Creating a Patient List

October 2020

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Overview of Patient List

Use the Patient List to build and view patient lists. Patient lists help you organize and easily access a large amount of patient data. You can view patient lists based on customized criteria, patient location, or your provider relationship.

By building a variety of lists, you can group patients by logical categories and easily locate a patient's chart rather than relying on a large single list. You can have up to 10 patient lists active at one time. Some patient lists are populated automatically by the system while others must be built manually. In either case, you decide which lists you want to be displayed.

As well, some patient lists are updated by the system. Patients are added and removed from the list as they are admitted, transferred or discharged.

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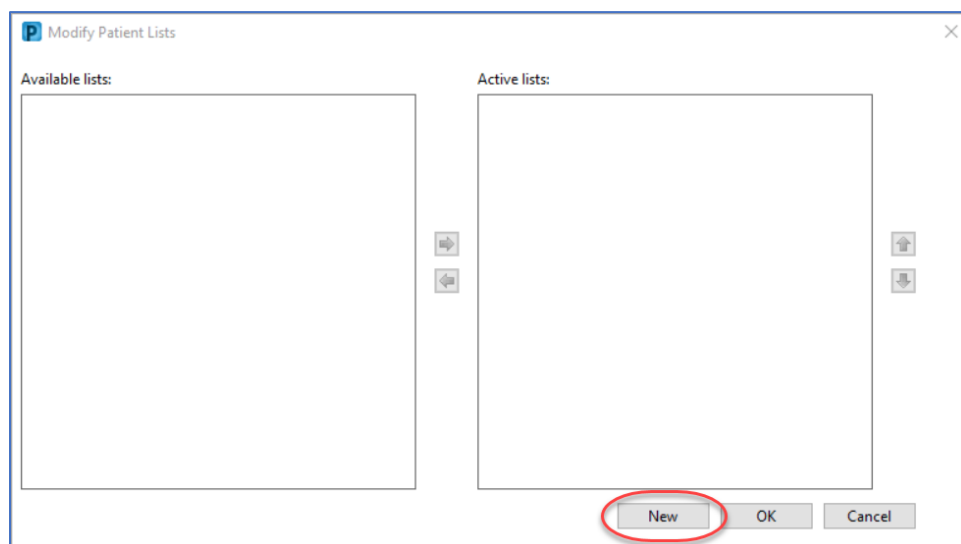
Create a Patient List

1. Log into PowerChart.
2. Establish your time frame.
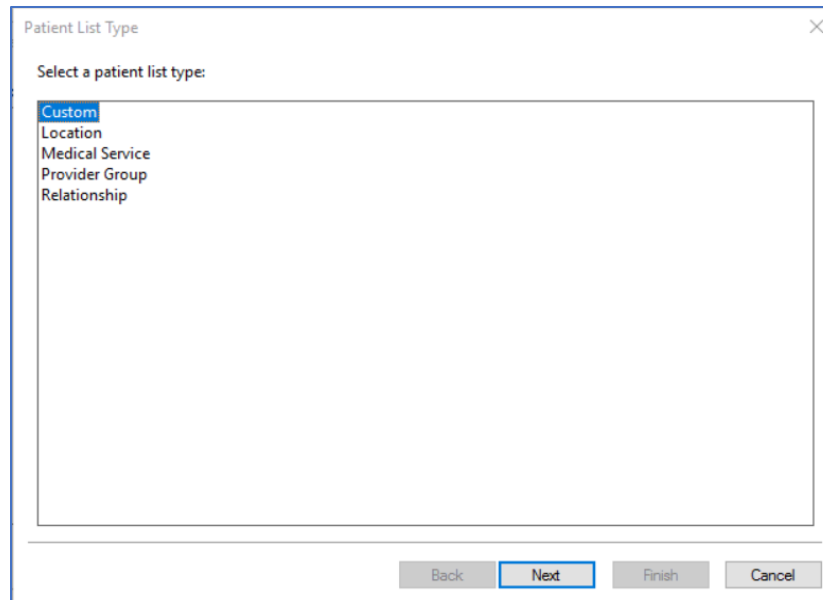3. Click on the Pt List icon.
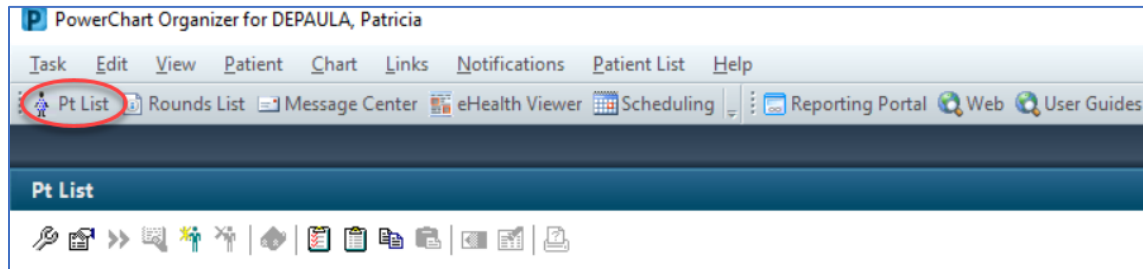
4. Click on the List Maintenance icon 🔧 , **OR** click on the Patient List menu and select List Maintenance.
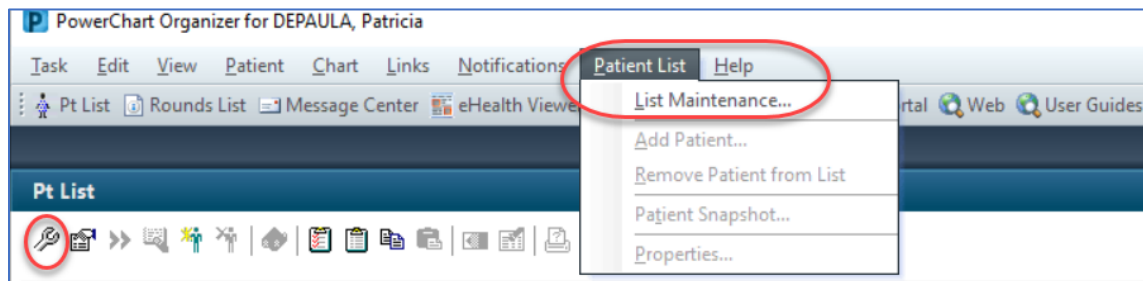
5. The Modify Patient Lists window will appear.
6. Click New.

7. A Patient List Type window will appear.

8. Select which patient list you would like to create. Steps for each type differ and will be explained in the following sections.

Creating a Custom List

Custom lists can be used to help you organize patients into categories or groups. For example, you may want to create a custom list for patients with a specific diagnosis.

The patients will not automatically populate to this list, you will need to add or remove patients yourself.

1. Follow steps to create a patient list.
2. Select Custom.
3. Click Next.
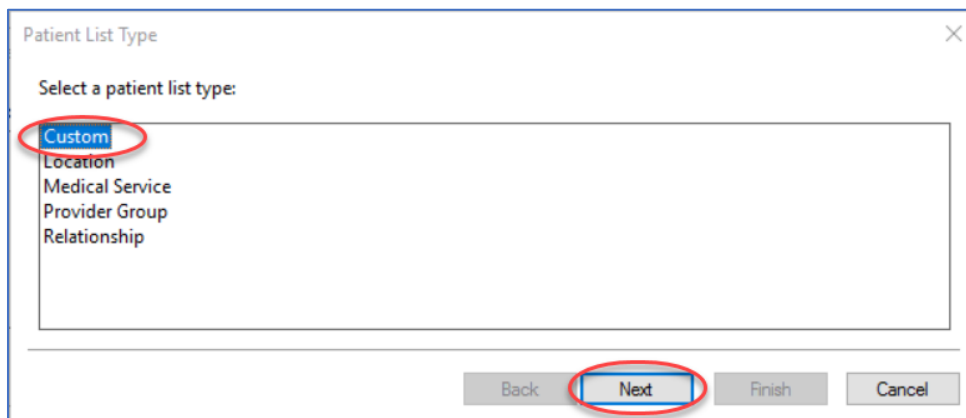
4. Type in the name of your list.

5. Click Finish.

6. This will add the list to the Available List column. Select the newly created list and click on the right arrow to move the list to the Active column.
7. Click OK.

8. This will add your Custom List to the Pt List icon.

Adding Patients to a Custom List

To add patients to your custom list, you can copy them from the Location List. Steps to create a Location List is in the next section.
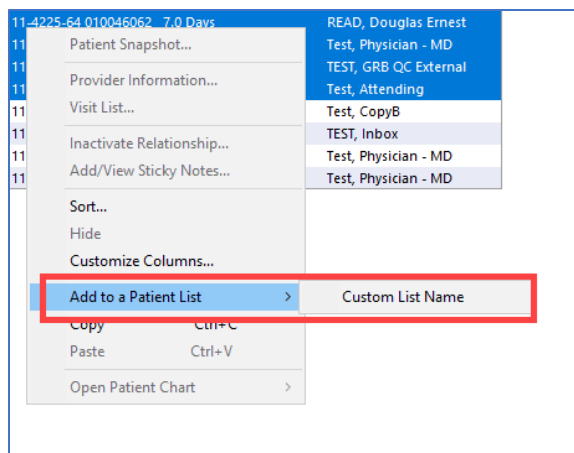
1. Open your Location List. Highlight the patients you would like on your Custom List.

2. Right click on the blue highlighted area, and Select Add to a Patient List. A drop down with your Custom List will appear. Select the list you want to add the patients to.
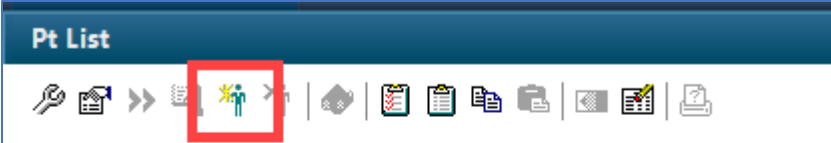

3. Open your Custom List tab, and Refresh. The list should be updated with the patients you have added.

Using the Add Patient Icon
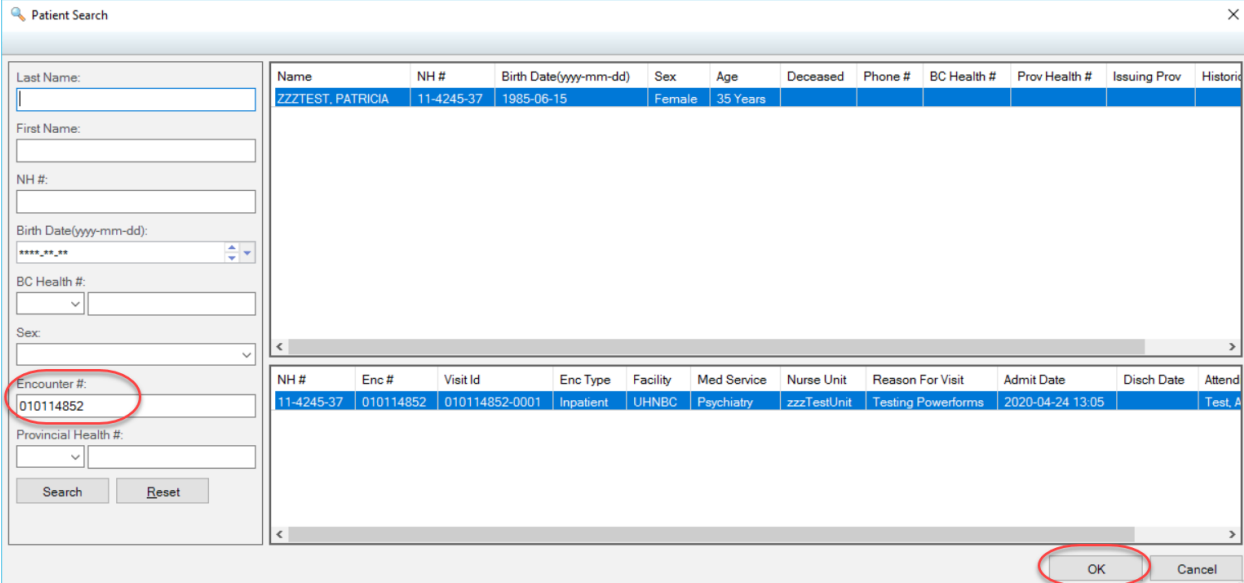
1. Click on the icon in the Pt List toolbar.

2. Search for the patient using the Encounter #. Ensure the correct patient and encounter is highlighted, and select OK.

2. The patient will then be added to the Custom List.

Creating a Location List

Location list is a designated location such as a nursing unit, all patients currently located in that unit are listed. This list does not allow you to add or remove patients as they are automatically listed upon admission to that location.

1. Follow steps to create a patient list.
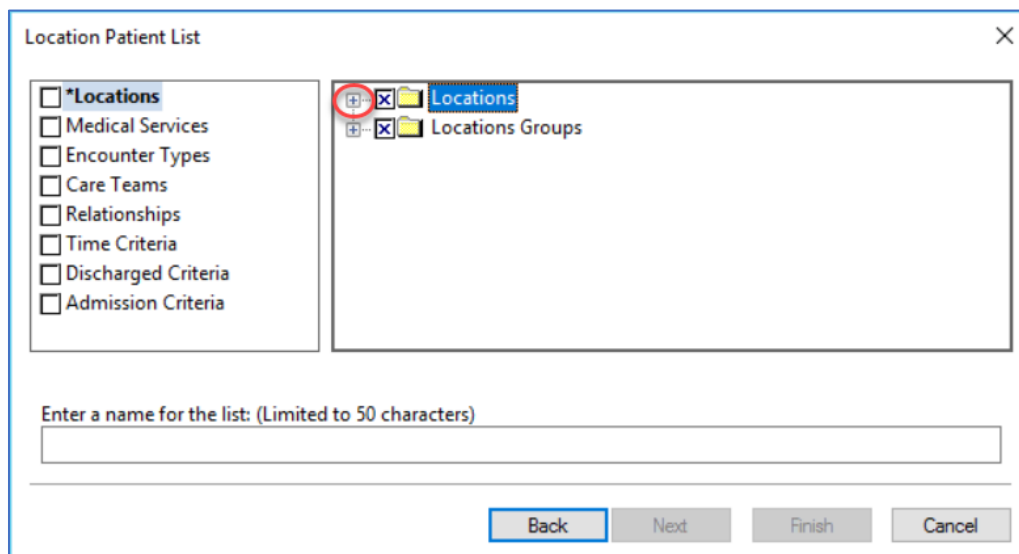2. Select Location.
3. Click Next.

4. Select the + beside Locations to expand the list.

5. Find the appropriate facility and continue to expand the list using the + until you find the specific care unit you want.

6. Click on the box beside the specific care unit to show a check mark. The unit's name will auto-populate in the name field.
7. Click Finish.

Note: It is recommended that a facility **NOT be chosen** to create a list. This may increase your log in time to PowerChart and/or the potential for PowerChart to "crash" and you will not be able to log into the application.

Note: The system does not allow 2 patient lists with the same name. Within the Name field, change/adjust the name of the location to how you want your list to be labelled.

8. This will add the list to the Available List column. Select the newly created list and click on the middle right hand arrow to move the list to the Active column.
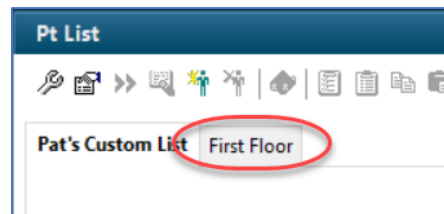9. Click OK.

10. This will add your Location List to the Pt List icon.

Creating a Visit Relationship Patient List

A relationship list displays a list of patients with whom you have an established relationship i.e. Physician-Attending, Physician-Consulting, etc. Relationships are created prior to opening a patient's chart for the first time. (In PowerChart, when you click on a patient name to open their chart, the Establish Relationship window opens and you are required to select a relationship).

1. Follow steps to create a patient list.
2. Select Relationship.
3. Click Next.
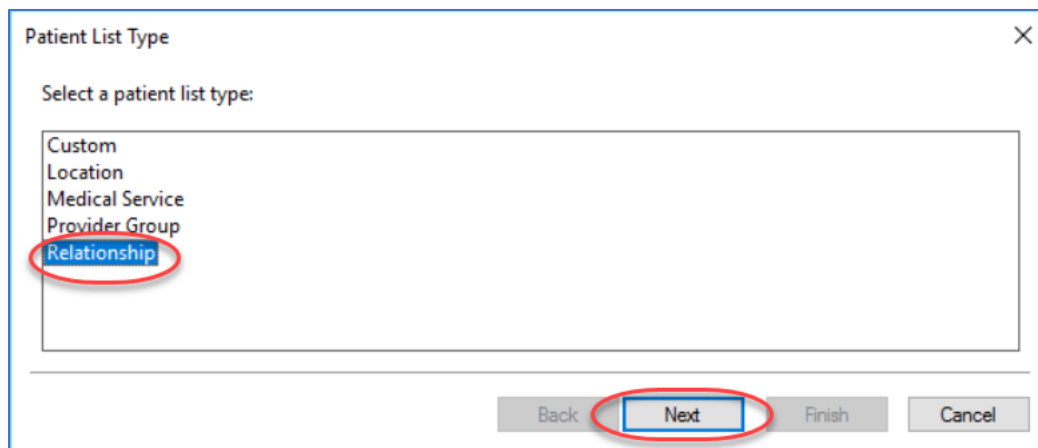
4. Select the + beside Visit Relationship to expand the list.
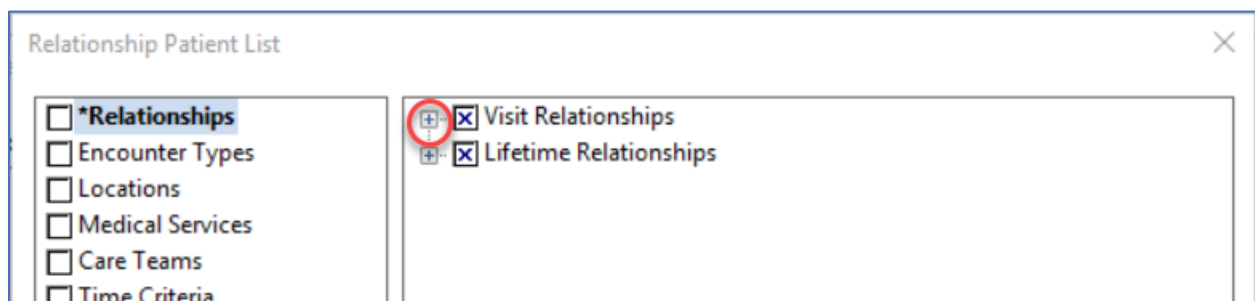
5. Choose the type of relationship that applies to your position by placing a check mark next to it.
6. The name of the position you have chosen will now show in the Name box. You can change this by clearing the name in the Name box and manually entering one of your choosing.

7. It is advisable to choose filters if there are a large number of patients appearing in the list. These can be changed at a later date.
8. Select the appropriate filters and click Finish.

9. The Modify Patient Lists window will appear. Select your list from the Available lists and click ➡ to move to the Active lists.

10. Click Ok. Ensure your list appears as a tab in the Pt List.
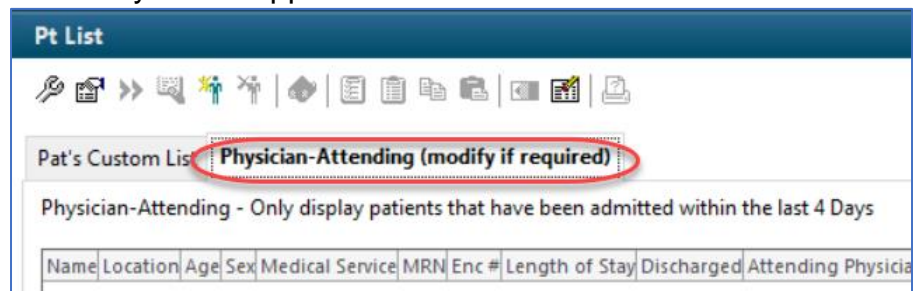
11. If your Visit Relationship list is too large, you can add additional filters by selecting the properties icon.
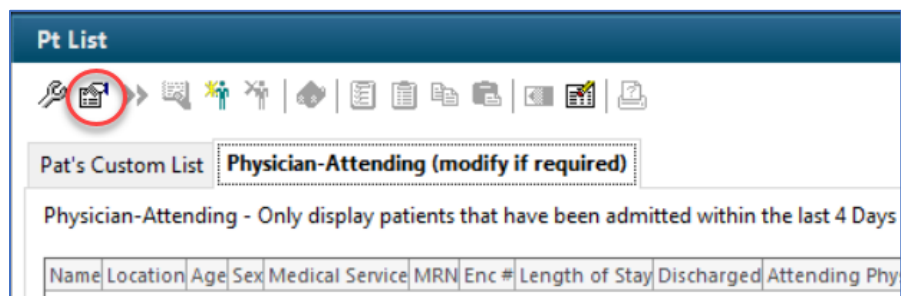
12. Select desired Encounter Type (Inpatient) filters such as Inpatient and Long Term Care to reduce your selected list.
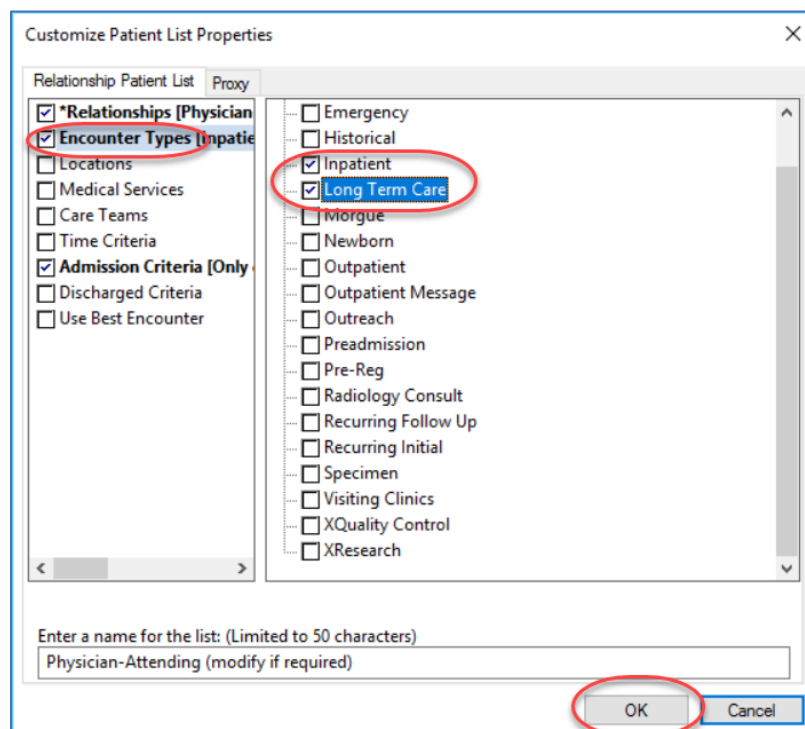
If you wish to have a separate Visiting Relationship list for an outpatient area, such as the ER Department:

1. Follow the steps above from #1-7.
2. Select the filter Encounter Types
3. Check off Emergency within the Encounter type.
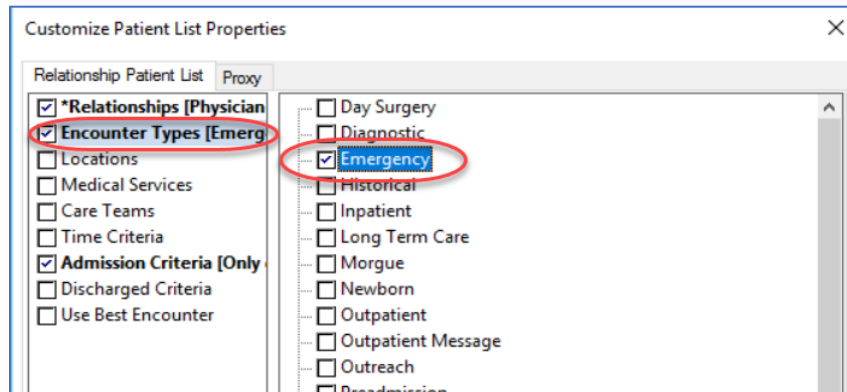
4. Click on the Discharged Criteria filter
5. Select Only display patients that have not been discharged

6. Click OK.

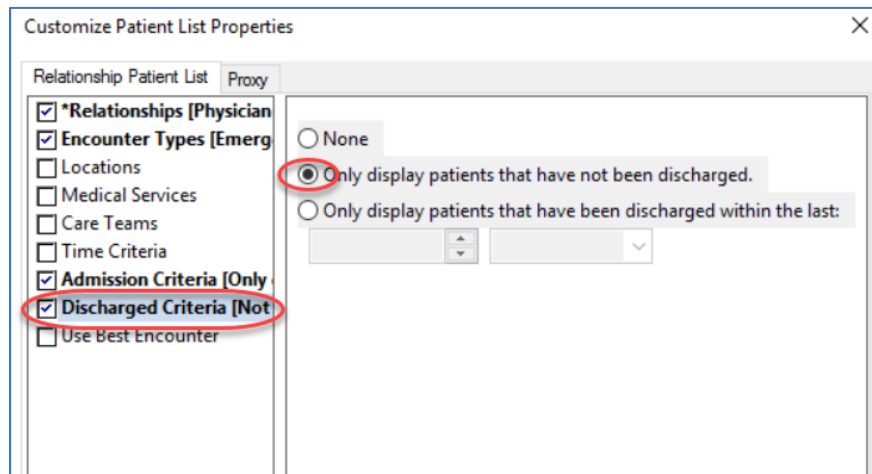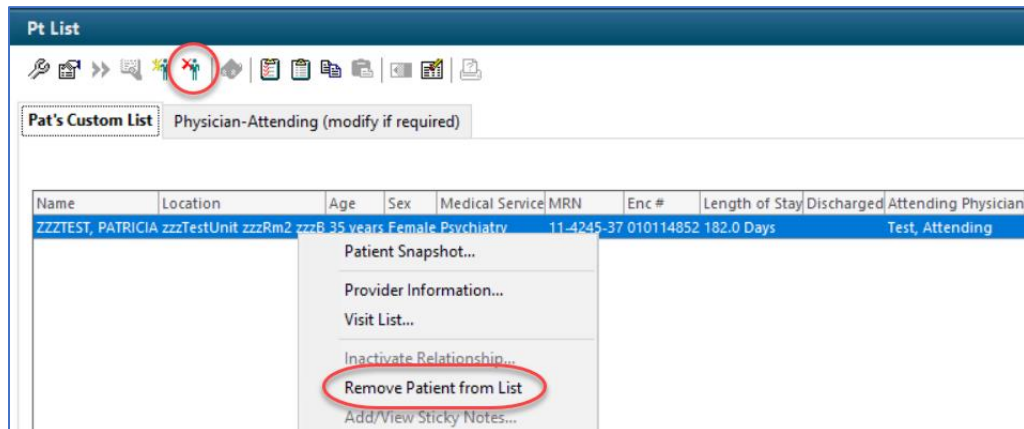## Removing Individual Patients from a Custom List

1. Click on your Custom List.
2. Highlight the name of the patient you wish to remove from your list.
3. Click on Remove Patient icon **OR** right click and select Remove Patient.

4. The patient will be removed from your list.

Removing Individual Patients from a Relationship List

1. Click on your Visit Relationship list.
2. Highlight the name of the patient you wish to remove from your list.
3. Click on the Inactivate Relationship icon **OR** right click and select Inactivate relationship.
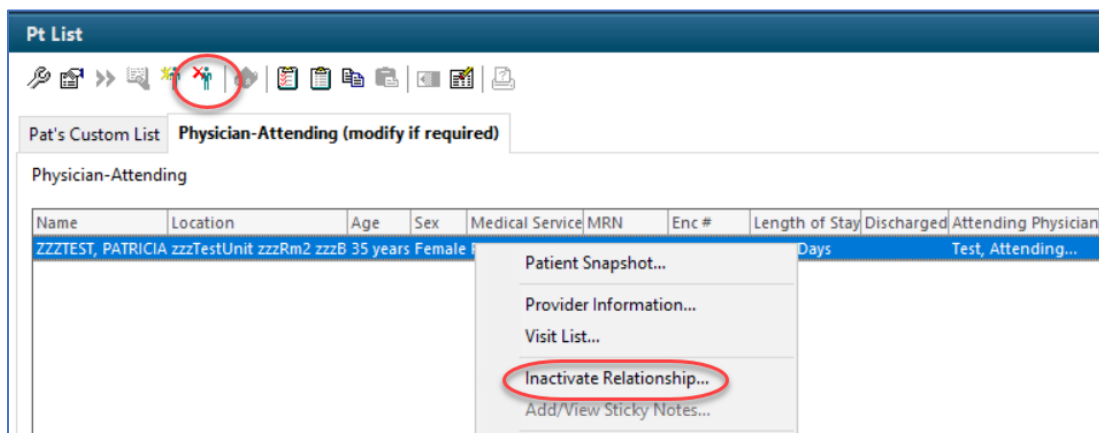
4. The patient will be removed from your list.

Tip: If you go back into that specific chart(s) and establish the same relationship this patient will appear on your relationship list again.