

Patient list – creating a custom list and proxy access

Care Delivery

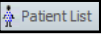

Quick reference guide

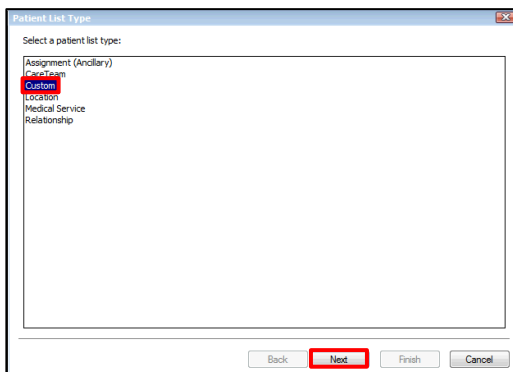
Custom lists will allow you to manage patient lists that do not fit into the location, medical service or relationship categories. Custom lists are only recommended to be used where the other types of patient lists are not suitable, as this list is not automatically maintained/refreshed by PowerChart (i.e. a discharged patient will remain on this list). Also opening a medical record from this list may not always open the most recent encounter. To create a **custom list**, it is recommended to make a location list first.

Note: For instructions about how to create a location list, please refer to the respective QRG.

Creating a Custom List

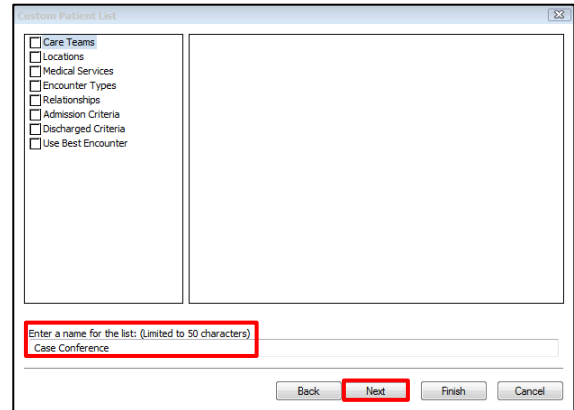
To create a **Custom list**, you need to have a patient list (e.g. PAH, Ward 5A) already established so you can transfer patients across to your custom list.

1. On the toolbar, click the  icon
2. Select the **List Maintenance**  icon from the toolbar.
3. Select **New**.
4. Select **Custom**.
5. Select **Next**.





The **Custom Patient List** window will open.

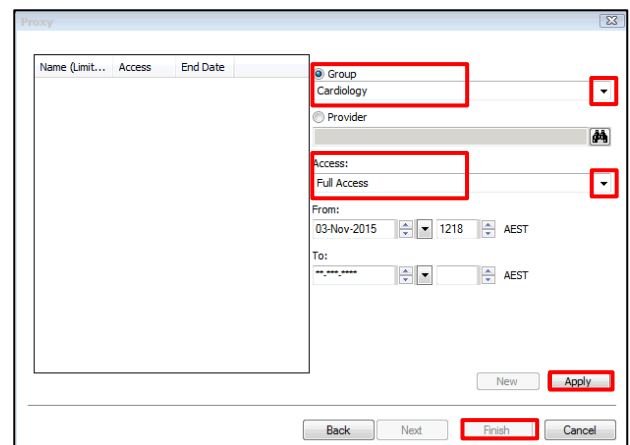
6. Type in **Custom List** name e.g. Case Conference and date, and select **Next**.



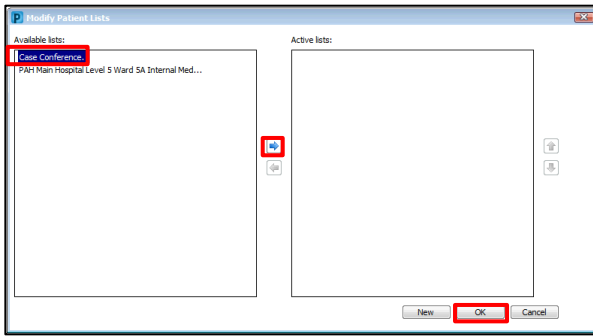
The **Proxy** window will open.

If you would like to share this list with other clinicians:

1. Select **New**.
2. Select  arrow for **Group**.
3. Select group(s) required for **Proxy**.
4. Select  arrow for **Access**.
5. Select level of **Access** required – e.g. Full Access, Maintain, or Read.
6. Select **Apply**.
7. Select **Finish**.



8. Transfer the available lists **individually** into the **Active List** column.



9. Select **OK**.

The new **custom list** and the **location list** will appear as separate tabs on the **Patient List** screen.

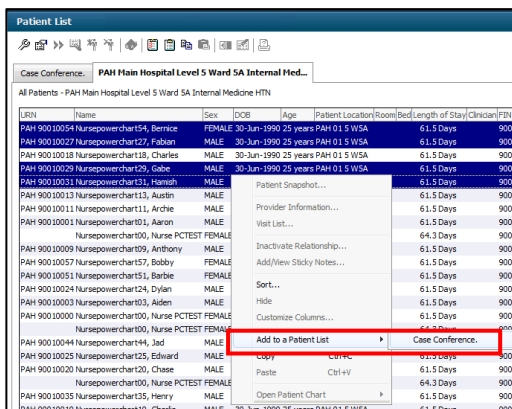
Note: If you have given proxy access to other clinicians, this list will appear in their **Available Lists**.

Note: If a clinician has been given full access to a list they can permanently delete this list from all users' active and available lists.

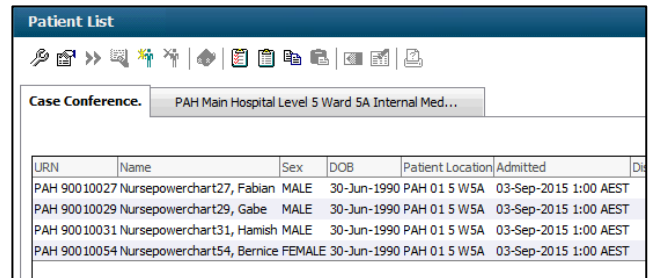
Adding Patients to the Custom List

To move a patient into your **Custom List**:

1. Select your patient(s) from location list (e.g. PAH Ward 5A). To select multiple patients, press and hold Ctrl key and click on each patient.
2. Right click and select **Add to a patient list** and your **Custom List** will show.



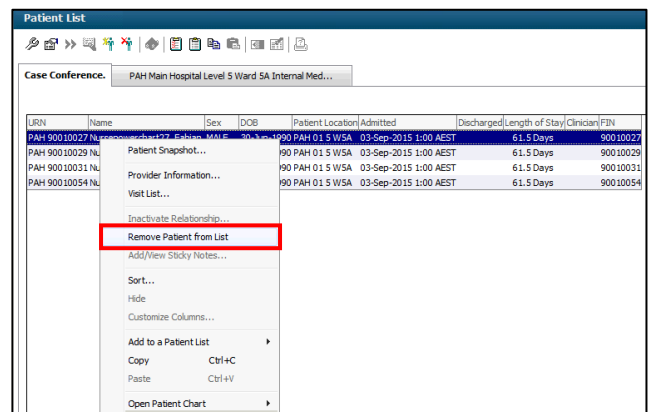
3. Select your **Custom List**.
4. Click **Refresh**. Selected patients will display in your **Custom List**.



To Remove Patients from Custom List

1. Click on patient name.
2. Right click and select **Remove Patient from list**.

Patient will disappear from list.

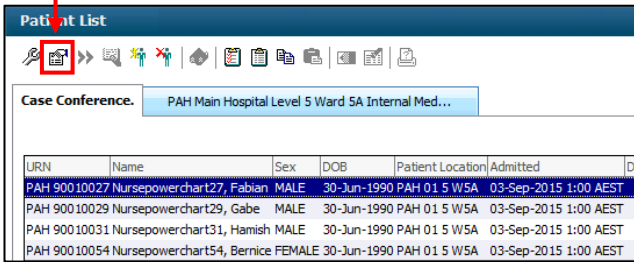


Renaming of a Custom List

This step will prevent new Custom Lists needing to be made each week (or as required).

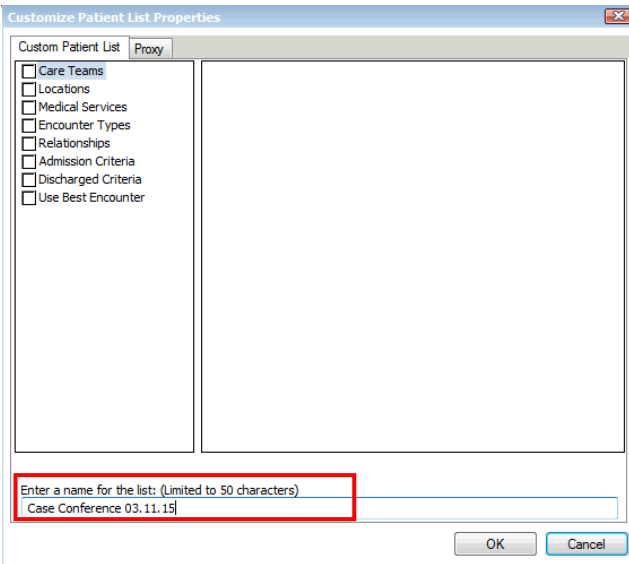
1. In your patient list window, select **properties** icon.





The **Customize Patient List Properties** window will open.

2. Change name of custom list (or date).



New **custom list** name will display in the name tab.

