![Northern Light Health logo]

Patient Lists aid in the 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.
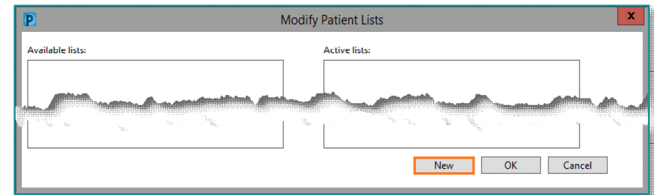
Setting Up a Patient List

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 Patient Lists** window, select **New** in the bottom right corner.

STEP 4: From the **Patient List Type** window, select the list type option appliable to create for role.

- **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.
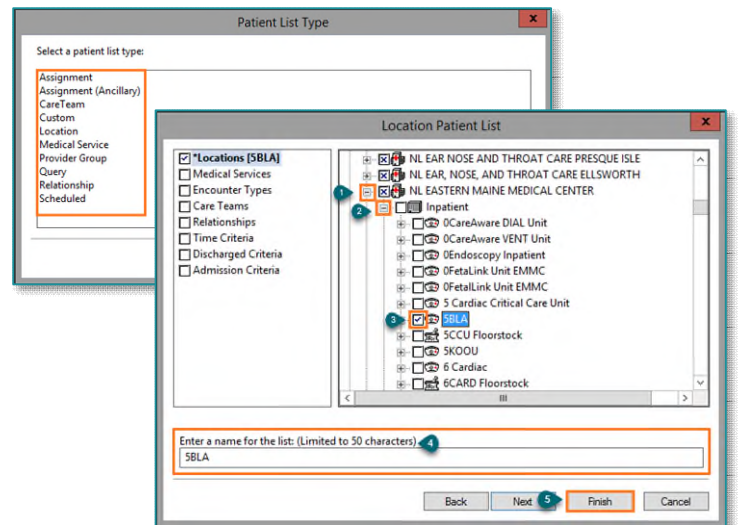
STEP 5: Select **Next**.

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
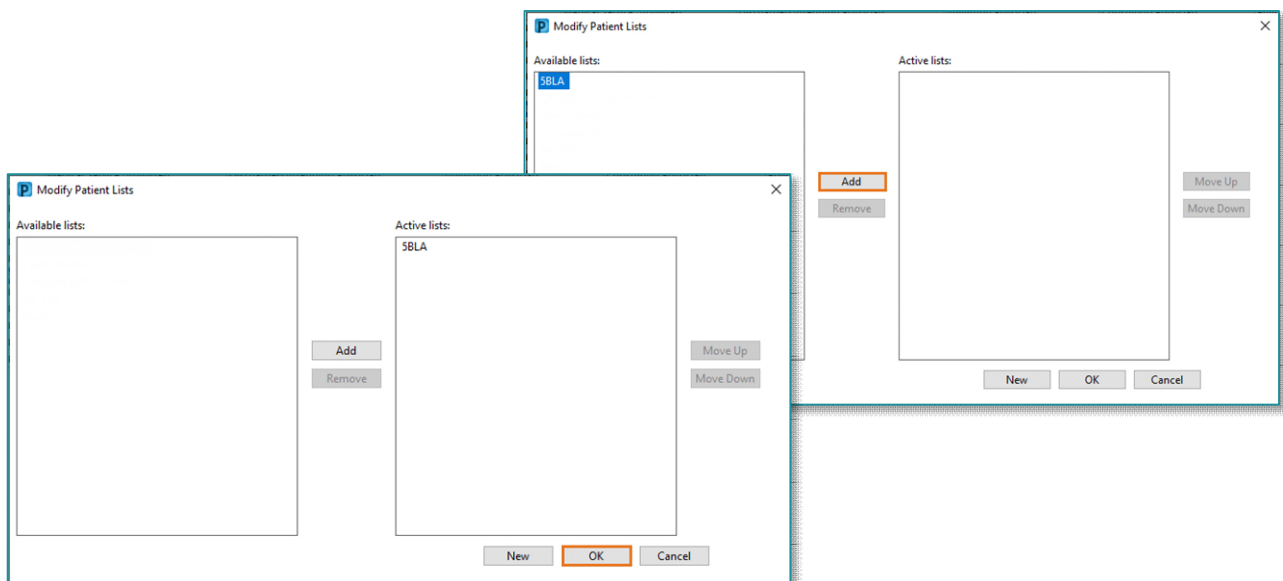
STEP 8:   Select **Finish**.

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

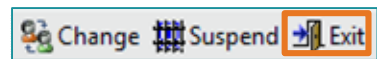**STEP 10**:   Click **Add** to move the patient list to **Active lists:** to be available on view.

- Single-select an available unit and click the **Move Up** and **Move Down** buttons to organize the order of patient lists, as necessary.
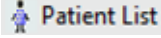
STEP 11:   Select **OK**.

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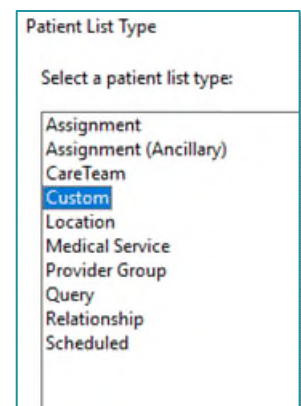
STEP 5:   Type a name for the list in the **Enter a name for the list** field.

STEP 6:   Click **Finish**.

**STEP 7:**   Select the newly created list form 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** [9 minutes ago] button to update the patient list.
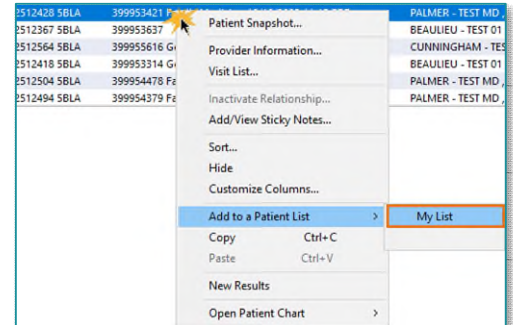
Remove Patient from a Custom Patient List

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**.
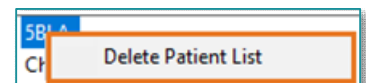
Giving Proxy Access to a Patient List

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: Within PowerChart, navigate to Patient List.

STEP 2: Select the **patient list** to be proxied.

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

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

STEP 5: Click **New**.

STEP 6: Search within the Provider field for who to grant proxy access to.

STEP 7: Choose the **Access level**.

- Full access allows the proxy access given to the provider to add patients and remove patients from the proxied patient list.
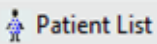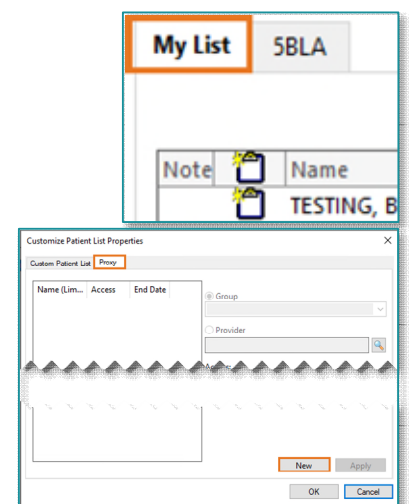
STEP 8:   Enter the **From:** and **To:** dates to grant access.

STEP 9:   Select **Apply**.

STEP 10:   Click **OK**.

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

Remove a Proxy

STEP 1:   Within PowerChart, navigate to Patient List.

STEP 2:   Select the **patient list** that was proxied.

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

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

STEP 5:   Select the **name** within the proxy list.

STEP 6:   Update the **To: date** to end proxy access.

STEP 7:   Select **Apply**.

STEP 8:   Click **OK**.