From the Office of Health Informatics

Quick Reference Guide (QRG)
Patient Lists

January 30, 2020

This Quick Reference Guide (QRG) demonstrates the steps for creating and maintaining patient lists.

Common Buttons & Icons

	List Maintenance icon
	+ (Plus) icon
	Right Arrow icon
	Left Arrow icon
	Up Arrow icon
	Down Arrow icon
	Add Patient icon
	Remove Patient icon
	Properties icon
	Customize Columns icon
	Red X icon
	Save icon
	Return Custom Columns to Default View icon
	Exit icon

Create a New Patient List by Location

➢ **From the Provider Handoff screen:**

STEP 1: Click **Patient List**.

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

STEP 3: Click **New** from the Modify Patient Lists window.

STEP 4: Click **Location** from the Patient List Type window.

STEP 5: With the selection highlighted, click **Next**.

STEP 6: Click the **Locations** + icon.

STEP 7: Use the + icons to drill down to the desired location(s).

NOTE: **Select more than one check box to create a list containing patients for multiple locations.**

STEP 8: Select the checkbox for the desired location(s).

STEP 9: Update the **Enter a name for the list** field, if needed.

NOTE: **The Back button returns to the Patient List Type window. The Next button allows a proxy to be added. The Cancel button closes the window without creating the list.**

STEP 10: Click **Finish**.

STEP 11: The list now displays in the **Available lists** pane.

NOTE: **To see the list on the Patient List screen, it needs to be activated.**

Activate Patient Lists

➢ **From the Patient List screen:**

STEP 1: Click the **List Maintenance** icon.

STEP 2: Click the list in the **Available lists** pane.

STEP 3: Click the **Right arrow** icon. The list now displays in the **Active lists** pane.

STEP 4: Repeat steps 1-3 as necessary for additional lists.

NOTE: **Use the Up arrow and Down arrow icons to change the order in which Active lists display on the Patient List screen.**

STEP 5: Click **OK** to save changes.

Create a Custom Patient List

➢ **From the Provider Handoff screen:**

STEP 1: Click **Patient List**.

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

STEP 3: Click **New** from the Modify Patient Lists window.

STEP 4: Click **Custom** from the Patient List Type window.

STEP 5: Click **Next**.

STEP 6: The Custom Patient List window displays. Use the left pane to add the desired list criteria.

NOTE: **When the list criteria list is clicked, additional selection options display in the right pane. Make selections, as necessary.**

STEP 7: Once all criteria are added, add a list name using the **Enter a name for the list** field.

NOTE: **The Back button returns to the Patient List Type window. The Next button allows a proxy to be added. The Cancel button closes the window without creating the list.**

STEP 8: Click **Finish**.

STEP 9: The list now displays in the **Available lists** pane.

NOTE: **To see the list on the Patient List screen, it needs to be activated. Manually add and remove patients from custom lists.**

Add a Patient to a Custom List

- **From the Patient List screen:**

STEP 1: Click the tab for the custom list.

STEP 2: Click the **Add Patient** icon.

STEP 3: Enter the patient search criteria in the appropriate fields; then, click **Search.**

STEP 4: Click the appropriate patient; then, click **OK**.

STEP 5: The patient now displays in the custom list.

NOTE: **Patients can also be added from an existing patient list by using the following steps:**

- **From the patient list, right-click the desired patient.**
- **From the dropdown menu, click Add to a Patient List.**
- **From the menu, click the custom list.**

Remove a Patient from a Custom List

- **From the Patient List screen:**

STEP 1: Click the tab for the custom list.

STEP 2: Click the patient to remove.

STEP 3: Click the **Remove Patient** icon. The patient no longer displays on the custom list.

Proxy a Patient List

- **From the Patient List page:**

STEP 1: Click the tab for the list to proxy.

STEP 2: Click the **Properties** icon.

STEP 3: Click the **Proxy** tab.

NOTE: **From the Proxy tab, any existing proxies display in the left pane.**

STEP 4: Click **New**.

STEP 5: Select the group or provider to which to grant access to the list.

NOTE: **Group is selected by default. Use the dropdown menu to select a group if necessary. Use the Provider field to search for and select an individual for the proxy. If there is more than one provider that matches the search criteria, click the Search icon to make the appropriate selection.**

STEP 6: Click the **Access** dropdown arrow.

STEP 7: Make the desired selection.

NOTE: **Full Access allows the proxy provider to have full control, including adding and removing patients, modifying properties, and deleting the list. Maintain allows the proxy to add and remove patients and modify the defined filter. Read allows the proxy to view the list only.**

STEP 8: Update the **From** fields, if needed.

NOTE: **The From field defaults to the current date and time.**

STEP 9: Update the **To** fields as needed.

STEP 10: Click **Apply**. The proxy displays in the left pane.

NOTE: **Add multiple proxies for a list, if needed.**

STEP 11: To save changes, click **OK**.

Rename a Patient List

- **From the Patient List screen:**

STEP 1: Click the tab for the list to rename.

STEP 2: Click the **Properties** icon.

STEP 3: In the Customize Patient List Properties window, update the entry in the **List Name** field.

STEP 4: Click **OK**.

Add a Column

- **From the Patient List screen:**

STEP 1: Click the tab for the list to customize.

STEP 2: Click the **Customize Columns** icon.

STEP 3: The Customize Columns Tool window displays. Click the desired column from the left, **Available Columns** pane.

STEP 4: Click the **Right arrow** icon.

STEP 5: Repeat steps 3-4 to add additional columns, if desired.

STEP 6: Use the **Up arrow** and **Down arrow** icons to reorder the list columns, as needed.

STEP 7: Click the **Save** icon.

NOTE: Use the Return Custom Columns to Default View icon to reset the columns to the system default.

STEP 8: Once complete, click the **Exit** icon.

Remove a Column

- **From the Patient List screen:**

STEP 1: Click the tab for the list to customize.

STEP 2: Click the **Customize Columns** icon. The Customize Columns Tool window displays.

STEP 3: Click the desired column from the right, **Existing Columns** pane.

STEP 4: Click the **Red X** icon.

STEP 5: Click the **Save** icon.

NOTE: Click the Return Custom Columns to Default View icon to reset any changes, if needed.

STEP 6: Once complete, click the **Exit** icon.

Rearrange Columns

- **From the Patient List screen:**

STEP 1: Click the tab for the list to customize.

STEP 2: Click the **Customize Columns** icon. The Customize Columns Tool window displays.

STEP 3: Click the column to move from the right, **Existing columns** pane.

STEP 4: Click the **Up arrow** or **Down arrow** icons to move the column to the desired spot.

STEP 5: Click the **Save** icon.

NOTE: Click the Return Custom Columns to Default View icon to reset any changes, if needed.

STEP 6: Once complete, click the **Exit** icon.

Deactivate Patient Lists

- **From the Patient List screen:**

STEP 1: Click the **List Maintenance** icon.

STEP 2: Click the list in the **Active lists** pane.

STEP 3: Click the **Left arrow** icon. The list no longer displays in the **Active lists** pane.

STEP 4: Click **OK** to save changes.

Delete a Patient List

- **From the Patient List screen:**

STEP 1: Click the **List Maintenance** icon.

STEP 2: Click the list in the **Active lists** pane.

STEP 3: Click the **Left arrow** icon. The list no longer displays in the **Active lists** pane.

STEP 4: Right-click the list in the **Available lists** pane.

STEP 5: Click **Delete Patient List**.

STEP 6: Click **Yes** in the Delete Patient List window.

STEP 7: Click **OK** to save changes.