Oracle Health (Cerner) Millennium
Creating a Patient List

June 27, 2025

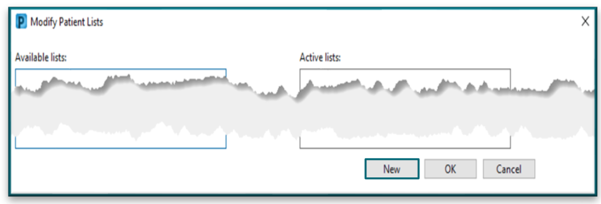
Patient Lists aid in efficiency of locating patients within certain patient care areas on the units worked on a regular basis. When logging in for the first time or when working in a new location, a patient list may need to be created. Providers may also create custom and proxied patient lists to aide in patient handoff.

Setting Up a Patient List

STEP 1: Select the **Patient List** icon from the toolbar at the top of the screen.

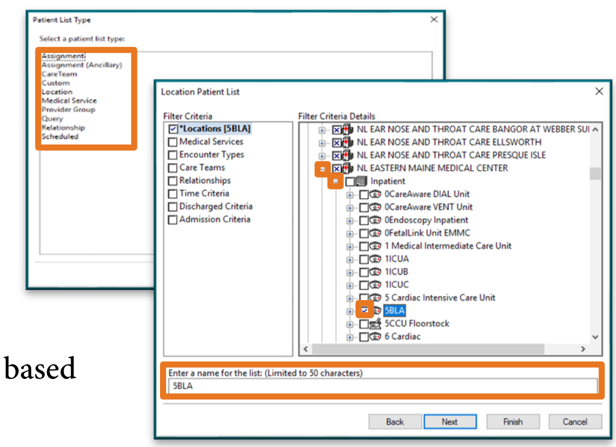
STEP 2: Select the **List Maintenance** icon.

STEP 3: Within **Modify Patients List** window, select **New** in the bottom right corner.



STEP 4: From the **Patient List Type** window, select the list type option.

- **Location** is used to populate a patient list based on registration location.
- **Custom** is used to create a patient list for selected patients to be added to from a registration/location-based list.
- **Assignment List** is used to create a patient list based on assignments made in Clairvia.



STEP 5: Select **Next**.

STEP 6: The **Patient List** window appears for the list type selected. Select desired preferences.

- When creating a location-based list, selecting the **plus sign** icon displays additional patient care areas applicable to a user's role.

STEP 7: Select the box beside the desired unit location or preferences, as necessary. Edit the name of the patient list that will display for each list, if applicable.

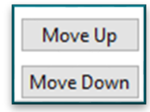
- Patient lists for different areas of care are indicated by specific icons:
  - Inpatient / Observation locations 
  - Ambulatory locations 
  - Operating Room locations 
  - Pharmacy locations 

STEP 8: Select **Finish**.

STEP 9: The **Modify Patient Lists** window appears. Select the applicable list within the available list section.

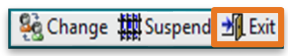
STEP 10: Click **Add** to move the patient list to **Active lists:** to be available on view.

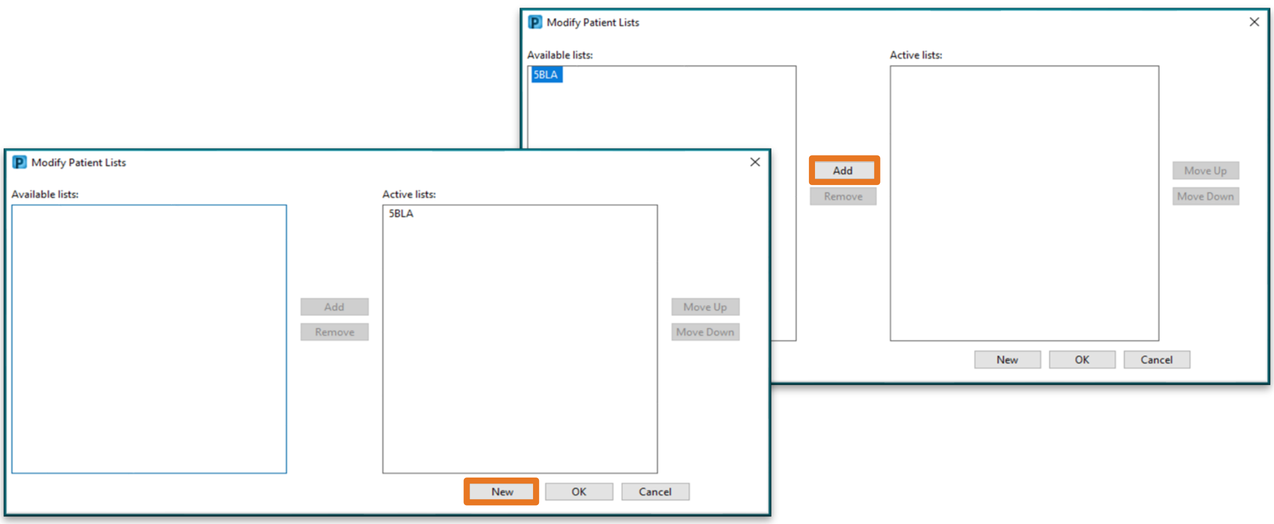
- Single-select an available unit and click the **Move Up** and **Move Down** buttons to organize the order of patient lists, as necessary.



STEP 11: Select **OK**.

STEP 12: Select **Exit** when complete to save settings.





Creating a Custom Patient List

STEP 1: Within PowerChart, click **Patient List**.

STEP 2: Click the **List Maintenance** Icon.

STEP 3: Click **New**.

STEP 4: Select **Custom**, then click **Next**.

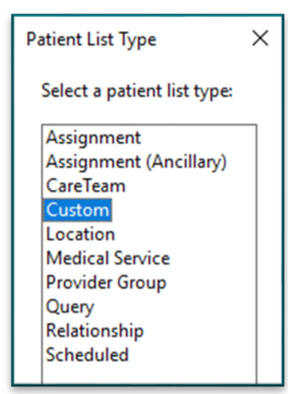
STEP 5: Type a name for the list in the **Enter a name for the list** field.

STEP 6: Click **Finish**.

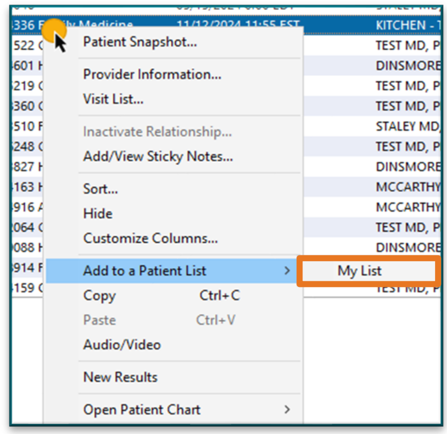
STEP 7: Select the newly created list from the **Available Lists:** pane.

STEP 8: Click the Add button to move the list into **Active Lists:** pane.

STEP 9: Click **OK**.



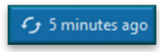
Add Patient to a Custom Patient List



STEP 1: Within the primary hospital **Patient List**, highlight the patient(s) to add by holding **Ctrl** and **left-clicking**.

STEP 2: Right-click and select **Add to Patient List** from menu.

STEP 3: Click the **minutes ago** button to update the patient lists.



Remove Patient to a Custom Patient List

STEP 1: Within **Patient List,** select the **custom list**.

STEP 2: Select the patient to be removed.

STEP 3: Click the **Remove Patient** icon. 

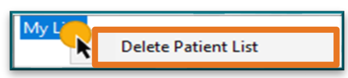
Removing a Patient List

STEP 1: Within **Patient List,** click the **List Maintenance** icon. 

STEP 2: Select the list to be removed from the **Active lists:** pane.

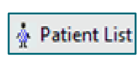
STEP 3: Click the **Remove** button to remove the list into **Available lists:** pane.

STEP 4: Right-click the **Patient List** and select **Delete Patient List**.



Giving Proxy Access to a Patient List

Providers can give proxy access to a patient list to another provider. This helps in the efficiency of patient handoff, which aides in the ability for providers to take patients from proxied lists to add to their own.

STEP 1: Navigate to the **Patient List** on the toolbar. 

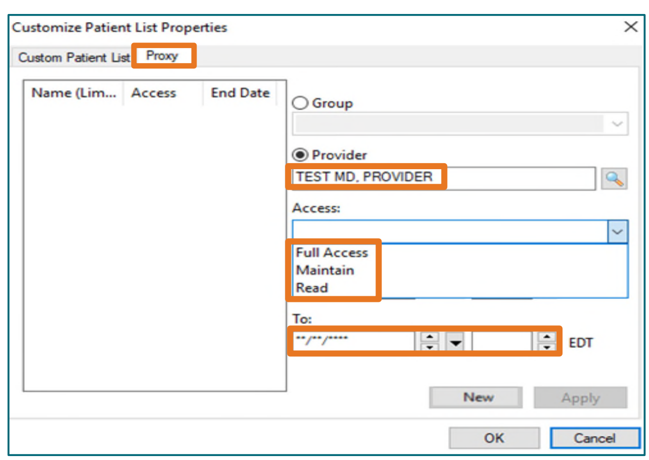
STEP 2: Select the **Patient List** to be proxied.

STEP 3: Click the **Properties** icon .

STEP 4: Click the **Proxy** tab.

STEP 5: Click **New.**

- Enter the name of the user to whom access is being granted in the **Provider** field.
- Select an access level option from the **Access** dropdown:
  - **Full Access** – Allows user to add/remove patients, add users, and delete the list.



- The list creator has **Full Access** by default.
- **Maintain** – Allows user to add/remove patients.
- **Read** – Allows user to view the patient list.

▪ Enter a future date/time in **To:** field in which the provider should be granted access.

<u>STEP 6</u>: Click **Apply**.

▪ Repeat this process for each user.

<u>STEP 7</u>: Click **OK** once finished.

<u>NOTE</u>: **The proxied patient list will appear with the name of the owner in parenthesis.**

Updating Custom Patient List Proxy Access

<u>STEP 1</u>: From the same **Proxy** tab mentioned above, select the user who needs to be updated.

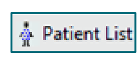
- Make any necessary changes.

➢ Click **Apply**.

➢ Click **OK**.

<u>NOTE</u>: Once a user has been added to a list, they cannot be removed. To revoke access, set the "To:" date for that user to the last date access should be granted.

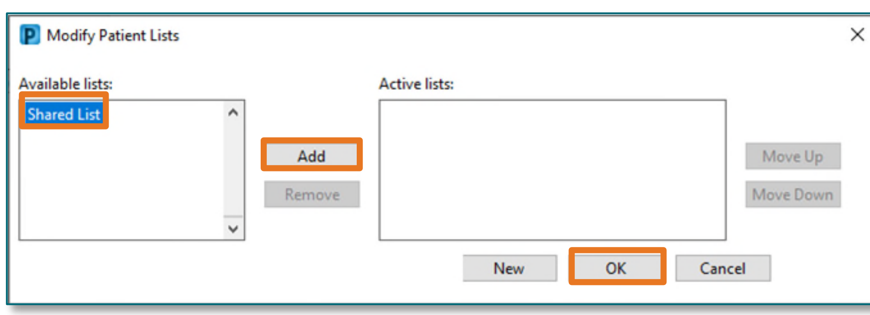
Adding a Shared Patient List

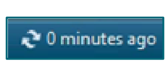
<u>STEP 1</u>: The receiving user must navigate to the **Patient List** on the toolbar. 

<u>STEP 2</u>: Click the **List Maintenance** icon in the upper left of the Patient List window. 

▪ Select the shared list(s) from the **Available Lists** pane and move it into the **Active Lists** pane by clicking the **Add** button.

▪ Click **OK** to close the **List Maintenance** window.



<u>STEP 3</u>: Click the **Minutes Ago** button 

to refresh.

▪ The new list will now display in Patient List.

Custom Proxy List Access Best Practices

- Select an additional administrative user to be granted **Full Access** to the list for access and privilege updates.
- **Physicians/PAs/NPs** should only be granted **Maintain** access to mitigate the risk of accidental list deletion.
- Access privileges should be regularly reviewed for necessary additions or revocations.