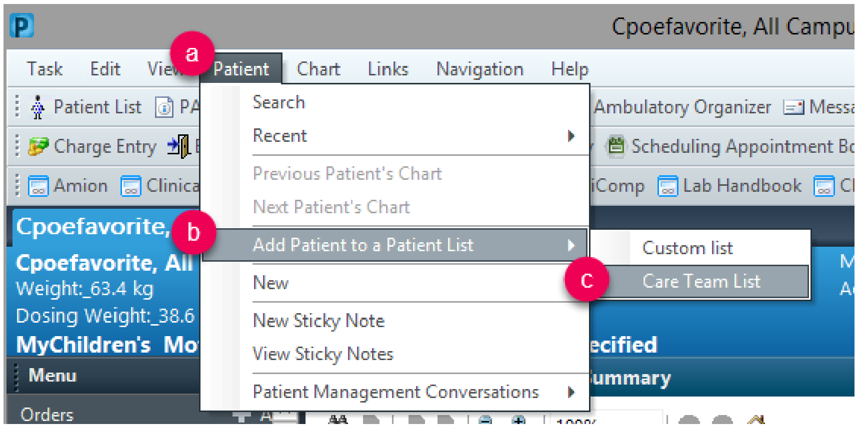
6. Click **Encounter Types** and click to check the appropriate encounter types from the list. Suggested encounter types: Emergency Dept, Inpatient, Outpatient in a Bed and Observation.
7. For Discharge criteria, select **Only display patients that have not been discharged** and click **Finish.**



8. Move the list from **Available lists** to **Active lists** and click **OK**.

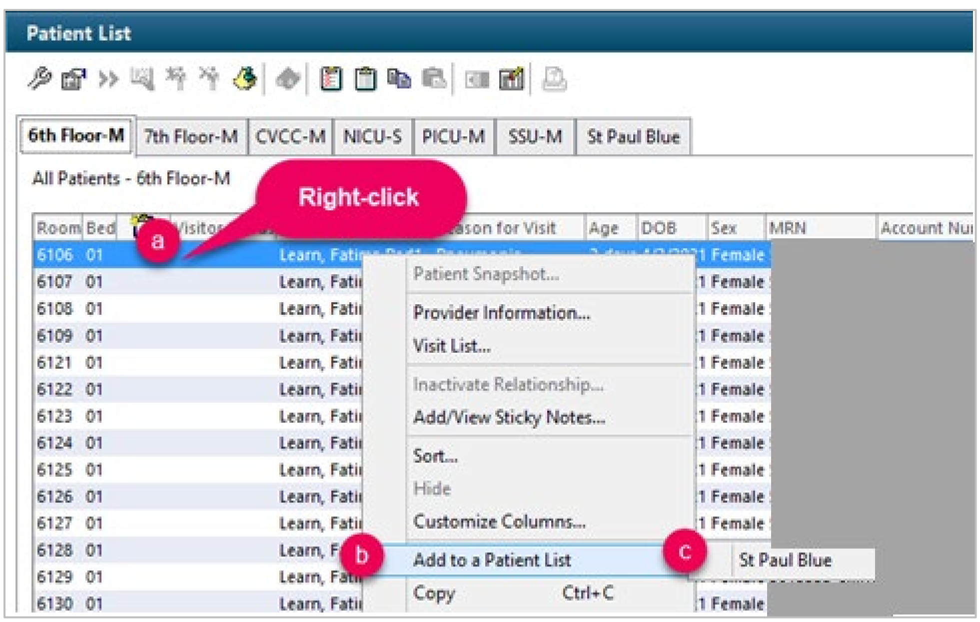


9. To add patients to the list: With a patient chart open, click **Patient** on the toolbar, select **Add Patient to a Patient List** and select **Care Team List**.



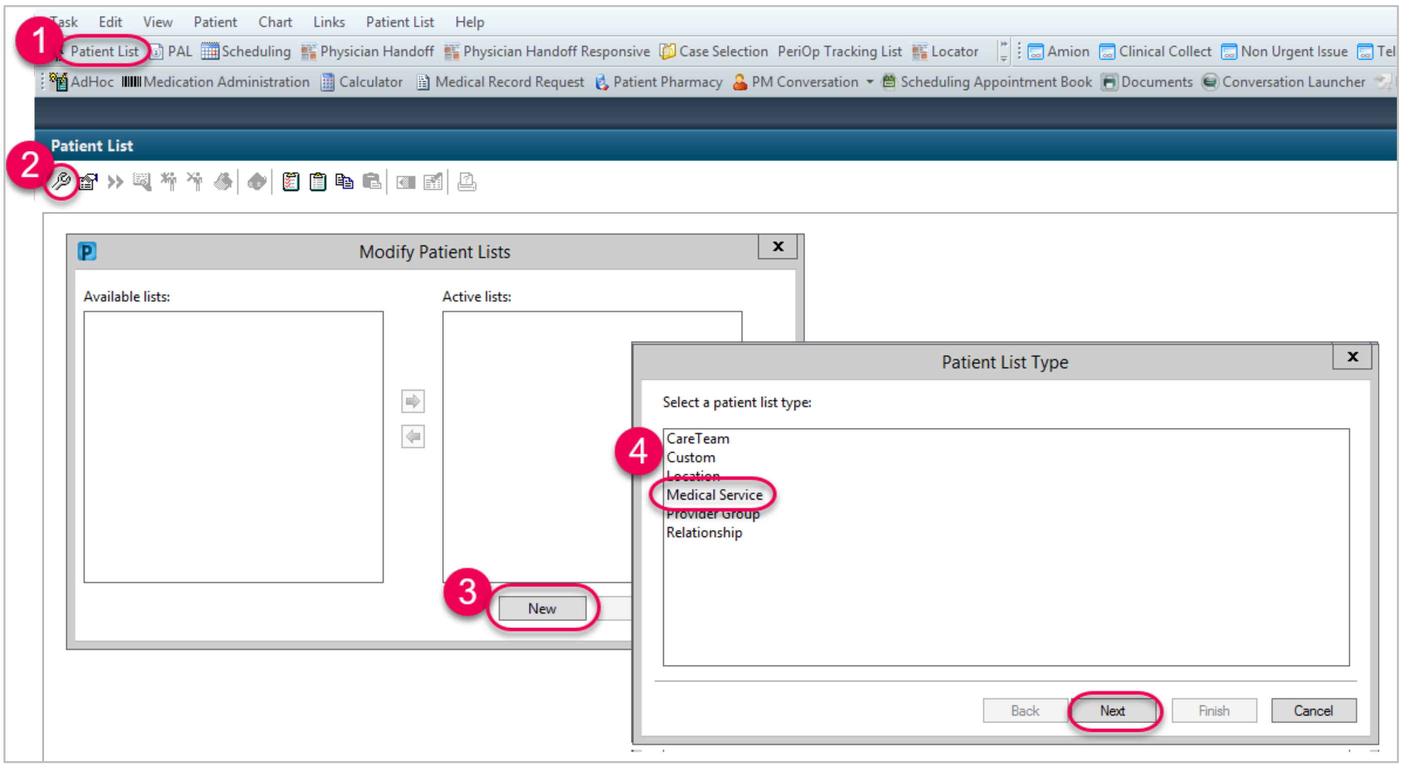
Or

Right-click on the patient name in another list (for example, a Location list) and select **Add to a Patient List**, and select the list (in this example, St Paul Blue). This assures that you are documenting on the current patient encounter.

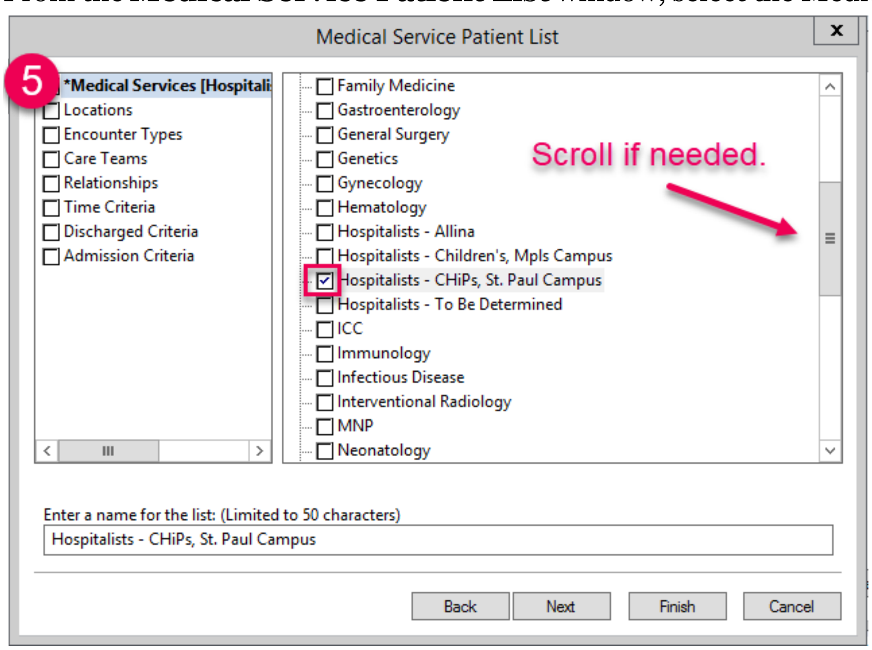


Setting up a Medical Services Patient List

1. Click **Patient List**.
2. From the **Patient List** screen, click on the **wrench** (List Maintenance) icon.
3. This opens the **Modify Patient Lists** window. Click **New** at the bottom.
4. From the **Patient List Type** window, select **Medical Service** and click **Next.**



5. From the **Medical Service Patient List** window, select the Medical Service.

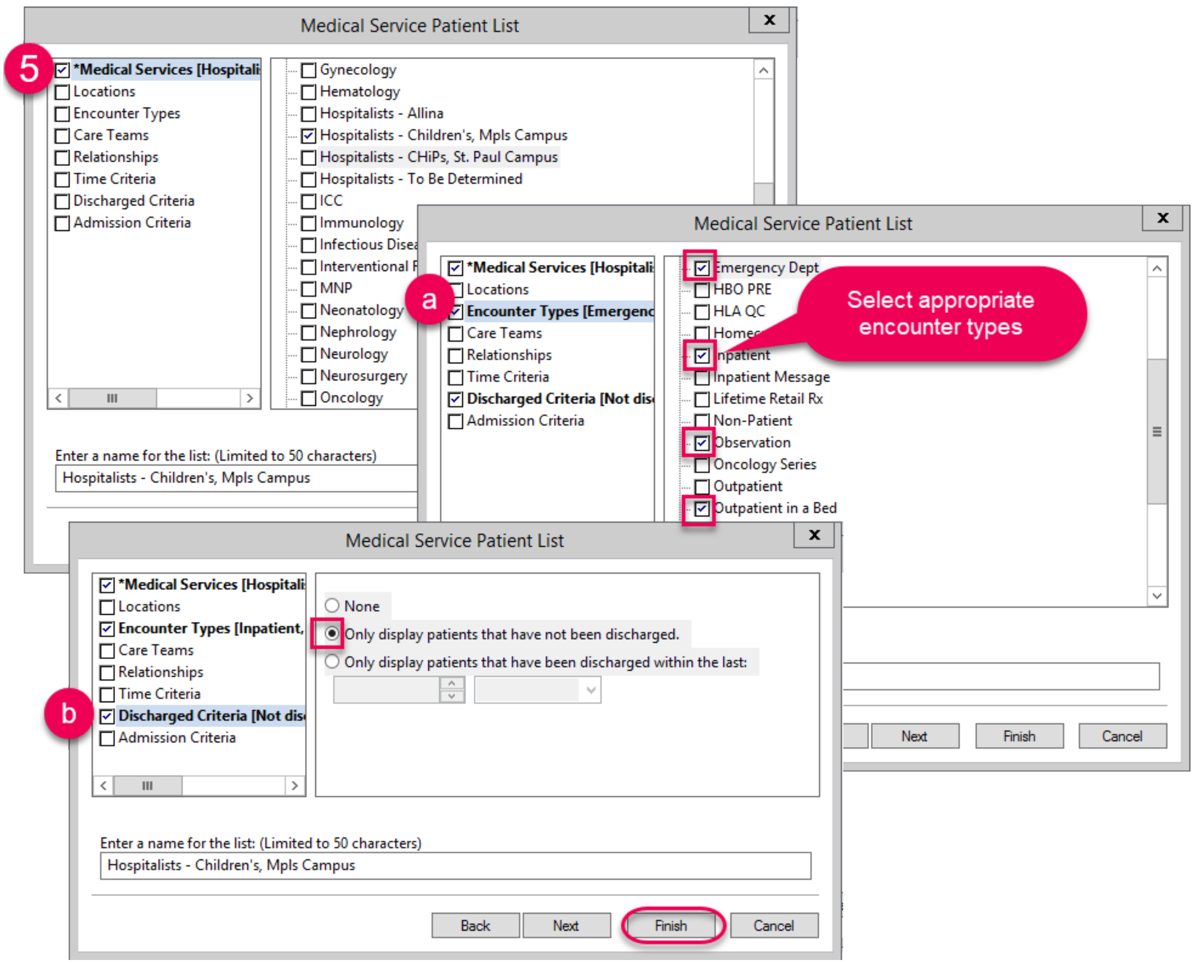


Optional: Other criteria can also be added to the list from this window.

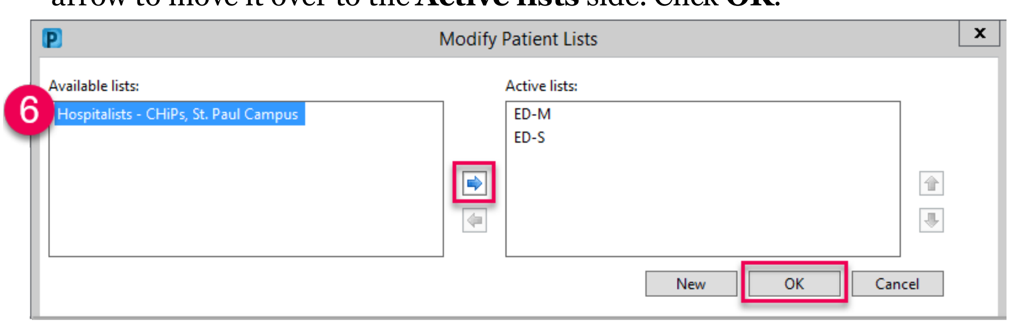
a. Encounter Types or visit types can be selected. Click **Encounter Types.** Then select encounter types from the list on the right to be included. For example, for inpatients select Emergency Dept, Inpatient, Observation and Outpatient in a Bed.

b. Discharge Criteria can be set. Click **Discharge Criteria** from the list in the left column, then select the appropriate criteria. Example: For inpatient lists, select **Only display patients that have not been discharged.**

Once settings have been selected, click **Finish**.



6. From the **Modify Patient Lists** window, find the list on the **Available lists** side and use the blue arrow to move it over to the **Active lists** side. Click **OK**.



The list will now display on the Patient List tab.