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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 <u>Completing Tasks in the</u> <u>PAL or the Single-Patient Tasklist</u>

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.

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Children's

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.

Nedical Service Patient List		
 *Medical Services [Hospitali Locations Encounter Types [Emergence] 	None Only display patients that have been admitted within:	
Care Teams Relationships Time Criteria	Look Back	
Admission Criteria	Look Forward	

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 <u>both</u> 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 since 140 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**.

Patient List PAL Schedu	ing 🎬 Physician Handoff 👫 Physician Hand	idoff Responsive 🎁 Case Selection PeriOp Tracking List 🎬 Locator 🥛 🗄 Amion 🗔 Clinical Collect 🗔 Non Urg
ient List		
남 > 및 추 추 종		
P	Modify Patient Lists	x
Available lists:	Active lists:	
		Patient List Type
	-	Select a patient list type:
	4	Assignment
		Care I eam Custom
		Location Provider Group
	Ner	ew
<u> </u>		
		· · · · · · · · · · · · · · · · · · ·

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

	Assignment Patient List			
	☐ Time Criteria ☐ Admission Criteria ☐ Discharged Criteria	 None Include patients that have met the criteria within the last Only display patients that have recently met the criteria within the last: 		
E	Enter a name for the list: (Limit	ed to 50 characters)		
J	My Assignment list			
Ī		Back Next Finish Cancel		



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

Modify Patient Lists	x
Active lists:	
4	-
New	K Cancel
	Modify Patient Lists Active lists:

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**.

Task Edit View Patient Chart Links Patient List Help	
Patient List 🗿 PAL 🚟 Scheduling 🎬 Physician Handoff 🞬 Physician Handoff Responsive 🖗 Case Selection PeriOp Tracking List 🎬 Locator 🏢 🗄 Amion 🚍 Clinical Col	lect 🗔 Non Urgent Issue 🗔 Tell
🗄 🎽 AdHoc 💵 Medication Administration 📓 Calculator 📓 Medical Record Request 歧 Patient Pharmacy 🍰 PM Conversation 👻 🛱 Scheduling Appointment Book 🗐 Documents	s 🖲 Conversation Launcher 🗐
Patient List	
P Modify Patient Lists X	
Available lists: Active lists:	
	Y
Patient List Type	^
i Select a patient list type:	
Assignment	
Custom	
Location Provider Group	
3 New	
Back Next	Finish Cancel



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.

	Location Patient List	x
Accations [6th Floor-S] Medical Services Encounter Types Care Teams Relationships Time Criteria	Children's Minneapolis Children's Minneapolis Children's St. Paul Charge Only Locations Clinics Northeast Pediatrics	^ =
Discharged Criteria	P.A.C.E. Patient Care Units P-D 2 4th Floor-S C 3 5th Floor-S D 10-S D 10-S D 10-S D 10-S D 10-S D 20-S D -D 2 NICU-S P-D 2 Perinatal-S	~
Enter a name for the list: (Limited 6th Floor-S	i to 50 characters) Back Next Finish C	ancel

- 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.

	Location Patient List	x		
 *Locations [ED-M] Medical Services Encounter Types [Emergenc Care Teams Relationships Time Criteria Discharged Criteria Admission Criteria 	HBO PRE HLA QC Homecare Inpatient Inpatient Message Lifetime Retail Rx Observation Oncology Series Outpatient Outpatient in a Bed Outpatient Message			
Enter a name for the list: (Limited to 50 characters) ED-M Back Next Finish Cancel				



- 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.

	P	Modify Patient Lists	x
Available lists: ED-M My Assignment list New OK Cancel	Available lists: ED-M My Assignment list	Active lists:	-

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**.

Task Edit View Patient Cl	hart Links Patient List Help	
Patient List 🗿 PAL 🧰 Schedul	ling 🎬 Physician Handoff 📲 Physician Har	ndoff Responsive 📁 Case Selection 🛛 PeriOp Tracking List 🎬 Locator 🛛 🏮 🗄 Amion 🗔 Clinical Collect 🗔 Non Urgent Issue 🗔 Tr
AdHoc IIIII Medication Administ	tration 🧾 Calculator 🔡 Medical Record Re	equest 🔥 Patient Pharmacy 🊨 PM Conversation 🝷 🖺 Scheduling Appointment Book 🗐 Documents 🔘 Conversation Launcher 🝸
Patient List		
🖉 🗗 » 🔍 4 4 6 🐠	📓 🛍 🖻 🖻 📾 🖬 🚨	
P	Modify Patient Lists	x
-	,,	
Available lists:	Active lists:	
		Patient List Type
		Select a patient list type:
	4	Assignment
		CareTeam
		Location Devides Group
		Provider Group
	3	
	N	ew
		Back Next Finish Cancel



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

	Custom Patient List	x			
Care Teams Image: Ca					
5 Inter a name for the list: (Limited to 50 characters) My Custom List Back Next Finish Cancel					

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

	P	lodify Patient Lists		x
6	Available lists: My Custom List	Active lists:	el	

- 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.



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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.

■" >> ~~{ ~~ ~~ ~~ ~~ ~~ ~~ ~~ ~~ ~~ ~~ ~~ ~~	Modify Patient Lists	x
Available lists:	Active lists:	
		Patient List Type Select a patient list type: Assignment CareTeam
		Custom Location Provider Group

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

	Care Team Patient List	x					
 ✓ Care Teams [St Paul Blue] Locations Medical Services Encounter Types Relationships Admission Criteria Discharged Criteria Use Best Encounter 	 Allina Minneapolis Allina St Paul Cardiopulmonary ED Follow Up Mpls ED Follow Up Stp Mpls CPN Complete Mpls CPN List Mpls CVL Urue Follow Up Mpls Gold Mpls Ked Team Orange Team Purple United Radiology Technologist Radiology Transcriptionist Y t Paul Blue 						
Enter a name for the list: (Limited to 50 characters) St Paul Blue							
Back Next Finish Cancel							

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.

	Car	e Team Patient List	x	
 *Care Teams [St Paul Blue] Locations Medical Services Encounter Types [Inpatient, Relationships Admission Criteria Discharged Criteria Use Best Encounter 	Eme HBC HLA Hon Inpa Inpa Lifet Non Onc Out Out Out	rgency Dept) PRE .QC necare tient tient Message iime Retail Rx -Patient ervation ology Series patient patient in a Bed patient Message		
		Care Team Patient List		x
< 11				
Enter a Care Teams [St Enter a Locations St Pau Medical Services Encounter Types Relationships Admission Criteri Discharged Criteri Use Best Encount Vse Best Encount	Paul Blue] [Inpatient] a eria [Not disc ter >	 None Inly display patients that have not been discharged. Only display patients that have been discharged with 	in the last:	
Enter a name for the St Paul Blue	e list: (Limited	to 50 characters)		
		Back Next Finis	h Ca	ncel

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

P	Modify Patient Lists	x
8 Available lists: St Paul Blue	Active lists: 6th Floor-M	
	CVCC-M NICU-S PICU-M	
	SSU-M	會
	New OK	Cancel

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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.

Patient List	:										
∥∎»	国标准。	• • 0) 🗂 🕩		M						
6th Floor-M	7th Floor-M	CVCC-M	NICU-S	PICU-M	SSU-M	St Pa	ul Blue	1			
All Patients	- 6th Floor-M	Rig	ht-clic	k							
Room Bed	Visitor			ason	for Visit	Age	DOB	Se	X	MRN	Account Nu
6106 01		Learn, I	Fatires Der	H Dourse	un fin	3.44		TI Fe	male		
6107 01		Learn, I	Fatir	Patient Sna	apshot			1 Fe	male		
6108 01		Learn, I	Fatir	Provider Information		1 Fe	male				
6109 01		Learn, I	Fatir	Vicit List				1 Fe	male		
6121 01		Learn, I	Fatir	VISIC CISC				1 Fe	male		
6122 01		Learn, I	Fatir	Inactivate	Relationsh	ip		1 Fe	male		
6123 01		Learn, I	Fatir	Add/View	Sticky Not	es		1 Fe	male		
6124 01		Learn, I	Fatii	Cart				1 Fe	male		
6125 01		Learn, I	Fatir	SOIL				1 Fe	male		
6126 01		Learn, I	Fatir	Hide				1 Fe	male		
6127 01		Learn, I	Fatir	Customize	Columns			1 Fe	male		
6128 01		Learn, I	b	Add to a P	atient List		0		St D	aul Blue	
6129 01		Learn, I	atu	AUG LU B P	unent cist		-		Jack	our proc	
6130 01		Learn, I	Fatie	Сору	C	tri+C		1 Fe	male		



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.

	Modify Patient Liste	c X
Available lists:	Active lists	2
		Patient List Type
		Select a patient list type:
		4 Custom
		Medical Service Provider Group Relationship
		reauonship

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

Medical Service Patient List					
Medical Services [Hospitali Locations Encounter Types Care Teams Relationships Time Criteria Discharged Criteria Admission Criteria	Gastroenterology General Surgery Genetics Gynecology Hematology Hospitalists - Allina Hospitalists - Children's, Mpls Campus Hospitalists - CHiPs, St. Paul Campus Hospitalists - To Be Determined ICC Infructional Radiology Inferventional Radiology MNP Neonatology				
Enter a name for the list: (Limited Hospitalists - CHiPs, St. Paul Car	to 50 characters) mpus Back Next Finish Cance				

11

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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.

	Medical Service Patient List	
5 • Medical Services [Hospitali Locations Encounter Types Care Teams Relationships Time Criteria Discharged Criteria	Gynecology Gynecology Hematology Hospitalists - Allina Hospitalists - Children's, Mpls Campus Hospitalists - CHiPs, St. Paul Campus Hospitalists - CHiPs, St. Paul Campus Hospitalists - To Be Determined CICC	
Admission Criteria	Medical Service Patient List Medical Service Patient Heaving Medical Service Heaving Medical Service Heaving Medical Service Heaving Medical Service Heaving Heaving Medical Service Heaving Medical Service Heaving Heaving Medical Service Heaving Heaving Medical Service Heav	
Image: Service of the service of th	Medical Service Patient List	Cancel

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**.

	P	Modify	Patient Lists		x
6	Available lists: Hospitalists - CHiPs, St. Paul Campus		Active lists: ED-M ED-S	New OK Cancel]]

The list will now display on the Patient List tab.

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