Patient Lists and Creating a My List
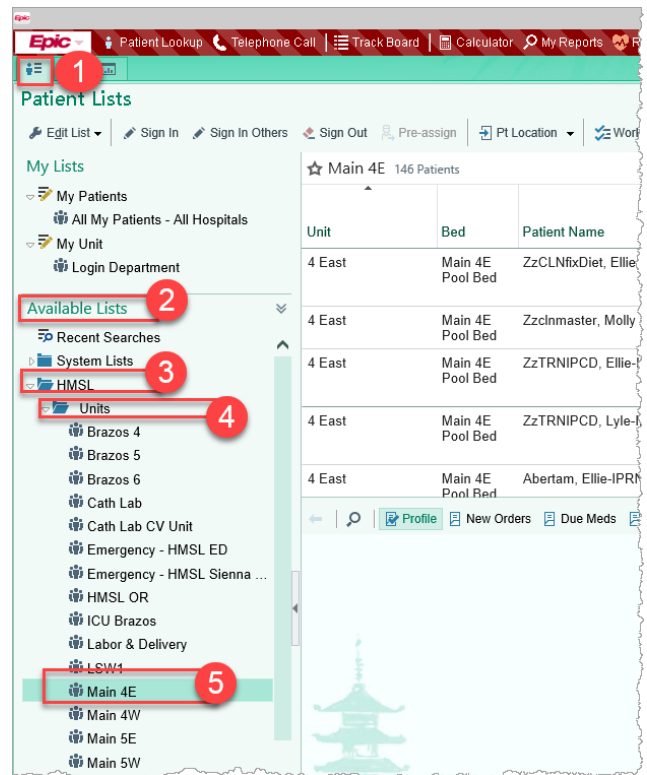
Intended Audience: All Inpatient Clinical Staff

Quick reference for using Patient Lists
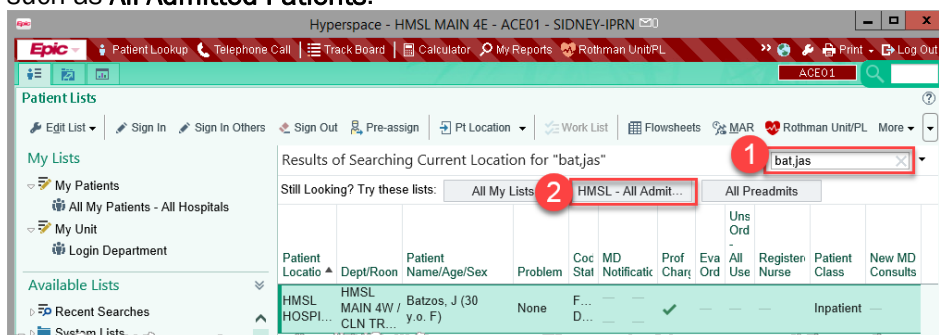
Using System Lists

You can use system lists to find patients multiple ways. You can look for someone on a particular unit, or if you are a specialty role, there may be a pre-created list specific to your role.

1. Go to your **Patient Lists** activity page

2. Look for the **Available Lists** section

3. Click on your hospital location's **HM** folder

4. To see all patients on a particular unit, click the **Units** folder

   - **Note**: There are other folders available under your hospital location. You can also select one of these other folders if it pertains to your specialty.

5. Select a unit list with the people icon
   - A list of all the patients in that unit will populate

Search Patient Lists

1. Search for a patient in any of your My Lists by typing a few letters of his name in the **Search** field. The field turns green when you've entered enough to search by.
   - When typing a last and first name, separate them by a comma. For example, enter **smi, joh**.

2. If you don't find the patient you're looking for, click a suggestion button in the header to search a system list, such as **All Admitted Patients**.
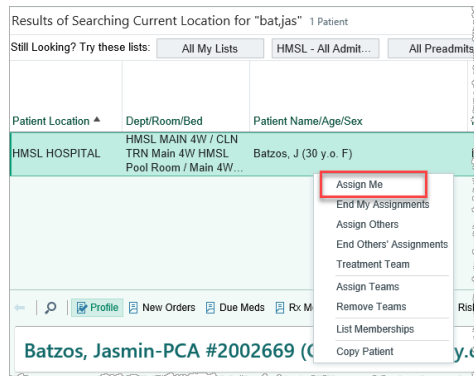
HOUSTON
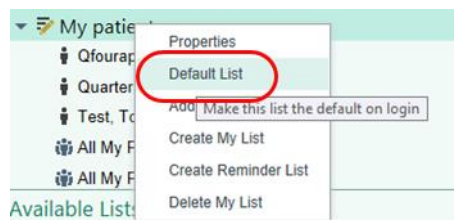**Methodist**
LEADING MEDICINE

Add a Patient to your My Patients List

Depending on your role, you can add a patient to your My Patients list in multiple ways.

1. Right-click on the patient name
2. Select **Assign Me** to place the patient in your list <u>AND assign yourself to the patient's treatment team</u>
   - <u>Note</u>: You can also highlight the patient name, and "drag and drop" the patient's name into your My Patients list. <u>This does not add you to the patient's treatment team</u>

3. Your assigned patients should also display in Rover. If you do not see your assigned patients in rover, in hyperspace on your normal workstation, right click your '**My Patient**' list and select '**Default List**."

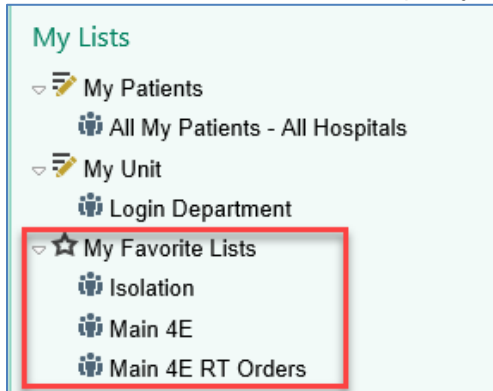## Add a Unit or System List to your My Patients List

1. Go to the **Patient Lists** activity page

2. Right-click on a list and select **Send To**, then choose your **My Patients** list (or any one of your My Lists)

   - You can also right-click on a list and select **Copy List**, then right-click on your My Patients and select **Paste List**.

   - You can also select a list, and "drag and drop" that list into your My Patients list
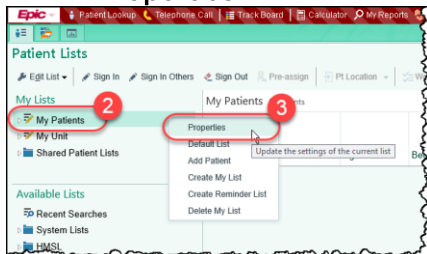
Note: If you right-click a system list and **Save as Favorite**, this creates a **My Favorite Lists** under your My Lists section. You can add multiple system lists to your Favorite Lists
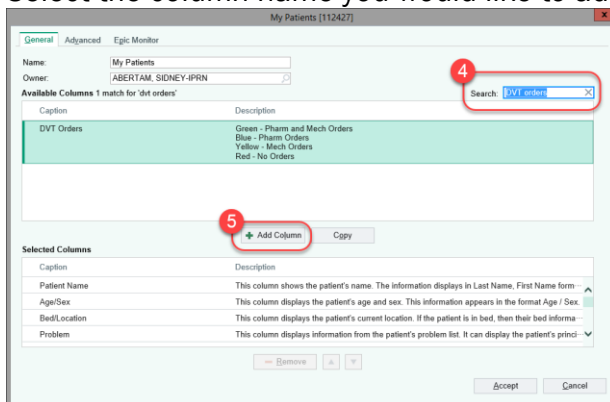

Add Column to your My Patients List

1. Go to the **Patient Lists** activity page
2. **Right-click** on your My Patients list, or on the desired My List to which you would like to add a column
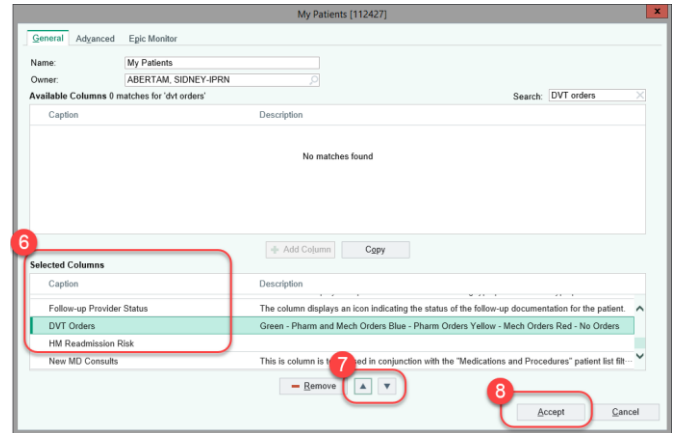3. Select **Properties**

4. In the search bar to the right, type in the name of a column you would like to add, for example, DVT Orders
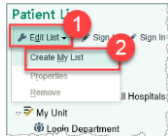5. Select the column name you would like to add and click **Add Column**

6. The column name will appear in the Selected Columns sections
7. Use the arrows to specify the order in which you would like to sort your columns
8. Accept then you are done
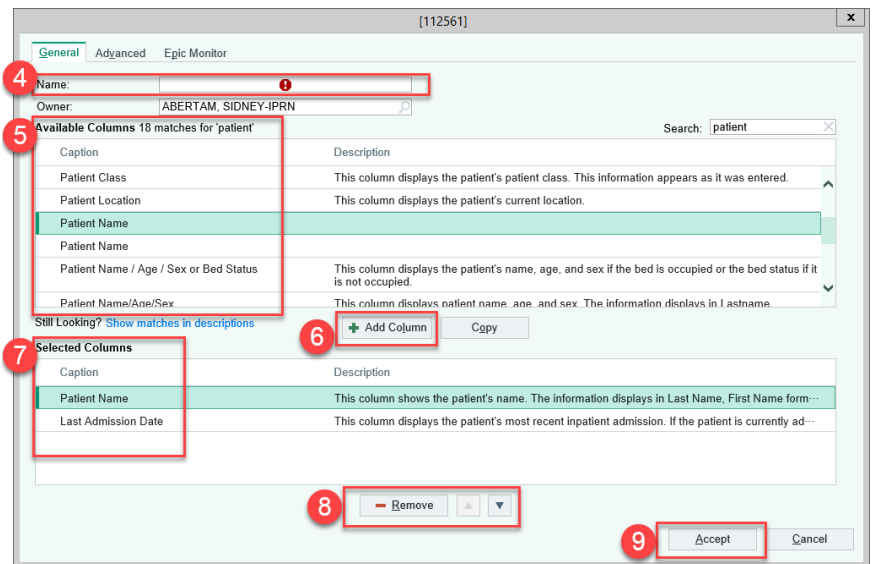9. The new column will now appear when viewing the My List you just edited

Create a new My List

1. Click on the [Edit List ▾] button in the upper left corner
2. Select **Create My List**

3. A new window opens
4. In the **Name** field, type in a name for the list
5. In the **Available Columns** section, you can search for the individual columns you want to see when you use this My List
6. Highlight a type of column, and click [+ Add Column]
7. The newly added column names will display in the **Selected Columns** section in bottom half of the window
8. Use the [— Remove] [▲] [▼] buttons to rearrange your columns in the order you would like to see them
9. Click **Accept** when you are done

Important Note: To have patients populate in this list, you must either have a system list added to this My List, or you must manually add patients to this list
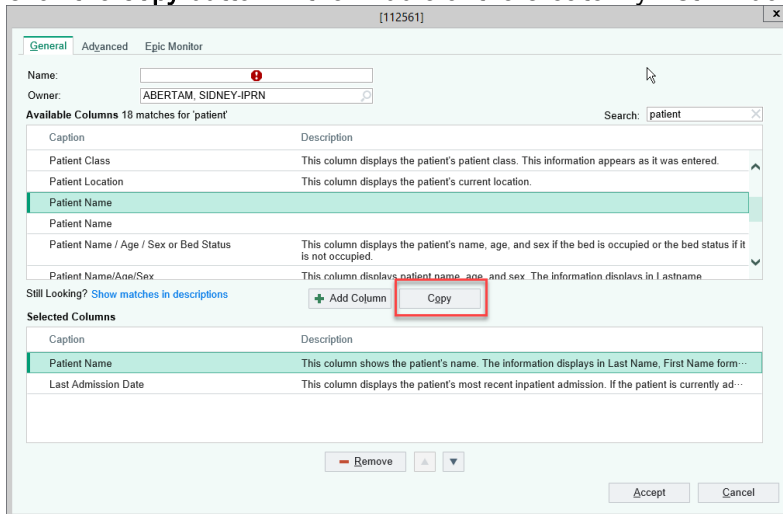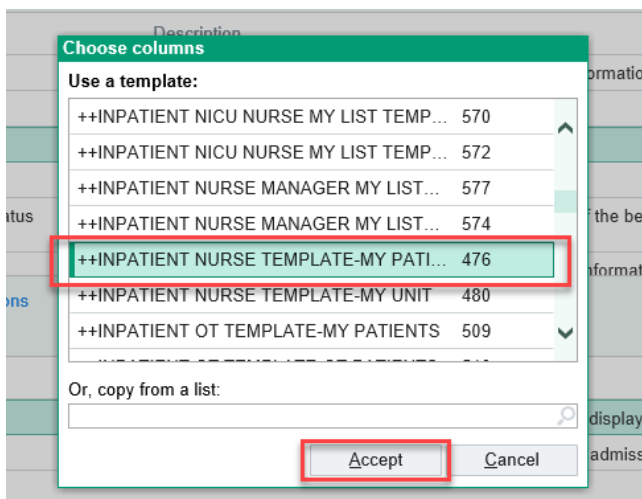
Copy an Existing User Template to Quickly Add Columns to your My List

You can quickly add columns to your list by copying an existing template. For example, if a nurse wants to create a personalized list and have the same columns as the standard nursing template, you can copy the nursing template to quickly add those nursing columns to your My List.

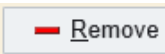1. Click the **Copy** button in the middle of the Create My List window

2. Search for the appropriate template that matches your job role
   - For example, an inpatient nurse might select an inpatient nurse template
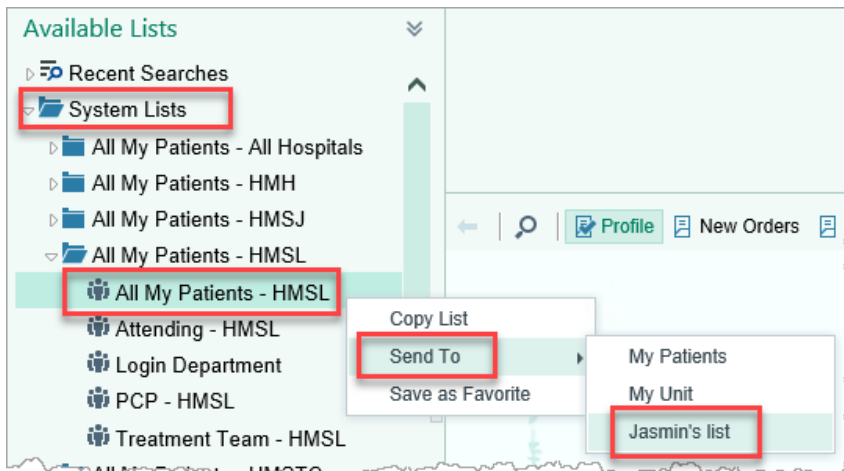3. Highlight the template you would like to copy
4. Click **Accept**

5. In the **Selected Columns** section, you can see the columns that are included with the chosen template

6. Use the [— Remove] [▲] [▼] buttons to rearrange your columns in the order you would like to see them

7. Click **Accept** when you are done

<u>Important Note</u>: To have patients populate in this list, you must either have a system list added to this My List, or you must manually add patients to this list

Sharing your Customized My List

1. Go to the **Advanced** tab

2. Locate the **Allow access to any of the following** section, and in the **User** field, type in the name of the user(s) with whom you would like to share your My List

3. Select what type of **Access Level** you would like to allow

   - **Add/Remove Patients** – allows that user(s) to add/remove patients from this shared list
   - **Change Accessibility** – allows that user(s) to modify who can access this shared list
   - **Delete Patient List** – allows that user(s) to be able to delete this shared list
   - **Modify Properties** – allows that user(s) to be able to modify this shared list
   - **View Only** – only allows that user(s) to be able to view this shared list

4. Click **Accept**

5. The other user(s) you specified should be able to now see your shared My List under the **Shared Patient List folder**

Important Note: To have patients populate in this list, you must either have a system list added to this My List, or you must manually add patients to this list