ieMR: Creating Patient lists

Quick reference guide

There are Four (4) types of Patients lists within the ieMR

1. Location – Patients appear on the Location list once they have been admitted or arrived in HBCIS and disappear once they have been discharged or marked as seen

2. Medical Services – All Patients that have been admitted under the team e.g. Paediatric Surgery will appear on the Medical Services List

3. Custom – Patients can be added to this manually maintained list which is encounter specific

4. Relationship – Only patients where there is a relationship between the clinician appear on the list. e.g. the patients chart has been documented in or the patient is admitted under that consultant

Creating a list

To create a list:

1. Click *Patient List* from the toolbar

2. Click *Lists Maintenance* icon from the toolbar

The *Modify Patient Lists* window will open.
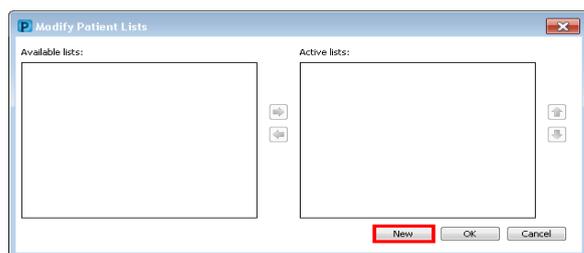
This window displays all current *Available* and *Active* lists.

- *Available lists*: a saved list, not currently viewed as a tab on the *Patient List* window

- *Active lists*: a saved list that is currently viewed as a tab on the *Patient List* window

3. Select *New*

> **Note:** See below for how to create specific lists, Location, Medical Services, Custom, Relationships.

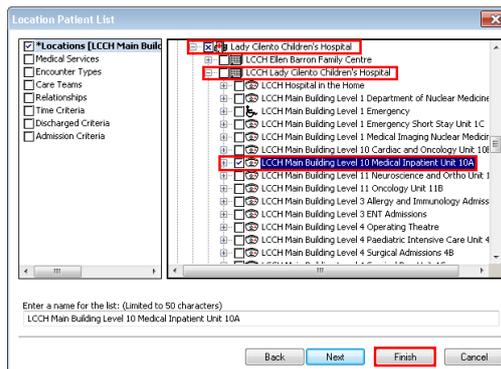## Location List

The *Patient List Type* window will open.

1. Select *Location*
2. Click *Next*

The *Location Patient List* window will open.

This window is used to select the location/s to add to the patient location list.

3. Expand the *Locations* folder

The location list will expand displaying the ieMR facilities.

4. Expand the relevant *hospital – Lady Cilento Children's Hospital*

5. Expand the relevant *building*

6. Continue expanding the folders until the desired location is displayed

7. Check the box next to the desired location

The name of the location will be added to the name field for the location list. You can at this time rename the Patient List

8. Select *Finish*

Medical Services list
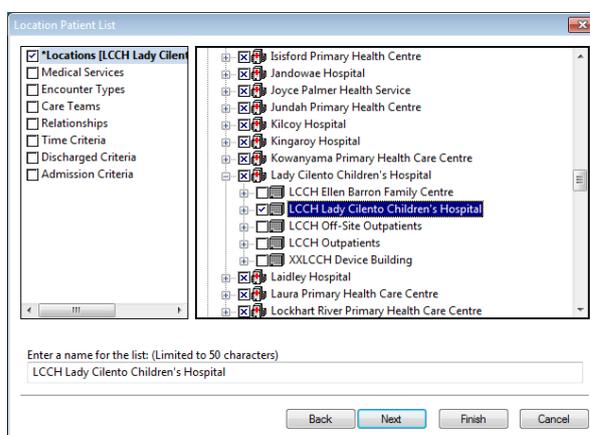
1. Select LCCH as your Location and then Medical Services list type

2. Check the box next to the Admitting Medical Services Team eg Paediatric Dermatology
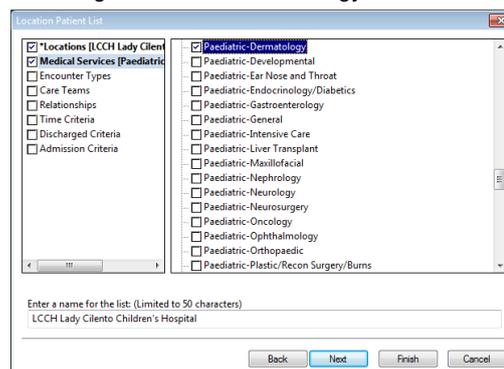
3. Change the List Name to something meaningful to you

4. Click *Next*
5. *Click Finish*
6. The *Medical Services Lists* will appear in the *Available lists* section. To ensure is it an Active list follow the steps 9 to 11 on page 1.

Custom List

1. Select Custom on the Patient List Type

2. Enter a meaning full name for the list eg. Dictation, Follow-up

To add a patient to the Custom list

1. Right click onto the patients name on the Location list and then
2. Add to a Patient List
3. Choose the Custom List
4. The patient will now appear on the Custom list

   or
5. Click onto the add Patient Icon

6. The Patient Serach page will appear. Search for the patient and click OK

7. The patient will now appear on the Custom list.

Note: If using a custom list to document into the patients chart ensure the correct encounter has been chosen

Creating a Relationship List

1. Complete steps 1 to 3 as per page 1 'Creating a Locations list
2. Select Relationship and then Next

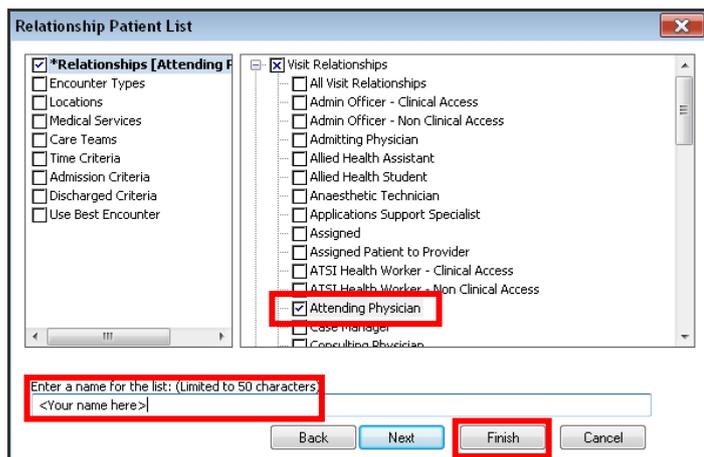The *Relationship Patient List* window will open.

3. Expand the *Visit Relationships* folder on the right.

4. Check the box next to *the role relationship with the patient e.g. Attending Physician*

   The role position to select can be found on the *Identity information* bar from the top left of the window.

   Update the name of the relationship list to include your name

5. Select *Finish*

6. Click *Next*

7. Click *Finish*

8. The *Relationship List* will appear in the *Available lists* section.

9. Add the Medical list to the *Active Lists* an Active list follow the steps 9 to 11 on page 1.

The new relationship list will appear as a tab on the *Patient List* window.

Note: Remember to regularly select the *Refresh* button to ensure that any new information added to PowerChart is included on the patient list.

Modify your Patients List

1. Select the active list you would like to modify
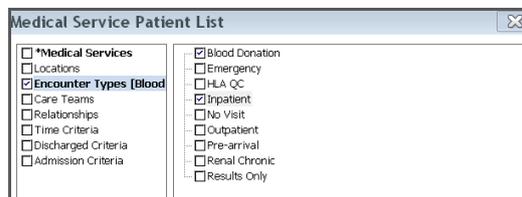
2. Click onto Patient List Properties icon
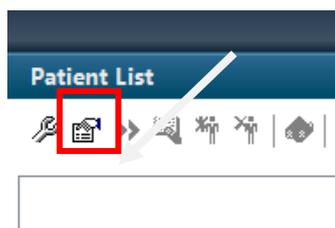
The Customised Patient List Properties selection will appear, This is the same list that is displayed when creating a new list
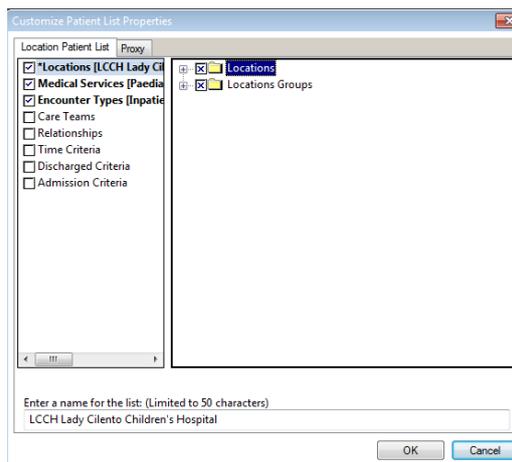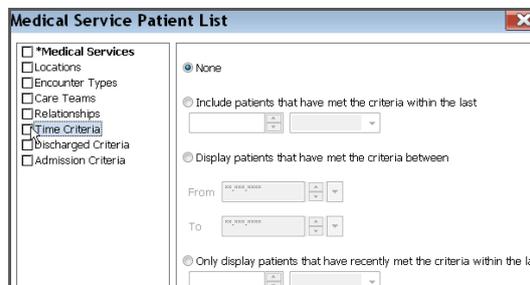

Encounter types criteria

The criterion for this filter displays a list of patients associated with a defined episode of care.
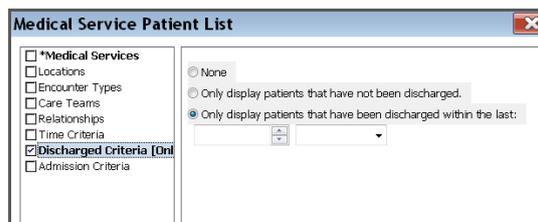

Time criteria

The criterion for this filter will allow only patients that have meet criteria within a time frame selected or within a specified date range to appear on the list.
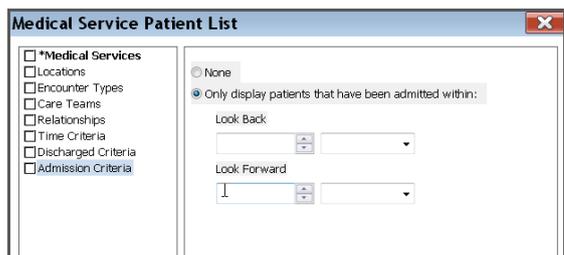

Discharged criteria

The criterion for this filter will allow only patients that have not been discharged or have been discharged within a time frame selected to appear in the list.
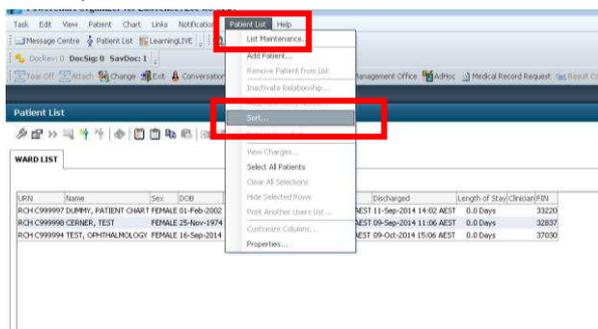

Admission criteria

The criterion for this filter will allow only patients that have been admitted within a timeframe selected to appear in the list.
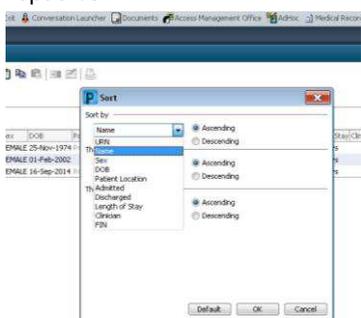
Sorting Patient Lists

You can sort your Patient Lists to display by bed number, or Surname etc.

1. From the Patient List screen, select Patient List from the toolbar, and Sort.

2. When the Sort menu appears, choose your display option/s.

Proxy a list

There is an ability to share your custom lists with other uses.

1. Click on the customise Patient List Properties icon as above
2. Chose the Proxy Tab and click on New
3. Click in the provider button and click on the binoculars to search for the person you wish to proxy your list too
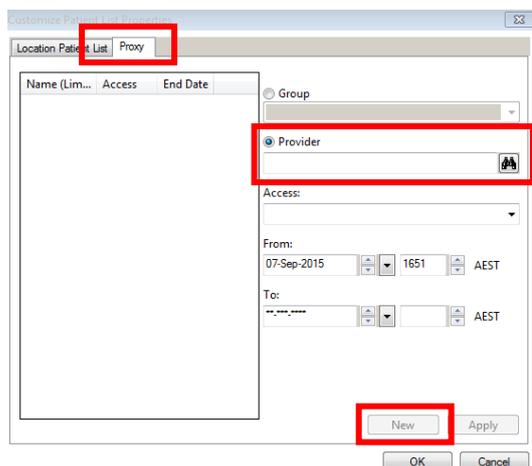
4. Enter the Last Name and Surname

5. Click on the search button

6. Select the correct Clinician and then OK
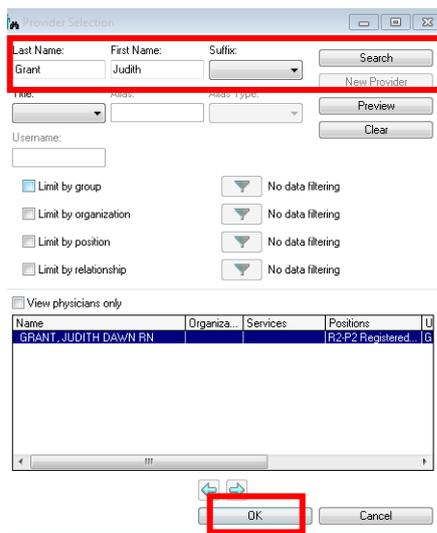
7. Select the type of access you would like them to have and enter the dates if appropriate

8. Click ok
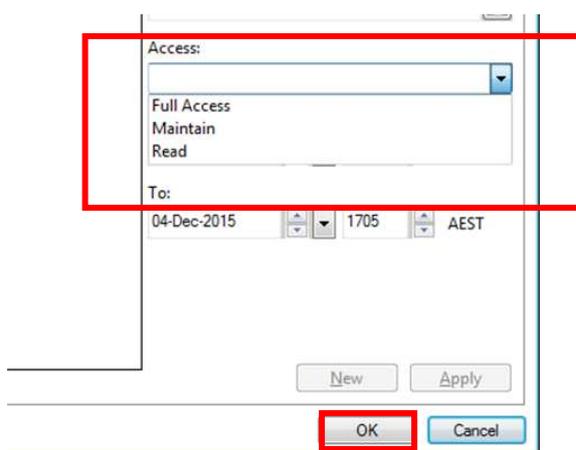
Alert: If you have given the person Full or Maintain access to your list they can also delete your list.

Removing and Deleting a Patient List

Deleting a patient list

To delete a patient list:

1. Ensure you are on the *Patient Lists* window

2. Select the *Lists Maintenance* icon from the toolbar

The *Modify Patient Lists* window will open.

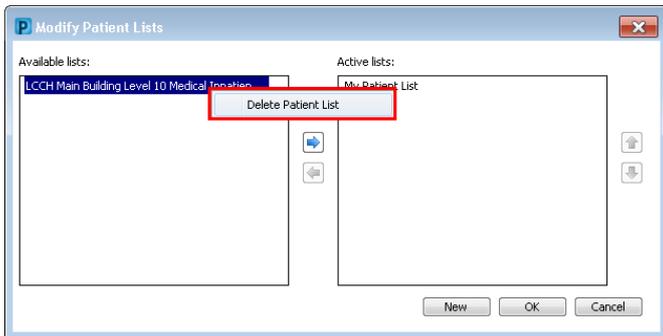This window displays all current *Available* and *Active* lists.
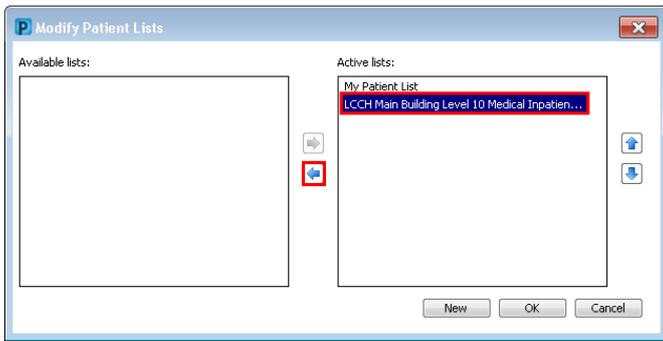
If the patient list is in the Active lists section:

3. Select the patient list from the *Active lists*

4. Select the across *arrow* icon

The patient list will move to the Available lists.
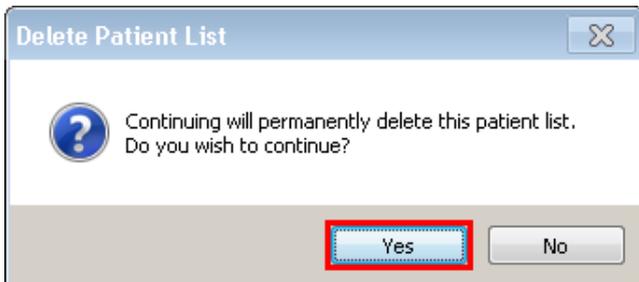

5. Right click on the patient list to delete

A menu will appear.

6. Select *Delete Patient List*

You will be notified that the patient list will be permanently deleted.

7. Select *Yes*

Note: To remove a patient list from the Patient Lists window without permanently deleting it, move it from the Active Lists to the Available lists section in the Modify Patient Lists window.

The patient list can be re-added to the Active lists at any time to be displayed as a tab on the Patient lists window.