From the Office of Health Informatics

PowerChart
Dynamic Worklist

July 17, 2025

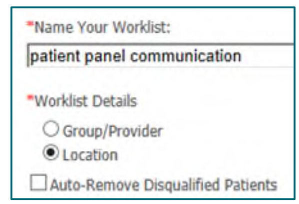
Dynamic Worklist offers staff the ability to group patients together based on different criteria and communicate with others to enhance the care plan.

Creating a Worklist

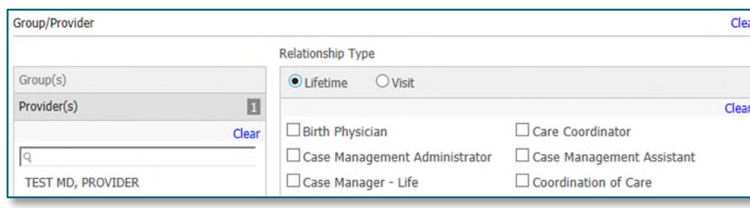
- Click the **Dynamic Worklist** button in the toolbar.

- Click **Create Worklist.**

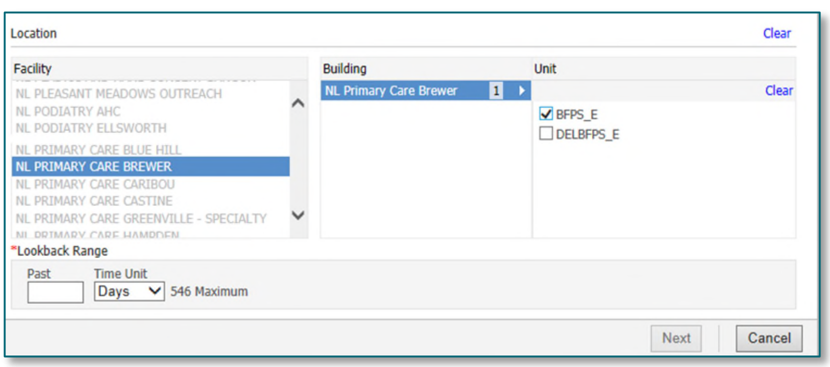
NOTE: If multiple Dynamic Worklists have already been created, click the dropdown arrow on List Actions, click Create Worklist.



- Enter the name of Worklist.
- Click **Group/Provider** or **Location.**
  - **Group/Provider** will allow users to view the list for a specific Provider or Provider Group.
    - Click **Providers** to search for and select the name of the provider.
    - Multiple providers can be selected as needed.
    - Select **Lifetime** or **Visit** for the Relationship Type.
    - Click the **checkbox** next to the type of Relationship desired for the Worklist.



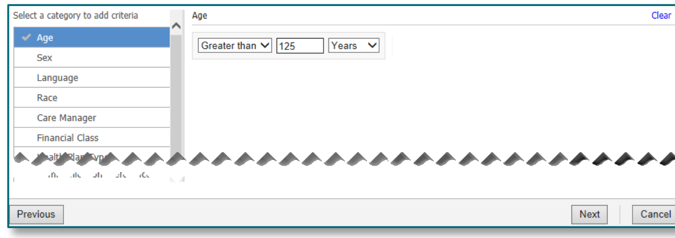
  - **Location** will create a list based on specific clinic locations.
    - Select the appropriate **Facility**, **Building**, and **Unit.**



    - Complete the **Lookback Range.**
    - Click **Next.**

➢ **Category Criteria**

- Click the category from the table of contents on the left-hand side to build criteria for the worklist.
- Complete sections needed to the right.

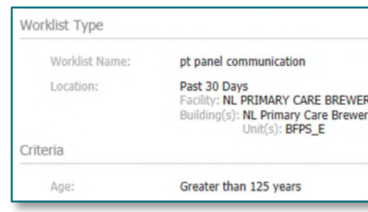


NOTE: **Patient must have a SNOWMED problem added to their chart.**

- Click **Next**.

➢ **Summary**

- Review the criteria of the list.
- Click **Finish**.

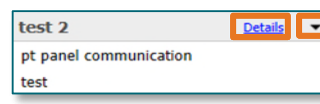


➢ The Dynamic Worklist will display all patients who qualify based on the criteria defined for the list.

Dynamic Worklist

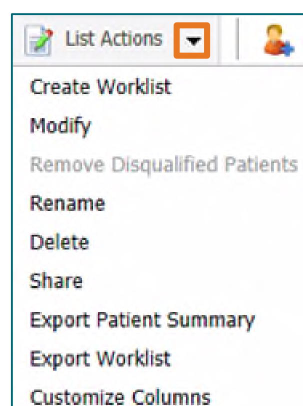
➢ **List of Dynamic Worklists**

- Navigate between Worklists if multiple Dynamic Worklists have been created by clicking the dropdown arrow.
- Hover over **Details** to view the criteria for the Worklist.



➢ **List Actions**

- **Create Worklist:** Create a new worklist.
- **Modify:** Modify the criteria of the Dynamic Worklist.
- **Remove Disqualified Patients:** Remove patients who no longer qualify for the given criteria.
  - When creating the worklist if **Auto-Remove Disqualified Patients** is checked this will dither out this option.
- **Rename:** Rename the Worklist.
- **Delete:** Delete the Worklist.
- **Share:** Share Worklists with a provider within Northern Light Health.
- **Export Patient Summary:** Export patient summary reports from specific encounters.
- **Export Worklist:** Export Worklist to an Excel document.
  - The Worklist can either be opened or saved.



- **Customize Columns:** Customize columns in the Worklist.

➢ **Add Patient**

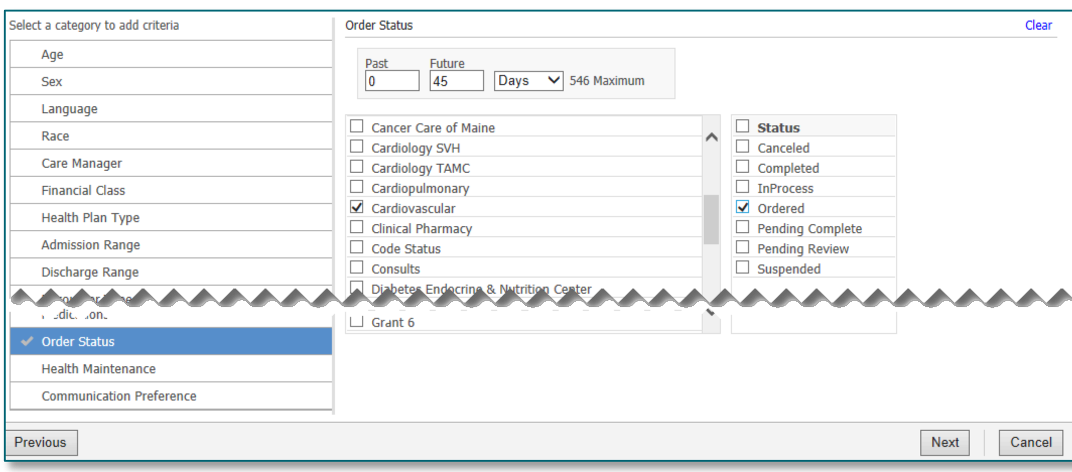
- Add a patient to Worklist and search for patient using patient identifiers.
- If the patient does not fit the criteria, red lines will show to the left of the patient's name.

Outstanding Orders Worklist

➢ To create a Dynamic Worklist for Outstanding Orders, navigate to the left side of the Table of Contents and click the category for **Order Status**.

➢ **Select the necessary details for the category:**

- Select the **date range** for the orders that will show.
- Select the **type of orders** that will show on the list.
- Select the **order status** of orders that will show in the list.
- Click **Next.**
- Click **Finish.**



Patient Panel Clean-Up Worklist

➢ To create a Dynamic Worklist for Patient Panel Clean-Up.

➢ Select **Location.**

- Select the appropriate **Facility**, **Building**, and **Unit**.
- In **Lookback Range** put 30 days.
- Click **Next.**

➢ Select **Age** under Category Criteria.

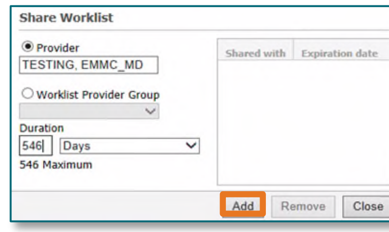
- Type in **126 Years**.
- Click **Next**.
- Click **Finish**.

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

Sharing a Worklist

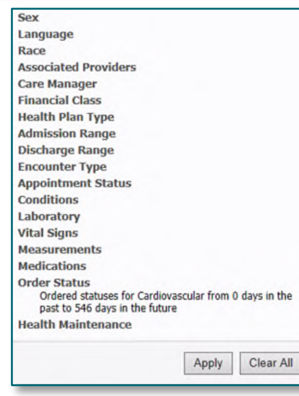
➢ **From the List Actions, select Share.**

- A single Provider or a Group can be assigned as a proxy and a duration of access applied.
- Click **Add** to make the Worklist shared.



Filtering a Dynamic Worklist

➢ Once a list is established, staff can pare down the view by setting more specific parameters to better manage the list.

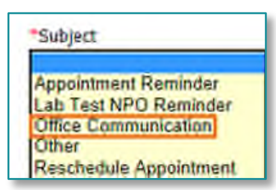


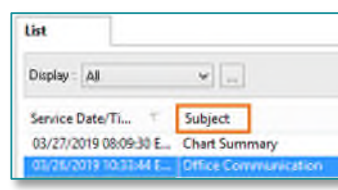
Generate Communication

Worklists are created by end users for a variety of reasons. One example is corresponding with multiple patients for the same reason at one time. Once the end user selects **Generate Communication**, there will be prompts for Subject and Note Type. The Subject matter can change depending on the letter used, but the Note Type should be consistent as Patient Letter.

➢ **Subject**

- The Subject line selected will correspond to the Subject section within Documentation.



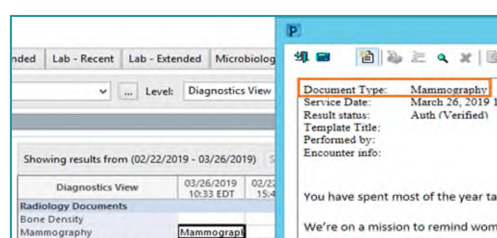


➢ **Note Type**

- **Patient Letter** is the correct selection as the options within the Subject are all forms of communication with the patient.

NOTE: **If a selection other than Patient Letter is made, the letter can route to an incorrect location in the patient's chart, such as Diagnostics.**

- For patient clean-up letters, use the auto text **/panel_cleanup** in the letter window.
- Once run, need to put in the provider's name at the top of the letter where it states INSERT PROVIDERS NAME.



- 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 the patient is signed up or will print letters to be mailed.
- Click **List Actions**.
- Click **Remove Disqualified Patient**.