

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 the 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**.

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Care Teams Relationships Time Criteria Discharged Criteria	Look Back	

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 PALor 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**.

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Patient List		
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5. Enter a list name, then click **Finish**.

		Assignment Patient List	×
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5	Enter a name for the list: (Limite	ed to 50 characters)	
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6. Move the list from Available Lists to Active Lists, then click OK.

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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**.

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Available lists:	Active lists:	Patient List Type
		Select a patient list type: Assignment Care Team Location Provider Group
	3 New	



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. Place a check next to the unit or clinic to select it.

Location Patient List	x
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Care Teams Charge Only Locations Relationships Clinics Time Criteria Only Locations Discharged Criteria P.A.C.E. Admission Criteria Patient Care Units	=
H Floor-S H Floor-S	~
Enter a name for the list: (Limited to 50 characters) 6th Floor-S Back Next Finish Ca	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 HLA QC Homecare Inpatient Message Inpatient Message Observation Oncology Series Outpatient in a Bed Outpatient Message	
Enter a name for the list: (Limited ED-M	to 50 characters)	
	Back Next Finish Canc	el



- 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.

P	Modify Patient Lists	x
Available lists: ED-M	Active lists:	
My Assignment list		1
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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 **Next**.

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P Available lists:	Modify Patient Lists Active lists	
	₽ ₽ 3	Patient List Type Select a patient list type: Asignment CareTeam Location Provider Group New



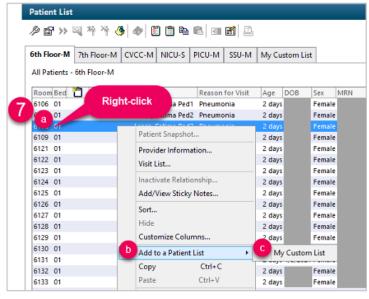
5. Enter a list name, then click **Finish**.

	Custom Patient List	x
Care Teams Locations Medical Services Encounter Types Relationships Admission Criteria Discharged Criteria Use Best Encounter	Allina Minneapolis Allina St Paul Cardiopulmonary ED Follow Up Mpls DFollow Up Stp Mpls CPN Complete Mpls CPN List Mpls CUlture Follow Up Mpls Gold St Paul Blue ted to 50 characters)	
My Custom List		
	Back Next Finish	Cancel

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

	P	odify Patient Lists	x
6	Available lists: My Custom List	Active lists:	
		New	OK Cancel

- 7. To add patients to the list with a patient chart open:
 - a. From the menu, right-click to choose **Patient**.
 - b. Choose 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 at the bottom.
- 4. In the **Patient List Type** window, click **CareTeam**, and click **Next**.

P Available lists:	Modify Patient Lists	x	
		Patient List Type Select a patient list type: Assignment CareTeam Custom Location Provider Group	
	3	Location	

5. Place a check mark next to 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 CPN List Mpls Celture Follow Up Mpls Gold Mpls Red Team Mpls Yellow Team Orange Team Purple United Radiology Technologist Radiology Transcriptionist Y St Paul Blue	
Enter a name for the list: (Limited	to 50 characters)	-
	Back Next Finish Canc	el

Next, set your Encounter types and Discharge Criteria.



- 6. Click on **Encounter Types** and place a check mark next to 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.

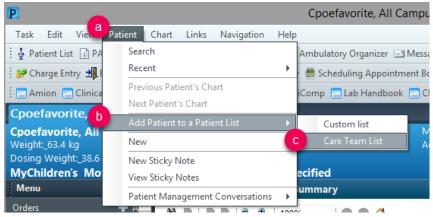
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 ✓ *Care Teams [St Paul Blue] Locations Medical Services Encounter Types [Inpatient, Relationships Admission Criteria Discharged Criteria Use Best Encounter ✓ Non-Patient ✓ Doscharged Criteria ✓ Doscology Series ✓ Dutpatient in a Bed ✓ Outpatient Message 		
Care Team Patient List		x
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8. Move the list from Available lists to Active lists and click OK.

P	Modify Patient Lists	x
Available lists: <u>St Paul Blue</u>	Active lists: 6th Floor-M 7th Floor-M CVCC-M NICU-S PICU-M SSU-M New OK	Cancel



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.



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 Lis	ŧ										
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6th Floor-M	7th Floor-M	CVCC-M	NICU-S	PICU-M	SSU-M	St Pa	ul Blue				
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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**.

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Available lists:	Modify Patient Lists	Patient List Type Select a patient list type: CareTeam Custom Medical Service Provider Group Relationship

5. From the Medical Service Patient List window, choose the Medical Service.

	Medical Service Patient List	x
< <tr> *Medical Services [Hospitali Locations Encounter Types Care Teams Relationships Time Criteria Discharged Criteria Admission Criteria</tr>	 Family Medicine Gastroenterology General Surgery Genetics Gynecology Hematology Hospitalists - Allina Hospitalists - Children's, Mpls Campus Hospitalists - To Be Determined ICC Immunology Infectious Disease Interventional Radiology Meonatology Neonatology 	< >
Enter a name for the list: (Limited Hospitalists - CHiPs, St. Paul Car		
	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.

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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**.

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The list will now show up on the Patient List tab.