Setting Up Powerchart Patient Lists

Overview

Your patient lists are associated with your login, so they are available wherever you are logged in. Also, PC’s on nurse units are typically set to have a default patient list for the location; You may see the unit as the default patient list.

- You can have more than one patient list, based on your work needs.
- Patient Lists are tabs displayed at the top of your work area – they can be “turned on and off”. When a Patient List is created, it can be Active (on) or Available (off). It cannot be deleted.

- 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 you by the Charge Nurse using the Clairvia acuity tool (only available to nurses and clinical support staff)
- **Location** – displays patients in the unit (or multiple units) selected
- **Medical Service** – displays patients, regardless of their location, based on the provider Medical Service identified when the patient is admitted (usually used by Hospitalists, Trauma). This can be changed later, in the Patient Demographics conversation on the Encounter tab
- **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; for example, St Paul Blue residents, CPN (Children’s Physician Network) providers, St Paul Clinic RNs (St Paul Culture Followup list)
- **Custom** – a personal list that you can pull into a Powerchart PAL or Task List

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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, Clinic
- **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)
- **Discharge** criteria
- **Admission** criteria

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

Suggested Patient List Filtering for Your Work

**ED** – Use a Location Patient List; Set it up to show patients admitted in the last 12 hours.

**SSU (SPS)** – Use a Location Patient List. Set it up to show Encounter types of **Inpatient**, **Observation** 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** – Use a Medical Service Patient List; Set it up to display **Inpatient** and **Observation** Encounter Types (to screen out Pre-reg patients).

**St Paul Clinic RNs** – Use a Care Team Patient List.

**Inpatient RNs** – Set up both an Assignment List and a Custom Location list for your home unit. Then, set up the Custom List to pull into your PAL or Task List; set Custom List to display Inpatient, Outpatient-in-a-bed and Observation Encounter Types (to screen out Pre-reg patients).

**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; set Custom List to display Inpatient and Observation Encounter Types (to screen out Pre-reg patients).

**Outpatient Clinic staff** – Use your Ambulatory Organizer for day-to-day work, but you could set up a Patient List 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, set up for your specific unit and the **Inpatient** and **Observation** Encounter Types (to screen out Pre-reg patients). Add No Pre-Registrations to the list name.
Setting Up an Assignment Patient List for a PAL (RN 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, then click **Finish**.

6 Move the list from **Available Lists** to **Active Lists**, then 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, to find the location you want to add, click + next to Locations.

6 Drill down to select the location or locations. You can change the list name if needed.
Other criteria can also be added to the list 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.

- Time Criteria can be set.
- Discharge Criteria can be set

- Admission criteria can be set
Set Up a Location Patient List

8 To remove Time, Discharge and Admission criteria, highlight the criteria on the left, then select **None**.

9 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.

10 Click **OK**. The list will now show up on the **Patient List** tab.
Setting Up a Custom 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. In the Patient List Type window, click Custom, and then click Next.
5 Enter a list name, then click **Finish**.

![Custom Patient List](image)

6 Move the list from **Available Lists** to **Active Lists**.

![Modify Patient Lists](image)

7 Click **OK**.
8 To add patients to the list, with a patient chart open, from the menu choose Patient, then Add Patient to a Patient 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 your new list (in this example, mkf). This assures that you are documenting on the current patient encounter.

Or

From the Patient List screen, click the Add Patient icon.

9 A search window will appear. Search for the patient and select the current encounter.

10 Select the patient and visit to add to your list and click OK.
**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** at the bottom.

4. In the Patient List Type window, click **CareTeam**, and click **Next**.
5 Choose a Care Team from Mpls or St Paul

Enter a name for the list, if applicable.

6 Next, set your Encounter types and Discharge Criteria.
   • Suggested encounter types: **Emergency Dept, Inpatient, Outpatient-in-a-Bed** and Observation
• Discharge criteria of **Not Discharged**

7  Click **Finish** and move the list from **Available lists** to **Active lists**.

8  Click **OK**.
9 To add patients to the list, with a patient chart open, from the menu choose Patient, then Add to a Patient List and select the Care Team (in this example, St Paul Blue).

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, mkf). This assures that you are documenting on the current patient encounter.

Or

From the Patient List screen, click the Add Patient icon.

10 A search window will appear. Search for the patient. Be sure to select the current encounter.

11 Choose the patient and visit to add to your list and click OK.
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, choose Medical Service, then Next
5 From the Medical Service Patient List window, choose the Medical Service and click **Next**.

6 Enter a name for the patient list, if applicable.

7 If the list is only for current inpatients, set a status of **Not discharged**. When done, click **Finish**.

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

- **Encounter types** or visit types of **Emergency Dept**, **Inpatient**, Outpatient-in-a-bed and/or **Observation** could be used.
• Discharge Criteria can be set

9 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 show up on the **Patient List** tab.