From the Office of Clinical Informatics
PowerChart Ambulatory Dynamic Worklist *for Patient Panel Clean-Up*
June 1, 2021

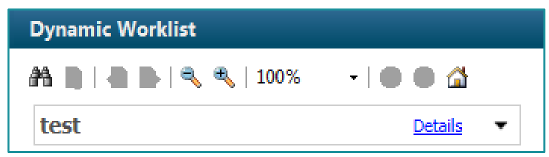
This flyer will demonstrate how to create and use Dynamic Worklist for Patient Panel Clean-Up.

Dynamic Worklist

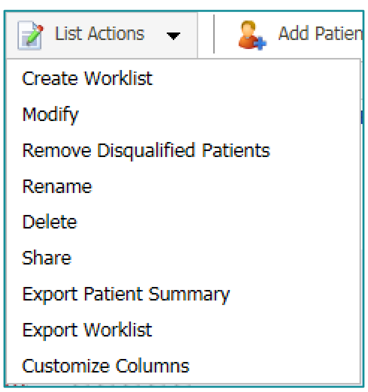
Dynamic Worklist is a person-level component and is designed to allow users to qualify patients based on many different criteria, such as conditions, results, orders, appointment types, age, sex, and more.

- **Dynamic Worklist Button**
  - The Dynamic Worklist button is clicked to access your dynamic worklists

- **List of Dynamic Worklists**
  - If multiple Dynamic Worklists have been created, you can navigate between your lists here. If you hover over **Details**, you can view the criteria for the Worklist.



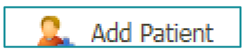
- **List Actions**



  - **Create Worklist**: Allows you to create a new worklist.
  - **Modify**: Allows you to modify the criteria of the Dynamic Worklist you are currently viewing.
  - **Remove Disqualified Patients**: If a patient no longer qualifies for the given criteria, you can remove them from your worklist using this button.
    - When creating the worklist, if you select **Auto-Remove Disqualified Patients** this dithers out this option.
  - **Rename**: Allows you to rename your Worklist.
  - **Delete**: Allows you to delete your Worklist.

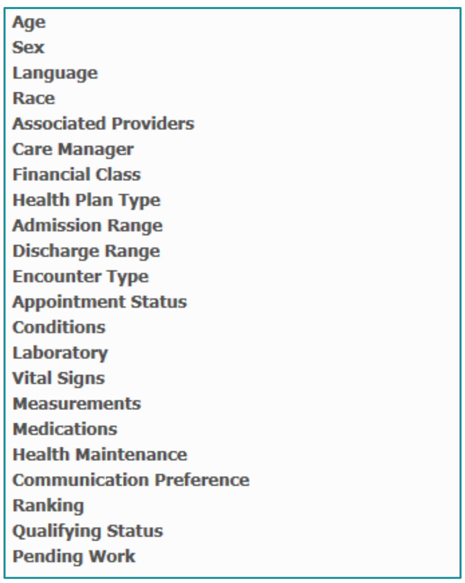
- **Share**: Allows you to share your Worklist with a provider within Northern Light Health.
- **Export Patient Summary/Export Worklist**: Exports your **Patient Summary** and/or **Worklist** to an Excel document. You can either open or save the document.
- **Customize Columns**: Allows you to customize the columns you are viewing for the Worklist.

➢ **Add Patient**



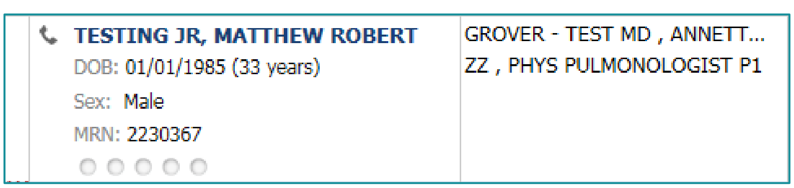
- Allows you to add a patient to your Worklist.
- If the patient does not fit the criteria, a red line will show to the left of the patient's name.

➢ **Category Criteria**



- Each of these categories allows you to select criteria filters specific to that category to further define your Worklist.

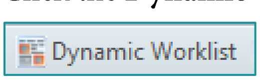
➢ **Patient Information**

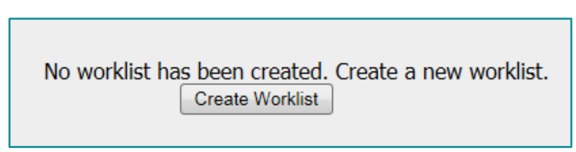


- General patient information is displayed in your list.

Creating a Dynamic Worklist

➢ Click the **Dynamic Worklist** icon in the PowerChart toolbar.

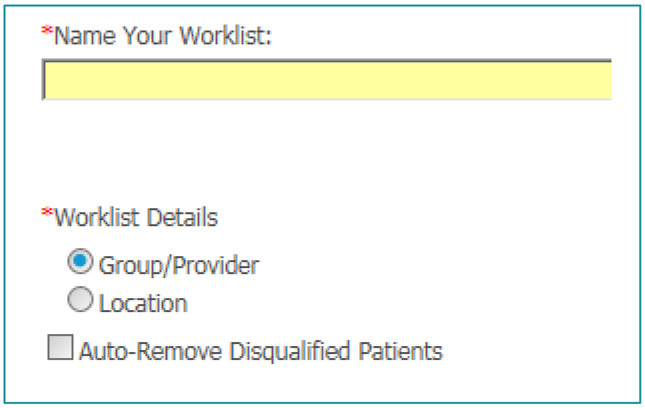




➢ Click **Create Worklist**.

➢ Enter the name of the Worklist.

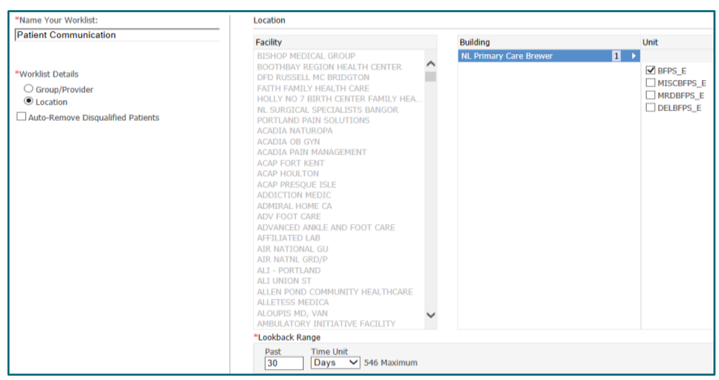
- Name your worklist **Patient Panel Communication**



- Select either the **Group/Provider** Worklist or the **Location** Worklist based on the type of list you want to create.
  - If you want to view the list for a specific Provider or Provider group, select the top **Group Provider**.
  - To create a list based on a specific clinic location, select the **Location** button.

➢ For this example, click **Location** then search for and select the Facility.

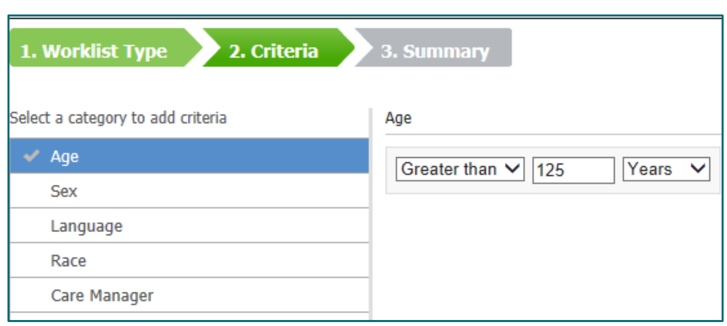
- Click the Location under Building.
- Under Unit click the abbreviation of the facility.
- In the Lookback Range put 30 Days.
- Click **Next**.



➢ Click the category from the table of contents on the left-hand side to build criteria for the worklist.

➢ Make selections from within the category to define the worklist.

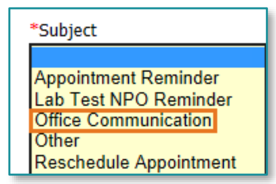
- Click the **Age** category.
- Type in **126 Years**.
- Click **Next** in bottom left corner.

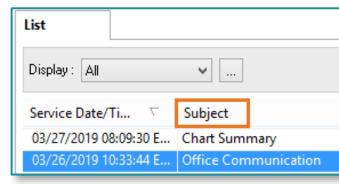


- Review the criteria of the list, then click **Finish** in the bottom right corner to view the list.

- **Add Patient**
  - Add a patient to Worklist from the **Panel clean-up** report and use the MRN to search for the patient.

Generate Communication





- **Subject**
  - The Subject line selected will correspond to the Subject section within Documentation.
- **Note Type**
  - **Patient Letter** is the correct selection as the options within the Subject are all forms of communication with the patient.
  - In the letter window use the auto text **/panel_cleanup**.
  - Once run you will need to put in the provider's name at the top of the letter where it states **INSERT PROVIDERS NAME**.
  - You will need to make a personal auto text for **.practiceinformation.** The auto text needs to be practice name and phone number only, **otherwise the letter will be 2 pages**.
  - Click **Generate**. This will either send by portal if patient is signed up or will print letters to be mailed.
  - Click **List Actions.**
  - Click **Remove Disqualified Patient.**