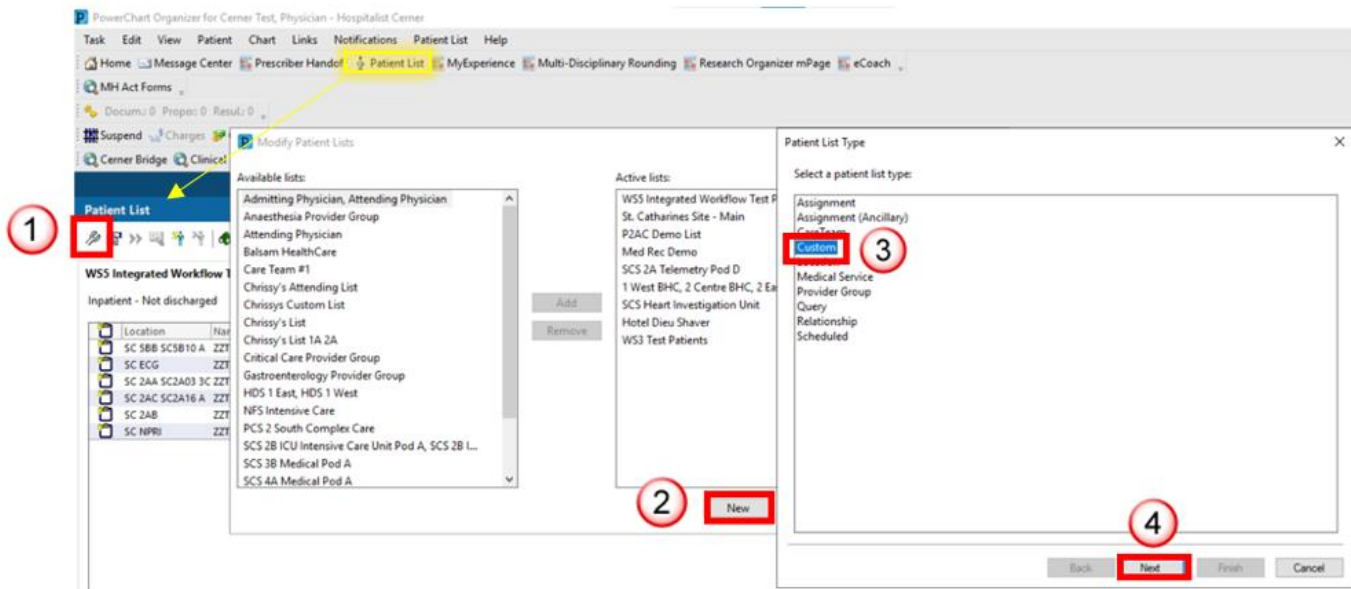## PRESCRIBERS

Create a Custom Patient List

Place only those patients you want to see on your custom list. Patients must be manually added and removed from your custom list.

1. Click the **List Maintenance** icon 🔧 in the Patient List.
2. Click **New** in the bottom right corner of the **Modify Patient Lists** window.
3. Select **Custom** in the **Patient List Type** window.
4. Click **Next**.

5. Type in a name for the list = *YourName_Custom (for example Dr. Tam_Customer List)* in the **Custom Patient List** window. **Custom Lists** need a unique name.
6. Click **Finish**. Your Custom Patient list should now appear.
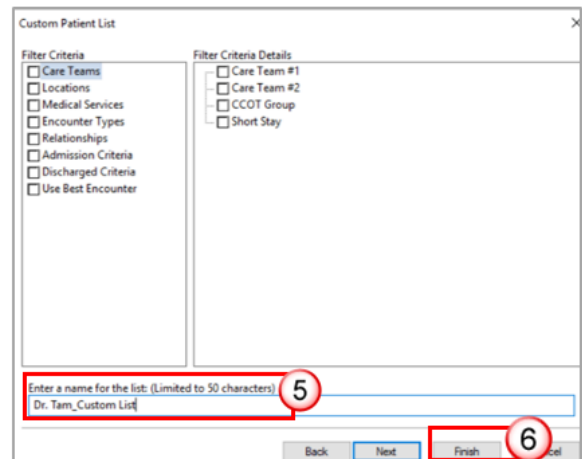
7. Select the newly created **Custom List** in the **Modify Patient Lists** window.
8. Click the **Add** button to move your **Custom List** to the right, under **Active Lists**.
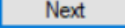9. Click **OK**
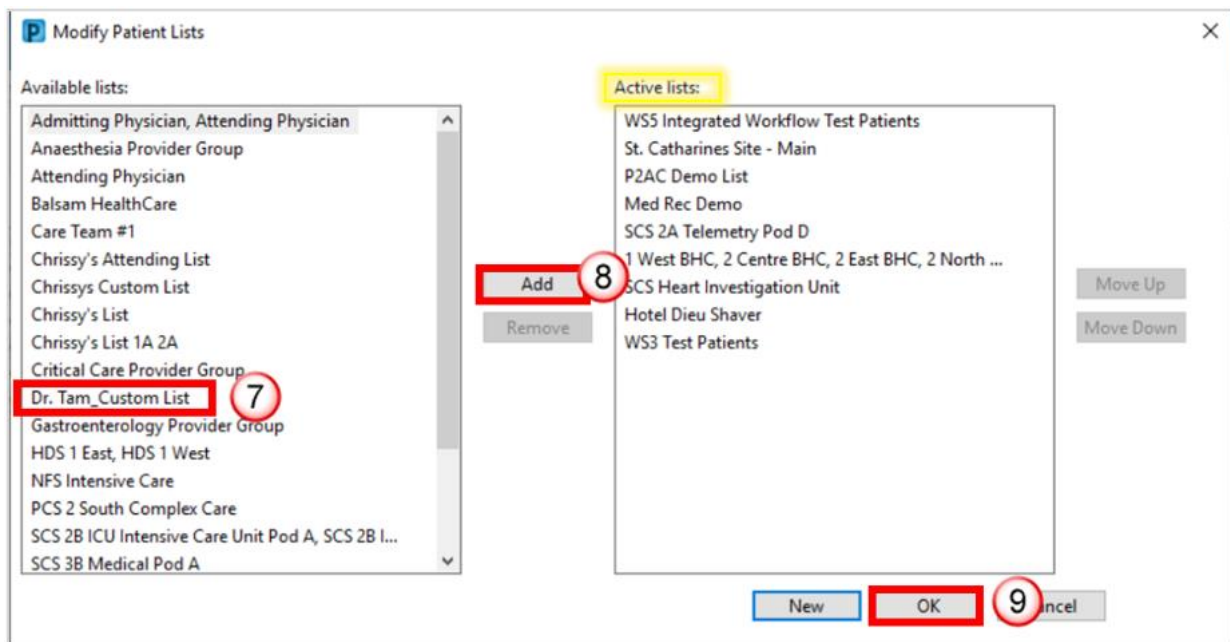
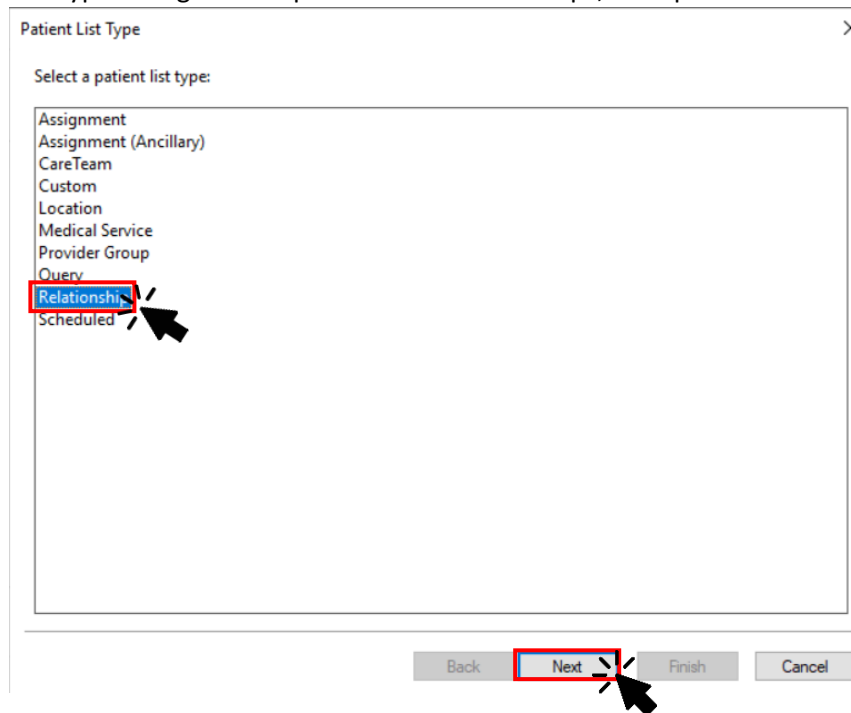Create Visit Relationship Patient Lists

Depending on your role at Niagara Health and/or Hotel Dieu Shaver, **physicians AND nurse practitioners** should create Visit Relationship patient lists.

- **Note**: Admitting, Attending, Consulting, and other Visit Relationship criteria should be selected **as appropriate to your role**. For instance, if only the "Attending Physician" and "Consulting Physician" criteria apply to your role, choose only those criteria.

Follow the steps below to create "Visit Relationship" patient list. In this instance, we will create a Consulting Physician patient list.

1. Follow **steps 1 to 2** on **page 1** to access **Modify Patient Lists** dialogue box.

2. The Patient List Type dialogue box opens. Click "Relationship", then press [Next]
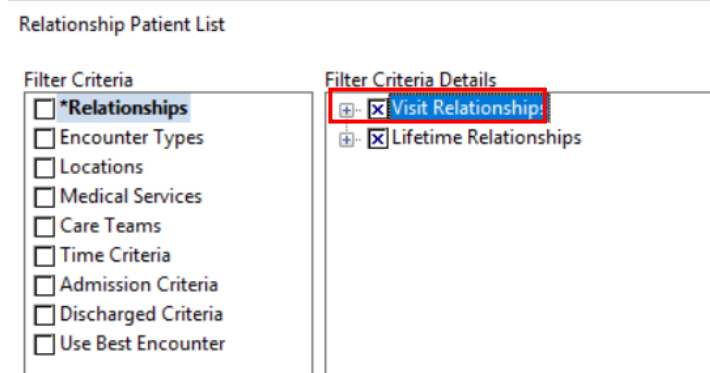
3. Click ⊞ next to "**Visit Relationships**", to expand.
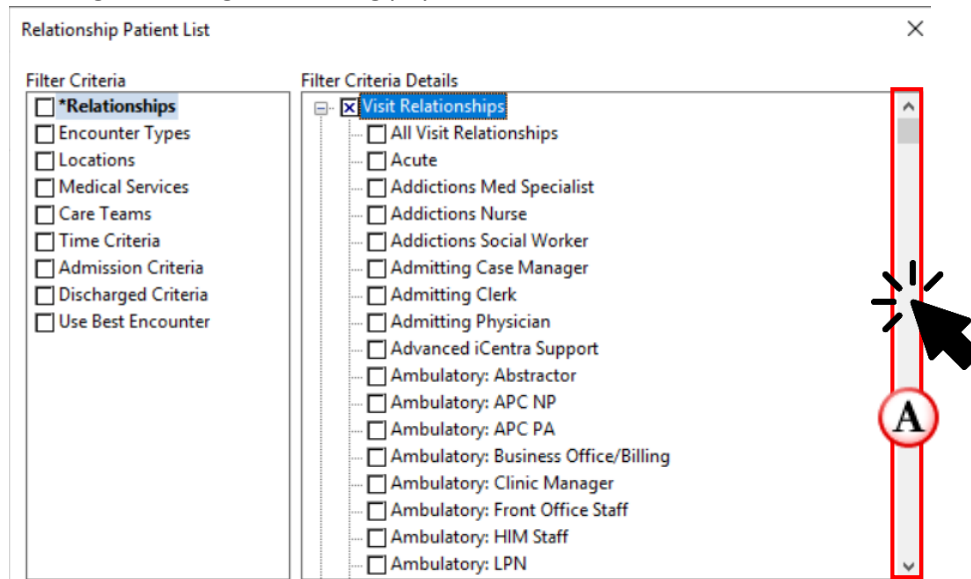
4. The Visit Relationship list is in alphabetical order, A) scroll down to "Consulting" and B) check the "**Consulting Physician**" box ☐; after checking the box, it will look like the following ☑ Consulting Physician

- To add other Visit relationship types, simply do this step but scroll up/down to check admitting, attending, or covering physician boxes.
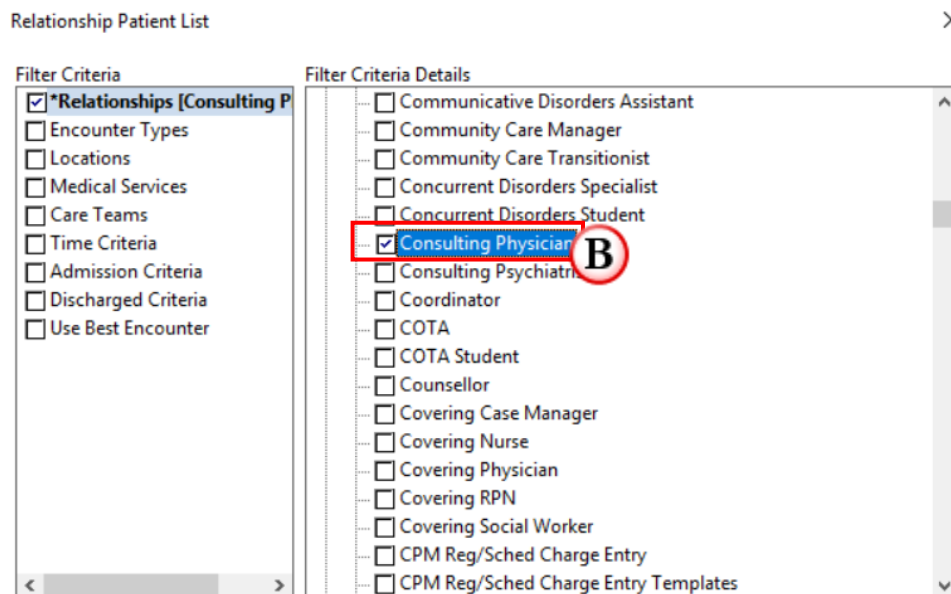

5. Click [Finish]

6. Complete the following steps to place "**Consulting Physician**" in the "**Active list**".
   A. Click on the List in the "**Available List**" box
   B. Click Add
   C. Click OK at the bottom of the dialogue box.
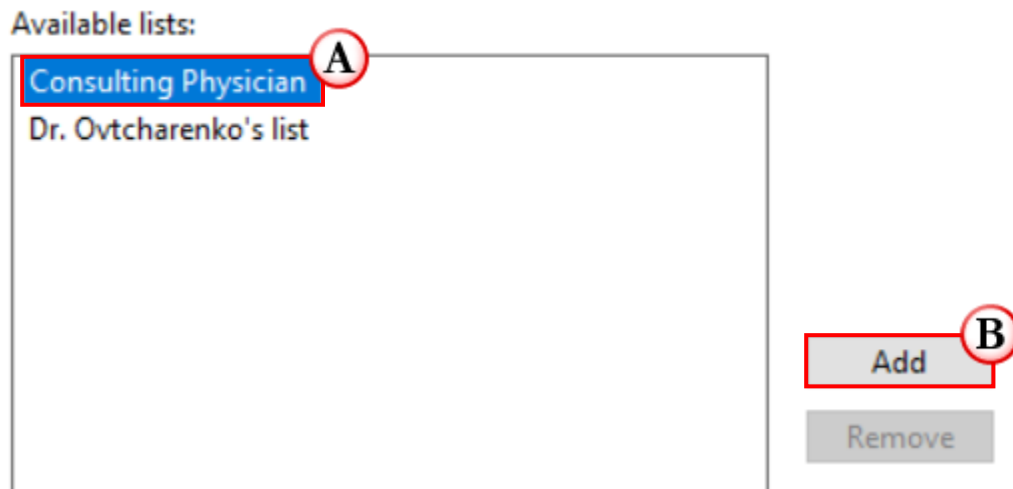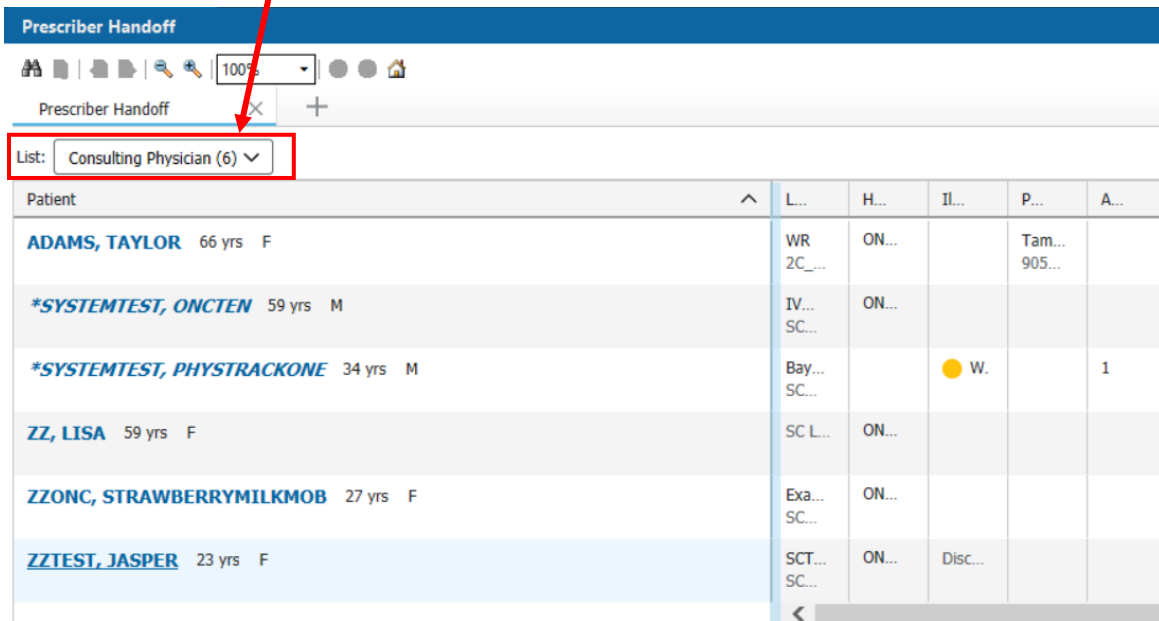
7. Select "List" dropdown.

8. Click Consulting Physician
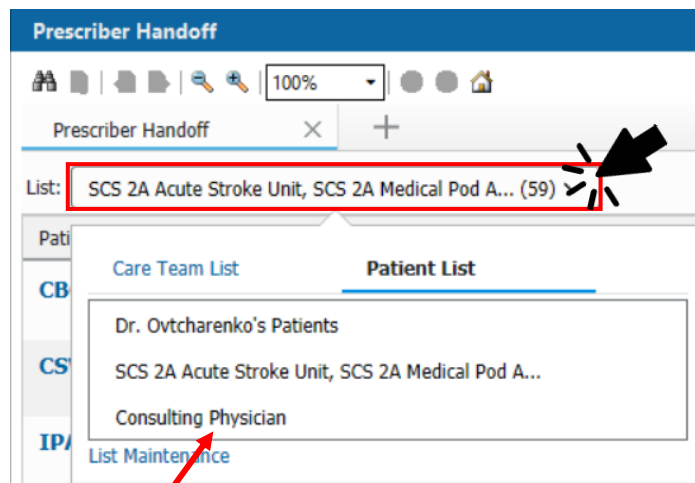
9. The "**Consulting Physician**" is now showing.

-   **Note**: The steps above can be done for all other Visit Relationships, including attending and admitting.
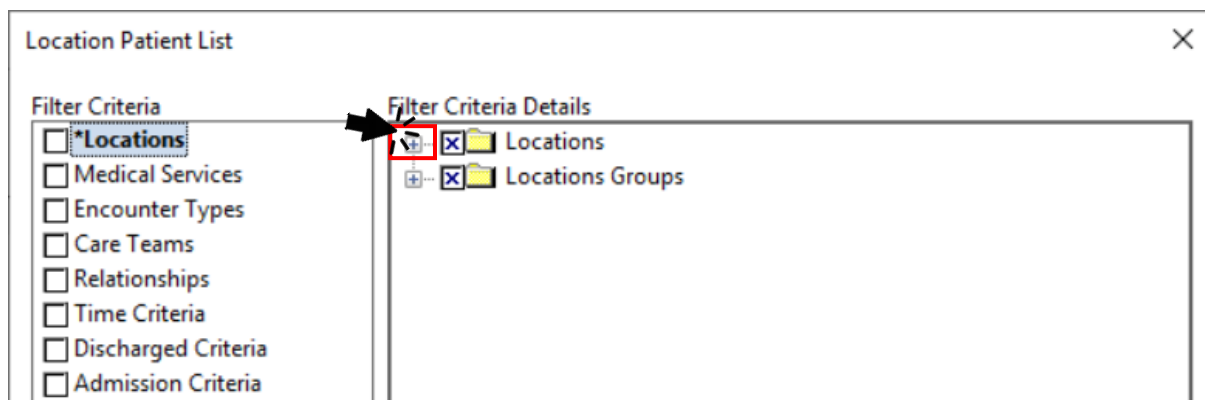
Create Location Patient List

Follow the steps below to create Location patient list. In this instance, we will create an SCS Main OR patient list.

1. Follow **steps 1 to 2** on <u>**page 1**</u> to access **Modify Patient Lists** dialogue box.

2. The Patient List Type dialogue box opens. Click "Location", then press
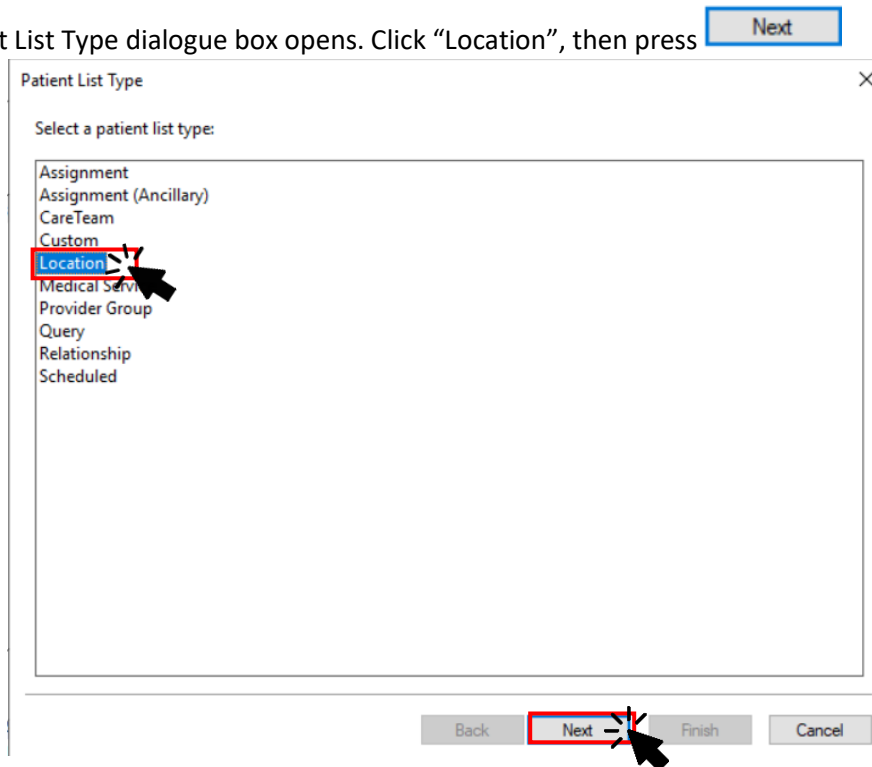
3. Click next to "**Location**", to expand.

4. The Location list comprises of six sites across NHS and HDS, A) Expand the desired site by pressing on ⊞, B) Further expand the site by again pressing on ⊞, C) Scroll down to unit you would like the list for, and D) Check the "**unit**" box ☐; after checking the box, it will look like the fol ⊞ ☑🚑 SCS Main OR

- **Add as many sites and units applicable to your role following the same steps.**

5. Click [Finish]

6. Complete the following steps to place your newly made list in the "**Active list**".
    A. Click on the List in the "**Available List**" box
    B. Click Add
    C. Click [OK] at the bottom of the dialogue box.
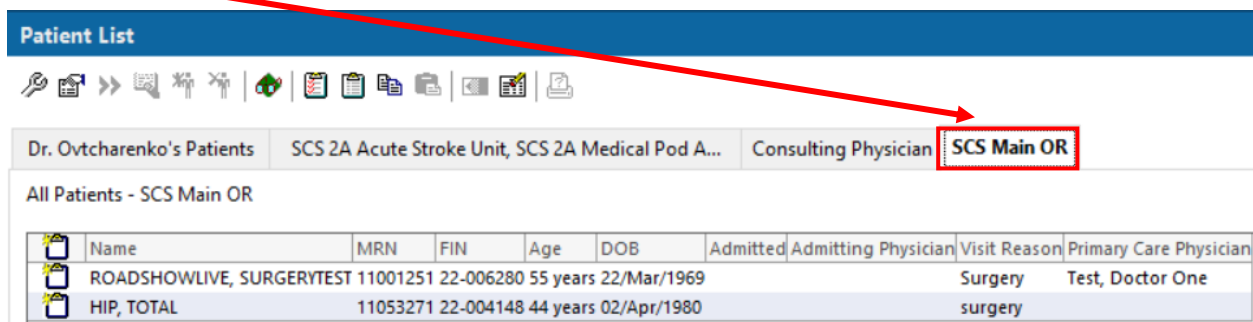
7. The "**SCS OR**" is now showing along the tabs. Click on the tab to view your patient list.
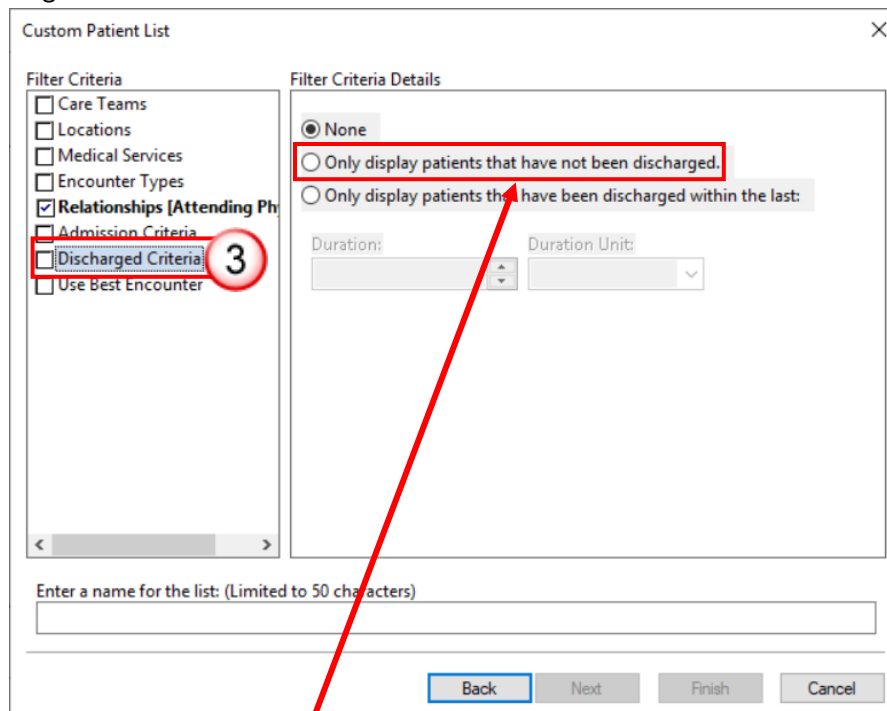
- **Note**: The steps above can be done for **all locations/units**.

Discharge Criteria

When creating any list, you may want to view patients who have not been discharged yet. Please complete the following steps to add discharge criteria.

1. Follow **steps 1 to 4** on **page 1**.
2. Select any applicable Visit Relationship, Location, or other criteria.
3. Click on Discharge Criteria.

4. Check

5. Click

Variations in Accessing **Modify Patient Lists** Dialogue Box

Through Patient List Window ⚕ Patient List

The **Modify Patient Lists** dialogue box can be accessed using the wrench icon 🔧 located on the middle-top of the screen. Please refer to **steps 1 to 2** on **page 1** for step by step instructions on accessing **Modify Patient Lists** dialogue box.
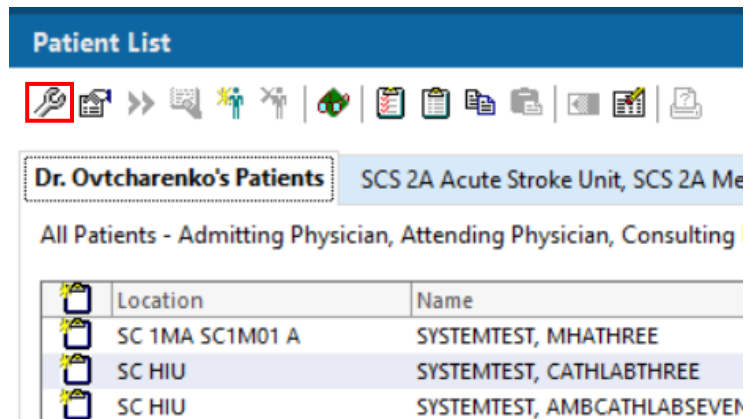
Through Prescriber Handoff Window 🔳 Prescriber Handoff

Complete the following steps to Access the Modify Patient Lists dialogue box in the Prescriber Handoff window:

1. Select Prescriber Handoff from the PowerChart toolbar.
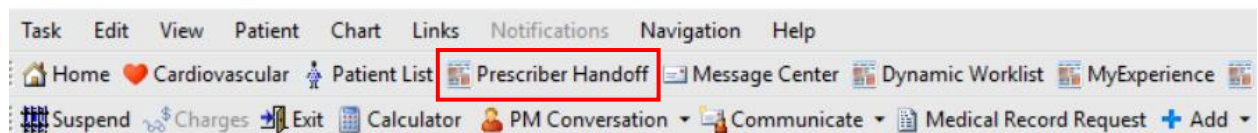
2. Select "List" dropdown.
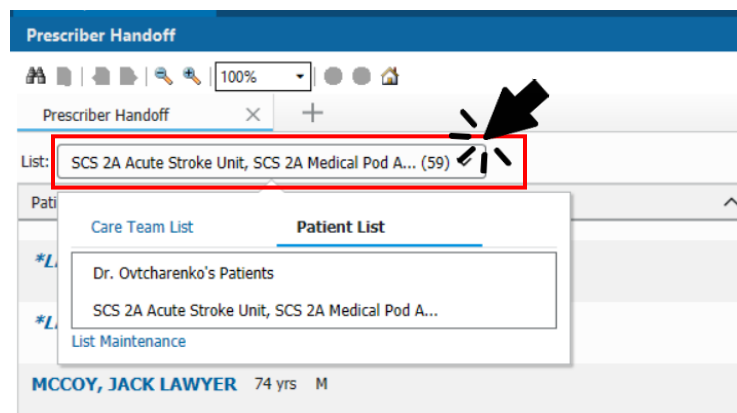
3. Click <u>List Maintenance</u>
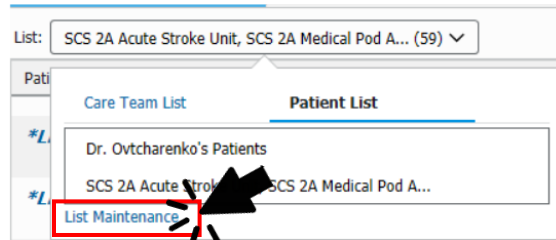
4. **Modify Patient Lists** dialogue box opens.
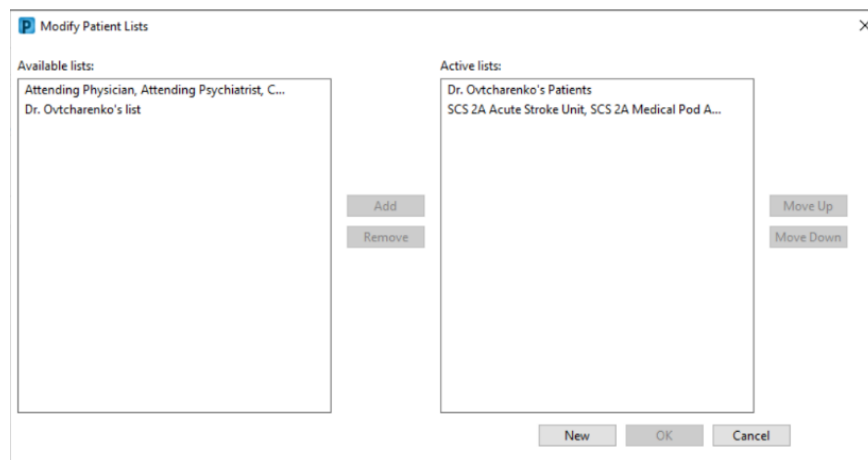
Notes and Considerations

- **ALWAYS** Check your "**Available lists**" and "**Active lists**" to avoid creating duplicate lists.
    A. The patient list you want to view **must** be under "**Active lists**".
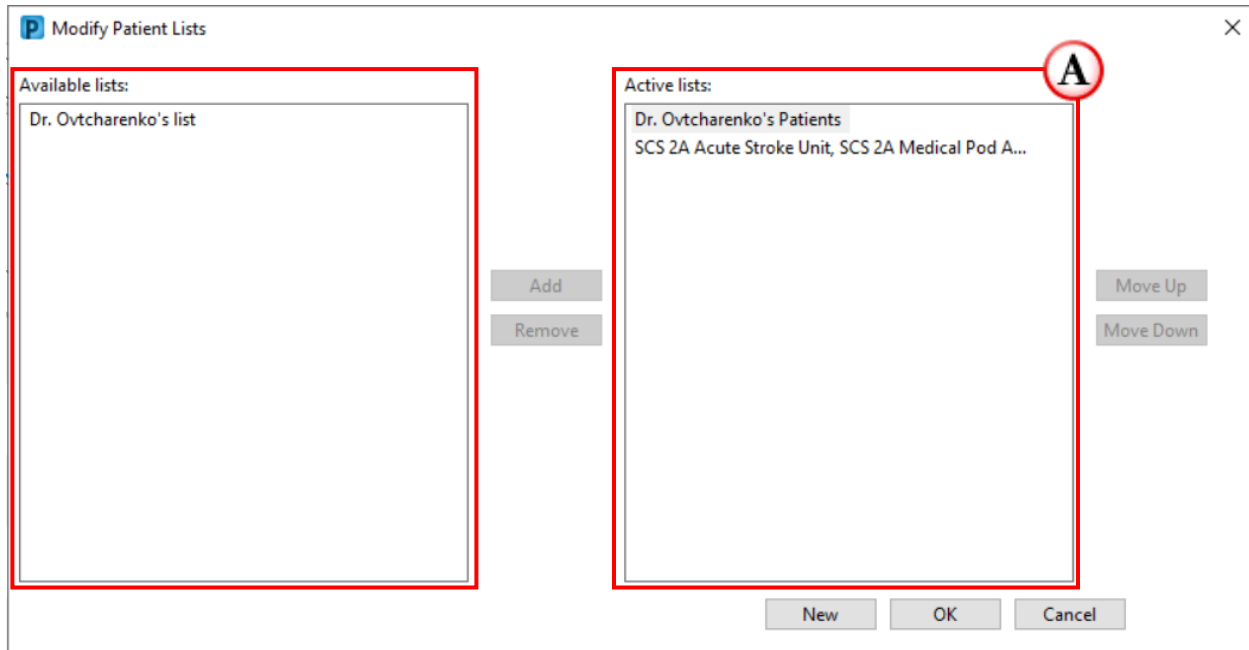
- If the desired list is in "**Available Lists**":
    A. Click on the List
    B. Click Add
    C. Click [OK] at the bottom of the dialogue box.

- When seeing patients in a unit, you may want to add a Bed column in the Patient List and sort your list based on bed number. Please note right-clicking and sorting your list can be done based on any column. For adding columns to your list and sorting them, complete the following steps:

1. Click ⚕ Patient List on PowerChart toolbar.

2. Select Customize Columns button 📊

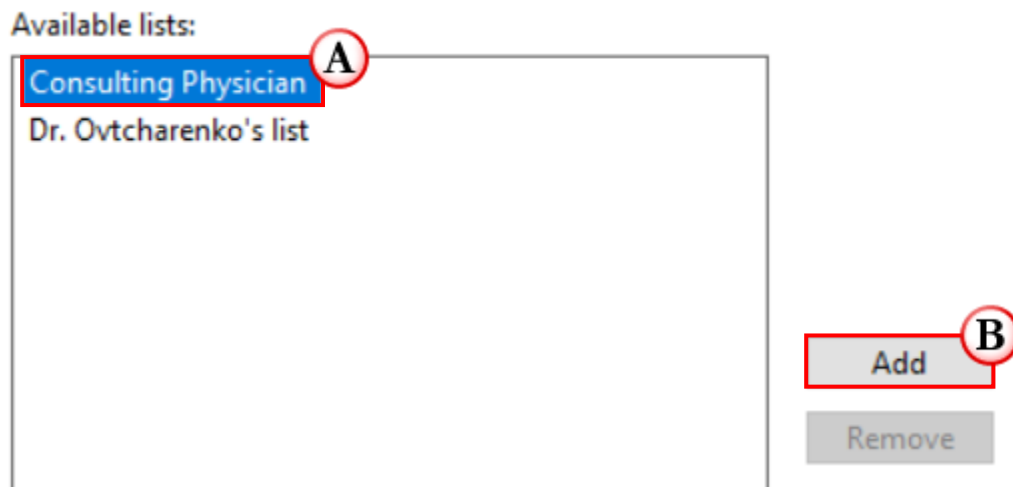3. **The DCP: Customize Columns Tools** dialogue box opens.
4. Select the columns you would like to add, **CTRL+CLICK** to select multiple columns.

5. Click ➡ to move the columns from "**Available Columns**" to "**Existing Columns**".

6. Use ⬆⬇ to order the columns to your preference.

7. Click 💾 to save your setting and exit out of the **DCP: Customize Columns Tools** dialogue box.

CTRL + CLICK

8. Right-click on any column you would like to sort the list by.

RIGHT-CLICK

9. Select **Sort**.

10. Select which column to sort and whether you would like an ascending or descending sort. You can sort a list by three columns.

11. Hit OK.
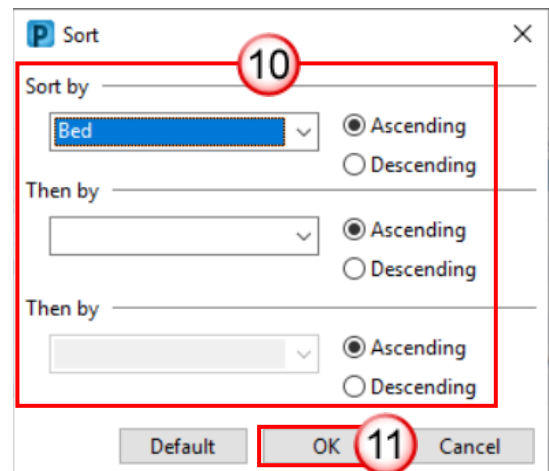
12. You list is now sorted by beds in ascending order.

Bed		Name	MRN	FIN	Age	DOB	Admitted
		ROADSHOWDRY, ANESTHESIATEST	11001212	22-001432	45 years	20/Mar/1979	
		KNEE, TOTAL	11053267	22-004145	43 years	06/Jun/1981	
		ROADSHOWLIVE, SURGERYTEST	11001251	22-000568	55 years	22/Mar/1969	
1A		PCR CONFORM TESTING, HIMTWENTY ZZZ	11001558	22-001686	34 years	26/Jun/1990	06/May/2024 12:40
1B		INI ONE, WSSEVEN	11000874	22-001135	24 years	01/Jan/2000	23/Feb/2024 13:47
1C		WTISTEST, CTHREE	11017458	22-006344	44 years	01/Feb/1980	16/Jul/2024 13:14
2A		SYSTEMTEST, PERIOPONE	11001829	22-002295	6 years	01/Nov/2018	31/May/2024 15:01
2B		REPORTING, WOUNDCARE	11002939	22-003398	53 years	01/Jan/1971	17/Jul/2024 09:09
3A		ZZTEST, DEBORAH	11000284	22-000954	72 years	25/Jun/1952	03/May/2024 13:57
3B		UNITTEST, GLMTHREESCS	11001608	22-001752	69 years	04/Feb/1955	10/May/2024 09:55
3C		UNITTEST, GLFTHREESCS	11001609	22-001754	67 years	05/May/1957	10/May/2024 10:05
4A		UNITTEST, GLMFOURSCS	11001610	22-001755	17 years	03/Mar/2007	10/May/2024 10:22
4B		UNITTEST, GLFFOURSCS	11001611	22-001756	17 years	04/Feb/2007	10/May/2024 10:29
A		ZZINATEST, MARK	11054754	22-006411	57 years	11/Nov/1967	31/Oct/2024 14:49
A		SYSTEMTEST, AMBFIFTYSEVEN	11001462	22-001598	54 years	04/Feb/1970	22/Apr/2024 14:18
A		ZZZTEST, MORRISON	11003054	22-003606	39 years	01/Apr/1985	24/Jul/2024 17:07